Aramark

ARMK

NYSE; shops; SIC 5812, Retail-Eating Places; CIK 0001584509

D

fourth fifth of 239 graded peers in shops

rank 180 of 239; percentile 75.2; sampling error 3.0 points; lower is stronger

A B C D E

D, the sloth



Scoreboard

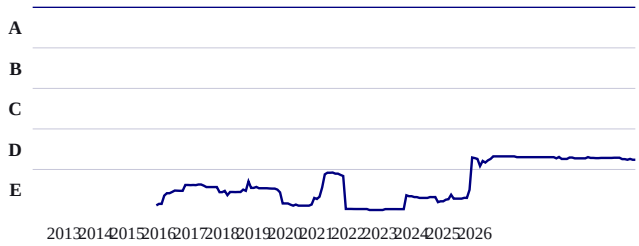
Profitability	D percentile 63.5
Solvency	D percentile 75.2
Growth and financing	B/C percentile 41.2
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $13.3B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	9 of 13
Graded from	filings received through Nov 25, 2025 362 days before the rescan; latest periodic filing 10-Q received Aug 11, 2026
Last close	$53.85 2026-11-20; market equity $14.2B; 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 Nov 25, 2025

Aramark (the "Company", "we" or "us") is a leading global provider of food and facilities services to education, healthcare, business & industry, and sports, leisure & corrections clients. Our largest market is the United States, which is supplemented by an additional 15-country footprint. We also provide our services on a more limited basis in several additional countries and in offshore locations. Based on total revenue in fiscal 2025, we hold a top 2 position in North America in food and facilities services and a top 3 position in food and facilities services internationally in most countries in which we have significant operations.

The thirteen inputs

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

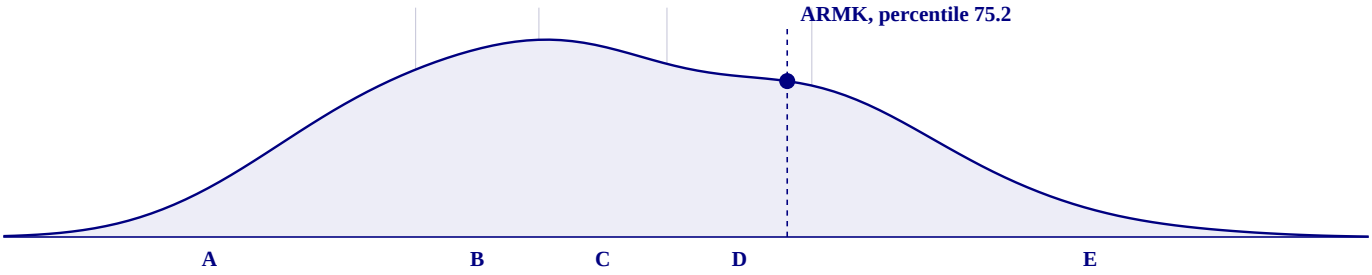
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 63.5						
Gross profitability	not computable	43.5%				
latest aligned inputs end 2022-09-30; latest annual assets end 2025-10-03						
Return on invested capital	8.3%	11.5%		69.3	76	2025-10-03

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Accruals ratio	(4.6%)	(4.9%)	57.7	268	2025-10-03
Gross margin stability, five years	not computable	1.2 pts			
latest aligned inputs end 2022-09-30; latest annual assets end 2025-10-03					
Solvency, sleeve percentile 75.2					
Altman Z double-prime	not computable	1.93			
one or more required annual facts are missing					
Net debt to EBITDA	3.73x	1.65x	77.8	91	2025-10-03
Interest coverage	not computable	3.83x			
latest aligned inputs end 2023-09-29; latest annual assets end 2025-10-03					
Current ratio	0.99x	1.34x	72.5	274	2025-10-03
Growth and financing, sleeve percentile 41.2					
Revenue growth, three-year compound	10.6%	1.8%	15.3	250	2025-10-03
Free cash flow growth, three-year compound	4.1%	5.2%	55.8	139	2025-10-03
Reinvestment rate	132.5%	13.1%	9.9	143	2025-10-03
Asset growth, three years	(4.1%)	3.3%	76.0	251	2025-10-03
Net share issuance, one year	(0.4%)	(0.6%)	49.3	206	2025-10-31

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
175	Target Corp. (TGT)	73.1	D	
176	Ingram Micro Holding Corp. (INGM)	73.5	D	
177	Lands' END, Inc. (LE)	73.9	D	short runway
178	Sherwin Williams Co. (SHW)	74.4	D	
179	El Pollo Loco Holdings, Inc. (LOCO)	74.8	D	
180	Aramark (ARMK)	75.2	D	
181	Willis Lease Finance Corp. (WLFC)	75.6	D	
182	Cracker Barrel OLD Country Store, Inc. (CBRL)	76.1	D	
183	CHS Inc. (CHSCP)	76.5	D	
184	Dave & Buster's Entertainment, Inc. (PLAY)	76.9	D	
185	1 800 Flowers COM Inc. (FLWS)	77.3	D/E	

