

Genpact Ltd. (G)

NYSE; other; SIC 8742, Services-Management Consulting Services; CIK 0001398659

Genpact Ltd. G; other	
Grade	A ▼ A B C D E strongest fifth of 336 graded peers percentile 9.9; sampling error 2.6 points; lower is stronger
Rank	34 of 336
Profitability	B + + + + + percentile 30.5
Solvency	B + + + + + percentile 27.6
Growth and financing	B/C + + + + + percentile 39.1
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 \$5.8B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active
Inputs computable	14 of 14
Graded from	filings received through Feb 26, 2026 225 days before the rescans; latest periodic filing 10-Q received Aug 7, 2026
Last close	\$34.68 2026-10-08; market equity \$5.8B
Price used in grade	None



A, the bull
strongest fifth of its sector; letters are fifths of the 336 graded peers

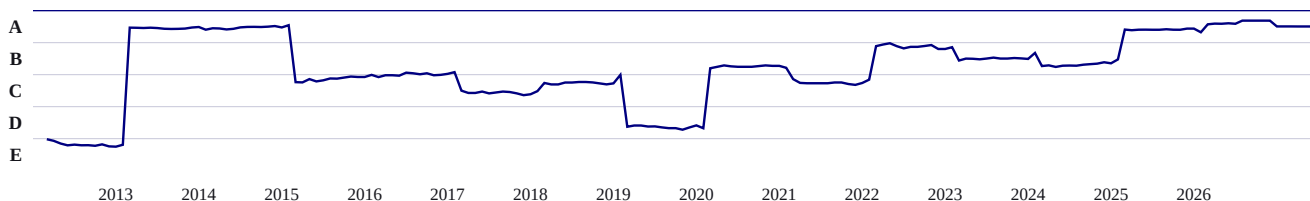
Share price, twelve months to the rescans
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: B from Jul 21, 2022, A/B from Aug 21, 2022, B from Dec 21, 2022, A from Mar 21, 2023

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 26, 2026

Genpact is an agentic and advanced technology solutions company recognized for its deep industry knowledge, process intelligence and last mile expertise. With decades of client trust and a strong partner ecosystem, we provide innovative solutions that transform how businesses run. Powered by a team with an active learning mindset and client centricity at its core, we deliver lasting value for the world's leading enterprises. We have over 146,500 employees and serve clients from more than 35 countries around the world. Our 2025 total net revenues were \$5.1 billion. Genpact was established more than 25 years ago as the global capability center for the

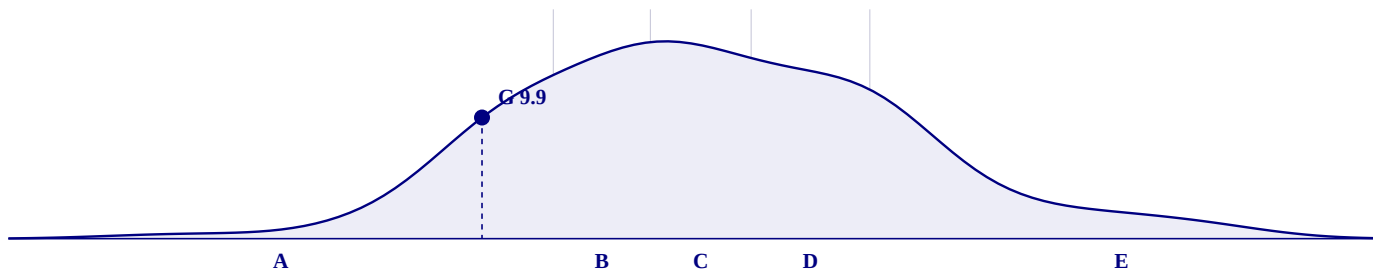
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 30.5						
Gross profitability		31.3%	27.1%	41.3	289	2025-12-31
Return on invested capital		18.3%	10.0%	22.7	151	2025-12-31
Accruals ratio		(4.8%)	(5.9%)	57.0	506	2025-12-31
Gross margin stability, five years		0.3 pts	2.2 pts	1.0	204	2025-12-31
Solvency, sleeve percentile 27.6						
Twelve-month failure probability		0.03%	0.04%	34.1	45	2026-06-30
Altman Z double-prime		3.63	2.05	24.7	386	2025-12-31
Net debt to EBITDA		0.84x	2.52x	24.0	184	2025-12-31
Interest coverage		10.20x	2.18x	19.5	88	2025-12-31
Current ratio		1.66x	1.32x	35.4	506	2025-12-31
Growth and financing, sleeve percentile 39.1						
Revenue growth, three-year compound		5.1%	5.1%	47.0	403	2025-12-31
Free cash flow growth, three-year compound		23.2%	8.7%	28.8	220	2025-12-31
Reinvestment rate		(9.7%)	11.9%	62.4	190	2025-12-31
Asset growth, three years		8.4%	4.1%	31.6	438	2025-12-31
Net share issuance, one year		(3.3%)	(0.4%)	25.6	356	2026-02-24

Among 336 peers

other; letters are fifths of this list



Rank	Company	Percentile	Letter	Warnings
29	Moodys Corp. (MCO)	8.4	A	
30	Southern Copper (SCCO)	8.7	A	
31	Legacy Education Inc. (LGCY)	9.0	A	fortress balance sheet
32	Installed Building Products, Inc. (IBP)	9.3	A	
33	Hackett Group, Inc. (HCKT)	9.6	A	fortress balance sheet
34	Genpact Ltd. (G) <	9.9	A	
35	Mastech Digital, Inc. (MHH)	10.1	A	
36	Hecla Mining (HL)	10.6	A	
37	Hecla Mining (HL-PB)	10.6	A	
38	Kforce Inc. (KFRC)	11.0	A	
39	Gartner Inc. (IT)	11.3	A	

