

Monro, Inc. (MNRO)

Nasdaq; other; SIC 7500, Services-Automotive Repair, Services & Parking; CIK 0000876427

Monro, Inc. MNRO; other	
Grade	E A B C D E weakest fifth of 336 graded peers percentile 87.5; sampling error 2.6 points; lower is stronger
Rank	294 of 336
Profitability	C percentile 47.3
Solvency	C percentile 56.8
Growth and financing	D/E percentile 80.0
Reliability	0.91 AUC filers with \$591M to \$2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	\$591M to \$2.67B assets total assets \$1.6B
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 May 27, 2026 135 days before the rescans; latest periodic filing 10-Q received Jul 29, 2026
Last close	\$13.73 2026-10-08; market equity \$412.2M
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

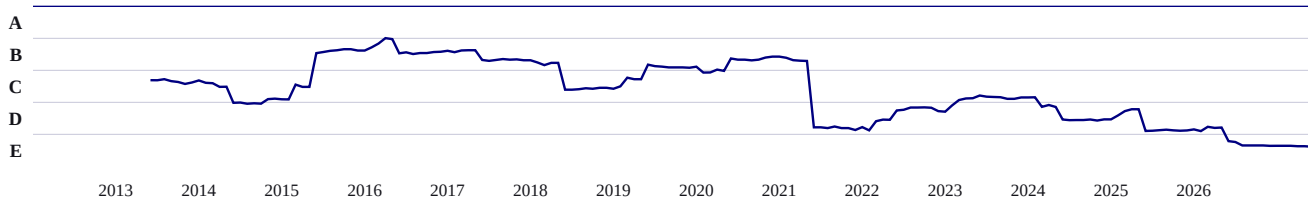
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: D from Jan 21, 2026, D/E from Feb 21, 2026, D from Mar 21, 2026, E 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 May 27, 2026

We are a leading nation-wide operator of retail tire and automotive repair stores in the United States. We offer to our customers, referred to as "guests", replacement tires and tire related services, automotive undercar repair services, and a broad range of routine maintenance services, primarily on passenger cars, light trucks, and vans. We also provide other products and services for brakes; mufflers and exhaust systems; and steering, drive train, suspension, and wheel alignment. We believe the convenience and value we

offer are key factors in serving and growing our base of customers.

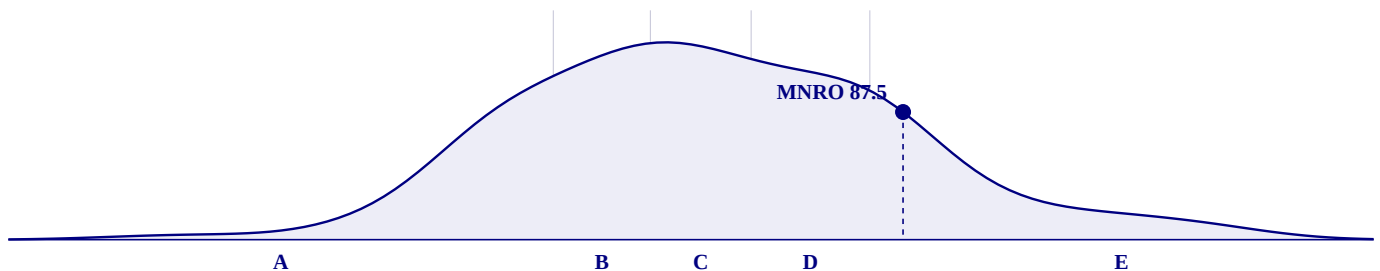
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 47.3						
Gross profitability		25.8%	27.1%	47.9	289	2026-03-28
Return on invested capital		2.2%	10.0%	78.7	151	2026-03-28
Accruals ratio		(4.3%)	(5.9%)	60.8	506	2026-03-28
Gross margin stability, five years		0.4 pts	2.2 pts	2.0	204	2026-03-28
Solvency, sleeve percentile 56.8						
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		0.75	2.05	55.1	386	2026-03-28
Net debt to EBITDA		0.88x	2.52x	25.1	184	2026-03-28
Interest coverage		not computable	2.18x			one or more required annual facts are missing
Current ratio		0.46x	1.32x	90.3	506	2026-03-28
Growth and financing, sleeve percentile 80.0						
Revenue growth, three-year compound		(4.4%)	5.1%	80.8	403	2026-03-28
Free cash flow growth, three-year compound		(39.6%)	8.7%	92.7	220	2026-03-28
Reinvestment rate		(241.8%)	11.9%	95.2	190	2026-03-28
Asset growth, three years		(4.1%)	4.1%	79.2	438	2026-03-28
Net share issuance, one year		0.2%	(0.4%)	52.1	356	2026-05-15

