Charles River Laboratories International, Inc. CRL

NYSE; other; SIC 8731, Services-Commercial Physical & Biological Research; CIK 0001100682

B

second fifth of 316 graded peers in other

rank 98 of 316; percentile 30.8; sampling error 2.7 points; lower is stronger

A B C D E

B, the elk



Scoreboard

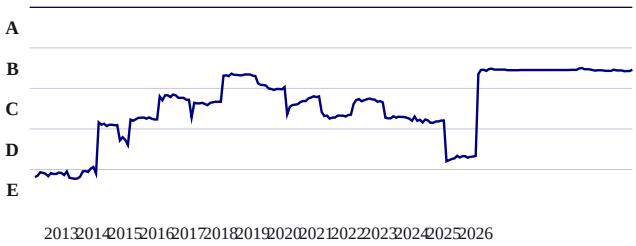
Profitability	A/B percentile 21.2
Solvency	C/D percentile 58.3
Growth and financing	C percentile 49.1
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $7.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	8 of 13
Graded from	filings received through Feb 18, 2026 275 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026
Last close	$327.99 2026-11-19; market equity $15.7B; 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 18, 2026

This Annual Report on Form 10-K contains forward-looking statements regarding future events and the future results of Charles River Laboratories International, Inc. that are based on our current expectations, estimates, forecasts and projections about the industries in which we operate and the beliefs and assumptions of our management.

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 21.2						
Gross profitability	not computable	26.8%				
one or more required annual facts are missing						
Return on invested capital	not computable	10.0%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	(12.0%)	(5.7%)		21.2	459	2025-12-27

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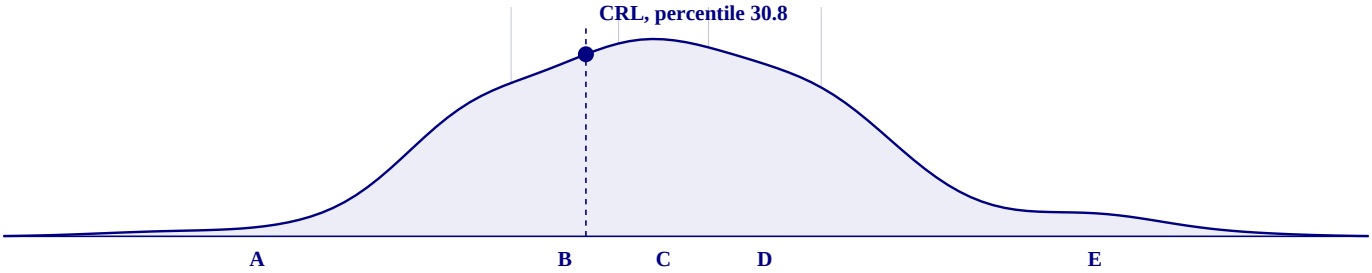
Gross margin stability, five years	not computable	2.2 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 58.3						
Altman Z double-prime	1.81	2.06		44.8	358	2025-12-27
Net debt to EBITDA	4.49x	2.36x		79.8	174	2025-12-27
Interest coverage	not computable	2.93x				
latest aligned inputs end 2023-12-30; latest annual assets end 2025-12-27						
Current ratio	1.29x	1.32x		50.2	463	2025-12-27
Growth and financing, sleeve percentile 49.1						
Revenue growth, three-year compound	0.3%	5.0%		66.0	377	2025-12-27
Free cash flow growth, three-year compound	20.7%	8.7%		32.5	213	2025-12-27
Reinvestment rate	not computable	13.3%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	(2.1%)	4.1%		75.4	403	2025-12-27
Net share issuance, one year	(3.7%)	(0.6%)		22.4	354	2026-01-24

Among 316 peers

other; 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
93	Landstar System Inc. (LSTR)	29.2	B	late filer, fortress balance sheet
94	Bgsf, Inc. (BGSF)	29.5	B	late filer
95	Planet Fitness, Inc. (PLNT)	29.8	B	
96	National CineMedia, Inc. (NCMI)	30.2	B	fortress balance sheet
97	C. H. Robinson Worldwide, Inc. (CHRW)	30.5	B	
98	Charles River Laboratories International, Inc. (CRL)	30.8	B	
99	Vulcan Materials Co. (VMC)	31.1	B	
100	Limbach Holdings, Inc. (LMB)	31.4	B	
101	Netflix Inc. (NFLX)	31.7	B	
102	Datavault AI Inc. (DVLT)	32.1	B	dilution, short runway, late filer, fortress balance sheet
103	Century Casinos Inc. (CNTY)	32.4	B	late filer