What the price implies

at the 2026-11-20 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	42.9%	(0.5%)	84
Distance from 52-week high	(13.7%)	(25.1%)	76
EBIT to enterprise value	4.0%	5.5%	35
Free cash flow yield	3.0%	4.2%	38
Book value to price	0.24	0.40	37
Sales to price	1.30	1.70	41
Composite equity issuance, five years	(35.5%)	(17.2%)	16

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Relative strength against the sector, log excess return	0.45	0.08	84
Twelve-month failure probability, CHS model	not computable	0.04%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-10-03	
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	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$499.4M
Operating cash flow, four quarters	$910.8M
Months of runway	not finite
Days since last periodic filing	103 (10-Q received Aug 11, 2026)
Median daily dollar volume, 63 sessions	$131.5M

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	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$13.7B	2022-09-30	2024-11-19	10-K	24-000212
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$14.8B	2022-09-30	2022-11-22	10-K	22-000236
3	assets	us-gaap:Assets	$15.1B	2022-09-30	2023-11-21	10-K	23-000237
4	operating income	us-gaap:OperatingIncomeLoss	$791.8M	2025-10-03	2025-11-25	10-K	25-000219
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$430.5M	2025-10-03	2025-11-25	10-K	25-000219
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$103.6M	2025-10-03	2025-11-25	10-K	25-000219
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$5.4B	2025-10-03	2025-11-25	10-K	25-000219
8	book equity	us-gaap:StockholdersEquity	$3.1B	2025-10-03	2025-11-25	10-K	25-000219
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$639.1M	2025-10-03	2025-11-25	10-K	25-000219
10	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$4.3B	2024-09-27	2025-11-25	10-K	25-000219
11	book equity	us-gaap:StockholdersEquity	$3.0B	2024-09-27	2025-11-25	10-K	25-000219
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$672.5M	2024-09-27	2025-11-25	10-K	25-000219
13	net income	us-gaap:NetIncomeLoss	$326.4M	2025-10-03	2025-11-25	10-K	25-000219
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$921.0M	2025-10-03	2025-11-25	10-K	25-000219
15	assets	us-gaap:Assets	$13.3B	2025-10-03	2025-11-25	10-K	25-000219
16	assets	us-gaap:Assets	$12.7B	2024-09-27	2025-11-25	10-K	25-000219
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$12.1B	2021-10-01	2023-11-21	10-K	23-000237
18	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$11.0B	2021-10-01	2022-11-22	10-K	22-000236
19	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$12.8B	2020-10-02	2022-11-22	10-K	22-000236
20	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$12.0B	2020-10-02	2022-11-22	10-K	22-000236
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$16.2B	2019-09-27	2021-11-23	10-K	21-000256
22	cost of revenue	us-gaap:CostOfRevenue	$15.3B	2019-09-27	2019-11-26	10-K	19-000237
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$15.8B	2018-09-28	2020-11-24	10-K	20-000230
24	cost of revenue	us-gaap:CostOfRevenue	$15.0B	2018-09-28	2019-11-26	10-K	19-000237
25	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$476.3M	2025-10-03	2025-11-25	10-K	25-000219
26	operating income	us-gaap:OperatingIncomeLoss	$625.0M	2023-09-29	2025-11-25	10-K	25-000219
27	interest expense	us-gaap:InterestExpense	$441.3M	2023-09-29	2023-11-21	10-K	23-000237
28	current assets	us-gaap:AssetsCurrent	$3.5B	2025-10-03	2025-11-25	10-K	25-000219
29	current liabilities	us-gaap:LiabilitiesCurrent	$3.5B	2025-10-03	2025-11-25	10-K	25-000219

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30	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$18.5B	2025-10-03	2025-11-25	10-K	25-000219
31	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$17.4B	2024-09-27	2025-11-25	10-K	25-000219
32	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$16.1B	2023-09-29	2025-11-25	10-K	25-000219
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$489.2M	2025-10-03	2025-11-25	10-K	25-000219
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$726.5M	2024-09-27	2025-11-25	10-K	25-000219
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$427.4M	2024-09-27	2025-11-25	10-K	25-000219
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$766.4M	2023-09-29	2023-11-21	10-K	23-000237
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$383.5M	2023-09-29	2025-11-25	10-K	25-000219
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$694.5M	2022-09-30	2023-11-21	10-K	23-000237
39	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$311.9M	2022-09-30	2024-11-19	10-K	24-000212
40	current assets	us-gaap:AssetsCurrent	$3.4B	2024-09-27	2025-11-25	10-K	25-000219
41	current liabilities	us-gaap:LiabilitiesCurrent	$4.2B	2024-09-27	2025-11-25	10-K	25-000219
42	assets	us-gaap:Assets	$16.9B	2023-09-29	2024-11-19	10-K	24-000212
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	262,934,101	2025-10-31	2025-11-25	10-K	25-000219
44	shares outstanding	dei:EntityCommonStockSharesOutstanding	263,947,698	2024-10-25	2024-11-19	10-K	24-000212

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