Monro, Inc.

MNRO

Nasdaq; other; SIC 7500, Services-Automotive Repair, Services & Parking; CIK 0000876427

E

weakest fifth of 315 graded peers in other

rank 277 of 315; percentile 87.9; sampling error 2.7 points; lower is stronger

A B C D E

E, the bear



Scoreboard

Profitability	C	percentile 47.8
Solvency	C/D	percentile 58.5
Growth and financing	D/E	percentile 80.3
Reliability	0.91 AUC	filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets	total assets $1.6B
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 May 27, 2026	180 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$9.51	2026-11-20; market equity $297.8M; 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 May 27, 2026

We are a leading nation-wide operator of retail tire and automotive repair stores in the United States. We offer to our customers, referred to as "guests", replacement tires and tire related services, automotive undercar repair services, and a broad range of routine maintenance services, primarily on passenger cars, light trucks, and vans. We also provide other products and services for brakes; mufflers and exhaust systems; and steering, drive train, suspension, and wheel alignment. We believe the convenience and value we offer are key factors in serving and growing our base of customers.

The thirteen inputs

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

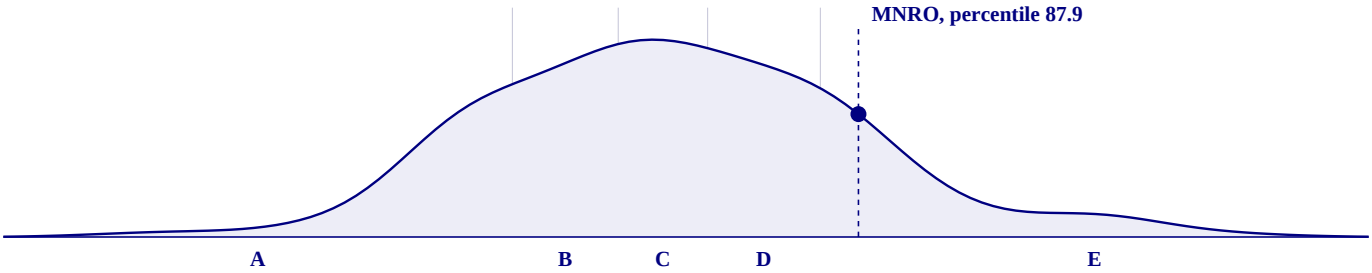
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 47.8						
Gross profitability	25.8%	26.7%		47.3	265	2026-03-28
Return on invested capital	2.2%	10.0%		80.1	147	2026-03-28
Accruals ratio	(4.3%)	(5.7%)		61.7	458	2026-03-28

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Gross margin stability, five years	0.4 pts	2.2 pts	2.1	195	2026-03-28
Solvency, sleeve percentile 58.5					
Altman Z double-prime	0.75	2.06	57.6	357	2026-03-28
Net debt to EBITDA	0.88x	2.37x	25.6	173	2026-03-28
Interest coverage	not computable	2.93x			
one or more required annual facts are missing					
Current ratio	0.46x	1.33x	92.2	462	2026-03-28
Growth and financing, sleeve percentile 80.3					
Revenue growth, three-year compound	(4.4%)	4.9%	80.0	376	2026-03-28
Free cash flow growth, three-year compound	(39.6%)	8.7%	94.3	213	2026-03-28
Reinvestment rate	(241.8%)	13.3%	95.7	187	2026-03-28
Asset growth, three years	(4.1%)	4.1%	80.0	402	2026-03-28
Net share issuance, one year	0.2%	(0.5%)	51.3	354	2026-05-15

Among 315 peers

other; 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
272	RXO, Inc. (RXO)	86.3	E	
273	CSX Corp. (CSX)	86.6	E	
274	Forward AIR Corp. (FWRD)	86.9	E	late filer
275	Comscore, Inc. (SCOR)	87.3	E	dilution
276	Xenia Hotels & Resorts, Inc. (XHR)	87.6	E	
277	Monro, Inc. (MNRO)	87.9	E	
278	GXO Logistics, Inc. (GXO)	88.2	E	
279	Enbridge Inc. (ENB)	88.5	E	
280	Plains ALL American Pipeline L.P. (PAA)	88.9	E	
281	Fidelity National Information Services, Inc. (FIS)	89.2	E	
282	AMN Healthcare Services Inc. (AMN)	89.5	E	

