

C. H. Robinson Worldwide, Inc. (CHRW)

Nasdaq; other; SIC 4731, Arrangement of Transportation of Freight & Cargo; CIK 0001043277

C. H. Robinson Worldwide, Inc. CHRW; other	
Grade	B A B C D E second fifth of 336 graded peers percentile 30.1; sampling error 2.6 points; lower is stronger
Rank	102 of 336
Profitability	B percentile 32.3
Solvency	B percentile 26.1
Growth and financing	D percentile 66.6
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 \$5.1B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Feb 13, 2026 238 days before the rescans; latest periodic filing 10-Q received Jul 31, 2026
Last close	\$141.28 2026-10-08; market equity \$16.5B
Price used in grade	None



B, the elk

second fifth of its sector; letters are fifths of the 336 graded peers

Share price, twelve months to the rescan

split-adjusted close; the letter is fixed at the rescan that set it

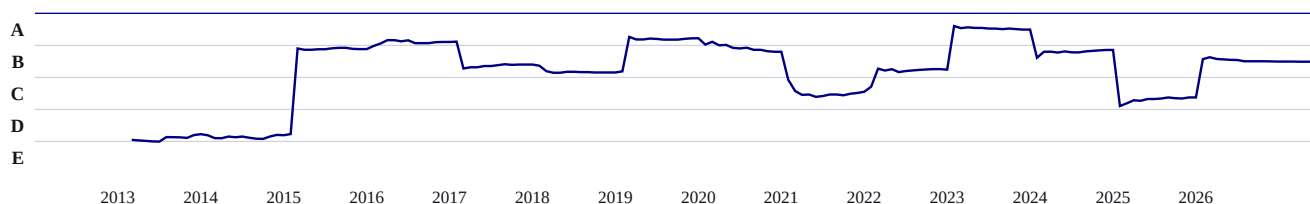


Date	Letter	Price (\$)
Nov	B	141.34
Mar	B	~180
Mar	C/D	~160
Sep	C	~145

Rescans on file: B from Feb 21, 2024, C/D from Feb 21, 2025, C from Mar 21, 2025

Letter at every rescans

Jan 21, 2012 to Oct 9, 2026; sector percentile, 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 13, 2026

C.H. Robinson Worldwide, Inc. ("C.H. Robinson," "the company," "we," "us," or "our") is one of the largest global logistics providers in the world, with consolidated total revenues of \$16.2 billion in 2025. As a leader in Lean artificial intelligence ("AI") supply chains, we deliver logistics like no one else. For more than a century, companies everywhere have looked to us to reimagine how goods move. We deliver tailored solutions across the world via truckload, less-than-truckload, ocean, air, and more. With our

unique combination of human insight and Lean AI working as one, supply chains move faster, smarter, and more sustainably.

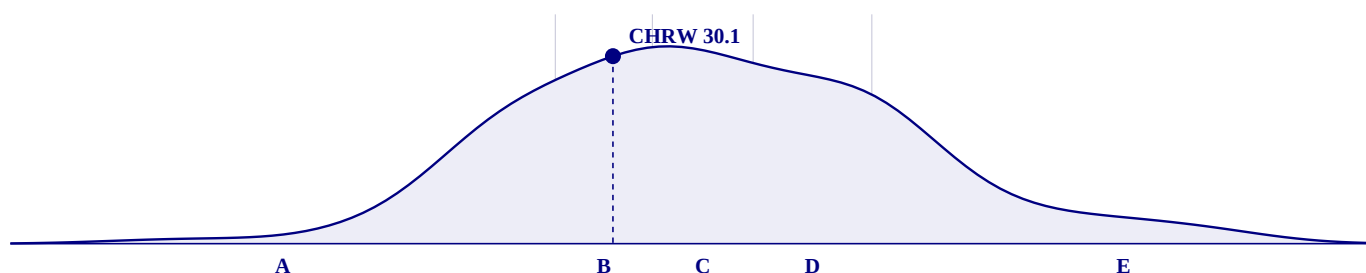
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 32.3						
Gross profitability		not computable	27.1%			one or more required annual facts are missing
Return on invested capital		22.6%	10.0%	18.0	151	2025-12-31
Accruals ratio		(6.3%)	(5.9%)	46.5	506	2025-12-31
Gross margin stability, five years		not computable	2.2 pts			five annual gross margins are required; found 0
Solvency, sleeve percentile 26.1						
Twelve-month failure probability		not computable	0.04%			latest liabilities, cash plus short-term investments, book equity, and shares are required
Altman Z double-prime		6.83	2.05	8.6	386	2025-12-31
Net debt to EBITDA		1.12x	2.52x	29.0	184	2025-12-31
Interest coverage		not computable	2.18x			one or more required annual facts are missing
Current ratio		1.53x	1.32x	40.8	506	2025-12-31
Growth and financing, sleeve percentile 66.6						
Revenue growth, three-year compound		(13.1%)	5.1%	91.0	403	2025-12-31
Free cash flow growth, three-year compound		(17.4%)	8.7%	79.5	220	2025-12-31
Reinvestment rate		47.9%	11.9%	34.4	190	2025-12-31
Asset growth, three years		(5.3%)	4.1%	81.5	438	2025-12-31
Net share issuance, one year		(0.07%)	(0.4%)	46.5	356	2026-02-11

Among 336 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
97	HireQuest, Inc. (HQUI)	28.7	B	
98	Franklin Covey Co. (FC)	29.0	B	fortress balance sheet

