SiteOne Landscape Supply, Inc.

SITE

NYSE; shops; SIC 5040, Wholesale-Professional & Commercial Equipment & Supplies; CIK 0001650729

A

strongest fifth of 239 graded peers in shops

rank 13 of 239; percentile 5.0; sampling error 3.0 points; lower is stronger

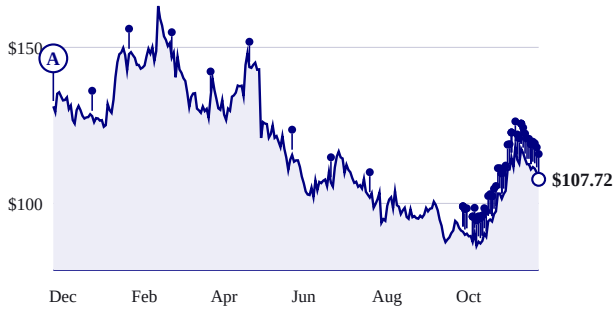
A B C D E

A, the bull



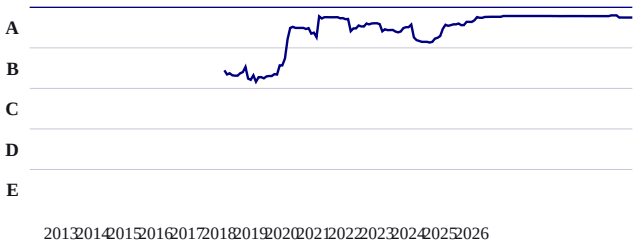
Scoreboard	
Profitability	B/C percentile 38.4
Solvency	A/B percentile 17.7
Growth and financing	B percentile 34.4
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $3.2B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	10 of 13
Graded from	filings received through Feb 19, 2026 276 days before the rescan; latest periodic filing 10-Q received Oct 28, 2026
Last close	$107.72 2026-11-20; market equity $4.6B; 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 19, 2026

The following discussion of our business contains "forward-looking statements," as discussed in "Special Note Regarding Forward-Looking Statements and Information" above. Our business, operations, and financial condition are subject to various risks as set forth in Part I,

The thirteen inputs

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

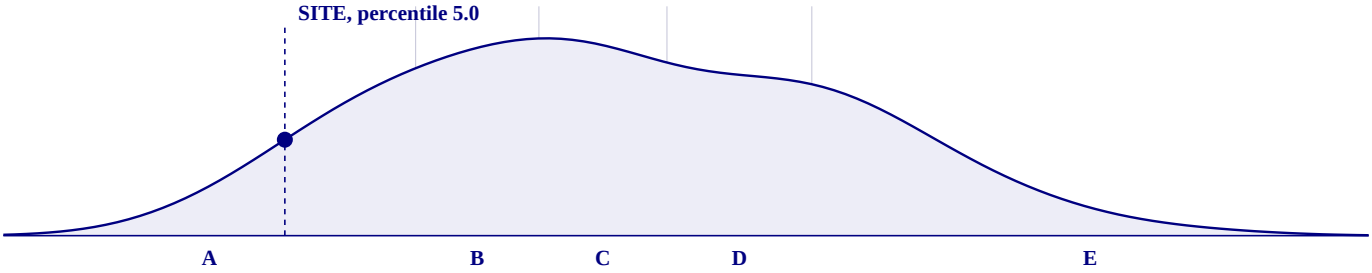
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 38.4						
Gross profitability	50.8%	43.5%		36.5	223	2025-12-28
Return on invested capital	10.0%	11.5%		54.7	76	2025-12-28
Accruals ratio	(4.7%)	(4.9%)		55.8	268	2025-12-28
Gross margin stability, five years	0.3 pts	1.2 pts		6.5	202	2025-12-28
Solvency, sleeve percentile 17.7						

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Altman Z double-prime	4.90	1.93	16.3	197	2025-12-28
Net debt to EBITDA	not computable	1.65x			
latest aligned inputs end 2018-12-30; latest annual assets end 2025-12-28					
Interest coverage	not computable	3.83x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-28					
Current ratio	2.47x	1.34x	19.0	274	2025-12-28
Growth and financing, sleeve percentile 34.4					
Revenue growth, three-year compound	5.4%	1.8%	30.5	250	2025-12-28
Free cash flow growth, three-year compound	9.1%	5.2%	42.0	139	2025-12-28
Reinvestment rate	not computable	13.1%			
latest aligned inputs end 2018-12-30; latest annual assets end 2025-12-28					
Asset growth, three years	8.3%	3.3%	26.4	251	2025-12-28
Net share issuance, one year	(1.1%)	(0.6%)	38.5	206	2026-02-13

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
8	Fastenal Co. (FAST)	2.9	A	fortress balance sheet
9	Ross Stores, Inc. (ROST)	3.4	A	fortress balance sheet
10	Global Industrial Co. (GIC)	3.8	A	
11	Chipotle Mexican Grill Inc. (CMG)	4.2	A	fortress balance sheet
12	Ezcorp Inc. (EZPW)	4.6	A	
13	SiteOne Landscape Supply, Inc. (SITE)	5.0	A	
14	Costco Wholesale Corp. (COST)	5.5	A	fortress balance sheet
15	Rave Restaurant Group, Inc. (RAVE)	5.9	A	
16	Tractor Supply Co. (TSCO)	6.3	A	fortress balance sheet
17	W.W. Grainger, Inc. (GWW)	6.7	A	
18	Winmark Corp. (WINA)	7.1	A	

