Genuine Parts Co.

GPC

NYSE; shops; SIC 5013, Wholesale-Motor Vehicle Supplies & New Parts; CIK 0000040987

C/D

on the C/D boundary of 239 graded peers in shops

rank 146 of 239; percentile 60.9; sampling error 3.0 points; lower is stronger

A B C D E

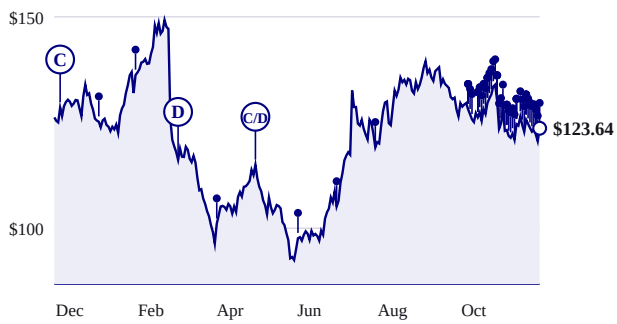
C/D, the tortoise



Scoreboard

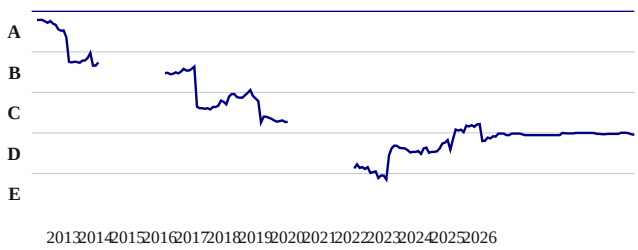
Profitability	C percentile 45.4
Solvency	D percentile 64.8
Growth and financing	C percentile 50.5
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $20.8B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress
Inputs computable	8 of 13
Graded from	filings received through Feb 20, 2026 272 days before the rescan; latest periodic filing 10-Q received Oct 20, 2026
Last close	$123.61 2026-11-18; market equity $17.0B; no price enters the letter

Share price, twelve months to the rescan



Split-adjusted close. Each lollipop is a rescan and carries the letter held then.

Letter at every rescan, 2012 to 2026



Sector percentile at each rescan, stronger toward the top; facts filed by each date only.

Business, in the company's words

opening of Item 1 of the 10-K received Feb 20, 2026

Incorporated in the State of Georgia in 1928, Genuine Parts Company is a leading global service provider of automotive and industrial replacement parts and value-added solutions. We serve our customers from more than 10,800 locations, primarily in North America, Europe, and Australasia (primarily Australia and New Zealand). We offer outstanding service, an industry-leading assortment of replacement parts, extensive supply chain and distribution capabilities, and enhanced technology solutions.

The thirteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 45.4						
Gross profitability	43.0%	43.5%		49.5	223	2025-12-31
Return on invested capital	not computable	11.5%				
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31						
Accruals ratio	(4.1%)	(4.9%)		61.4	268	2025-12-31

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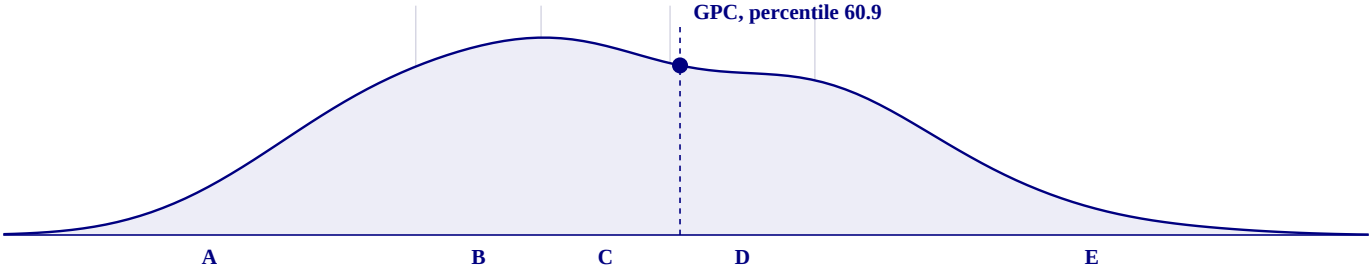
Gross margin stability, five years	0.7 pts	1.2 pts	25.4	202	2025-12-31
Solvency, sleeve percentile 64.8					
Altman Z double-prime	not computable	1.93			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.46x			
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	2.71x			
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31					
Current ratio	1.08x	1.34x	64.8	274	2025-12-31
Growth and financing, sleeve percentile 50.5					
Revenue growth, three-year compound	3.2%	1.8%	41.0	250	2025-12-31
Free cash flow growth, three-year compound	(28.0%)	4.7%	90.5	138	2025-12-31
Reinvestment rate	not computable	13.3%			
latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31					
Asset growth, three years	8.0%	3.3%	27.6	251	2025-12-31
Net share issuance, one year	(0.8%)	(0.6%)	42.9	206	2026-02-17

Among 239 peers

shops; letters are fifths of this list



Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.

