LKQ Corp.

LKQ

Nasdaq; shops; SIC 5010, Wholesale-Motor Vehicles & Motor Vehicle Parts & Supplies; CIK 0001065696

C

middle fifth of 239 graded peers in shops

rank 112 of 239; percentile 46.6; sampling error 3.0 points; lower is stronger

A B C D E

C, the tortoise



Scoreboard

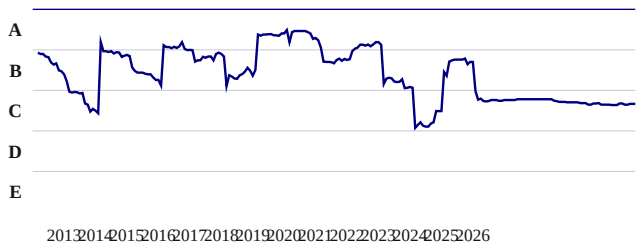
Profitability	C/D	percentile 57.4
Solvency	B	percentile 35.2
Growth and financing	C	percentile 52.1
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $15.1B
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 Feb 19, 2026	277 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$18.51	2026-11-20; market equity $4.7B; 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 19, 2026

LKQ Corporation ("LKQ," the "Company" or "we") is a global distributor of vehicle products, including replacement parts, components and systems used in the repair and maintenance of vehicles, and specialty aftermarket products and accessories to improve the performance, functionality and appearance of vehicles.

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 57.4						
Gross profitability	34.8%	43.5%		60.8	223	2025-12-31
Return on invested capital	not computable	11.5%				
latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31						
Accruals ratio	(3.0%)	(4.9%)		74.2	268	2025-12-31
Gross margin stability, five years	0.9 pts	1.2 pts		37.3	202	2025-12-31

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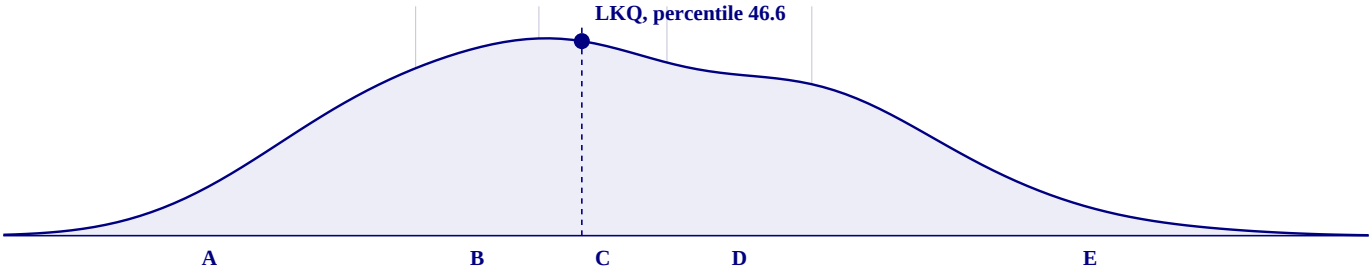
Solvency, sleeve percentile 35.2						
Altman Z double-prime	not computable	1.93				
one or more required annual facts are missing						
Net debt to EBITDA	not computable	1.65x				
latest aligned inputs end 2014-12-31; latest annual assets end 2025-12-31						
Interest coverage	not computable	3.83x				
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31						
Current ratio	1.67x	1.34x		35.2	274	2025-12-31
Growth and financing, sleeve percentile 52.1						
Revenue growth, three-year compound	2.2%	1.8%		47.4	250	2025-12-31
Free cash flow growth, three-year compound	(6.3%)	5.2%		73.2	139	2025-12-31
Reinvestment rate	(18.2%)	13.1%		77.5	143	2025-12-31
Asset growth, three years	7.9%	3.3%		28.0	251	2025-12-31
Net share issuance, one year	(1.6%)	(0.6%)		34.6	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
107	Sonic Automotive Inc. (SAH)	44.5	C	
108	Cannae Holdings, Inc. (CNNE)	45.0	C	fortress balance sheet
109	First Watch Restaurant Group, Inc. (FWRG)	45.4	C	
110	Herbalife Ltd. (HLF)	45.8	C	
111	Honest Company, Inc. (HNST)	46.2	C	
112	LKQ Corp. (LKQ)	46.6	C	
113	Central Garden & PET Co. (CENT)	47.1	C	
114	Group 1 Automotive Inc. (GPI)	47.5	C	
115	Titan Machinery Inc. (TITN)	47.9	C	fortress balance sheet
116	Boise Cascade Co. (BCC)	48.3	C	
117	Foster L B Co. (FSTR)	48.7	C	

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	(25.4%)	(0.5%)	27
Distance from 52-week high	(46.8%)	(25.1%)	22
EBIT to enterprise value	16.8%	5.5%	96
Free cash flow yield	18.1%	4.2%	91
Book value to price	1.35	0.40	86
Sales to price	2.92	1.70	65
Composite equity issuance, five years	(34.1%)	(17.2%)	19
Relative strength against the sector, log excess return	(0.20)	0.08	27
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 None 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	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$319.0M
Operating cash flow, four quarters	$796.0M
Months of runway	not finite
Days since last periodic filing	25 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$75.7M

