

Pool Corp. (POOL)

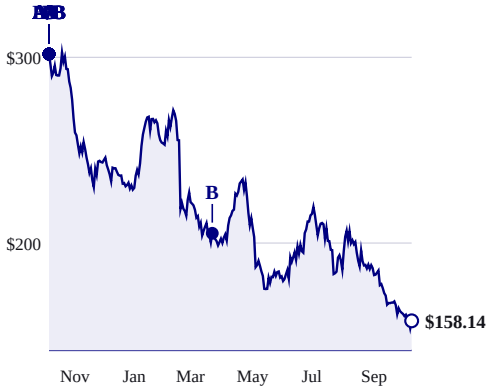
Nasdaq; shops; SIC 5090, Wholesale-Misc Durable Goods; CIK 0000945841

Pool Corp. POOL; shops	
Grade	B A B C D E second fifth of 258 graded peers percentile 33.1; sampling error 2.9 points; lower is stronger
Rank	86 of 258
Profitability	C percentile 53.6
Solvency	B percentile 23.4
Growth and financing	C percentile 54.5
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 \$3.6B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: short runway, distress
Inputs computable	10 of 14
Graded from	filings received through Feb 26, 2026 225 days before the rescans; latest periodic filing 10-Q received Jul 29, 2026
Last close	\$158.13 2026-10-08; market equity \$5.8B
Price used in grade	None



B, the elk
second 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

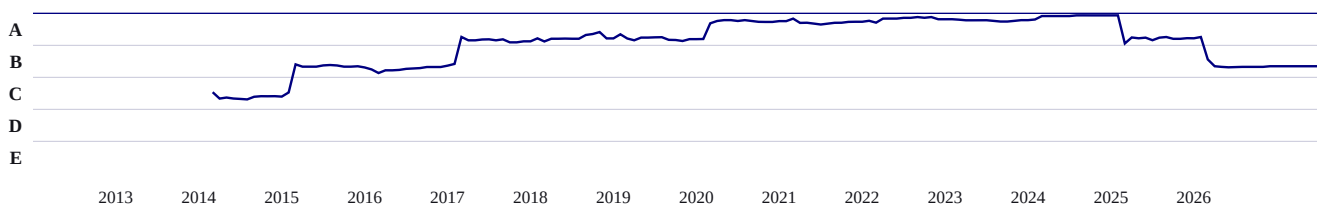


Date	Price (\$)	Rescan Label
Nov	300	A/B
Mar	~200	B
Apr	~210	A
Sep	158.14	-

Rescans on file: A from Mar 21, 2022, A/B from Mar 21, 2025, A 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 26, 2026

Pool Corporation (the Company, which may also be referred to as we, us or our), a member of the S&P 500 Index, is the world's largest wholesale distributor of swimming pool supplies, equipment and related leisure products and is one of the leading distributors of irrigation and landscape maintenance products in the United States. As of December 31, 2025, we operated 456 sales centers strategically located in North America, Europe and Australia, from which we sell swimming pool supplies, equipment and related

leisure products, irrigation and landscape maintenance products and hardscapes, tile and stone products.

