

SiteOne Landscape Supply, Inc. (SITE)

NYSE; shops; SIC 5040, Wholesale-Professional & Commercial Equipment & Supplies; CIK 0001650729

SiteOne Landscape Supply, Inc.	
SITE; shops	
Grade	A ▼ A B C D E strongest fifth of 258 graded peers percentile 4.3; sampling error 2.9 points; lower is stronger
Rank	12 of 258
Profitability	B/C percentile 37.8
Solvency	A/B percentile 18.4
Growth and financing	B percentile 34.3
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 \$3.2B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Feb 19, 2026 232 days before the rescans; latest periodic filing 10-Q received Jul 29, 2026
Last close	\$87.66 2026-10-08; market equity \$3.9B
Price used in grade	None

A, the bull

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

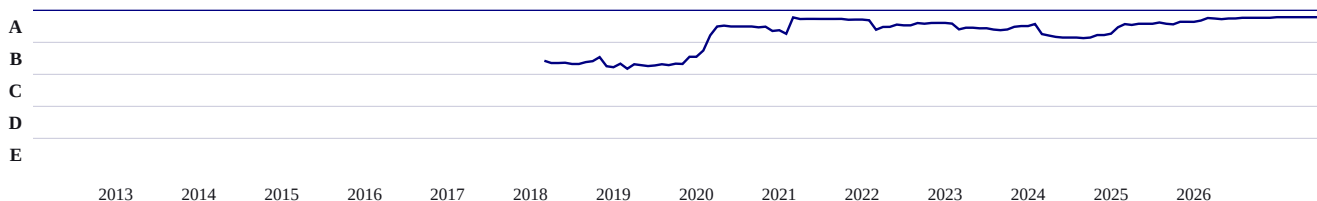
Share price, twelve months to the rescans

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

Rescans on file: A from Mar 21, 2020, A from Mar 21, 2024, A/B from Jun 21, 2025

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 19, 2026

The following discussion of our business contains "forward-looking statements," as discussed in "Special Note Regarding Forward-Looking Statements and Information" above. Our business, operations, and financial condition are subject to various risks as set forth in Part I,

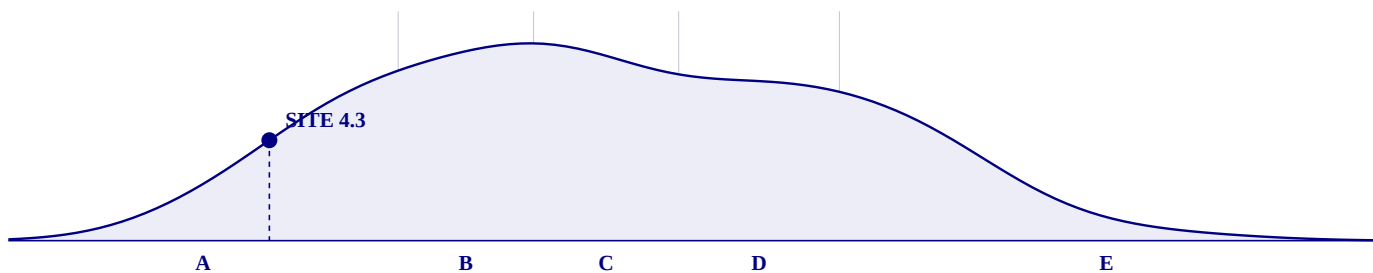
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 37.8						
Gross profitability		50.8%	42.6%	36.5	242	2025-12-28
Return on invested capital		10.0%	10.9%	53.0	84	2025-12-28
Accruals ratio		(4.7%)	(4.9%)	55.6	287	2025-12-28
Gross margin stability, five years		0.3 pts	1.2 pts	6.0	219	2025-12-28
Solvency, sleeve percentile 18.4						
Twelve-month failure probability		not computable	0.04%			four consecutive discrete net-income quarters are required; found 4
Altman Z double-prime		4.90	1.92	16.4	208	2025-12-28
Net debt to EBITDA		not computable	1.84x			latest aligned inputs end 2018-12-30; latest annual assets end 2025-12-28
Interest coverage		not computable	2.26x			latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-28
Current ratio		2.47x	1.37x	20.4	295	2025-12-28
Growth and financing, sleeve percentile 34.3						
Revenue growth, three-year compound		5.4%	1.5%	29.5	269	2025-12-28
Free cash flow growth, three-year compound		9.1%	5.6%	43.2	147	2025-12-28
Reinvestment rate		not computable	7.3%			latest aligned inputs end 2018-12-30; latest annual assets end 2025-12-28
Asset growth, three years		8.3%	3.4%	25.5	272	2025-12-28
Net share issuance, one year		(1.1%)	(0.6%)	39.0	211	2026-02-13

