

GXO Logistics, Inc. (GXO)

NYSE; other; SIC 4700, Transportation Services; CIK 0001852244

GXO Logistics, Inc. GXO; other	
Grade	E A B C D E weakest fifth of 336 graded peers percentile 87.2; sampling error 2.6 points; lower is stronger
Rank	293 of 336
Profitability	D percentile 73.7
Solvency	C/D percentile 61.0
Growth and financing	C percentile 48.9
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 \$12.3B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress
Inputs computable	9 of 14
Graded from	filings received through Feb 25, 2026 226 days before the rescans; latest periodic filing 10-Q received Aug 5, 2026
Last close	\$46.34 2026-10-08; market equity \$5.3B
Price used in grade	None



E, the bear

weakest 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: D from Feb 21, 2023, E from Feb 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 25, 2026

GXO Logistics, Inc., together with its subsidiaries ("GXO," the "Company," "our," or "we"), is the largest pure-play contract logistics provider in the world and a foremost innovator in the industry. We provide our customers with high-value-added warehousing and distribution, order fulfillment, e-commerce, reverse logistics and other supply chain services differentiated by our ability to deliver technology-enabled, customized solutions at scale.

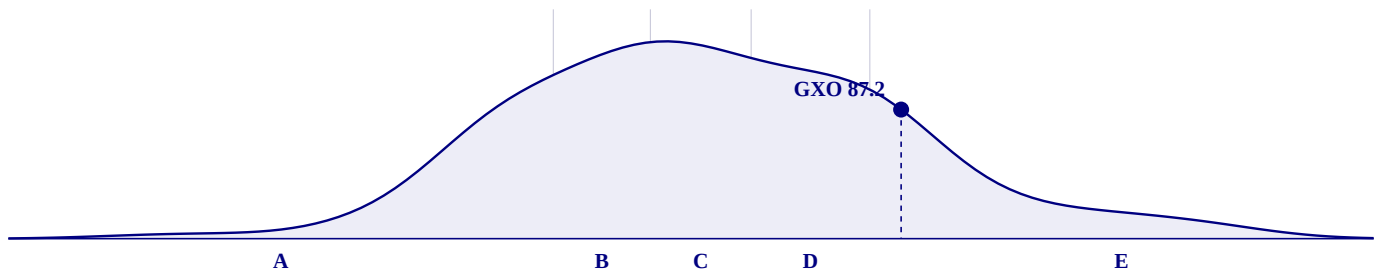
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 73.7						
Gross profitability		not computable	27.1%			one or more required annual facts are missing
Return on invested capital		1.7%	10.0%	80.0	151	2025-12-31
Accruals ratio		(3.4%)	(5.9%)	67.3	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 61.0						
Twelve-month failure probability		not computable	0.04%			liabilities and a nearby cover-page share count are required at 2026-06-30
Altman Z double-prime		not computable	2.05			one or more required annual facts are missing
Net debt to EBITDA		2.51x	2.52x	49.2	184	2025-12-31
Interest coverage		not computable	2.18x			latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31
Current ratio		0.85x	1.32x	72.9	506	2025-12-31
Growth and financing, sleeve percentile 48.9						
Revenue growth, three-year compound		13.6%	5.1%	22.9	403	2025-12-31
Free cash flow growth, three-year compound		(18.1%)	8.7%	80.4	220	2025-12-31
Reinvestment rate		(202.8%)	11.9%	94.2	190	2025-12-31
Asset growth, three years		10.0%	4.1%	26.5	438	2025-12-31
Net share issuance, one year		(4.0%)	(0.4%)	20.6	356	2026-02-20

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
288	RXO, Inc. (RXO)	85.7	E	
289	Forward AIR Corp. (FWRD)	86.0	E	late filer

290	Xenia Hotels & Resorts, Inc. (XHR)	86.3	E	
291	MP Materials Corp. DE (MP)	86.6	E	fortress
				balance sheet
292	Advantage Solutions Inc. (ADV)	86.9	E	
293	GXO Logistics, Inc. (GXO) <	87.2	E	
294	Monro, Inc. (MNRO)	87.5	E	
295	Enbridge Inc. (ENB)	87.8	E	
296	Getty Images Holdings, Inc. (GETY)	88.1	E	
297	Comscore, Inc. (SCOR)	88.4	E	dilution
298	Plains ALL American Pipeline L.P. (PAA)	88.7	E	