What the price implies

at the 2026-11-19 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	63.8%	0.06%	90
Distance from 52-week high	(12.8%)	(27.0%)	75
EBIT to enterprise value	0.1%	4.6%	20
Free cash flow yield	3.3%	4.0%	44
Book value to price	0.21	0.38	31
Sales to price	0.26	0.72	20
Composite equity issuance, five years	(3.8%)	(9.5%)	61

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Relative strength against the sector, log excess return	0.37	(0.12)	90
Twelve-month failure probability, CHS model	not computable	0.03%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-27	
Return on assets above zero	fail
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$200.4M
Operating cash flow, four quarters	$622.4M
Months of runway	not finite
Days since last periodic filing	16 (10-Q received Nov 4, 2026)
Median daily dollar volume, 63 sessions	$283.4M

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	operating income	us-gaap:OperatingIncomeLoss	$25.2M	2025-12-27	2026-02-18	10-K	26-000022
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$99.5M	2025-12-27	2026-02-18	10-K	26-000022
3	income tax	us-gaap:IncomeTaxExpenseBenefit	$42.7M	2025-12-27	2026-02-18	10-K	26-000022
4	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.1B	2025-12-27	2026-02-18	10-K	26-000022
5	book equity	us-gaap:StockholdersEquity	$3.2B	2025-12-27	2026-02-18	10-K	26-000022
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$213.8M	2025-12-27	2026-02-18	10-K	26-000022
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.2B	2024-12-28	2026-02-18	10-K	26-000022
8	book equity	us-gaap:StockholdersEquity	$3.5B	2024-12-28	2026-02-18	10-K	26-000022
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$194.6M	2024-12-28	2026-02-18	10-K	26-000022
10	net income	us-gaap:NetIncomeLoss	-$144.3M	2025-12-27	2026-02-18	10-K	26-000022
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$737.6M	2025-12-27	2026-02-18	10-K	26-000022
12	assets	us-gaap:Assets	$7.1B	2025-12-27	2026-02-18	10-K	26-000022
13	assets	us-gaap:Assets	$7.5B	2024-12-28	2026-02-18	10-K	26-000022
14	current assets	us-gaap:AssetsCurrent	$1.4B	2025-12-27	2026-02-18	10-K	26-000022
15	current liabilities	us-gaap:LiabilitiesCurrent	$1.1B	2025-12-27	2026-02-18	10-K	26-000022
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.4B	2025-12-27	2026-02-18	10-K	26-000022
17	liabilities	us-gaap:Liabilities	$3.9B	2025-12-27	2026-02-18	10-K	26-000022
18	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$403.3M	2025-12-27	2026-02-18	10-K	26-000022
19	operating income	us-gaap:OperatingIncomeLoss	$617.3M	2023-12-30	2026-02-18	10-K	26-000022
20	interest expense	us-gaap:InterestExpense	$136.7M	2023-12-30	2024-02-14	10-K	24-000007
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.0B	2025-12-27	2026-02-18	10-K	26-000022
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.0B	2024-12-28	2026-02-18	10-K	26-000022
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.1B	2023-12-30	2026-02-18	10-K	26-000022
24	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.0B	2022-12-31	2025-02-19	10-K	25-000011
25	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$219.2M	2025-12-27	2026-02-18	10-K	26-000022
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$734.6M	2024-12-28	2026-02-18	10-K	26-000022
27	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$233.0M	2024-12-28	2026-02-18	10-K	26-000022
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$683.9M	2023-12-30	2026-02-18	10-K	26-000022
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$318.5M	2023-12-30	2026-02-18	10-K	26-000022

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30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$619.6M	2022-12-31	2025-02-19	10-K	25-000011
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$324.7M	2022-12-31	2025-02-19	10-K	25-000011
32	current assets	us-gaap:AssetsCurrent	$1.4B	2024-12-28	2026-02-18	10-K	26-000022
33	current liabilities	us-gaap:LiabilitiesCurrent	$994.1M	2024-12-28	2026-02-18	10-K	26-000022
34	assets	us-gaap:Assets	$8.2B	2023-12-30	2025-02-19	10-K	25-000011
35	assets	us-gaap:Assets	$7.6B	2022-12-31	2024-02-14	10-K	24-000007
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	49,227,800	2026-01-24	2026-02-18	10-K	26-000022
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	51,141,607	2025-01-25	2025-02-19	10-K	25-000011

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