

Genuine Parts Co. (GPC)

NYSE; shops; SIC 5013, Wholesale-Motor Vehicle Supplies & New Parts; CIK 0000040987

Genuine Parts Co. GPC; shops	
Grade	C/D A B C D E on the C/D boundary of 258 graded peers percentile 60.7; sampling error 2.9 points; lower is stronger
Rank	157 of 258
Profitability	C percentile 44.5
Solvency	D percentile 67.0
Growth and financing	C percentile 50.5
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 \$20.8B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: short runway, distress
Inputs computable	8 of 14
Graded from	filings received through Feb 20, 2026 231 days before the rescan; latest periodic filing 10-Q received Jul 21, 2026
Last close	\$128.19 2026-10-08; market equity \$17.7B
Price used in grade	None



C/D, the tortoise

on the C/D boundary of its sector; letters are fifths of the 258 graded peers

Share price, twelve months to the rescan

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



Rescans on file: C/D from Sep 21, 2025, C from Oct 21, 2025, D from Feb 21, 2026, C/D from Apr 21, 2026

Letter at every rescan

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 20, 2026

Incorporated in the State of Georgia in 1928, Genuine Parts Company is a leading global service provider of automotive and industrial replacement parts and value-added solutions. We serve our customers from more than 10,800 locations, primarily in North America, Europe, and Australasia (primarily Australia and New Zealand). We offer outstanding service, an industry-leading assortment of replacement parts, extensive supply chain and distribution capabilities, and enhanced technology solutions.

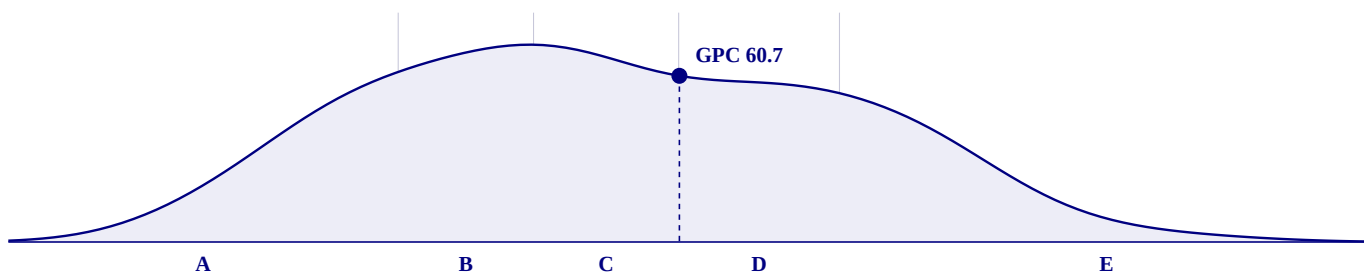
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 44.5						
Gross profitability		43.0%	42.6%	48.1	242	2025-12-31
Return on invested capital		not computable	10.9%			latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31
Accruals ratio		(4.1%)	(4.9%)	61.5	287	2025-12-31
Gross margin stability, five years		0.7 pts	1.2 pts	23.9	219	2025-12-31
Solvency, sleeve percentile 67.0						
Twelve-month failure probability		not computable	0.04%			liabilities and a nearby cover-page share count are required at 2026-06-30 one or more required annual facts are missing latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31
Altman Z double-prime		not computable	1.92			latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31
Net debt to EBITDA		not computable	1.84x			latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31
Interest coverage		not computable	2.26x			latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31
Current ratio		1.08x	1.37x	67.0	295	2025-12-31
Growth and financing, sleeve percentile 50.5						
Revenue growth, three-year compound		3.2%	1.5%	39.6	269	2025-12-31
Free cash flow growth, three-year compound		(28.0%)	5.6%	91.8	147	2025-12-31
Reinvestment rate		not computable	7.3%			latest aligned inputs end 2018-12-31; latest annual assets end 2025-12-31
Asset growth, three years		8.0%	3.4%	27.3	272	2025-12-31
Net share issuance, one year		(0.8%)	(0.6%)	43.3	211	2026-02-17

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
152	Papa Johns International Inc. (PZZA)	58.8	C/D	
153	Autozone Inc. (AZO)	59.1	C/D	
154	Stitch Fix, Inc. (SFIX)	59.5	C/D	
155	Resideo Technologies, Inc. (REZI)	59.9	C/D	short runway
156	Albertsons Companies, Inc. (ACI)	60.3	C/D	
157	Genuine Parts Co. (GPC) <	60.7	C/D	
158	Wayfair Inc. (W)	61.1	C/D	
159	Kohls Corp. (KSS)	61.5	C/D	
160	MGP Ingredients Inc. (MGPI)	61.9	C/D	
161	Marinemax Inc. (HZO)	62.3	C/D	
162	CarParts.com, Inc. (PRTS)	62.6	C/D	

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	(0.1%)	(0.1%)	49
Distance from 52-week high	(14.1%)	(24.1%)	67
EBIT to enterprise value	6.6%	5.3%	65
Free cash flow yield	2.4%	4.2%	35
Book value to price	0.26	0.36	42
Sales to price	1.38	1.75	44
Composite equity issuance, five years	(20.3%)	(16.7%)	38
Relative strength against the sector, log excess return	0.02	0.02	49