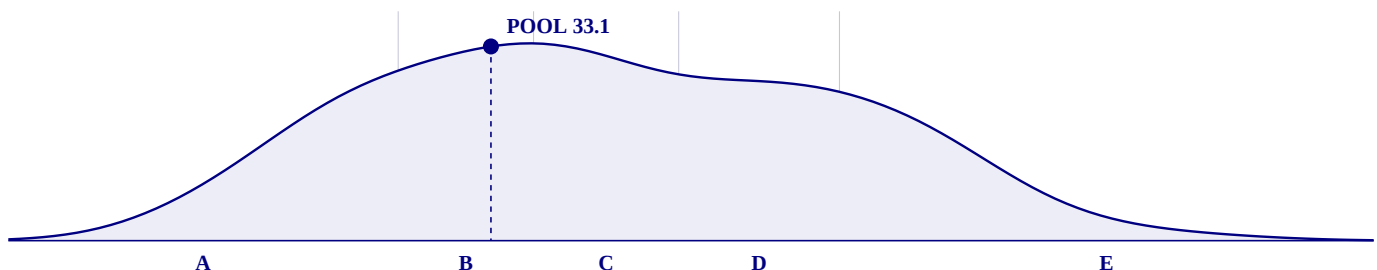
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 53.6						
Gross profitability		43.4%	42.6%	47.7	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		1.2%	(4.9%)	91.6	287	2025-12-31
Gross margin stability, five years		0.6 pts	1.2 pts	21.6	219	2025-12-31
Solvency, sleeve percentile 23.4						
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		4.02	1.92	23.7	208	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 2011-12-31; latest annual assets end 2025-12-31
Current ratio		2.24x	1.37x	23.1	295	2025-12-31
Growth and financing, sleeve percentile 54.5						
Revenue growth, three-year compound		(5.1%)	1.5%	75.7	269	2025-12-31
Free cash flow growth, three-year compound		(11.1%)	5.6%	80.1	147	2025-12-31
Reinvestment rate		49.4%	7.3%	27.8	152	2025-12-31
Asset growth, three years		0.6%	3.4%	58.7	272	2025-12-31
Net share issuance, one year		(2.2%)	(0.6%)	30.0	211	2026-02-20

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
81	Natural Grocers by Vitamin Cottage, Inc. (NGVC)	31.1	B	
82	Biglari Holdings Inc. (BH)	31.7	B	
83	Biglari Holdings Inc. (BH-A)	31.7	B	
84	Home Depot, Inc. (HD)	32.3	B	
85	Coupang, Inc. (CPNG)	32.7	B	fortress balance sheet
86	Pool Corp. (POOL) <	33.1	B	
87	Burlington Stores, Inc. (BURL)	33.5	B	
88	Weyco Group Inc. (WEYS)	33.9	B	
89	Flanigans Enterprises Inc. (BDL)	34.2	B	late filer, fortress balance sheet
90	Live Ventures Inc. (LIVE)	34.6	B	
91	Cencora, Inc. (COR)	35.0	B	

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	(38.3%)	(0.1%)	12
Distance from 52-week high	(47.7%)	(24.1%)	18
EBIT to enterprise value	8.3%	5.3%	79
Free cash flow yield	5.4%	4.2%	60
Book value to price	0.20	0.36	34
Sales to price	0.92	1.75	33
Composite equity issuance, five years	(17.7%)	(16.7%)	46
Relative strength against the sector, log excess return	(0.46)	0.02	12

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	fail
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
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	72 (10-Q received Jul 29, 2026)
Median daily dollar volume, 63 sessions	\$128.0M

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	\$1.6B	2025-12-31	2026-02-26	10-K	0001193125-26-074833
2	assets	us-gaap:Assets	\$3.6B	2025-12-31	2026-02-26	10-K	0001193125-26-074833
3	operating income	us-gaap:OperatingIncomeLoss	\$313.9M	2018-12-31	2021-02-25	10-K	0000945841-21-000022
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesMinorityInterestAndRelatedIncome	\$97.0M	2018-12-31	2021-02-25	10-K	0000945841-21-000022
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$58.8M	2018-12-31	2021-02-25	10-K	0000945841-21-000022