Rank	Company	Percentile	Letter	Warnings
141	Distribution Solutions Group, Inc. (DSGR)	58.8	C/D	
142	United Natural Foods Inc. (UNFI)	59.2	C/D	
143	Papa Johns International Inc. (PZZA)	59.7	C/D	
144	Autonation, Inc. (AN)	60.1	C/D	
145	Kohls Corp. (KSS)	60.5	C/D	
146	Genuine Parts Co. (GPC)	60.9	C/D	
147	Stitch Fix, Inc. (SFIX)	61.3	C/D	
148	Wayfair Inc. (W)	61.8	C/D	
149	Albertsons Companies, Inc. (ACI)	62.2	C/D	
150	Resideo Technologies, Inc. (REZI)	62.6	C/D	
151	Sempreon, Inc. (CASK)	63.0	C/D	

What the price implies

at the 2026-11-18 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	2.4%	(0.7%)	54
Distance from 52-week high	(17.2%)	(21.1%)	60
EBIT to enterprise value	6.8%	5.1%	71
Free cash flow yield	2.5%	4.0%	35
Book value to price	0.27	0.36	40
Sales to price	1.43	1.55	46
Composite equity issuance, five years	(21.1%)	(17.2%)	39

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Relative strength against the sector, log excess return	0.11	0.08	54
Twelve-month failure probability, CHS model	not computable	0.03%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2025-12-31	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	30 (10-Q received Oct 20, 2026)
Median daily dollar volume, 63 sessions	$110.6M

Sources

every fact behind the inputs; each row links to its filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	$8.9B	2025-12-31	2026-02-20	10-K	26-000003
2	assets	us-gaap:Assets	$20.8B	2025-12-31	2026-02-20	10-K	26-000003
3	operating income	us-gaap:OperatingIncomeLoss	$1.4B	2018-12-31	2019-02-25	10-K	19-000015
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$994.6M	2018-12-31	2021-02-19	10-K	21-000009
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$245.1M	2018-12-31	2021-02-19	10-K	21-000009
6	total debt	us-gaap:LongTermDebt	$3.1B	2018-12-31	2020-02-21	10-K	20-000010
7	book equity	us-gaap:StockholdersEquity	$3.5B	2018-12-31	2020-02-21	10-K	20-000010
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$333.5M	2018-12-31	2019-02-25	10-K	19-000015
9	total debt	us-gaap:LongTermDebt	$3.2B	2017-12-31	2019-02-25	10-K	19-000015
10	book equity	us-gaap:StockholdersEquity	$3.4B	2017-12-31	2019-02-25	10-K	19-000015
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$314.9M	2017-12-31	2019-02-25	10-K	19-000015
12	net income	us-gaap:NetIncomeLoss	$65.9M	2025-12-31	2026-02-20	10-K	26-000003
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$890.8M	2025-12-31	2026-02-20	10-K	26-000003
14	assets	us-gaap:Assets	$19.3B	2024-12-31	2026-02-20	10-K	26-000003
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$24.3B	2025-12-31	2026-02-20	10-K	26-000003
16	gross profit	us-gaap:GrossProfit	$8.5B	2024-12-31	2026-02-20	10-K	26-000003
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$23.5B	2024-12-31	2026-02-20	10-K	26-000003
18	gross profit	us-gaap:GrossProfit	$8.3B	2023-12-31	2026-02-20	10-K	26-000003
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$23.1B	2023-12-31	2026-02-20	10-K	26-000003
20	gross profit	us-gaap:GrossProfit	$7.7B	2022-12-31	2025-02-21	10-K	25-000026
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$22.1B	2022-12-31	2025-02-21	10-K	25-000026
22	gross profit	us-gaap:GrossProfit	$6.6B	2021-12-31	2024-02-22	10-K	24-000024
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$18.9B	2021-12-31	2024-02-22	10-K	24-000024
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$227.6M	2018-12-31	2021-02-19	10-K	21-000009
25	interest expense	us-gaap:InterestExpense	$101.8M	2018-12-31	2021-02-19	10-K	21-000009
26	current assets	us-gaap:AssetsCurrent	$10.6B	2025-12-31	2026-02-20	10-K	26-000003
27	current liabilities	us-gaap:LiabilitiesCurrent	$9.8B	2025-12-31	2026-02-20	10-K	26-000003
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$469.8M	2025-12-31	2026-02-20	10-K	26-000003
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.3B	2024-12-31	2026-02-20	10-K	26-000003

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30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$567.3M	2024-12-31	2026-02-20	10-K	26-000003
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.4B	2023-12-31	2026-02-20	10-K	26-000003
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$512.7M	2023-12-31	2026-02-20	10-K	26-000003
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$1.5B	2022-12-31	2023-02-23	10-K	23-000008
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$339.6M	2022-12-31	2025-02-21	10-K	25-000026
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$226.5M	2018-12-31	2021-02-19	10-K	21-000009
36	current assets	us-gaap:AssetsCurrent	$7.6B	2018-12-31	2020-02-21	10-K	20-000010
37	current liabilities	us-gaap:LiabilitiesCurrent	$5.9B	2018-12-31	2020-02-21	10-K	20-000010
38	current assets	us-gaap:AssetsCurrent	$7.3B	2017-12-31	2019-02-25	10-K	19-000015
39	current liabilities	us-gaap:LiabilitiesCurrent	$5.5B	2017-12-31	2019-02-25	10-K	19-000015
40	assets	us-gaap:Assets	$18.0B	2023-12-31	2025-02-21	10-K	25-000026
41	assets	us-gaap:Assets	$16.5B	2022-12-31	2024-02-22	10-K	24-000024
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	137,622,108	2026-02-17	2026-02-20	10-K	26-000003
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	138,782,030	2025-02-18	2025-02-21	10-K	25-000026

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