Pilgrims Pride Corp.

PPC

Nasdaq; consumer nondurables; SIC 2015, Poultry Slaughtering and Processing; CIK 0000802481

B/C

on the B/C boundary of 118 graded peers in consumer nond...

rank 51 of 118; percentile 42.7; sampling error 3.8 points; lower is stronger

A B C D E

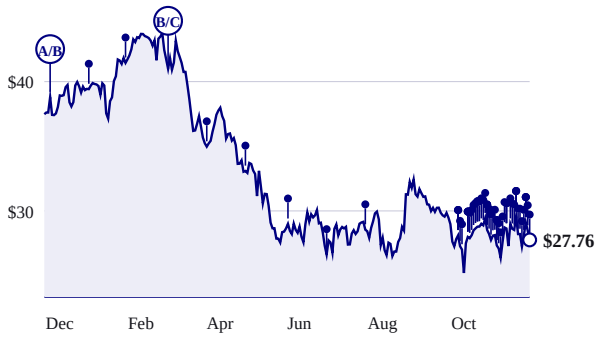
B/C, the elk



Scoreboard

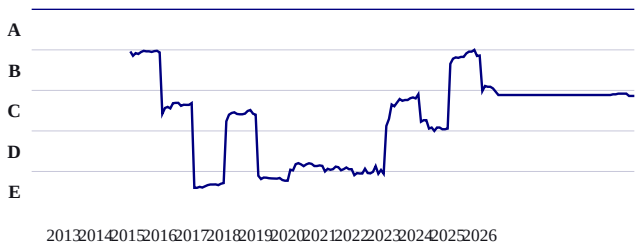
Profitability	C	percentile 50.6
Solvency	B/C	percentile 37.0
Growth and financing	C	percentile 45.9
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $10.3B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	13 of 13	
Graded from	filings received through Feb 12, 2026	280 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$27.77	2026-11-18; market equity $6.6B; 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 12, 2026

Pilgrim's Pride Corporation (referred to herein as "Pilgrim's," "PPC," "the Company," "we," "us," "our," or similar terms) is primarily engaged in the production, processing, marketing and distribution of fresh, frozen and value-added chicken and pork products to retailers, distributors and foodservice operators. JBS S.A., through its indirect wholly-owned subsidiaries (together, "JBS"), beneficially owns 82.28% of our outstanding common stock. We market our balanced portfolio of fresh, prepared and value-added meat products to a diverse set of customers across the U.S., the U.K. and Europe, Mexico and in over 120 other countries.

The thirteen inputs

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

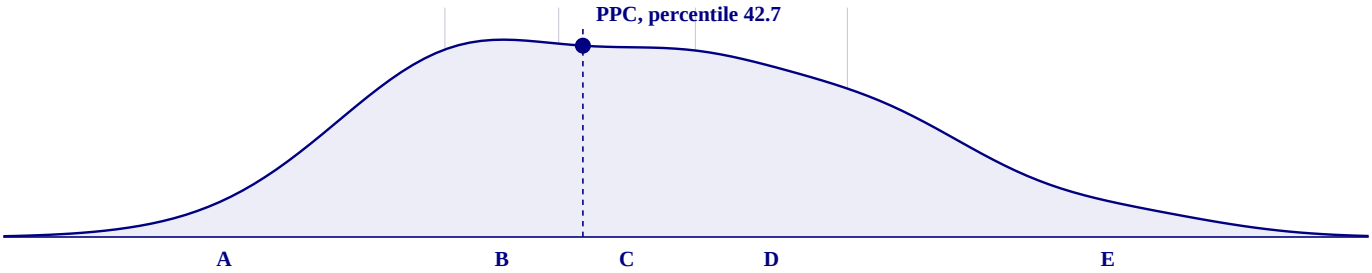
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 50.6						
Gross profitability	22.8%	30.0%		59.0	135	2025-12-28
Return on invested capital	20.2%	5.7%		16.3	44	2025-12-28

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Accruals ratio	(2.8%)	(5.2%)	68.8	139	2025-12-28
Gross margin stability, five years	2.4 pts	1.9 pts	58.2	111	2025-12-28
Solvency, sleeve percentile 37.0					
Altman Z double-prime	3.19	3.11	44.0	110	2025-12-28
Net debt to EBITDA	1.19x	2.44x	28.0	51	2025-12-28
Interest coverage	10.00x	2.36x	16.7	37	2025-12-28
Current ratio	1.47x	1.82x	59.2	143	2025-12-28
Growth and financing, sleeve percentile 45.9					
Revenue growth, three-year compound	1.9%	(0.1%)	41.9	125	2025-12-28
Free cash flow growth, three-year compound	52.9%	14.7%	16.9	60	2025-12-28
Reinvestment rate	(82.4%)	11.8%	82.1	68	2025-12-28
Asset growth, three years	3.8%	0.2%	34.7	125	2025-12-28
Net share issuance, one year	0.2%	0.03%	53.9	103	2026-02-11

