

Graco Inc. (GGG)

NYSE; manufacturing; SIC 3561, Pumps & Pumping Equipment; CIK 0000042888

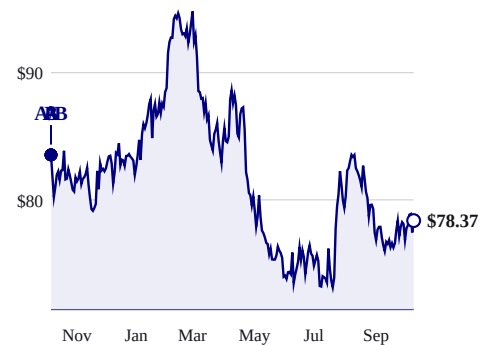
Graco Inc. GGG; manufacturing	
Grade	A ▼ A B C D E strongest fifth of 255 graded peers percentile 4.7; sampling error 3.0 points; lower is stronger
Rank	13 of 255
Profitability	B + + + + + percentile 26.1
Solvency	B + + + + + percentile 27.8
Growth and financing	B/C + + + + + percentile 38.3
Reliability	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 \$3.3B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress, fortress balance sheet
Inputs computable	9 of 14
Graded from	filings received through Feb 17, 2026 234 days before the rescans; latest periodic filing 10-Q received Jul 22, 2026
Last close	\$78.37 2026-10-08; market equity \$12.7B
Price used in grade	None



A, the bull
strongest fifth of its sector;
letters are fifths of the 255
graded peers

Share price, twelve months to the rescans

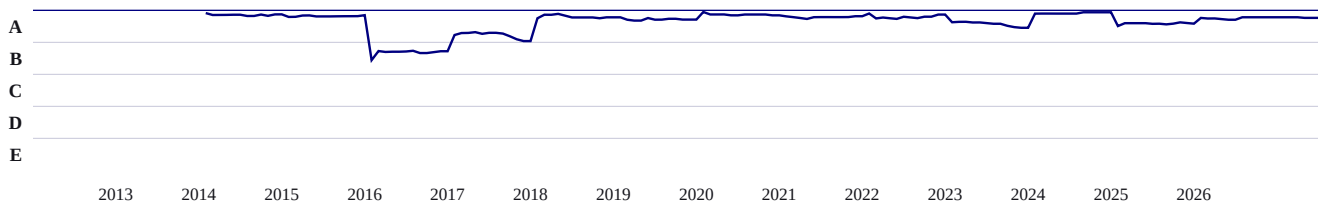
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: A from Feb 21, 2017, A/B from Nov 21, 2017, A from Feb 21, 2018, A from Feb 21, 2019

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 17, 2026

Graco Inc., together with its subsidiaries ("Graco," "us," "we," or "our Company"), is a multi-national manufacturing company. We supply technology and expertise for the management of fluids and coatings in industrial and commercial applications. We design, manufacture and market systems and equipment used to move, measure, mix, control, dispense and spray fluid and powder materials. Our equipment is used in manufacturing, processing, construction and maintenance industries. Graco is a Minnesota corporation and

was incorporated in 1926.

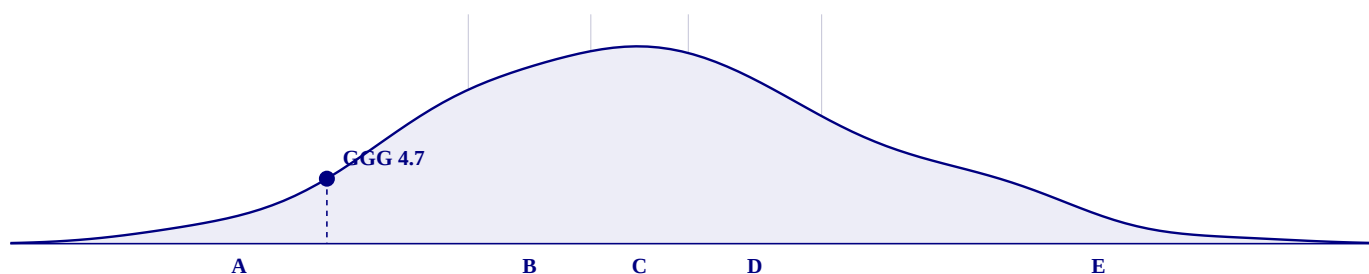
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 26.1						
Gross profitability		35.8%	21.9%	14.2	275	2025-12-26
Return on invested capital		not computable	9.7%			one or more required annual facts are missing
Accruals ratio		(5.0%)	(3.6%)	40.7	308	2025-12-26
Gross margin stability, five years		1.4 pts	2.1 pts	23.2	229	2025-12-26
Solvency, sleeve percentile 27.8						
Twelve-month failure probability		not computable	0.04%			liabilities and a nearby cover-page share count are required at 2026-06-26
Altman Z double-prime		not computable	3.66			one or more required annual facts are missing
Net debt to EBITDA		not computable	1.78x			one or more required annual facts are missing
Interest coverage		not computable	5.09x			latest aligned inputs end 2023-12-29; latest annual assets end 2025-12-26
Current ratio		3.15x	2.25x	27.8	325	2025-12-26
Growth and financing, sleeve percentile 38.3						
Revenue growth, three-year compound		1.4%	2.1%	53.4	269	2025-12-26
Free cash flow growth, three-year compound		53.5%	13.9%	9.4	139	2025-12-26
Reinvestment rate		(29.3%)	26.4%	84.1	139	2025-12-26
Asset growth, three years		10.3%	4.4%	26.3	279	2025-12-26
Net share issuance, one year		(2.5%)	0.01%	18.6	243	2026-01-23

