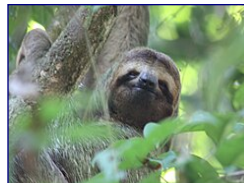


O'Reilly Automotive Inc. (ORLY)

Nasdaq; shops; SIC 5531, Retail-Auto & Home Supply Stores; CIK 0000898173

O'Reilly Automotive Inc. ORLY; shops	
Grade	D  fourth fifth of 258 graded peers percentile 65.4; sampling error 2.9 points; lower is stronger
Rank	169 of 258
Profitability	C  percentile 43.3
Solvency	E  percentile 86.1
Growth and financing	B/C  percentile 38.0
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 \$16.5B
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 27, 2026 224 days before the rescans; latest periodic filing 10-Q received Aug 7, 2026
Last close	\$86.00 2026-10-08; market equity \$69.6B
Price used in grade	None



D, the sloth

fourth fifth of its sector; letters are fifths of the 258 graded peers

Share price, twelve months to the rescans

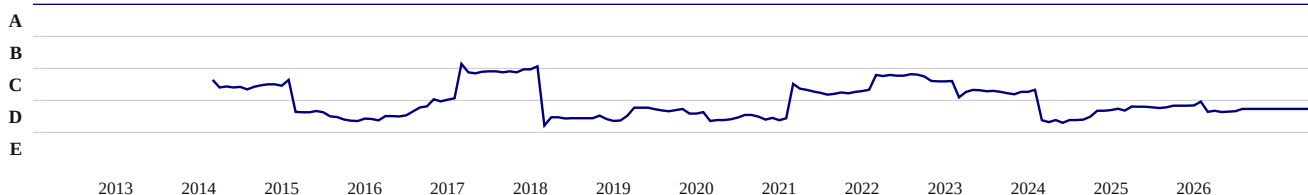
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: C from Apr 21, 2023, D from Mar 21, 2024, C/D from Feb 21, 2026, D from Mar 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 Feb 27, 2026

Unless otherwise indicated, "we," "us," "our," and similar terms, as well as references to the "Company," refer to O'Reilly Automotive, Inc. and its Subsidiaries. O'Reilly is one of the largest specialty retailers of automotive aftermarket parts, tools, supplies, equipment, and accessories across North America, selling our products to both do-it-yourself ("DIY") and professional service provider customers, our "dual market strategy." The business was founded in 1957 by Charles F. O'Reilly and his son, Charles H.

"Chub" O'Reilly, Sr., and initially operated from a single store in Springfield, Missouri.

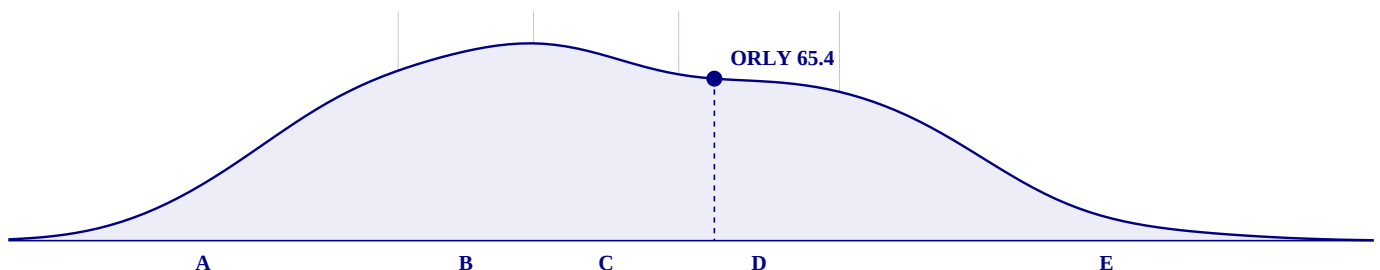
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 43.3						
Gross profitability		55.5%	42.6%	28.6	242	2025-12-31
Return on invested capital		not computable	10.9%			latest aligned inputs end 2016-12-31; latest annual assets end 2025-12-31
Accruals ratio		(1.4%)	(4.9%)	82.5	287	2025-12-31
Gross margin stability, five years		0.6 pts	1.2 pts	18.8	219	2025-12-31
Solvency, sleeve percentile 86.1						
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 2016-12-31; latest annual assets end 2025-12-31 one or more required annual facts are missing
Altman Z double-prime		not computable	1.92			
Net debt to EBITDA		not computable	1.84x			
Interest coverage		not computable	2.26x			
Current ratio		0.77x	1.37x	86.1	295	2025-12-31
Growth and financing, sleeve percentile 38.0						
Revenue growth, three-year compound		7.3%	1.5%	23.1	269	2025-12-31
Free cash flow growth, three-year compound		(14.9%)	5.6%	82.9	147	2025-12-31
Reinvestment rate		39.5%	7.3%	33.8	152	2025-12-31
Asset growth, three years		9.4%	3.4%	21.8	272	2025-12-31
Net share issuance, one year		(2.4%)	(0.6%)	28.6	211	2026-02-23

Among 258 peers

shops; letters are fifths of this list



Rank	Company	Percentile	Letter	Warnings
164	Mcdonalds Corp. (MCD)	63.4	D	
165	1stdibs.com, Inc. (DIBS)	63.8	D	
166	Duluth Holdings Inc. (DLTH)	64.2	D	
167	NU Skin Enterprises, Inc. (NUS)	64.6	D	distress, fortress balance sheet
168	A.K.A. Brands Holding Corp. (AKA)	65.0	D	
169	O Reilly Automotive Inc. (ORLY) <	65.4	D	
170	AerSale Corp. (ASLE)	65.8	D	short runway, fortress balance sheet
171	World Kinect Corp. (WKC)	66.1	D	
172	Vince Holding Corp. (VNCE)	66.5	D	
173	Seaboard Corp. (SEB)	66.9	D	
174	Aspen Aerogels Inc. (ASPN)	67.3	D	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	(17.6%)	(0.1%)	32
Distance from 52-week high	(16.5%)	(24.1%)	61
EBIT to enterprise value	4.7%	5.3%	43
Free cash flow yield	2.3%	4.2%	34
Book value to price	(0.03)	0.36	13
Sales to price	0.26	1.75	3
Composite equity issuance, five years	(26.4%)	(16.7%)	28
Relative strength against the sector, log excess return	(0.17)	0.02	32

