

US Foods Holding Corp. (USFD)

NYSE; shops; SIC 5140, Wholesale-Groceries & Related Products; CIK 0001665918

US Foods Holding Corp.	
USFD; shops	
Grade	C A B C D E middle fifth of 258 graded peers percentile 44.0; sampling error 2.9 points; lower is stronger
Rank	114 of 258
Profitability	C percentile 43.6
Solvency	C/D percentile 59.8
Growth and financing	B/C percentile 38.7
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 \$13.9B
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 Feb 12, 2026 239 days before the rescans; latest periodic filing 10-Q received Aug 6, 2026
Last close	\$97.17 2026-10-08; market equity \$21.0B
Price used in grade	None



C, the tortoise

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

Share price, twelve months to the rescans

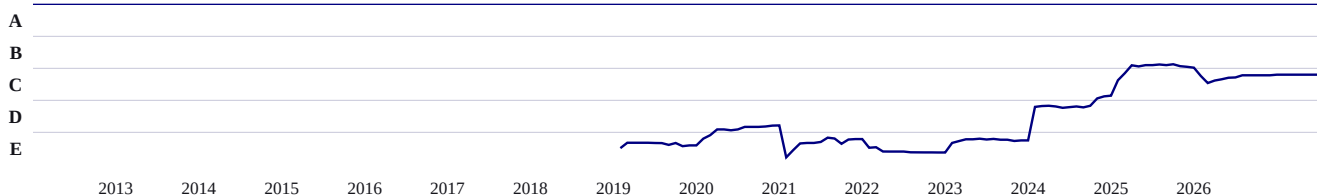
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: C/D from Nov 21, 2024, C from Feb 21, 2025, B/C from Apr 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 12, 2026

US Foods Holding Corp. and its consolidated subsidiaries are referred to in this Annual Report as "we," "our," "us," the "Company," or "US Foods." US Foods Holding Corp. conducts all of its operations through its wholly owned subsidiary US Foods, Inc. ("USF") and its subsidiaries. At US Foods, we strive to inspire and empower chefs and foodservice operators to bring great food experiences to consumers. This mission is supported by our brand promise of WE HELP YOU MAKE IT®.

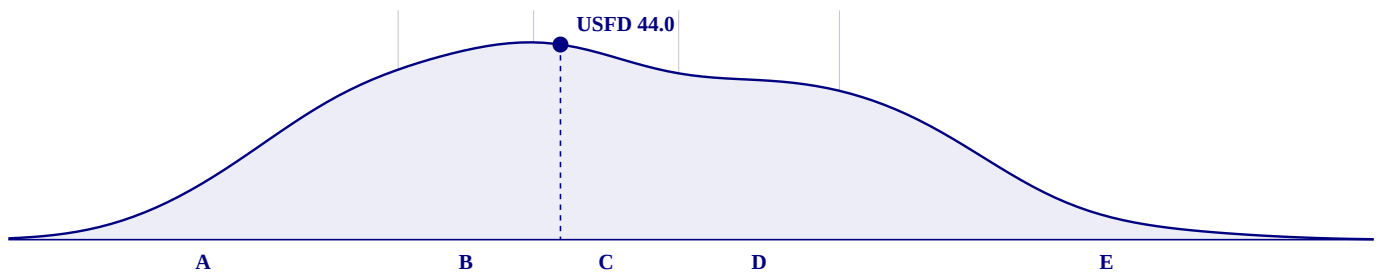
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 43.6						
Gross profitability		49.2%	42.6%	39.8	242	2025-12-27
Return on invested capital		9.7%	10.9%	59.0	84	2025-12-27
Accruals ratio		(5.1%)	(4.9%)	51.4	287	2025-12-27
Gross margin stability, five years		0.7 pts	1.2 pts	24.3	219	2025-12-27
Solvency, sleeve percentile 59.8						
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		1.94	1.92	46.9	208	2025-12-27
Net debt to EBITDA		3.02x	1.84x	70.7	100	2025-12-27
Interest coverage		not computable	2.26x			latest aligned inputs end 2023-12-30; latest annual assets end 2025-12-27
Current ratio		1.16x	1.37x	61.9	295	2025-12-27
Growth and financing, sleeve percentile 38.7						
Revenue growth, three-year compound		5.0%	1.5%	32.8	269	2025-12-27
Free cash flow growth, three-year compound		24.2%	5.6%	21.2	147	2025-12-27
Reinvestment rate		(17.4%)	7.3%	73.5	152	2025-12-27
Asset growth, three years		3.0%	3.4%	48.7	272	2025-12-27
Net share issuance, one year		(4.3%)	(0.6%)	17.1	211	2026-02-06

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
109	Wingstop Inc. (WING)	42.0	B/C	
110	Central Garden & PET Co. (CENT)	42.6	B/C	
111	Central Garden & PET Co. (CENTA)	42.6	B/C	
112	H&R Block Inc. (HRB)	43.2	C	
113	TJX Companies Inc. (TJX)	43.6	C	
114	US Foods Holding Corp. (USFD) <	44.0	C	
115	LKQ Corp. (LKQ)	44.4	C	
116	Cannae Holdings, Inc. (CNNE)	44.7	C	fortress balance sheet
117	Herbalife Ltd. (HLF)	45.1	C	