Among 255 peers

manufacturing; letters are fifths of this list



Rank	Company	Percentile	Letter	Warnings
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8	ITT Inc. (ITT)	2.8	A	fortress
				balance sheet
9	Smith Midland Corp. (SMID)	3.1	A	late filer
10	Alamo Group Inc. (ALG)	3.5	A	fortress
				balance sheet
11	Simpson Manufacturing Co., Inc. (SSD)	3.9	A	fortress
				balance sheet
12	ACM Research, Inc. (ACMR)	4.3	A	fortress
				balance sheet
13	Graco Inc. (GGG) <	4.7	A	
14	Innovex International, Inc. (INVX)	5.1	A	fortress
				balance sheet
15	Blue Bird Corp. (BLBD)	5.5	A	
16	Heico Corp. (HEI)	6.1	A	
17	Heico Corp. (HEI-A)	6.1	A	
18	Lindsay Corp. (LNN)	6.7	A	fortress
				balance sheet

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	(7.6%)	13.7%	27
Distance from 52-week high	(17.3%)	(24.3%)	67
EBIT to enterprise value	not computable	4.1%	
Free cash flow yield	5.0%	3.4%	66
Book value to price	0.20	0.34	25
Sales to price	0.18	0.54	12
Composite equity issuance, five years	(11.3%)	(9.5%)	42
Relative strength against the sector, log excess return	(0.21)	(0.00)	27

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-26	
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	\$507.6M
Operating cash flow, four quarters	\$673.5M
Months of runway	not finite
Days since last periodic filing	79 (10-Q received Jul 22, 2026)
Median daily dollar volume, 63 sessions	\$110.6M

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	\$1.2B	2025-12-26	2026-02-17	10-K	0000042888-26-000081
2	assets	us-gaap:Assets	\$3.3B	2025-12-26	2026-02-17	10-K	0000042888-26-000081
3	net income	us-gaap:NetIncomeLoss	\$521.8M	2025-12-26	2026-02-17	10-K	0000042888-26-000081

4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$683.6M	2025-12-26	2026-02-17	10-K	0000042888-26-000081
5	assets	us-gaap:Assets	\$3.1B	2024-12-27	2026-02-17	10-K	0000042888-26-000081
6	revenue	us-gaap:Revenues	\$2.2B	2025-12-26	2026-02-17	10-K	0000042888-26-000081
7	gross profit	us-gaap:GrossProfit	\$1.1B	2024-12-27	2026-02-17	10-K	0000042888-26-000081
8	revenue	us-gaap:Revenues	\$2.1B	2024-12-27	2026-02-17	10-K	0000042888-26-000081
9	gross profit	us-gaap:GrossProfit	\$1.2B	2023-12-29	2026-02-17	10-K	0000042888-26-000081
10	revenue	us-gaap:Revenues	\$2.2B	2023-12-29	2026-02-17	10-K	0000042888-26-000081
11	gross profit	us-gaap:GrossProfit	\$1.1B	2022-12-30	2025-02-18	10-K	0000042888-25-000011
12	revenue	us-gaap:Revenues	\$2.1B	2022-12-30	2025-02-18	10-K	0000042888-25-000011
13	gross profit	us-gaap:GrossProfit	\$1.0B	2021-12-31	2024-02-20	10-K	0000042888-24-000010
14	revenue	us-gaap:Revenues	\$2.0B	2021-12-31	2024-02-20	10-K	0000042888-24-000010
15	operating income	us-gaap:OperatingIncomeLoss	\$646.8M	2023-12-29	2026-02-17	10-K	0000042888-26-000081
16	interest expense	us-gaap:InterestExpense	\$5.2M	2023-12-29	2024-02-20	10-K	0000042888-24-000010
17	current assets	us-gaap:AssetsCurrent	\$1.5B	2025-12-26	2026-02-17	10-K	0000042888-26-000081
18	current liabilities	us-gaap:LiabilitiesCurrent	\$467.3M	2025-12-26	2026-02-17	10-K	0000042888-26-000081
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$45.7M	2025-12-26	2026-02-17	10-K	0000042888-26-000081
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$621.7M	2024-12-27	2026-02-17	10-K	0000042888-26-000081
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$106.7M	2024-12-27	2026-02-17	10-K	0000042888-26-000081
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$651.0M	2023-12-29	2026-02-17	10-K	0000042888-26-000081
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$184.8M	2023-12-29	2026-02-17	10-K	0000042888-26-000081
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$377.4M	2022-12-30	2025-02-18	10-K	0000042888-25-000011
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$201.2M	2022-12-30	2025-02-18	10-K	0000042888-25-000011
26	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$107.4M	2025-12-26	2026-02-17	10-K	0000042888-26-000081
27	operating income	us-gaap:OperatingIncomeLoss	\$624.8M	2025-12-26	2026-02-17	10-K	0000042888-26-000081
28	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItems	\$611.2M	2025-12-26	2026-02-17	10-K	0000042888-26-000081
29	income tax	us-gaap:IncomeTaxExpenseBenefit	\$119.4M	2025-12-26	2026-02-17	10-K	0000042888-26-000081
30	current assets	us-gaap:AssetsCurrent	\$1.5B	2024-12-27	2026-02-17	10-K	0000042888-26-000081
31	current liabilities	us-gaap:LiabilitiesCurrent	\$405.8M	2024-12-27	2026-02-17	10-K	0000042888-26-000081
32	assets	us-gaap:Assets	\$2.7B	2023-12-29	2025-02-18	10-K	0000042888-25-000011
33	assets	us-gaap:Assets	\$2.4B	2022-12-30	2024-02-20	10-K	0000042888-24-000010
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	165,338,302	2026-01-23	2026-02-17	10-K	0000042888-26-000081
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	169,493,970	2025-01-24	2025-02-18	10-K	0000042888-25-000011