Among 258 peers

shops; letters are fifths of this list



Rank	Company	Percentile	Letter	Warnings
7	Brinker International, Inc. (EAT)	2.3	A	
8	Fastenal Co. (FAST)	2.7	A	fortress
				balance sheet
9	DXP Enterprises Inc. (DXPE)	3.1	A	
10	Ross Stores, Inc. (ROST)	3.5	A	fortress
				balance sheet
11	Global Industrial Co. (GIC)	3.9	A	
12	SiteOne Landscape Supply, Inc. (SITE) <	4.3	A	
13	Costco Wholesale Corp. (COST)	4.7	A	fortress
				balance sheet
14	Tractor Supply Co. (TSCO)	5.1	A	fortress
				balance sheet
15	Chipotle Mexican Grill Inc. (CMG)	5.4	A	fortress
				balance sheet
16	W.W. Grainger, Inc. (GWV)	5.8	A	
17	Weis Markets Inc. (WMK)	6.2	A	late filer

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	(23.5%)	(0.1%)	26
Distance from 52-week high	(46.3%)	(24.1%)	19
EBIT to enterprise value	5.5%	5.3%	52
Free cash flow yield	6.3%	4.2%	66
Book value to price	0.42	0.36	55
Sales to price	1.21	1.75	39
Composite equity issuance, five years	(0.10%)	(16.7%)	78
Relative strength against the sector, log excess return	(0.24)	0.02	26

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 8 of 9, period end 2025-12-28	
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	pass
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$84.0M
Operating cash flow, four quarters	\$308.0M
Months of runway	not finite
Days since last periodic filing	72 (10-Q received Jul 29, 2026)
Median daily dollar volume, 63 sessions	\$79.5M

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	2025-12-28	2026-02-19	10-K	0001650729-26-000005
2	assets	us-gaap:Assets	\$3.2B	2025-12-28	2026-02-19	10-K	0001650729-26-000005
3	operating income	us-gaap:OperatingIncomeLoss	\$238.1M	2025-12-28	2026-02-19	10-K	0001650729-26-000005