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	(8.5%)	2.0%	40
Distance from 52-week high	(28.5%)	(26.8%)	46

EBIT to enterprise value	11.6%	4.4%	93
Free cash flow yield	12.6%	4.1%	88
Book value to price	0.45	0.34	63
Sales to price	0.87	0.70	56
Composite equity issuance, five years	(19.0%)	(8.8%)	32
Relative strength against the sector, log excess return	(0.24)	(0.13)	40

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 8 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	pass
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$517.4M
Operating cash flow, four quarters	\$644.0M
Months of runway	not finite
Days since last periodic filing	63 (10-Q received Aug 7, 2026)
Median daily dollar volume, 63 sessions	\$66.3M

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	\$1.8B	2025-12-31	2026-02-26	10-K	0001398659-26-000004
2	assets	us-gaap:Assets	\$5.8B	2025-12-31	2026-02-26	10-K	0001398659-26-000004
3	operating income	us-gaap:OperatingIncomeLoss	\$750.2M	2025-12-31	2026-02-26	10-K	0001398659-26-000004
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$730.1M	2025-12-31	2026-02-26	10-K	0001398659-26-000004
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$177.7M	2025-12-31	2026-02-26	10-K	0001398659-26-000004
6	total debt	us-gaap:LongTermDebt	\$1.5B	2025-12-31	2026-02-26	10-K	0001398659-26-000004
7	book equity	us-gaap:StockholdersEquity	\$2.5B	2025-12-31	2026-02-26	10-K	0001398659-26-000004
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$853.8M	2025-12-31	2026-02-26	10-K	0001398659-26-000004
9	total debt	us-gaap:LongTermDebt	\$1.2B	2024-12-31	2026-02-26	10-K	0001398659-26-000004
10	book equity	us-gaap:StockholdersEquity	\$2.4B	2024-12-31	2026-02-26	10-K	0001398659-26-000004
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$648.2M	2024-12-31	2026-02-26	10-K	0001398659-26-000004
12	net income	us-gaap:NetIncomeLoss	\$552.5M	2025-12-31	2026-02-26	10-K	0001398659-26-000004
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$812.9M	2025-12-31	2026-02-26	10-K	0001398659-26-000004
14	assets	us-gaap:Assets	\$5.0B	2024-12-31	2026-02-26	10-K	0001398659-26-000004
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$5.1B	2025-12-31	2026-02-26	10-K	0001398659-26-000004
16	gross profit	us-gaap:GrossProfit	\$1.7B	2024-12-31	2026-02-26	10-K	0001398659-26-000004
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.8B	2024-12-31	2026-02-26	10-K	0001398659-26-000004
18	gross profit	us-gaap:GrossProfit	\$1.6B	2023-12-31	2026-02-26	10-K	0001398659-26-000004
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.5B	2023-12-31	2026-02-26	10-K	0001398659-26-000004
20	gross profit	us-gaap:GrossProfit	\$1.5B	2022-12-31	2025-03-03	10-K	0001398659-25-000035
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.4B	2022-12-31	2025-03-03	10-K	0001398659-25-000035
22	gross profit	us-gaap:GrossProfit	\$1.4B	2021-12-31	2024-02-29	10-K	0001398659-24-000031
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.0B	2021-12-31	2024-02-29	10-K	0001398659-24-000031
24	current assets	us-gaap:AssetsCurrent	\$2.7B	2025-12-31	2026-02-26	10-K	0001398659-26-000004
25	current liabilities	us-gaap:LiabilitiesCurrent	\$1.6B	2025-12-31	2026-02-26	10-K	0001398659-26-000004
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$1.4B	2025-12-31	2026-02-26	10-K	0001398659-26-000004
27	liabilities	us-gaap:Liabilities	\$3.3B	2025-12-31	2026-02-26	10-K	0001398659-26-000004
28	depreciation amortization	us-gaap:Depreciation	\$70.7M	2025-12-31	2026-02-26	10-K	0001398659-26-000004
29	interest expense	us-gaap:InterestAndDebtExpense	\$73.5M	2025-12-31	2026-02-26	10-K	0001398659-26-000004

30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$78.2M	2025-12-31	2026-02-26	10-K	0001398659-26-000004
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$615.4M	2024-12-31	2026-02-26	10-K	0001398659-26-000004
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$82.8M	2024-12-31	2026-02-26	10-K	0001398659-26-000004
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$490.8M	2023-12-31	2026-02-26	10-K	0001398659-26-000004
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$55.4M	2023-12-31	2026-02-26	10-K	0001398659-26-000004
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$443.7M	2022-12-31	2025-03-03	10-K	0001398659-25-000035
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$50.6M	2022-12-31	2025-03-03	10-K	0001398659-25-000035
37	current assets	us-gaap:AssetsCurrent	\$2.1B	2024-12-31	2026-02-26	10-K	0001398659-26-000004
38	current liabilities	us-gaap:LiabilitiesCurrent	\$963.7M	2024-12-31	2026-02-26	10-K	0001398659-26-000004
39	assets	us-gaap:Assets	\$4.8B	2023-12-31	2025-03-03	10-K	0001398659-25-000035
40	assets	us-gaap:Assets	\$4.6B	2022-12-31	2024-02-29	10-K	0001398659-24-000031
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	169,863,795	2026-02-24	2026-02-26	10-K	0001398659-26-000004
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	175,669,364	2025-02-20	2025-03-03	10-K	0001398659-25-000035