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	$5.3B	2025-12-31	2026-02-19	10-K	26-000012
2	assets	us-gaap:Assets	$15.1B	2025-12-31	2026-02-19	10-K	26-000012
3	operating income	us-gaap:OperatingIncomeLoss	$649.9M	2014-12-31	2017-02-27	10-K	17-000005
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$587.9M	2014-12-31	2017-02-27	10-K	17-000005
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$204.3M	2014-12-31	2017-02-27	10-K	17-000005
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.8B	2014-12-31	2016-02-25	10-K	16-000076
7	book equity	us-gaap:StockholdersEquity	$2.7B	2014-12-31	2018-02-28	10-K	18-000004
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$114.6M	2014-12-31	2018-02-28	10-K	18-000004
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.3B	2013-12-31	2015-03-02	10-K	15-000007
10	book equity	us-gaap:StockholdersEquity	$2.4B	2013-12-31	2017-02-27	10-K	17-000005
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$150.5M	2013-12-31	2017-02-27	10-K	17-000005
12	net income	us-gaap:NetIncomeLoss	$608.0M	2025-12-31	2026-02-19	10-K	26-000012
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2025-12-31	2026-02-19	10-K	26-000012
14	assets	us-gaap:Assets	$15.0B	2024-12-31	2026-02-19	10-K	26-000012
15	revenue	us-gaap:Revenues	$13.7B	2025-12-31	2026-02-19	10-K	26-000012
16	gross profit	us-gaap:GrossProfit	$5.4B	2024-12-31	2026-02-19	10-K	26-000012
17	revenue	us-gaap:Revenues	$13.8B	2024-12-31	2026-02-19	10-K	26-000012
18	gross profit	us-gaap:GrossProfit	$5.4B	2023-12-31	2026-02-19	10-K	26-000012
19	revenue	us-gaap:Revenues	$13.3B	2023-12-31	2026-02-19	10-K	26-000012
20	gross profit	us-gaap:GrossProfit	$5.2B	2022-12-31	2025-02-20	10-K	25-000015
21	revenue	us-gaap:Revenues	$12.8B	2022-12-31	2025-02-20	10-K	25-000015
22	gross profit	us-gaap:GrossProfit	$5.3B	2021-12-31	2024-02-22	10-K	24-000009
23	revenue	us-gaap:Revenues	$13.1B	2021-12-31	2024-02-22	10-K	24-000009
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$125.4M	2014-12-31	2017-02-27	10-K	17-000005
25	operating income	us-gaap:OperatingIncomeLoss	$1.3B	2023-12-31	2026-02-19	10-K	26-000012
26	interest expense	us-gaap:InterestExpense	-$214.0M	2023-12-31	2024-02-22	10-K	24-000009
27	current assets	us-gaap:AssetsCurrent	$5.2B	2025-12-31	2026-02-19	10-K	26-000012
28	current liabilities	us-gaap:LiabilitiesCurrent	$3.1B	2025-12-31	2026-02-19	10-K	26-000012
29	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$216.0M	2025-12-31	2026-02-19	10-K	26-000012
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2024-12-31	2026-02-19	10-K	26-000012
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$311.0M	2024-12-31	2026-02-19	10-K	26-000012

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.4B	2023-12-31	2026-02-19	10-K	26-000012
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$358.0M	2023-12-31	2026-02-19	10-K	26-000012
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.2B	2022-12-31	2025-02-20	10-K	25-000015
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$222.0M	2022-12-31	2025-02-20	10-K	25-000015
36	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$418.0M	2025-12-31	2026-02-19	10-K	26-000012
37	operating income	us-gaap:OperatingIncomeLoss	$993.0M	2025-12-31	2026-02-19	10-K	26-000012
38	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$800.0M	2025-12-31	2026-02-19	10-K	26-000012
39	income tax	us-gaap:IncomeTaxExpenseBenefit	$204.0M	2025-12-31	2026-02-19	10-K	26-000012
40	current assets	us-gaap:AssetsCurrent	$4.9B	2024-12-31	2026-02-19	10-K	26-000012
41	current liabilities	us-gaap:LiabilitiesCurrent	$2.9B	2024-12-31	2026-02-19	10-K	26-000012
42	assets	us-gaap:Assets	$15.1B	2023-12-31	2025-02-20	10-K	25-000015
43	assets	us-gaap:Assets	$12.0B	2022-12-31	2024-02-22	10-K	24-000009
44	shares outstanding	dei:EntityCommonStockSharesOutstanding	255,132,267	2026-02-13	2026-02-19	10-K	26-000012
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	259,154,784	2025-02-14	2025-02-20	10-K	25-000015

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