Genpact Ltd.

G

NYSE; other; SIC 8742, Services-Management Consulting Services; CIK 0001398659

A

strongest fifth of 316 graded peers in other

rank 34 of 316; percentile 10.5; sampling error 2.7 points; lower is stronger

A B C D E

A, the bull



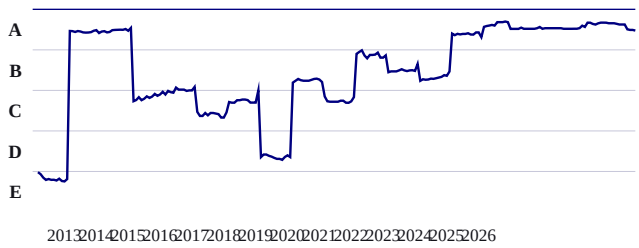
Scoreboard	
Profitability	B percentile 30.6
Solvency	B percentile 27.8
Growth and financing	B/C percentile 39.4
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $5.8B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered
Inputs computable	13 of 13
Graded from	filings received through Feb 26, 2026 267 days before the rescan; latest periodic filing 10-Q received Nov 6, 2026
Last close	$40.85 2026-11-19; market equity $6.8B; 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 26, 2026

Genpact is an agentic and advanced technology solutions company recognized for its deep industry knowledge, process intelligence and last mile expertise. With decades of client trust and a strong partner ecosystem, we provide innovative solutions that transform how businesses run. Powered by a team with an active learning mindset and client centricity at its core, we deliver lasting value for the world's leading enterprises. We have over 146,500 employees and serve clients from more than 35 countries around the world. Our 2025 total net revenues were $5.1 billion. Genpact was established more than 25 years ago as the global capability center for the General Electric Company ("GE").

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 30.6						
Gross profitability	31.3%	26.8%		40.8	266	2025-12-31
Return on invested capital	18.3%	10.0%		23.3	147	2025-12-31

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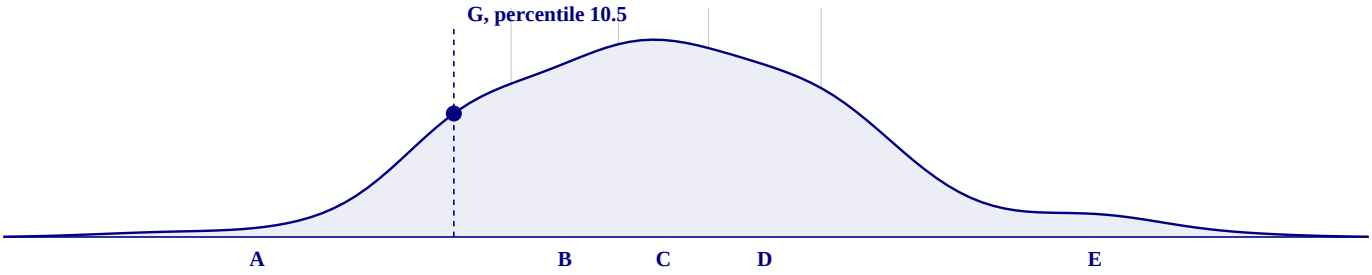
Accruals ratio	(4.8%)	(5.7%)	57.4	459	2025-12-31
Gross margin stability, five years	0.3 pts	2.2 pts	1.0	196	2025-12-31
Solvency, sleeve percentile 27.8					
Altman Z double-prime	3.63	2.06	26.3	358	2025-12-31
Net debt to EBITDA	0.84x	2.36x	24.9	174	2025-12-31
Interest coverage	10.20x	2.93x	23.4	78	2025-12-31
Current ratio	1.66x	1.32x	36.8	463	2025-12-31
Growth and financing, sleeve percentile 39.4					
Revenue growth, three-year compound	5.1%	5.0%	46.8	377	2025-12-31
Free cash flow growth, three-year compound	23.2%	8.7%	28.3	213	2025-12-31
Reinvestment rate	(9.7%)	13.3%	64.5	187	2025-12-31
Asset growth, three years	8.4%	4.1%	31.1	403	2025-12-31
Net share issuance, one year	(3.3%)	(0.6%)	26.1	354	2026-02-24

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
29	Cavco Industries, Inc. (CVCO)	8.9	A	
30	Legacy Education Inc. (LGCY)	9.2	A	fortress balance sheet
31	Akamai Technologies Inc. (AKAM)	9.5	A	
32	IES Holdings, Inc. (IESC)	9.8	A	fortress balance sheet
33	Installed Building Products, Inc. (IBP)	10.2	A	
34	Genpact Ltd. (G)	10.5	A	
35	Mercadolibre Inc. (MELI)	10.8	A	
36	Hackett Group, Inc. (HCKT)	11.1	A	fortress balance sheet
37	Mastech Digital, Inc. (MHH)	11.4	A	
38	Hecla Mining (HL)	11.7	A	
39	Kforce Inc. (KFRC)	12.1	A	

