Ingram Micro Holding Corp. INGM

NYSE; shops; SIC 5045, Wholesale-Computers & Peripheral Equipment & Software; CIK 0001897762

D

fourth fifth of 239 graded peers in shops

rank 176 of 239; percentile 73.5; sampling error 3.0 points; lower is stronger

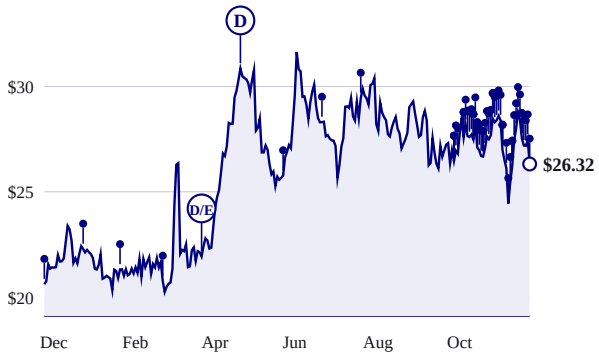
A B C D E

D, the sloth



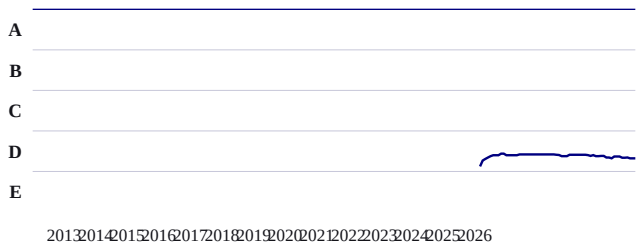
Scoreboard	
Profitability	D percentile 74.1
Solvency	C percentile 44.8
Growth and financing	C/D percentile 59.7
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $21.2B
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 Mar 3, 2026 264 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$26.33 2026-11-20; market equity $6.1B; 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 Mar 3, 2026

Ingram Micro is a leading solutions provider by revenue and/or by global footprint for the global information technology ("IT") ecosystem helping power the world's leading technology brands. With our vast infrastructure and focus on client and endpoint solutions, advanced solutions offerings, cloud-based and other solutions, we enable our business partners to scale and operate more efficiently in the markets they serve. We are at the center of the technology ecosystem and deliver customized solutions to our vendor and reseller partners, enabling them to provide excellent business outcomes to the end-user companies and consumers they serve.

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 74.1						
Gross profitability	16.5%	43.5%		86.5	223	2025-12-27
Return on invested capital	9.2%	11.5%		61.3	76	2025-12-27
Accruals ratio	(2.9%)	(4.9%)		74.5	268	2025-12-27

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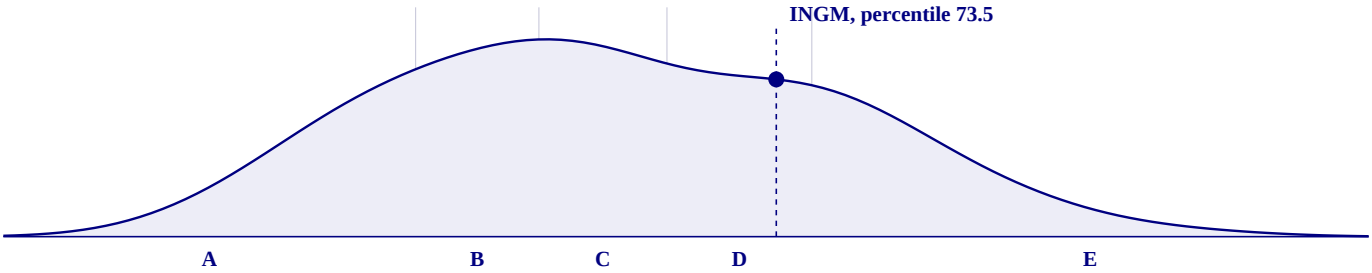
Gross margin stability, five years	not computable	1.2 pts			
five annual gross margins are required; found 2					
Solvency, sleeve percentile 44.8					
Altman Z double-prime	2.19	1.93	41.3	197	2025-12-27
Net debt to EBITDA	1.24x	1.65x	43.3	91	2025-12-27
Interest coverage	not computable	3.83x			
one or more required annual facts are missing					
Current ratio	1.33x	1.34x	49.8	274	2025-12-27
Growth and financing, sleeve percentile 59.7					
Revenue growth, three-year compound	not computable	1.8%			
four annual observations are required; found 2					
Free cash flow growth, three-year compound	not computable	5.2%			
four consecutive annual FCF observations are required; found 2					
Reinvestment rate	(0.3%)	13.1%	63.4	143	2025-12-27
Asset growth, three years	not computable	3.3%			
four annual observations are required; found 3					
Net share issuance, one year	0.1%	(0.6%)	56.1	206	2026-02-23

