

Dollar General Corp. (DG)

NYSE; shops; SIC 5331, Retail-Variety Stores; CIK 0000029534

Dollar General Corp. DG; shops	
Grade	B A B C D E second fifth of 258 graded peers percentile 37.0; sampling error 2.9 points; lower is stronger
Rank	96 of 258
Profitability	B/C percentile 38.1
Solvency	C percentile 52.1
Growth and financing	C percentile 44.4
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 \$31.0B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress
Inputs computable	12 of 14
Graded from	filings received through Mar 20, 2026 203 days before the rescans; latest periodic filing 10-Q received Aug 27, 2026
Last close	\$124.17 2026-10-08; market equity \$27.4B
Price used in grade	None



B, the elk
second fifth of its sector; letters are fifths of the 258 graded peers

Share price, twelve months to the rescans

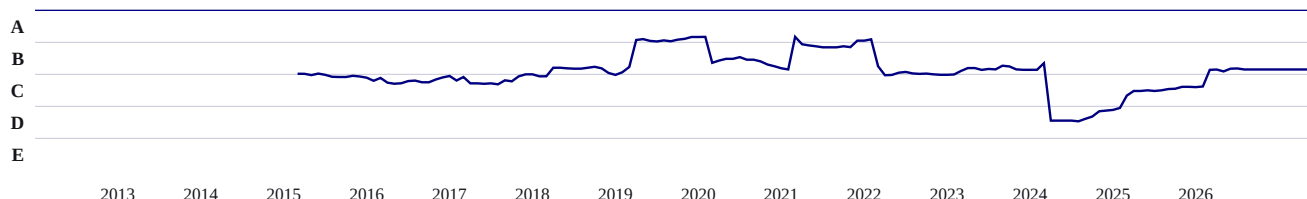
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: B/C from Mar 21, 2026, B from Apr 21, 2026, B/C from May 21, 2026, B from Jun 21, 2026

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 Mar 20, 2026

We are the largest discount retailer in the United States by number of stores, with 20,959 stores located in 48 U.S. states and Mexico as of February 27, 2026, with the greatest concentration of stores in the southern, southwestern, midwestern and eastern United States. Our first stores in Mexico opened in 2023. We offer a broad selection of merchandise, including consumable items, seasonal items, home products and apparel. Our merchandise includes national brands from leading manufacturers, as well as our own private brand

selections with prices at substantial discounts to national brands.

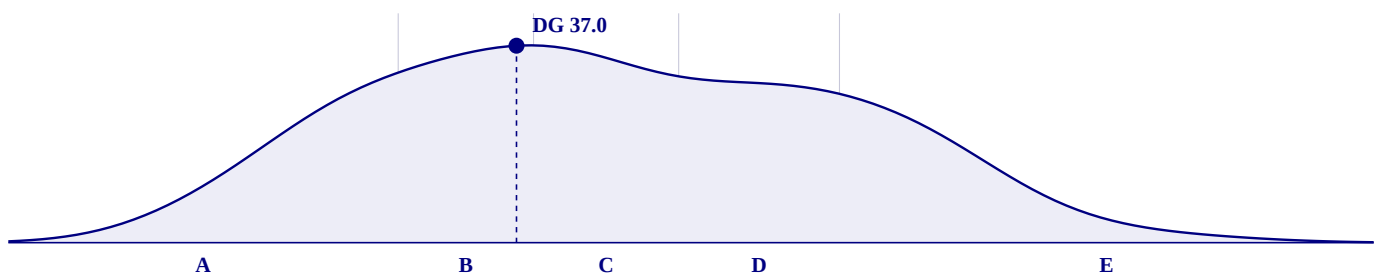
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 38.1						
Gross profitability		42.3%	42.6%	49.0	242	2026-01-30
Return on invested capital		14.1%	10.9%	38.6	84	2026-01-30
Accruals ratio		(6.8%)	(4.9%)	37.8	287	2026-01-30
Gross margin stability, five years		0.7 pts	1.2 pts	27.1	219	2026-01-30
Solvency, sleeve percentile 52.1						
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		1.54	1.92	51.7	208	2026-01-30
Net debt to EBITDA		1.05x	1.84x	40.4	100	2026-01-30
Interest coverage		not computable	2.26x			latest aligned inputs end 2024-02-02; latest annual assets end 2026-01-30
Current ratio		1.13x	1.37x	64.3	295	2026-01-30
Growth and financing, sleeve percentile 44.4						
Revenue growth, three-year compound		4.1%	1.5%	36.2	269	2026-01-30
Free cash flow growth, three-year compound		78.1%	5.6%	7.5	147	2026-01-30
Reinvestment rate		(9.7%)	7.3%	70.2	152	2026-01-30
Asset growth, three years		2.1%	3.4%	50.9	272	2026-01-30
Net share issuance, one year		0.1%	(0.6%)	57.1	211	2026-03-18

Among 258 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
91	Cencora, Inc. (COR)	35.0	B	
92	Alta Equipment Group Inc. (ALTG)	35.6	B	
93	Alta Equipment Group Inc. (ALTG-PA)	35.6	B	
94	Reborn Coffee, Inc. (REBN)	36.2	B	dilution, late filer, fortress balance sheet
95	Avnet Inc. (AVT)	36.6	B	
96	Dollar General Corp. (DG) <	37.0	B	