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	(13.0%)	0.06%	38
Distance from 52-week high	(15.8%)	(27.0%)	70
EBIT to enterprise value	10.0%	4.6%	88
Free cash flow yield	10.8%	4.0%	83
Book value to price	0.40	0.38	52
Sales to price	0.74	0.72	51
Composite equity issuance, five years	(20.0%)	(9.5%)	35
Relative strength against the sector, log excess return	(0.26)	(0.12)	38
Twelve-month failure probability, CHS model	0.02%	0.03%	20

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Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 8 of 9, period end 2025-12-31	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
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	pass
Cash, filings, liquidity	
Cash and equivalents	$499.1M
Operating cash flow, four quarters	$428.7M
Months of runway	not finite
Days since last periodic filing	14 (10-Q received Nov 6, 2026)
Median daily dollar volume, 63 sessions	$69.2M

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	$1.8B	2025-12-31	2026-02-26	10-K	26-000004
2	assets	us-gaap:Assets	$5.8B	2025-12-31	2026-02-26	10-K	26-000004
3	operating income	us-gaap:OperatingIncomeLoss	$750.2M	2025-12-31	2026-02-26	10-K	26-000004
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$730.1M	2025-12-31	2026-02-26	10-K	26-000004
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$177.7M	2025-12-31	2026-02-26	10-K	26-000004
6	total debt	us-gaap:LongTermDebt	$1.5B	2025-12-31	2026-02-26	10-K	26-000004
7	book equity	us-gaap:StockholdersEquity	$2.5B	2025-12-31	2026-02-26	10-K	26-000004
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$853.8M	2025-12-31	2026-02-26	10-K	26-000004
9	total debt	us-gaap:LongTermDebt	$1.2B	2024-12-31	2026-02-26	10-K	26-000004
10	book equity	us-gaap:StockholdersEquity	$2.4B	2024-12-31	2026-02-26	10-K	26-000004
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$648.2M	2024-12-31	2026-02-26	10-K	26-000004
12	net income	us-gaap:NetIncomeLoss	$552.5M	2025-12-31	2026-02-26	10-K	26-000004
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$812.9M	2025-12-31	2026-02-26	10-K	26-000004
14	assets	us-gaap:Assets	$5.0B	2024-12-31	2026-02-26	10-K	26-000004
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$5.1B	2025-12-31	2026-02-26	10-K	26-000004
16	gross profit	us-gaap:GrossProfit	$1.7B	2024-12-31	2026-02-26	10-K	26-000004
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.8B	2024-12-31	2026-02-26	10-K	26-000004
18	gross profit	us-gaap:GrossProfit	$1.6B	2023-12-31	2026-02-26	10-K	26-000004
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.5B	2023-12-31	2026-02-26	10-K	26-000004
20	gross profit	us-gaap:GrossProfit	$1.5B	2022-12-31	2025-03-03	10-K	25-000035
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.4B	2022-12-31	2025-03-03	10-K	25-000035
22	gross profit	us-gaap:GrossProfit	$1.4B	2021-12-31	2024-02-29	10-K	24-000031
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.0B	2021-12-31	2024-02-29	10-K	24-000031
24	current assets	us-gaap:AssetsCurrent	$2.7B	2025-12-31	2026-02-26	10-K	26-000004
25	current liabilities	us-gaap:LiabilitiesCurrent	$1.6B	2025-12-31	2026-02-26	10-K	26-000004
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.4B	2025-12-31	2026-02-26	10-K	26-000004
27	liabilities	us-gaap:Liabilities	$3.3B	2025-12-31	2026-02-26	10-K	26-000004
28	depreciation amortization	us-gaap:Depreciation	$70.7M	2025-12-31	2026-02-26	10-K	26-000004
29	interest expense	us-gaap:InterestAndDebtExpense	$73.5M	2025-12-31	2026-02-26	10-K	26-000004
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$78.2M	2025-12-31	2026-02-26	10-K	26-000004
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$615.4M	2024-12-31	2026-02-26	10-K	26-000004

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32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$82.8M	2024-12-31	2026-02-26	10-K	26-000004
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$490.8M	2023-12-31	2026-02-26	10-K	26-000004
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$55.4M	2023-12-31	2026-02-26	10-K	26-000004
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$443.7M	2022-12-31	2025-03-03	10-K	25-000035
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$50.6M	2022-12-31	2025-03-03	10-K	25-000035
37	current assets	us-gaap:AssetsCurrent	$2.1B	2024-12-31	2026-02-26	10-K	26-000004
38	current liabilities	us-gaap:LiabilitiesCurrent	$963.7M	2024-12-31	2026-02-26	10-K	26-000004
39	assets	us-gaap:Assets	$4.8B	2023-12-31	2025-03-03	10-K	25-000035
40	assets	us-gaap:Assets	$4.6B	2022-12-31	2024-02-29	10-K	24-000031
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	169,863,795	2026-02-24	2026-02-26	10-K	26-000004
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	175,669,364	2025-02-20	2025-03-03	10-K	25-000035

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