4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$208.1M	2025-12-28	2026-02-19	10-K	0001650729-26-000005
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$45.7M	2025-12-28	2026-02-19	10-K	0001650729-26-000005
6	total debt	us-gaap:LongTermDebt	\$385.4M	2025-12-28	2026-02-19	10-K	0001650729-26-000005
7	book equity	us-gaap:StockholdersEquity	\$1.7B	2025-12-28	2026-02-19	10-K	0001650729-26-000005
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$190.6M	2025-12-28	2026-02-19	10-K	0001650729-26-000005
9	total debt	us-gaap:LongTermDebt	\$388.2M	2024-12-29	2026-02-19	10-K	0001650729-26-000005
10	book equity	us-gaap:StockholdersEquity	\$1.6B	2024-12-29	2026-02-19	10-K	0001650729-26-000005
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$107.1M	2024-12-29	2026-02-19	10-K	0001650729-26-000005
12	net income	us-gaap:NetIncomeLoss	\$151.8M	2025-12-28	2026-02-19	10-K	0001650729-26-000005
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$300.5M	2025-12-28	2026-02-19	10-K	0001650729-26-000005
14	assets	us-gaap:Assets	\$3.1B	2024-12-29	2026-02-19	10-K	0001650729-26-000005
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.7B	2025-12-28	2026-02-19	10-K	0001650729-26-000005
16	gross profit	us-gaap:GrossProfit	\$1.6B	2024-12-29	2026-02-19	10-K	0001650729-26-000005
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.5B	2024-12-29	2026-02-19	10-K	0001650729-26-000005
18	gross profit	us-gaap:GrossProfit	\$1.5B	2023-12-31	2026-02-19	10-K	0001650729-26-000005
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.3B	2023-12-31	2026-02-19	10-K	0001650729-26-000005
20	gross profit	us-gaap:GrossProfit	\$1.4B	2023-01-01	2025-02-20	10-K	0001650729-25-000004
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$4.0B	2023-01-01	2025-02-20	10-K	0001650729-25-000004
22	gross profit	us-gaap:GrossProfit	\$1.2B	2022-01-02	2024-02-22	10-K	0001650729-24-000004
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$3.5B	2022-01-02	2024-02-22	10-K	0001650729-24-000004
24	current assets	us-gaap:AssetsCurrent	\$1.7B	2025-12-28	2026-02-19	10-K	0001650729-26-000005
25	current liabilities	us-gaap:LiabilitiesCurrent	\$686.8M	2025-12-28	2026-02-19	10-K	0001650729-26-000005
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$1.2B	2025-12-28	2026-02-19	10-K	0001650729-26-000005
27	liabilities	us-gaap:Liabilities	\$1.5B	2025-12-28	2026-02-19	10-K	0001650729-26-000005
28	total debt	us-gaap:LongTermDebt	\$558.2M	2018-12-30	2020-02-26	10-K	0001650729-20-000004
29	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$17.3M	2018-12-30	2020-02-26	10-K	0001650729-20-000004
30	operating income	us-gaap:OperatingIncomeLoss	\$107.3M	2018-12-30	2021-03-03	10-K	0001650729-21-000006
31	depreciation amortization	us-gaap:Depreciation	\$21.5M	2018-12-30	2019-02-27	10-K	0001650729-19-000004
32	operating income	us-gaap:OperatingIncomeLoss	\$250.3M	2023-12-31	2026-02-19	10-K	0001650729-26-000005
33	interest expense	us-gaap:InterestExpense	\$27.1M	2023-12-31	2024-02-22	10-K	0001650729-24-000004
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$53.7M	2025-12-28	2026-02-19	10-K	0001650729-26-000005
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$283.4M	2024-12-29	2026-02-19	10-K	0001650729-26-000005
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$40.5M	2024-12-29	2026-02-19	10-K	0001650729-26-000005
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$297.5M	2023-12-31	2026-02-19	10-K	0001650729-26-000005
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$32.1M	2023-12-31	2026-02-19	10-K	0001650729-26-000005
39	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$217.2M	2023-01-01	2025-02-20	10-K	0001650729-25-000004
40	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$27.1M	2023-01-01	2025-02-20	10-K	0001650729-25-000004
41	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$14.9M	2018-12-30	2021-03-03	10-K	0001650729-21-000006
42	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$175.2M	2025-12-28	2026-02-19	10-K	0001650729-26-000005
43	income tax	us-gaap:IncomeTaxExpenseBenefit	\$1.3M	2018-12-30	2021-03-03	10-K	0001650729-21-000006
44	current assets	us-gaap:AssetsCurrent	\$765.4M	2018-12-30	2020-02-26	10-K	0001650729-20-000004
45	current liabilities	us-gaap:LiabilitiesCurrent	\$282.4M	2018-12-30	2020-02-26	10-K	0001650729-20-000004
46	current assets	us-gaap:AssetsCurrent	\$601.9M	2017-12-31	2019-02-27	10-K	0001650729-19-000004
47	current liabilities	us-gaap:LiabilitiesCurrent	\$205.8M	2017-12-31	2019-02-27	10-K	0001650729-19-000004
48	assets	us-gaap:Assets	\$2.8B	2023-12-31	2025-02-20	10-K	0001650729-25-000004
49	assets	us-gaap:Assets	\$2.5B	2023-01-01	2024-02-22	10-K	0001650729-24-000004
50	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,459,316	2026-02-13	2026-02-19	10-K	0001650729-26-000005
51	shares outstanding	dei:EntityCommonStockSharesOutstanding	44,964,924	2025-02-14	2025-02-20	10-K	0001650729-25-000004