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	2.1%	0.4%	52
Distance from 52-week high	(60.1%)	(28.8%)	17
EBIT to enterprise value	5.2%	4.6%	56
Free cash flow yield	13.0%	4.1%	88
Book value to price	1.93	0.39	94
Sales to price	3.89	0.75	87
Composite equity issuance, five years	(29.1%)	(9.5%)	17
Relative strength against the sector, log excess return	(0.10)	(0.12)	52
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 5 of 9, period end 2026-03-28	
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	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$15.0M
Operating cash flow, four quarters	$44.3M
Months of runway	not finite
Days since last periodic filing	25 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$11.2M

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	$405.3M	2026-03-28	2026-05-27	10-K	26-000007
2	assets	us-gaap:Assets	$1.6B	2026-03-28	2026-05-27	10-K	26-000007
3	operating income	us-gaap:OperatingIncomeLoss	$20.0M	2026-03-28	2026-05-27	10-K	26-000007
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$3.1M	2026-03-28	2026-05-27	10-K	26-000007
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$927,000	2026-03-28	2026-05-27	10-K	26-000007
6	total debt	us-gaap:LongTermDebt	$60.0M	2026-03-28	2026-05-27	10-K	26-000007
7	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$591.5M	2026-03-28	2026-05-27	10-K	26-000007
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$14.6M	2026-03-28	2026-05-27	10-K	26-000007
9	total debt	us-gaap:LongTermDebt	$61.2M	2025-03-29	2025-05-28	10-K	25-000146
10	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$620.8M	2025-03-29	2026-05-27	10-K	26-000007
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$20.8M	2025-03-29	2026-05-27	10-K	26-000007
12	net income	us-gaap:NetIncomeLoss	$2.2M	2026-03-28	2026-05-27	10-K	26-000007
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$70.4M	2026-03-28	2026-05-27	10-K	26-000007
14	assets	us-gaap:Assets	$1.6B	2025-03-29	2026-05-27	10-K	26-000007
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2026-03-28	2026-05-27	10-K	26-000007
16	gross profit	us-gaap:GrossProfit	$417.6M	2025-03-29	2026-05-27	10-K	26-000007
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2025-03-29	2026-05-27	10-K	26-000007
18	gross profit	us-gaap:GrossProfit	$452.1M	2024-03-30	2026-05-27	10-K	26-000007
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2024-03-30	2026-05-27	10-K	26-000007
20	gross profit	us-gaap:GrossProfit	$456.2M	2023-03-25	2025-05-28	10-K	25-000146
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2023-03-25	2025-05-28	10-K	25-000146
22	gross profit	us-gaap:GrossProfit	$481.8M	2022-03-26	2024-05-28	10-K	24-000155
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.4B	2022-03-26	2024-05-28	10-K	24-000155
24	current assets	us-gaap:AssetsCurrent	$236.6M	2026-03-28	2026-05-27	10-K	26-000007
25	current liabilities	us-gaap:LiabilitiesCurrent	$517.8M	2026-03-28	2026-05-27	10-K	26-000007
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$581.7M	2026-03-28	2026-05-27	10-K	26-000007
27	liabilities	us-gaap:Liabilities	$976.5M	2026-03-28	2026-05-27	10-K	26-000007
28	depreciation amortization	us-gaap:Depreciation	$31.3M	2026-03-28	2026-05-27	10-K	26-000007
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$31.7M	2026-03-28	2026-05-27	10-K	26-000007
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$131.9M	2025-03-29	2026-05-27	10-K	26-000007
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$26.4M	2025-03-29	2026-05-27	10-K	26-000007

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$125.2M	2024-03-30	2026-05-27	10-K	26-000007
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$25.5M	2024-03-30	2026-05-27	10-K	26-000007
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$215.0M	2023-03-25	2025-05-28	10-K	25-000146
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$39.0M	2023-03-25	2025-05-28	10-K	25-000146
36	current assets	us-gaap:AssetsCurrent	$277.4M	2025-03-29	2026-05-27	10-K	26-000007
37	current liabilities	us-gaap:LiabilitiesCurrent	$524.3M	2025-03-29	2026-05-27	10-K	26-000007
38	assets	us-gaap:Assets	$1.7B	2024-03-30	2025-05-28	10-K	25-000146
39	assets	us-gaap:Assets	$1.8B	2023-03-25	2024-05-28	10-K	24-000155
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,025,266	2026-05-15	2026-05-27	10-K	26-000007
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	29,969,077	2025-05-16	2025-05-28	10-K	25-000146

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