Insight Enterprises Inc.

NSIT

Nasdaq; shops; SIC 5961, Retail-Catalog & Mail-Order Houses; CIK 0000932696

C

middle fifth of 239 graded peers in shops

rank 125 of 239; percentile 52.1; sampling error 3.0 points; lower is stronger

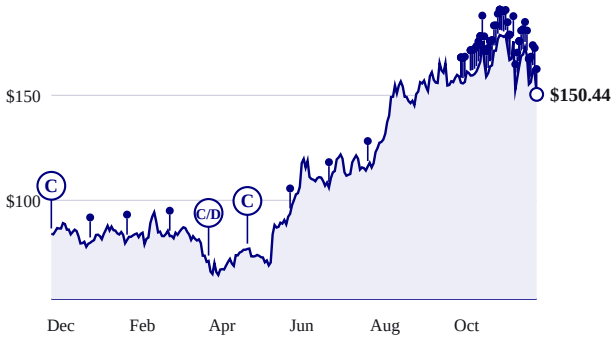
A B C D E

C, the tortoise



Scoreboard	
Profitability	D percentile 73.5
Solvency	C percentile 52.3
Growth and financing	B percentile 24.0
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 $9.1B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	12 of 13
Graded from	filings received through Feb 12, 2026 283 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$150.15 2026-11-20; market equity $4.3B; 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 12, 2026

Today, every business is a technology business. At Insight, we accelerate transformation by unlocking the power of people and technology. We turn complexity into clarity, helping clients achieve meaningful business outcomes and drive real results at scale. We serve these clients in North America; Europe, the Middle East and Africa ("EMEA"); and Asia-Pacific ("APAC"). As a Fortune 500-ranked Solutions Integrator, we deliver secure, end-to-end digital transformation and meet the needs of our clients through a comprehensive portfolio of solutions, far-reaching partnerships and 37 years of broad IT expertise.

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 73.5						
Gross profitability	19.4%	43.5%		82.9	223	2025-12-31
Return on invested capital	9.9%	11.5%		56.0	76	2025-12-31
Accruals ratio	(1.8%)	(4.9%)		81.6	268	2025-12-31

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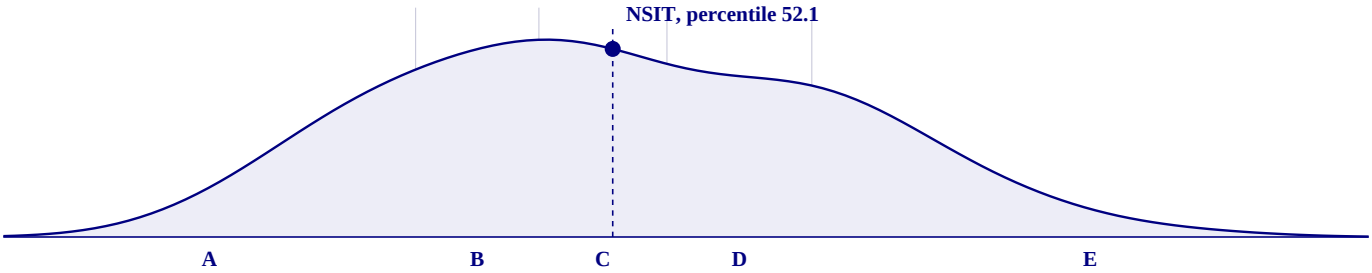
Gross margin stability, five years	2.4 pts	1.2 pts	73.6	202	2025-12-31
Solvency, sleeve percentile 52.3					
Altman Z double-prime	1.93	1.93	47.4	197	2025-12-31
Net debt to EBITDA	2.27x	1.65x	55.6	91	2025-12-31
Interest coverage	not computable	3.83x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	1.25x	1.34x	53.8	274	2025-12-31
Growth and financing, sleeve percentile 24.0					
Revenue growth, three-year compound	(7.5%)	1.8%	83.9	250	2025-12-31
Free cash flow growth, three-year compound	117.4%	5.2%	2.2	139	2025-12-31
Reinvestment rate	194.5%	13.1%	1.4	143	2025-12-31
Asset growth, three years	21.1%	3.3%	4.0	251	2025-12-31
Net share issuance, one year	(2.5%)	(0.6%)	28.3	206	2026-02-06

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
120	Reliance, Inc. (RS)	50.0	C	
121	Bath & Body Works, Inc. (BBWI)	50.4	C	
122	Universal Corp. (UVV)	50.8	C	late filer
123	Mckesson Corp. (MCK)	51.3	C	
124	Walmart Inc. (WMT)	51.7	C	
125	Insight Enterprises Inc. (NSIT)	52.1	C	
126	Darden Restaurants Inc. (DRI)	52.5	C	
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

