Arrow Electronics, Inc.

ARW

NYSE; shops; SIC 5065, Wholesale-Electronic Parts & Equipment, NEC; CIK 0000007536

C

middle fifth of 239 graded peers in shops

rank 132 of 239; percentile 55.0; sampling error 3.0 points; lower is stronger

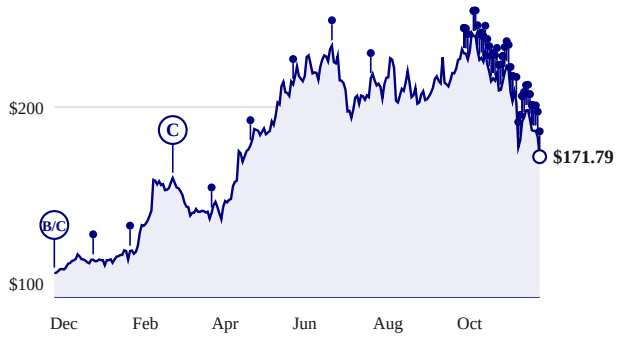
A B C D E

C, the tortoise



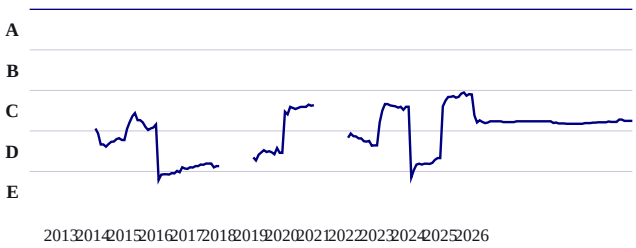
Scoreboard	
Profitability	D percentile 69.3
Solvency	C percentile 48.0
Growth and financing	B percentile 34.2
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $29.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	8 of 13
Graded from	filings received through Feb 11, 2026 284 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$171.50 2026-11-20; market equity $8.7B; 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 11, 2026

Arrow Electronics, Inc. (the "company" or "Arrow") sources and engineers technology for thousands of leading manufacturers, service providers, and users of enterprise computing solutions. The company has one of the world's broadest portfolios of product offerings available from leading electronic components and enterprise computing solutions suppliers. Equipped with a range of services, solutions, and software, the company helps industrial and commercial customers introduce innovative products, reduce their time to market, and enhance their overall competitiveness. Arrow was incorporated in New York in 1946.

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 69.3						
Gross profitability	11.9%	43.5%		91.0	223	2025-12-31
Return on invested capital	not computable	11.5%				
one or more required annual facts are missing						

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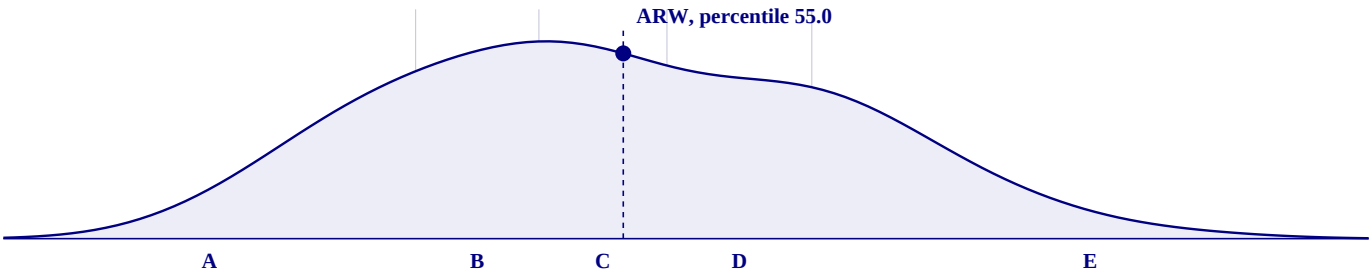
Accruals ratio	2.0%	(4.9%)	94.0	268	2025-12-31
Gross margin stability, five years	0.6 pts	1.2 pts	22.9	202	2025-12-31
Solvency, sleeve percentile 48.0					
Altman Z double-prime	not computable	1.93			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.65x			
one or more required annual facts are missing					
Interest coverage	not computable	3.83x			
one or more required annual facts are missing					
Current ratio	1.36x	1.34x	48.0	274	2025-12-31
Growth and financing, sleeve percentile 34.2					
Revenue growth, three-year compound	(6.0%)	1.8%	81.1	250	2025-12-31
Free cash flow growth, three-year compound	not computable	5.2%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	155.2%	13.1%	6.3	143	2025-12-31
Asset growth, three years	10.1%	3.3%	18.8	251	2025-12-31
Net share issuance, one year	(2.1%)	(0.6%)	30.7	206	2026-02-03