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	(30.4%)	(0.5%)	21
Distance from 52-week high	(34.0%)	(25.1%)	36
EBIT to enterprise value	4.7%	5.5%	43
Free cash flow yield	5.3%	4.2%	59
Book value to price	0.37	0.40	47
Sales to price	1.01	1.70	36
Composite equity issuance, five years	(2.8%)	(17.2%)	75
Relative strength against the sector, log excess return	(0.27)	0.08	21
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 8 of 9, period end 2025-12-28	
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	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$88.4M
Operating cash flow, four quarters	$321.5M
Months of runway	not finite
Days since last periodic filing	25 (10-Q received Oct 28, 2026)
Median daily dollar volume, 63 sessions	$90.9M

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	$1.6B	2025-12-28	2026-02-19	10-K	26-000005
2	assets	us-gaap:Assets	$3.2B	2025-12-28	2026-02-19	10-K	26-000005
3	operating income	us-gaap:OperatingIncomeLoss	$238.1M	2025-12-28	2026-02-19	10-K	26-000005
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$203.1M	2025-12-28	2026-02-19	10-K	26-000005
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$45.7M	2025-12-28	2026-02-19	10-K	26-000005
6	total debt	us-gaap:LongTermDebt	$385.4M	2025-12-28	2026-02-19	10-K	26-000005
7	book equity	us-gaap:StockholdersEquity	$1.7B	2025-12-28	2026-02-19	10-K	26-000005
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$190.6M	2025-12-28	2026-02-19	10-K	26-000005
9	total debt	us-gaap:LongTermDebt	$388.2M	2024-12-29	2026-02-19	10-K	26-000005
10	book equity	us-gaap:StockholdersEquity	$1.6B	2024-12-29	2026-02-19	10-K	26-000005
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$107.1M	2024-12-29	2026-02-19	10-K	26-000005
12	net income	us-gaap:NetIncomeLoss	$151.8M	2025-12-28	2026-02-19	10-K	26-000005
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$300.5M	2025-12-28	2026-02-19	10-K	26-000005
14	assets	us-gaap:Assets	$3.1B	2024-12-29	2026-02-19	10-K	26-000005
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.7B	2025-12-28	2026-02-19	10-K	26-000005
16	gross profit	us-gaap:GrossProfit	$1.6B	2024-12-29	2026-02-19	10-K	26-000005
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.5B	2024-12-29	2026-02-19	10-K	26-000005
18	gross profit	us-gaap:GrossProfit	$1.5B	2023-12-31	2026-02-19	10-K	26-000005
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.3B	2023-12-31	2026-02-19	10-K	26-000005
20	gross profit	us-gaap:GrossProfit	$1.4B	2023-01-01	2025-02-20	10-K	25-000004
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.0B	2023-01-01	2025-02-20	10-K	25-000004
22	gross profit	us-gaap:GrossProfit	$1.2B	2022-01-02	2024-02-22	10-K	24-000004
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.5B	2022-01-02	2024-02-22	10-K	24-000004
24	current assets	us-gaap:AssetsCurrent	$1.7B	2025-12-28	2026-02-19	10-K	26-000005
25	current liabilities	us-gaap:LiabilitiesCurrent	$686.8M	2025-12-28	2026-02-19	10-K	26-000005
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.2B	2025-12-28	2026-02-19	10-K	26-000005
27	liabilities	us-gaap:Liabilities	$1.5B	2025-12-28	2026-02-19	10-K	26-000005
28	total debt	us-gaap:LongTermDebt	$558.2M	2018-12-30	2020-02-26	10-K	20-000004
29	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$17.3M	2018-12-30	2020-02-26	10-K	20-000004
30	operating income	us-gaap:OperatingIncomeLoss	$107.3M	2018-12-30	2021-03-03	10-K	21-000006
31	depreciation amortization	us-gaap:Depreciation	$21.5M	2018-12-30	2019-02-27	10-K	19-000004

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32	operating income	us-gaap:OperatingIncomeLoss	$250.3M	2023-12-31	2026-02-19	10-K	26-000005
33	interest expense	us-gaap:InterestExpense	$27.1M	2023-12-31	2024-02-22	10-K	24-000004
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$53.7M	2025-12-28	2026-02-19	10-K	26-000005
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$283.4M	2024-12-29	2026-02-19	10-K	26-000005
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$40.5M	2024-12-29	2026-02-19	10-K	26-000005
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$297.5M	2023-12-31	2026-02-19	10-K	26-000005
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$32.1M	2023-12-31	2026-02-19	10-K	26-000005
39	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$217.2M	2023-01-01	2025-02-20	10-K	25-000004
40	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$27.1M	2023-01-01	2025-02-20	10-K	25-000004
41	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$14.9M	2018-12-30	2021-03-03	10-K	21-000006
42	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$75.2M	2018-12-30	2021-03-03	10-K	21-000006
43	income tax	us-gaap:IncomeTaxExpenseBenefit	$1.3M	2018-12-30	2021-03-03	10-K	21-000006
44	current assets	us-gaap:AssetsCurrent	$765.4M	2018-12-30	2020-02-26	10-K	20-000004
45	current liabilities	us-gaap:LiabilitiesCurrent	$282.4M	2018-12-30	2020-02-26	10-K	20-000004
46	current assets	us-gaap:AssetsCurrent	$601.9M	2017-12-31	2019-02-27	10-K	19-000004
47	current liabilities	us-gaap:LiabilitiesCurrent	$205.8M	2017-12-31	2019-02-27	10-K	19-000004
48	assets	us-gaap:Assets	$2.8B	2023-12-31	2025-02-20	10-K	25-000004
49	assets	us-gaap:Assets	$2.5B	2023-01-01	2024-02-22	10-K	24-000004
50	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,459,316	2026-02-13	2026-02-19	10-K	26-000005
51	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,964,924	2025-02-14	2025-02-20	10-K	25-000004