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	56.3%	(0.5%)	90
Distance from 52-week high	(15.8%)	(25.1%)	71
EBIT to enterprise value	6.2%	5.5%	59
Free cash flow yield	6.4%	4.2%	67
Book value to price	0.36	0.40	47
Sales to price	1.90	1.70	53
Composite equity issuance, five years	(19.8%)	(17.2%)	43
Relative strength against the sector, log excess return	0.54	0.08	90
Twelve-month failure probability, CHS model	not computable	0.04%	

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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	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$397.7M
Operating cash flow, four quarters	$302.3M
Months of runway	not finite
Days since last periodic filing	17 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$49.6M

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	2026-02-12	10-K	26-000007
2	assets	us-gaap:Assets	$9.1B	2025-12-31	2026-02-12	10-K	26-000007
3	operating income	us-gaap:OperatingIncomeLoss	$334.9M	2025-12-31	2026-02-12	10-K	26-000007
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$225.8M	2025-12-31	2026-02-12	10-K	26-000007
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$68.5M	2025-12-31	2026-02-12	10-K	26-000007
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.4B	2025-12-31	2026-02-12	10-K	26-000007
7	book equity	us-gaap:StockholdersEquity	$1.6B	2025-12-31	2026-02-12	10-K	26-000007
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$358.0M	2025-12-31	2026-02-12	10-K	26-000007
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$531.2M	2024-12-31	2026-02-12	10-K	26-000007
10	book equity	us-gaap:StockholdersEquity	$1.8B	2024-12-31	2026-02-12	10-K	26-000007
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$259.2M	2024-12-31	2026-02-12	10-K	26-000007
12	net income	us-gaap:NetIncomeLoss	$157.3M	2025-12-31	2026-02-12	10-K	26-000007
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$303.8M	2025-12-31	2026-02-12	10-K	26-000007
14	assets	us-gaap:Assets	$7.4B	2024-12-31	2026-02-12	10-K	26-000007
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$8.2B	2025-12-31	2026-02-12	10-K	26-000007
16	gross profit	us-gaap:GrossProfit	$1.8B	2024-12-31	2026-02-12	10-K	26-000007
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$8.7B	2024-12-31	2026-02-12	10-K	26-000007
18	gross profit	us-gaap:GrossProfit	$1.7B	2023-12-31	2026-02-12	10-K	26-000007
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$9.2B	2023-12-31	2026-02-12	10-K	26-000007
20	gross profit	us-gaap:GrossProfit	$1.6B	2022-12-31	2025-02-14	10-K	25-005817
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$10.4B	2022-12-31	2025-02-14	10-K	25-005817
22	gross profit	us-gaap:GrossProfit	$1.4B	2021-12-31	2024-02-22	10-K	24-006391
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$9.4B	2021-12-31	2024-02-22	10-K	24-006391
24	current assets	us-gaap:AssetsCurrent	$6.4B	2025-12-31	2026-02-12	10-K	26-000007
25	current liabilities	us-gaap:LiabilitiesCurrent	$5.1B	2025-12-31	2026-02-12	10-K	26-000007
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.5B	2025-12-31	2026-02-12	10-K	26-000007
27	liabilities	us-gaap:Liabilities	$7.4B	2025-12-31	2026-02-12	10-K	26-000007
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$106.3M	2025-12-31	2026-02-12	10-K	26-000007
29	operating income	us-gaap:OperatingIncomeLoss	$419.8M	2023-12-31	2026-02-12	10-K	26-000007
30	interest expense	us-gaap:InterestExpense	$41.1M	2023-12-31	2024-02-22	10-K	24-006391
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$24.5M	2025-12-31	2026-02-12	10-K	26-000007

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$632.8M	2024-12-31	2026-02-12	10-K	26-000007
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$46.8M	2024-12-31	2026-02-12	10-K	26-000007
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$619.5M	2023-12-31	2026-02-12	10-K	26-000007
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$39.3M	2023-12-31	2026-02-12	10-K	26-000007
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$98.1M	2022-12-31	2025-02-14	10-K	25-005817
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$70.9M	2022-12-31	2025-02-14	10-K	25-005817
38	current assets	us-gaap:AssetsCurrent	$4.8B	2024-12-31	2026-02-12	10-K	26-000007
39	current liabilities	us-gaap:LiabilitiesCurrent	$4.1B	2024-12-31	2026-02-12	10-K	26-000007
40	assets	us-gaap:Assets	$6.3B	2023-12-31	2025-02-14	10-K	25-005817
41	assets	us-gaap:Assets	$5.1B	2022-12-31	2024-02-22	10-K	24-006391
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,996,502	2026-02-06	2026-02-12	10-K	26-000007
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	31,777,678	2025-02-07	2025-02-14	10-K	25-005817

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