99	Acorn Energy, Inc. (ACFN)	29.3	B fortress balance sheet
100	Planet Fitness, Inc. (PLNT)	29.6	B
101	Broadridge Financial Solutions, Inc. (BR)	29.9	B
102	C. H. Robinson Worldwide, Inc. (CHRW) <	30.1	B
103	Barrett Business Services Inc. (BBSI)	30.4	B
104	National CineMedia, Inc. (NCMI)	30.7	B fortress balance sheet
105	Charles River Laboratories International, Inc. (CRL)	31.0	B
106	Century Casinos Inc. (CNTY)	31.3	B late filer
107	Vulcan Materials Co. (VMC)	31.6	B

What the price implies

at the 2026-10-08 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	13.8%	2.0%	59
Distance from 52-week high	(32.5%)	(26.8%)	39
EBIT to enterprise value	4.4%	4.4%	50
Free cash flow yield	5.4%	4.1%	60
Book value to price	0.10	0.34	18
Sales to price	0.98	0.70	60
Composite equity issuance, five years	(26.1%)	(8.8%)	18
Relative strength against the sector, log excess return	(0.02)	(0.13)	59

Diagnostics

not in 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	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$154.6M
Operating cash flow, four quarters	\$685.4M
Months of runway	not finite
Days since last periodic filing	70 (10-Q received Jul 31, 2026)
Median daily dollar volume, 63 sessions	\$237.4M

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	operating income	us-gaap:OperatingIncomeLoss	\$795.0M	2025-12-31	2026-02-13	10-K	0001043277-26-000009
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$702.5M	2025-12-31	2026-02-13	10-K	0001043277-26-000009
3	income tax	us-gaap:IncomeTaxExpenseBenefit	\$135.4M	2025-12-31	2026-02-13	10-K	0001043277-26-000009
4	total debt	us-gaap:LongTermDebt	\$1.1B	2025-12-31	2026-02-13	10-K	0001043277-26-000009
5	book equity	us-gaap:StockholdersEquity	\$1.8B	2025-12-31	2026-02-13	10-K	0001043277-26-000009
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$160.9M	2025-12-31	2026-02-13	10-K	0001043277-26-000009
7	total debt	us-gaap:LongTermDebt	\$1.4B	2024-12-31	2026-02-13	10-K	0001043277-26-000009
8	book equity	us-gaap:StockholdersEquity	\$1.7B	2024-12-31	2026-02-13	10-K	0001043277-26-000009
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$145.8M	2024-12-31	2026-02-13	10-K	0001043277-26-000009
10	net income	us-gaap:NetIncomeLoss	\$587.1M	2025-12-31	2026-02-13	10-K	0001043277-26-000009

11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$914.5M	2025-12-31	2026-02-13	10-K	0001043277-26-000009
12	assets	us-gaap:Assets	\$5.1B	2025-12-31	2026-02-13	10-K	0001043277-26-000009
13	assets	us-gaap:Assets	\$5.3B	2024-12-31	2026-02-13	10-K	0001043277-26-000009
14	current assets	us-gaap:AssetsCurrent	\$2.8B	2025-12-31	2026-02-13	10-K	0001043277-26-000009
15	current liabilities	us-gaap:LiabilitiesCurrent	\$1.8B	2025-12-31	2026-02-13	10-K	0001043277-26-000009
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$6.1B	2025-12-31	2026-02-13	10-K	0001043277-26-000009
17	liabilities	us-gaap:Liabilities	\$3.2B	2025-12-31	2026-02-13	10-K	0001043277-26-000009
18	depreciation amortization	us-gaap:Depreciation	\$32.5M	2025-12-31	2026-02-13	10-K	0001043277-26-000009
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$16.2B	2025-12-31	2026-02-13	10-K	0001043277-26-000009
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$17.7B	2024-12-31	2026-02-13	10-K	0001043277-26-000009
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$17.6B	2023-12-31	2026-02-13	10-K	0001043277-26-000009
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$24.7B	2022-12-31	2025-02-14	10-K	0001043277-25-000012
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$19.6M	2025-12-31	2026-02-13	10-K	0001043277-26-000009
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$509.1M	2024-12-31	2026-02-13	10-K	0001043277-26-000009
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$22.7M	2024-12-31	2026-02-13	10-K	0001043277-26-000009
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$731.9M	2023-12-31	2026-02-13	10-K	0001043277-26-000009
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$30.0M	2023-12-31	2026-02-13	10-K	0001043277-26-000009
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.7B	2022-12-31	2025-02-14	10-K	0001043277-25-000012
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$61.9M	2022-12-31	2025-02-14	10-K	0001043277-25-000012
30	current assets	us-gaap:AssetsCurrent	\$3.0B	2024-12-31	2026-02-13	10-K	0001043277-26-000009
31	current liabilities	us-gaap:LiabilitiesCurrent	\$2.3B	2024-12-31	2026-02-13	10-K	0001043277-26-000009
32	assets	us-gaap:Assets	\$5.2B	2023-12-31	2026-02-13	10-K	0001043277-26-000009
33	assets	us-gaap:Assets	\$6.0B	2022-12-31	2025-02-14	10-K	0001043277-25-000012
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	118,620,833	2026-02-11	2026-02-13	10-K	0001043277-26-000009
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	118,705,622	2025-02-12	2025-02-14	10-K	0001043277-25-000012