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
171	Wendy's Co. (WEN)	71.4	D	
172	Marinemax Inc. (HZO)	71.8	D	
173	HF Foods Group Inc. (HFFG)	72.3	D	
174	Team Inc. (TISI)	72.7	D	
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	

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	18.4%	(0.5%)	69
Distance from 52-week high	(16.8%)	(25.1%)	68
EBIT to enterprise value	9.8%	5.5%	83
Free cash flow yield	13.0%	4.2%	85
Book value to price	0.72	0.40	69
Sales to price	8.68	1.70	89

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Composite equity issuance, five years	not computable	(17.2%)	
Relative strength against the sector, log excess return	0.26	0.08	69
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 2025-12-27	
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	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$1.0B
Operating cash flow, four quarters	$300.8M
Months of runway	not finite
Days since last periodic filing	24 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$50.0M

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	2025-12-27	2026-03-03	10-K	26-013588
2	assets	us-gaap:Assets	$21.2B	2025-12-27	2026-03-03	10-K	26-013588
3	operating income	us-gaap:OperatingIncomeLoss	$876.9M	2025-12-27	2026-03-03	10-K	26-013588
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$530.8M	2025-12-27	2026-03-03	10-K	26-013588
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$202.9M	2025-12-27	2026-03-03	10-K	26-013588
6	total debt	us-gaap:LongTermDebt	$3.2B	2025-12-27	2026-03-03	10-K	26-013588
7	book equity	us-gaap:StockholdersEquity	$4.2B	2025-12-27	2026-03-03	10-K	26-013588
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.9B	2025-12-27	2026-03-03	10-K	26-013588
9	total debt	us-gaap:LongTermDebt	$3.4B	2024-12-28	2026-03-03	10-K	26-013588
10	book equity	us-gaap:StockholdersEquity	$3.7B	2024-12-28	2026-03-03	10-K	26-013588
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$918.4M	2024-12-28	2026-03-03	10-K	26-013588
12	net income	us-gaap:NetIncomeLoss	$327.9M	2025-12-27	2026-03-03	10-K	26-013588
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$916.1M	2025-12-27	2026-03-03	10-K	26-013588
14	assets	us-gaap:Assets	$18.8B	2024-12-28	2026-03-03	10-K	26-013588
15	current assets	us-gaap:AssetsCurrent	$18.2B	2025-12-27	2026-03-03	10-K	26-013588
16	current liabilities	us-gaap:LiabilitiesCurrent	$13.7B	2025-12-27	2026-03-03	10-K	26-013588
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.6B	2025-12-27	2026-03-03	10-K	26-013588
18	liabilities	us-gaap:Liabilities	$17.0B	2025-12-27	2026-03-03	10-K	26-013588
19	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$197.2M	2025-12-27	2026-03-03	10-K	26-013588
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$52.6B	2025-12-27	2026-03-03	10-K	26-013588
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$48.0B	2024-12-28	2026-03-03	10-K	26-013588
22	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$130.8M	2025-12-27	2026-03-03	10-K	26-013588
23	current assets	us-gaap:AssetsCurrent	$15.8B	2024-12-28	2026-03-03	10-K	26-013588
24	current liabilities	us-gaap:LiabilitiesCurrent	$11.3B	2024-12-28	2026-03-03	10-K	26-013588
25	assets	us-gaap:Assets	$17.6B	2024-03-30	2025-03-05	10-K	25-010298
26	shares outstanding	dei:EntityCommonStockSharesOutstanding	235,074,694	2026-02-23	2026-03-03	10-K	26-013588
27	shares outstanding	dei:EntityCommonStockSharesOutstanding	234,825,581	2025-02-25	2025-03-05	10-K	25-010298

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