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
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
299	Fidelity National Information Services, Inc. (FIS)	89.0	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	(27.4%)	2.0%	22
Distance from 52-week high	(42.3%)	(26.8%)	28
EBIT to enterprise value	4.4%	4.4%	50
Free cash flow yield	9.4%	4.1%	82
Book value to price	1.43	0.34	94
Sales to price	2.80	0.70	86
Composite equity issuance, five years	(31.1%)	(8.8%)	13
Relative strength against the sector, log excess return	(0.47)	(0.13)	22

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 5 of 9, period end 2026-03-28	
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	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$14.6M
Operating cash flow, four quarters	\$70.4M
Months of runway	not finite
Days since last periodic filing	72 (10-Q received Jul 29, 2026)
Median daily dollar volume, 63 sessions	\$11.9M

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	\$405.3M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
2	assets	us-gaap:Assets	\$1.6B	2026-03-28	2026-05-27	10-K	0000876427-26-000007
3	operating income	us-gaap:OperatingIncomeLoss	\$20.0M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$54.6M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$927,000	2026-03-28	2026-05-27	10-K	0000876427-26-000007
6	total debt	us-gaap:LongTermDebt	\$60.0M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
7	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableToNoncontrolling	\$54.6M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$14.6M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
9	total debt	us-gaap:LongTermDebt	\$61.2M	2025-03-29	2025-05-28	10-K	0001562762-25-000146
10	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableToNoncontrolling	\$54.6M	2025-03-29	2026-05-27	10-K	0000876427-26-000007
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$20.8M	2025-03-29	2026-05-27	10-K	0000876427-26-000007
12	net income	us-gaap:NetIncomeLoss	\$2.2M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$70.4M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
14	assets	us-gaap:Assets	\$1.6B	2025-03-29	2026-05-27	10-K	0000876427-26-000007
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.2B	2026-03-28	2026-05-27	10-K	0000876427-26-000007
16	gross profit	us-gaap:GrossProfit	\$417.6M	2025-03-29	2026-05-27	10-K	0000876427-26-000007
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.2B	2025-03-29	2026-05-27	10-K	0000876427-26-000007
18	gross profit	us-gaap:GrossProfit	\$452.1M	2024-03-30	2026-05-27	10-K	0000876427-26-000007
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.3B	2024-03-30	2026-05-27	10-K	0000876427-26-000007
20	gross profit	us-gaap:GrossProfit	\$456.2M	2023-03-25	2025-05-28	10-K	0001562762-25-000146

21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.3B	2023-03-25	2025-05-28	10-K	0001562762-25-000146
22	gross profit	us-gaap:GrossProfit	\$481.8M	2022-03-26	2024-05-28	10-K	0001562762-24-000155
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.4B	2022-03-26	2024-05-28	10-K	0001562762-24-000155
24	current assets	us-gaap:AssetsCurrent	\$236.6M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
25	current liabilities	us-gaap:LiabilitiesCurrent	\$517.8M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$581.7M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
27	liabilities	us-gaap:Liabilities	\$976.5M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
28	depreciation amortization	us-gaap:Depreciation	\$31.3M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$31.7M	2026-03-28	2026-05-27	10-K	0000876427-26-000007
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$131.9M	2025-03-29	2026-05-27	10-K	0000876427-26-000007
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$26.4M	2025-03-29	2026-05-27	10-K	0000876427-26-000007
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$125.2M	2024-03-30	2026-05-27	10-K	0000876427-26-000007
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$25.5M	2024-03-30	2026-05-27	10-K	0000876427-26-000007
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$215.0M	2023-03-25	2025-05-28	10-K	0001562762-25-000146
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$39.0M	2023-03-25	2025-05-28	10-K	0001562762-25-000146
36	current assets	us-gaap:AssetsCurrent	\$277.4M	2025-03-29	2026-05-27	10-K	0000876427-26-000007
37	current liabilities	us-gaap:LiabilitiesCurrent	\$524.3M	2025-03-29	2026-05-27	10-K	0000876427-26-000007
38	assets	us-gaap:Assets	\$1.7B	2024-03-30	2025-05-28	10-K	0001562762-25-000146
39	assets	us-gaap:Assets	\$1.8B	2023-03-25	2024-05-28	10-K	0001562762-24-000155
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,025,266	2026-05-15	2026-05-27	10-K	0000876427-26-000007
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	29,969,077	2025-05-16	2025-05-28	10-K	0001562762-25-000146