Among 118 peers

consumer nondurables; 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
46	Ingredion Inc. (INGR)	38.5	B/C	
47	Coca-Cola Consolidated, Inc. (COKE)	39.3	B/C	
48	Johnson Outdoors Inc. (JOUT)	40.2	B/C	fortress balance sheet
49	Seneca Foods Corp. (SENEA)	41.0	B/C	
50	Coca Cola Co. (KO)	41.9	B/C	
51	Pilgrims Pride Corp. (PPC)	42.7	B/C	
52	Boston Beer Co. Inc. (SAM)	43.6	B/C	fortress balance sheet
53	Bridgford Foods Corp. (BRID)	44.4	C	
54	Hershey Co. (HSY)	45.3	C	
55	Post Holdings, Inc. (POST)	46.2	C	
56	Philip Morris International Inc. (PM)	47.0	C	

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	(29.1%)	(1.0%)	26
Distance from 52-week high	(36.6%)	(21.1%)	27
EBIT to enterprise value	17.8%	3.5%	97
Free cash flow yield	9.9%	4.4%	80
Book value to price	0.59	0.58	51
Sales to price	2.80	1.16	78
Composite equity issuance, five years	(18.8%)	(17.0%)	41
Relative strength against the sector, log excess return	(0.43)	(0.09)	26
Twelve-month failure probability, CHS model	not computable	0.04%	

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2025-12-28	
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	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$935.8M
Operating cash flow, four quarters	$975.4M
Months of runway	not finite
Days since last periodic filing	21 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$36.8M

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	$2.4B	2025-12-28	2026-02-12	10-K	26-000011
2	assets	us-gaap:Assets	$10.3B	2025-12-28	2026-02-12	10-K	26-000011
3	operating income	us-gaap:OperatingIncomeLoss	$1.6B	2025-12-28	2026-02-12	10-K	26-000011
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$1.5B	2025-12-28	2026-02-12	10-K	26-000011
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$418.8M	2025-12-28	2026-02-12	10-K	26-000011
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$3.1B	2025-12-28	2026-02-12	10-K	26-000011
7	book equity	us-gaap:StockholdersEquity	$3.7B	2025-12-28	2026-02-12	10-K	26-000011
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$640.2M	2025-12-28	2026-02-12	10-K	26-000011
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$3.2B	2024-12-29	2026-02-12	10-K	26-000011
10	book equity	us-gaap:StockholdersEquity	$4.2B	2024-12-29	2026-02-12	10-K	26-000011
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$2.0B	2024-12-29	2026-02-12	10-K	26-000011
12	net income	us-gaap:NetIncomeLoss	$1.1B	2025-12-28	2026-02-12	10-K	26-000011
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.4B	2025-12-28	2026-02-12	10-K	26-000011
14	assets	us-gaap:Assets	$10.7B	2024-12-29	2026-02-12	10-K	26-000011
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$18.5B	2025-12-28	2026-02-12	10-K	26-000011
16	gross profit	us-gaap:GrossProfit	$2.3B	2024-12-29	2026-02-12	10-K	26-000011
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.9B	2024-12-29	2026-02-12	10-K	26-000011
18	gross profit	us-gaap:GrossProfit	$1.1B	2023-12-31	2026-02-12	10-K	26-000011
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.4B	2023-12-31	2026-02-12	10-K	26-000011
20	gross profit	us-gaap:GrossProfit	$1.8B	2022-12-25	2025-02-13	10-K	25-000011
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$17.5B	2022-12-25	2025-02-13	10-K	25-000011
22	gross profit	us-gaap:GrossProfit	$1.4B	2021-12-26	2024-02-27	10-K	24-000015
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$14.8B	2021-12-26	2024-02-27	10-K	24-000015
24	current assets	us-gaap:AssetsCurrent	$4.2B	2025-12-28	2026-02-12	10-K	26-000011
25	current liabilities	us-gaap:LiabilitiesCurrent	$2.9B	2025-12-28	2026-02-12	10-K	26-000011
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$2.2B	2025-12-28	2026-02-12	10-K	26-000011
27	liabilities	us-gaap:Liabilities	$6.6B	2025-12-28	2026-02-12	10-K	26-000011
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$456.2M	2025-12-28	2026-02-12	10-K	26-000011
29	interest expense	us-gaap:InterestExpense	$161.4M	2025-12-28	2026-02-12	10-K	26-000011
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$718.5M	2025-12-28	2026-02-12	10-K	26-000011
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.0B	2024-12-29	2026-02-12	10-K	26-000011

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32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$458.5M	2024-12-29	2026-02-12	10-K	26-000011
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$677.9M	2023-12-31	2026-02-12	10-K	26-000011
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$557.8M	2023-12-31	2025-02-13	10-K	25-000011
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$669.9M	2022-12-25	2025-02-13	10-K	25-000011
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$487.1M	2022-12-25	2024-02-27	10-K	24-000015
37	current assets	us-gaap:AssetsCurrent	$5.1B	2024-12-29	2026-02-12	10-K	26-000011
38	current liabilities	us-gaap:LiabilitiesCurrent	$2.6B	2024-12-29	2026-02-12	10-K	26-000011
39	assets	us-gaap:Assets	$9.8B	2023-12-31	2025-02-13	10-K	25-000011
40	assets	us-gaap:Assets	$9.3B	2022-12-25	2024-02-27	10-K	24-000015
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	237,547,447	2026-02-11	2026-02-12	10-K	26-000011
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	237,122,205	2025-02-12	2025-02-13	10-K	25-000011

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