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2025-12-31	
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	pass
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	80 (10-Q received Jul 21, 2026)
Median daily dollar volume, 63 sessions	\$138.4M

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	\$8.9B	2025-12-31	2026-02-20	10-K	0000040987-26-000003
2	assets	us-gaap:Assets	\$20.8B	2025-12-31	2026-02-20	10-K	0000040987-26-000003
3	operating income	us-gaap:OperatingIncomeLoss	\$1.4B	2018-12-31	2019-02-25	10-K	0000040987-19-000015
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsNondiscontrollingInterests	\$34.6M	2018-12-31	2019-02-19	10-K	0000040987-21-000009
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$245.1M	2018-12-31	2021-02-19	10-K	0000040987-21-000009
6	total debt	us-gaap:LongTermDebt	\$3.1B	2018-12-31	2020-02-21	10-K	0000040987-20-000010
7	book equity	us-gaap:StockholdersEquity	\$3.5B	2018-12-31	2020-02-21	10-K	0000040987-20-000010
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$333.5M	2018-12-31	2019-02-25	10-K	0000040987-19-000015
9	total debt	us-gaap:LongTermDebt	\$3.2B	2017-12-31	2019-02-25	10-K	0000040987-19-000015
10	book equity	us-gaap:StockholdersEquity	\$3.4B	2017-12-31	2019-02-25	10-K	0000040987-19-000015
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$314.9M	2017-12-31	2019-02-25	10-K	0000040987-19-000015
12	net income	us-gaap:NetIncomeLoss	\$65.9M	2025-12-31	2026-02-20	10-K	0000040987-26-000003
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$890.8M	2025-12-31	2026-02-20	10-K	0000040987-26-000003
14	assets	us-gaap:Assets	\$19.3B	2024-12-31	2026-02-20	10-K	0000040987-26-000003
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$24.3B	2025-12-31	2026-02-20	10-K	0000040987-26-000003
16	gross profit	us-gaap:GrossProfit	\$8.5B	2024-12-31	2026-02-20	10-K	0000040987-26-000003
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$23.5B	2024-12-31	2026-02-20	10-K	0000040987-26-000003
18	gross profit	us-gaap:GrossProfit	\$8.3B	2023-12-31	2026-02-20	10-K	0000040987-26-000003
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$23.1B	2023-12-31	2026-02-20	10-K	0000040987-26-000003
20	gross profit	us-gaap:GrossProfit	\$7.7B	2022-12-31	2025-02-21	10-K	0000040987-25-000026
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$22.1B	2022-12-31	2025-02-21	10-K	0000040987-25-000026
22	gross profit	us-gaap:GrossProfit	\$6.6B	2021-12-31	2024-02-22	10-K	0000040987-24-000024
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$18.9B	2021-12-31	2024-02-22	10-K	0000040987-24-000024
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$227.6M	2018-12-31	2021-02-19	10-K	0000040987-21-000009
25	interest expense	us-gaap:InterestExpense	\$101.8M	2018-12-31	2021-02-19	10-K	0000040987-21-000009
26	current assets	us-gaap:AssetsCurrent	\$10.6B	2025-12-31	2026-02-20	10-K	0000040987-26-000003
27	current liabilities	us-gaap:LiabilitiesCurrent	\$9.8B	2025-12-31	2026-02-20	10-K	0000040987-26-000003
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$469.8M	2025-12-31	2026-02-20	10-K	0000040987-26-000003
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.3B	2024-12-31	2026-02-20	10-K	0000040987-26-000003
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$567.3M	2024-12-31	2026-02-20	10-K	0000040987-26-000003
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.4B	2023-12-31	2026-02-20	10-K	0000040987-26-000003
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$512.7M	2023-12-31	2026-02-20	10-K	0000040987-26-000003
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperation	\$1.5B	2022-12-31	2023-02-23	10-K	0000040987-23-000008
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$339.6M	2022-12-31	2025-02-21	10-K	0000040987-25-000026
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$226.5M	2018-12-31	2021-02-19	10-K	0000040987-21-000009
36	current assets	us-gaap:AssetsCurrent	\$7.6B	2018-12-31	2020-02-21	10-K	0000040987-20-000010
37	current liabilities	us-gaap:LiabilitiesCurrent	\$5.9B	2018-12-31	2020-02-21	10-K	0000040987-20-000010
38	current assets	us-gaap:AssetsCurrent	\$7.3B	2017-12-31	2019-02-25	10-K	0000040987-19-000015
39	current liabilities	us-gaap:LiabilitiesCurrent	\$5.5B	2017-12-31	2019-02-25	10-K	0000040987-19-000015
40	assets	us-gaap:Assets	\$18.0B	2023-12-31	2025-02-21	10-K	0000040987-25-000026
41	assets	us-gaap:Assets	\$16.5B	2022-12-31	2024-02-22	10-K	0000040987-24-000024
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	137,622,108	2026-02-17	2026-02-20	10-K	0000040987-26-000003
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	138,782,030	2025-02-18	2025-02-21	10-K	0000040987-25-000026