6	total debt	us-gaap:LongTermDebt	\$666.8M	2018-12-31	2019-02-27	10-K	0000945841-19-000013
7	book equity	us-gaap:StockholdersEquity	\$223.6M	2018-12-31	2022-02-25	10-K	0000945841-22-000023
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$16.4M	2018-12-31	2019-02-27	10-K	0000945841-19-000013
9	total debt	us-gaap:LongTermDebt	\$519.6M	2017-12-31	2019-02-27	10-K	0000945841-19-000013
10	book equity	us-gaap:StockholdersEquity	\$223.1M	2017-12-31	2021-02-25	10-K	0000945841-21-000022
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$29.9M	2017-12-31	2019-02-27	10-K	0000945841-19-000013
12	net income	us-gaap:NetIncomeLoss	\$406.4M	2025-12-31	2026-02-26	10-K	0001193125-26-074833
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$365.9M	2025-12-31	2026-02-26	10-K	0001193125-26-074833
14	assets	us-gaap:Assets	\$3.4B	2024-12-31	2026-02-26	10-K	0001193125-26-074833
15	revenue	us-gaap:Revenues	\$5.3B	2025-12-31	2026-02-26	10-K	0001193125-26-074833
16	gross profit	us-gaap:GrossProfit	\$1.6B	2024-12-31	2026-02-26	10-K	0001193125-26-074833
17	revenue	us-gaap:Revenues	\$5.3B	2024-12-31	2026-02-26	10-K	0001193125-26-074833
18	gross profit	us-gaap:GrossProfit	\$1.7B	2023-12-31	2026-02-26	10-K	0001193125-26-074833
19	revenue	us-gaap:Revenues	\$5.5B	2023-12-31	2026-02-26	10-K	0001193125-26-074833
20	gross profit	us-gaap:GrossProfit	\$1.9B	2022-12-31	2025-02-27	10-K	0000945841-25-000032
21	revenue	us-gaap:Revenues	\$6.2B	2022-12-31	2025-02-27	10-K	0000945841-25-000032
22	gross profit	us-gaap:GrossProfit	\$1.6B	2021-12-31	2024-02-27	10-K	0000945841-24-000021
23	revenue	us-gaap:Revenues	\$5.3B	2021-12-31	2024-02-27	10-K	0000945841-24-000021
24	current assets	us-gaap:AssetsCurrent	\$2.0B	2025-12-31	2026-02-26	10-K	0001193125-26-074833
25	current liabilities	us-gaap:LiabilitiesCurrent	\$880.3M	2025-12-31	2026-02-26	10-K	0001193125-26-074833
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$520.7M	2025-12-31	2026-02-26	10-K	0001193125-26-074833
27	operating income	us-gaap:OperatingIncomeLoss	\$580.2M	2025-12-31	2026-02-26	10-K	0001193125-26-074833
28	book equity	us-gaap:StockholdersEquity	\$1.2B	2025-12-31	2026-02-26	10-K	0001193125-26-074833
29	liabilities	us-gaap:Liabilities	\$2.4B	2025-12-31	2026-02-26	10-K	0001193125-26-074833
30	depreciation amortization	us-gaap:Depreciation	\$26.1M	2018-12-31	2021-02-25	10-K	0000945841-21-000022
31	operating income	us-gaap:OperatingIncomeLoss	\$125.1M	2011-12-31	2014-02-27	10-K	0000945841-14-000019
32	interest expense	us-gaap:InterestExpense	\$8.0M	2011-12-31	2012-02-29	10-K	0000945841-12-000018
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$56.3M	2025-12-31	2026-02-26	10-K	0001193125-26-074833
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$659.2M	2024-12-31	2026-02-26	10-K	0001193125-26-074833
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$59.5M	2024-12-31	2026-02-26	10-K	0001193125-26-074833
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$888.2M	2023-12-31	2026-02-26	10-K	0001193125-26-074833
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$60.1M	2023-12-31	2026-02-26	10-K	0001193125-26-074833
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$484.9M	2022-12-31	2025-02-27	10-K	0000945841-25-000032
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$43.6M	2022-12-31	2025-02-27	10-K	0000945841-25-000032
40	depreciation amortization	us-gaap:Depreciation	\$42.7M	2025-12-31	2026-02-26	10-K	0001193125-26-074833
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesMinorityInterestAndNoncontrollingInterests	\$533.4M	2025-12-31	2026-02-26	10-K	0001193125-26-074833
42	income tax	us-gaap:IncomeTaxExpenseBenefit	\$127.1M	2025-12-31	2026-02-26	10-K	0001193125-26-074833
43	current assets	us-gaap:AssetsCurrent	\$1.7B	2024-12-31	2026-02-26	10-K	0001193125-26-074833
44	current liabilities	us-gaap:LiabilitiesCurrent	\$844.2M	2024-12-31	2026-02-26	10-K	0001193125-26-074833
45	assets	us-gaap:Assets	\$3.4B	2023-12-31	2025-02-27	10-K	0000945841-25-000032
46	assets	us-gaap:Assets	\$3.6B	2022-12-31	2024-02-27	10-K	0000945841-24-000021
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	36,787,820	2026-02-20	2026-02-26	10-K	0001193125-26-074833
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	37,630,465	2025-02-20	2025-02-27	10-K	0000945841-25-000032