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
127	Hudson Technologies Inc. (HDSN)	52.9	C	
128	Lithia Motors Inc. (LAD)	53.4	C	
129	Penske Automotive Group, Inc. (PAG)	53.8	C	
130	Climb Global Solutions, Inc. (CLMB)	54.2	C	fortress balance sheet
131	Victoria's Secret & Co. (VSXY)	54.6	C	
132	Arrow Electronics, Inc. (ARW)	55.0	C	
133	Yum China Holdings, Inc. (YUMC)	55.5	C	
134	Cheesecake Factory Inc. (CAKE)	55.9	C	
135	Barnes & Noble Education, Inc. (BNED)	56.3	C	late filer
136	Grocery Outlet Holding Corp. (GO)	56.7	C	
137	BlueLinx Holdings Inc. (BXC)	57.1	C/D	

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	103.5%	(0.5%)	96
Distance from 52-week high	(29.0%)	(25.1%)	43
EBIT to enterprise value	not computable	5.5%	
Free cash flow yield	(0.4%)	4.2%	20
Book value to price	0.83	0.40	73
Sales to price	3.55	1.70	69

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Composite equity issuance, five years	(38.9%)	(17.2%)	11
Relative strength against the sector, log excess return	0.80	0.08	96
Twelve-month failure probability, CHS model	not computable	0.04%	

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	pass
Operating cash flow exceeds net income	fail
Long-term leverage fell	pass
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$215.6M
Operating cash flow, four quarters	$776.6M
Months of runway	not finite
Days since last periodic filing	17 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$97.7M

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	$3.5B	2025-12-31	2026-02-11	10-K	26-012765
2	assets	us-gaap:Assets	$29.1B	2025-12-31	2026-02-11	10-K	26-012765
3	net income	us-gaap:NetIncomeLoss	$571.3M	2025-12-31	2026-02-11	10-K	26-012765
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$64.0M	2025-12-31	2026-02-11	10-K	26-012765
5	assets	us-gaap:Assets	$21.8B	2024-12-31	2026-02-11	10-K	26-012765
6	revenue	us-gaap:Revenues	$30.9B	2025-12-31	2026-02-11	10-K	26-012765
7	gross profit	us-gaap:GrossProfit	$3.3B	2024-12-31	2026-02-11	10-K	26-012765
8	revenue	us-gaap:Revenues	$27.9B	2024-12-31	2026-02-11	10-K	26-012765
9	gross profit	us-gaap:GrossProfit	$4.1B	2023-12-31	2026-02-11	10-K	26-012765
10	revenue	us-gaap:Revenues	$33.1B	2023-12-31	2026-02-11	10-K	26-012765
11	gross profit	us-gaap:GrossProfit	$4.8B	2022-12-31	2025-02-11	10-K	25-000781
12	revenue	us-gaap:Revenues	$37.1B	2022-12-31	2025-02-11	10-K	25-000781
13	gross profit	us-gaap:GrossProfit	$4.2B	2021-12-31	2024-02-13	10-K	24-001018
14	revenue	us-gaap:Revenues	$34.5B	2021-12-31	2024-02-13	10-K	24-001018
15	current assets	us-gaap:AssetsCurrent	$25.7B	2025-12-31	2026-02-11	10-K	26-012765
16	current liabilities	us-gaap:LiabilitiesCurrent	$18.8B	2025-12-31	2026-02-11	10-K	26-012765
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$101.3M	2025-12-31	2026-02-11	10-K	26-012765
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2024-12-31	2026-02-11	10-K	26-012765
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$92.7M	2024-12-31	2026-02-11	10-K	26-012765
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$705.4M	2023-12-31	2026-02-11	10-K	26-012765
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$83.3M	2023-12-31	2026-02-11	10-K	26-012765
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$33.1M	2022-12-31	2025-02-11	10-K	25-000781
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$78.8M	2022-12-31	2025-02-11	10-K	25-000781
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$137.8M	2025-12-31	2026-02-11	10-K	26-012765
25	operating income	us-gaap:OperatingIncomeLoss	$822.2M	2025-12-31	2026-02-11	10-K	26-012765
26	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$717.9M	2025-12-31	2026-02-11	10-K	26-012765
27	income tax	us-gaap:IncomeTaxExpenseBenefit	$148.2M	2025-12-31	2026-02-11	10-K	26-012765

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28	current assets	us-gaap:AssetsCurrent	$18.4B	2024-12-31	2026-02-11	10-K	26-012765
29	current liabilities	us-gaap:LiabilitiesCurrent	$12.6B	2024-12-31	2026-02-11	10-K	26-012765
30	assets	us-gaap:Assets	$21.7B	2023-12-31	2025-02-11	10-K	25-000781
31	assets	us-gaap:Assets	$21.8B	2022-12-31	2024-02-13	10-K	24-001018
32	shares outstanding	dei:EntityCommonStockSharesOutstanding	51,086,165	2026-02-03	2026-02-11	10-K	26-012765
33	shares outstanding	dei:EntityCommonStockSharesOutstanding	52,172,303	2025-02-04	2025-02-11	10-K	25-000781

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