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 7 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	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$262.2M
Operating cash flow, four quarters	\$3.3B
Months of runway	not finite
Days since last periodic filing	63 (10-Q received Aug 7, 2026)
Median daily dollar volume, 63 sessions	\$482.3M

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	\$9.2B	2025-12-31	2026-02-27	10-K	0000898173-26-000009
2	assets	us-gaap:Assets	\$16.5B	2025-12-31	2026-02-27	10-K	0000898173-26-000009
3	operating income	us-gaap:OperatingIncomeLoss	\$1.7B	2016-12-31	2019-02-27	10-K	0000898173-19-000060

4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesMinorityInterestAndIncomeLossFromDiscontinuedOperations	\$1.6B	2016-12-31	2019-02-27	10-K	0000898173-19-000060
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$599.5M	2016-12-31	2019-02-27	10-K	0000898173-19-000060
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$1.9B	2016-12-31	2017-02-28	10-K	0000898173-17-000091
7	book equity	us-gaap:StockholdersEquity	\$1.6B	2016-12-31	2020-02-28	10-K	0000898173-20-000007
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$146.6M	2016-12-31	2019-02-27	10-K	0000898173-19-000060
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$1.4B	2015-12-31	2017-02-28	10-K	0000898173-17-000091
10	book equity	us-gaap:StockholdersEquity	\$2.0B	2015-12-31	2019-02-27	10-K	0000898173-19-000060
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$116.3M	2015-12-31	2019-02-27	10-K	0000898173-19-000060
12	net income	us-gaap:NetIncomeLoss	\$2.5B	2025-12-31	2026-02-27	10-K	0000898173-26-000009
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$2.8B	2025-12-31	2026-02-27	10-K	0000898173-26-000009
14	assets	us-gaap:Assets	\$14.9B	2024-12-31	2026-02-27	10-K	0000898173-26-000009
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$17.8B	2025-12-31	2026-02-27	10-K	0000898173-26-000009
16	gross profit	us-gaap:GrossProfit	\$8.6B	2024-12-31	2026-02-27	10-K	0000898173-26-000009
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$16.7B	2024-12-31	2026-02-27	10-K	0000898173-26-000009
18	gross profit	us-gaap:GrossProfit	\$8.1B	2023-12-31	2026-02-27	10-K	0000898173-26-000009
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$15.8B	2023-12-31	2026-02-27	10-K	0000898173-26-000009
20	gross profit	us-gaap:GrossProfit	\$7.4B	2022-12-31	2025-02-28	10-K	0000898173-25-000008
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$14.4B	2022-12-31	2025-02-28	10-K	0000898173-25-000008
22	gross profit	us-gaap:GrossProfit	\$7.0B	2021-12-31	2024-02-28	10-K	0000898173-24-000009
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$13.3B	2021-12-31	2024-02-28	10-K	0000898173-24-000009
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$217.9M	2016-12-31	2019-02-27	10-K	0000898173-19-000060
25	current assets	us-gaap:AssetsCurrent	\$6.7B	2025-12-31	2026-02-27	10-K	0000898173-26-000009
26	current liabilities	us-gaap:LiabilitiesCurrent	\$8.8B	2025-12-31	2026-02-27	10-K	0000898173-26-000009
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$1.2B	2025-12-31	2026-02-27	10-K	0000898173-26-000009
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$3.0B	2024-12-31	2026-02-27	10-K	0000898173-26-000009
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$1.0B	2024-12-31	2026-02-27	10-K	0000898173-26-000009
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$3.0B	2023-12-31	2026-02-27	10-K	0000898173-26-000009
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$1.0B	2023-12-31	2026-02-27	10-K	0000898173-26-000009
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$3.1B	2022-12-31	2025-02-28	10-K	0000898173-25-000008
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$563.3M	2022-12-31	2025-02-28	10-K	0000898173-25-000008
34	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$511.2M	2025-12-31	2026-02-27	10-K	0000898173-26-000009
35	operating income	us-gaap:OperatingIncomeLoss	\$3.5B	2025-12-31	2026-02-27	10-K	0000898173-26-000009
36	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsInequitiesAndControllingInterests	\$3.3B	2025-12-31	2026-02-27	10-K	0000898173-26-000009
37	income tax	us-gaap:IncomeTaxExpenseBenefit	\$702.0M	2025-12-31	2026-02-27	10-K	0000898173-26-000009
38	current assets	us-gaap:AssetsCurrent	\$5.8B	2024-12-31	2026-02-27	10-K	0000898173-26-000009
39	current liabilities	us-gaap:LiabilitiesCurrent	\$8.3B	2024-12-31	2026-02-27	10-K	0000898173-26-000009
40	assets	us-gaap:Assets	\$13.9B	2023-12-31	2025-02-28	10-K	0000898173-25-000008
41	assets	us-gaap:Assets	\$12.6B	2022-12-31	2024-02-28	10-K	0000898173-24-000009
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	838,487,034	2026-02-23	2026-02-27	10-K	0000898173-26-000009
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	57,272,442	2025-02-24	2025-02-28	10-K	0000898173-25-000008