97	Zumiez Inc. (ZUMZ)	37.4	B/C	fortress
				balance sheet
98	Haverty Furniture Companies Inc. (HVT)	37.9	B/C	fortress
				balance sheet
99	Haverty Furniture Companies Inc. (HVT-A)	37.9	B/C	fortress
				balance sheet
100	Openlane, Inc. (OPLN)	38.5	B/C	
101	Giftify, Inc. (GIFT)	38.9	B/C	

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	25.1%	(0.1%)	73
Distance from 52-week high	(20.5%)	(24.1%)	54
EBIT to enterprise value	7.3%	5.3%	71
Free cash flow yield	8.7%	4.2%	77
Book value to price	0.34	0.36	47
Sales to price	1.56	1.75	47
Composite equity issuance, five years	(16.9%)	(16.7%)	49
Relative strength against the sector, log excess return	0.25	0.02	73

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 7 of 9, period end 2026-01-30	
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	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$1.6B
Operating cash flow, four quarters	\$3.3B
Months of runway	not finite
Days since last periodic filing	43 (10-Q received Aug 27, 2026)
Median daily dollar volume, 63 sessions	\$277.2M

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	\$13.1B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
2	assets	us-gaap:Assets	\$31.0B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
3	operating income	us-gaap:OperatingIncomeLoss	\$2.2B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$2.0B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$452.3M	2026-01-30	2026-03-20	10-K	0001104659-26-032325
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$4.6B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
7	book equity	us-gaap:StockholdersEquity	\$8.5B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$1.1B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$5.7B	2025-01-31	2026-03-20	10-K	0001104659-26-032325
10	book equity	us-gaap:StockholdersEquity	\$7.4B	2025-01-31	2026-03-20	10-K	0001104659-26-032325
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$932.6M	2025-01-31	2026-03-20	10-K	0001104659-26-032325
12	net income	us-gaap:NetIncomeLoss	\$1.5B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$3.6B	2026-01-30	2026-03-20	10-K	0001104659-26-032325

14	assets	us-gaap:Assets	\$31.1B	2025-01-31	2026-03-20	10-K	0001104659-26-032325
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$42.7B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
16	gross profit	us-gaap:GrossProfit	\$12.0B	2025-01-31	2026-03-20	10-K	0001104659-26-032325
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$40.6B	2025-01-31	2026-03-20	10-K	0001104659-26-032325
18	gross profit	us-gaap:GrossProfit	\$11.7B	2024-02-02	2026-03-20	10-K	0001104659-26-032325
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$38.7B	2024-02-02	2026-03-20	10-K	0001104659-26-032325
20	gross profit	us-gaap:GrossProfit	\$11.8B	2023-02-03	2025-03-21	10-K	0001558370-25-003413
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$37.8B	2023-02-03	2025-03-21	10-K	0001558370-25-003413
22	gross profit	us-gaap:GrossProfit	\$10.8B	2022-01-28	2024-03-25	10-K	0001558370-24-003813
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$34.2B	2022-01-28	2024-03-25	10-K	0001558370-24-003813
24	current assets	us-gaap:AssetsCurrent	\$7.9B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
25	current liabilities	us-gaap:LiabilitiesCurrent	\$7.0B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$4.4B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
27	liabilities	us-gaap:Liabilities	\$22.5B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$1.0B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
29	operating income	us-gaap:OperatingIncomeLoss	\$2.4B	2024-02-02	2026-03-20	10-K	0001104659-26-032325
30	interest expense	us-gaap:InterestExpense	\$326.8M	2024-02-02	2024-03-25	10-K	0001558370-24-003813
31	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$1.2B	2026-01-30	2026-03-20	10-K	0001104659-26-032325
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$3.0B	2025-01-31	2026-03-20	10-K	0001104659-26-032325
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$1.3B	2025-01-31	2026-03-20	10-K	0001104659-26-032325
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$2.4B	2024-02-02	2026-03-20	10-K	0001104659-26-032325
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$1.7B	2024-02-02	2026-03-20	10-K	0001104659-26-032325
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$2.0B	2023-02-03	2025-03-21	10-K	0001558370-25-003413
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$1.6B	2023-02-03	2025-03-21	10-K	0001558370-25-003413
38	current assets	us-gaap:AssetsCurrent	\$8.2B	2025-01-31	2026-03-20	10-K	0001104659-26-032325
39	current liabilities	us-gaap:LiabilitiesCurrent	\$6.9B	2025-01-31	2026-03-20	10-K	0001104659-26-032325
40	assets	us-gaap:Assets	\$30.8B	2024-02-02	2025-03-21	10-K	0001558370-25-003413
41	assets	us-gaap:Assets	\$29.1B	2023-02-03	2024-03-25	10-K	0001558370-24-003813
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	220,226,320	2026-03-18	2026-03-20	10-K	0001104659-26-032325
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	219,947,078	2025-03-19	2025-03-21	10-K	0001558370-25-003413