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	(9.8%)	2.0%	39
Distance from 52-week high	(29.3%)	(26.8%)	44
EBIT to enterprise value	3.5%	4.4%	36
Free cash flow yield	2.1%	4.1%	32
Book value to price	0.56	0.34	71
Sales to price	2.48	0.70	84
Composite equity issuance, five years	not computable	(8.8%)	
Relative strength against the sector, log excess return	(0.25)	(0.13)	39

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	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$769.0M
Operating cash flow, four quarters	\$509.0M
Months of runway	not finite
Days since last periodic filing	65 (10-Q received Aug 5, 2026)
Median daily dollar volume, 63 sessions	\$59.6M

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	\$245.0M	2025-12-31	2026-02-25	10-K	0001852244-26-000007
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItems	\$104.0M	2025-12-31	2026-02-25	10-K	0001852244-26-000007
3	income tax	us-gaap:IncomeTaxExpenseBenefit	\$68.0M	2025-12-31	2026-02-25	10-K	0001852244-26-000007
4	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$2.6B	2025-12-31	2026-02-25	10-K	0001852244-26-000007
5	book equity	us-gaap:StockholdersEquity	\$3.0B	2025-12-31	2026-02-25	10-K	0001852244-26-000007
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$854.0M	2025-12-31	2026-02-25	10-K	0001852244-26-000007
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$2.5B	2024-12-31	2026-02-25	10-K	0001852244-26-000007
8	book equity	us-gaap:StockholdersEquity	\$3.0B	2024-12-31	2026-02-25	10-K	0001852244-26-000007
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$413.0M	2024-12-31	2026-02-25	10-K	0001852244-26-000007
10	net income	us-gaap:NetIncomeLoss	\$32.0M	2025-12-31	2026-02-25	10-K	0001852244-26-000007
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$434.0M	2025-12-31	2026-02-25	10-K	0001852244-26-000007

12	assets	us-gaap:Assets	\$12.3B	2025-12-31	2026-02-25	10-K	0001852244-26-000007
13	assets	us-gaap:Assets	\$11.3B	2024-12-31	2026-02-25	10-K	0001852244-26-000007
14	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$457.0M	2025-12-31	2026-02-25	10-K	0001852244-26-000007
15	operating income	us-gaap:OperatingIncomeLoss	\$318.0M	2023-12-31	2026-02-25	10-K	0001852244-26-000007
16	interest expense	us-gaap:InterestExpense	\$53.0M	2023-12-31	2024-02-15	10-K	0001852244-24-000007
17	current assets	us-gaap:AssetsCurrent	\$3.3B	2025-12-31	2026-02-25	10-K	0001852244-26-000007
18	current liabilities	us-gaap:LiabilitiesCurrent	\$3.9B	2025-12-31	2026-02-25	10-K	0001852244-26-000007
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$13.2B	2025-12-31	2026-02-25	10-K	0001852244-26-000007
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$11.7B	2024-12-31	2026-02-25	10-K	0001852244-26-000007
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$9.8B	2023-12-31	2026-02-25	10-K	0001852244-26-000007
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$9.0B	2022-12-31	2025-02-18	10-K	0001852244-25-000007
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$324.0M	2025-12-31	2026-02-25	10-K	0001852244-26-000007
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$549.0M	2024-12-31	2026-02-25	10-K	0001852244-26-000007
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$359.0M	2024-12-31	2026-02-25	10-K	0001852244-26-000007
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$558.0M	2023-12-31	2026-02-25	10-K	0001852244-26-000007
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$274.0M	2023-12-31	2026-02-25	10-K	0001852244-26-000007
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$542.0M	2022-12-31	2025-02-18	10-K	0001852244-25-000007
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$342.0M	2022-12-31	2025-02-18	10-K	0001852244-25-000007
30	current assets	us-gaap:AssetsCurrent	\$2.6B	2024-12-31	2026-02-25	10-K	0001852244-26-000007
31	current liabilities	us-gaap:LiabilitiesCurrent	\$3.2B	2024-12-31	2026-02-25	10-K	0001852244-26-000007
32	assets	us-gaap:Assets	\$9.5B	2023-12-31	2025-02-18	10-K	0001852244-25-000007
33	assets	us-gaap:Assets	\$9.2B	2022-12-31	2024-02-15	10-K	0001852244-24-000007
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	114,713,579	2026-02-20	2026-02-25	10-K	0001852244-26-000007
35	shares outstanding	dei:EntityCommonStockSharesOutstanding	119,518,035	2025-02-13	2025-02-18	10-K	0001852244-25-000007