118	Sonic Automotive Inc. (SAH)	45.5	C
119	Honest Company, Inc. (HNST)	45.9	C

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	36.8%	(0.1%)	83
Distance from 52-week high	(12.5%)	(24.1%)	74
EBIT to enterprise value	4.6%	5.3%	41
Free cash flow yield	4.6%	4.2%	54
Book value to price	0.20	0.36	36
Sales to price	1.88	1.75	54
Composite equity issuance, five years	(2.2%)	(16.7%)	75
Relative strength against the sector, log excess return	0.34	0.02	83

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 7 of 9, period end 2025-12-27	
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	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$56.0M
Operating cash flow, four quarters	\$1.4B
Months of runway	not finite
Days since last periodic filing	64 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	\$221.5M

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	\$6.9B	2025-12-27	2026-02-12	10-K	0001665918-26-000008
2	assets	us-gaap:Assets	\$13.9B	2025-12-27	2026-02-12	10-K	0001665918-26-000008
3	operating income	us-gaap:OperatingIncomeLoss	\$1.2B	2025-12-27	2026-02-12	10-K	0001665918-26-000008
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordMeasuresAndControllingInt	\$38.0M	2025-12-27	2026-02-12	10-K	0001665918-26-000008
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$222.0M	2025-12-27	2026-02-12	10-K	0001665918-26-000008
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$5.1B	2025-12-27	2026-02-12	10-K	0001665918-26-000008
7	book equity	us-gaap:StockholdersEquity	\$4.3B	2025-12-27	2026-02-12	10-K	0001665918-26-000008
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$41.0M	2025-12-27	2026-02-12	10-K	0001665918-26-000008
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$4.8B	2024-12-28	2026-02-12	10-K	0001665918-26-000008
10	book equity	us-gaap:StockholdersEquity	\$4.5B	2024-12-28	2026-02-12	10-K	0001665918-26-000008
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$59.0M	2024-12-28	2026-02-12	10-K	0001665918-26-000008
12	net income	us-gaap:NetIncomeLoss	\$676.0M	2025-12-27	2026-02-12	10-K	0001665918-26-000008
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.4B	2025-12-27	2026-02-12	10-K	0001665918-26-000008
14	assets	us-gaap:Assets	\$13.4B	2024-12-28	2026-02-12	10-K	0001665918-26-000008
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$39.4B	2025-12-27	2026-02-12	10-K	0001665918-26-000008
16	gross profit	us-gaap:GrossProfit	\$6.5B	2024-12-28	2026-02-12	10-K	0001665918-26-000008
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$37.9B	2024-12-28	2026-02-12	10-K	0001665918-26-000008
18	gross profit	us-gaap:GrossProfit	\$6.1B	2023-12-30	2026-02-12	10-K	0001665918-26-000008
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$35.6B	2023-12-30	2026-02-12	10-K	0001665918-26-000008
20	gross profit	us-gaap:GrossProfit	\$5.5B	2022-12-31	2025-02-13	10-K	0001665918-25-000017

21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$34.1B	2022-12-31	2025-02-13	10-K	0001665918-25-000017
22	gross profit	us-gaap:GrossProfit	\$4.7B	2022-01-01	2024-02-15	10-K	0001665918-24-000014
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$29.5B	2022-01-01	2024-02-15	10-K	0001665918-24-000014
24	current assets	us-gaap:AssetsCurrent	\$4.2B	2025-12-27	2026-02-12	10-K	0001665918-26-000008
25	current liabilities	us-gaap:LiabilitiesCurrent	\$3.6B	2025-12-27	2026-02-12	10-K	0001665918-26-000008
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$2.7B	2025-12-27	2026-02-12	10-K	0001665918-26-000008
27	liabilities	us-gaap:Liabilities	\$9.6B	2025-12-27	2026-02-12	10-K	0001665918-26-000008
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$462.0M	2025-12-27	2026-02-12	10-K	0001665918-26-000008
29	operating income	us-gaap:OperatingIncomeLoss	\$1.0B	2023-12-30	2026-02-12	10-K	0001665918-26-000008
30	interest expense	us-gaap:InterestExpense	\$324.0M	2023-12-30	2024-02-15	10-K	0001665918-24-000014
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$410.0M	2025-12-27	2026-02-12	10-K	0001665918-26-000008
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.2B	2024-12-28	2026-02-12	10-K	0001665918-26-000008
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$341.0M	2024-12-28	2026-02-12	10-K	0001665918-26-000008
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.1B	2023-12-30	2026-02-12	10-K	0001665918-26-000008
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$309.0M	2023-12-30	2026-02-12	10-K	0001665918-26-000008
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$765.0M	2022-12-31	2025-02-13	10-K	0001665918-25-000017
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$265.0M	2022-12-31	2025-02-13	10-K	0001665918-25-000017
38	current assets	us-gaap:AssetsCurrent	\$4.0B	2024-12-28	2026-02-12	10-K	0001665918-26-000008
39	current liabilities	us-gaap:LiabilitiesCurrent	\$3.3B	2024-12-28	2026-02-12	10-K	0001665918-26-000008
40	assets	us-gaap:Assets	\$13.2B	2023-12-30	2025-02-13	10-K	0001665918-25-000017
41	assets	us-gaap:Assets	\$12.8B	2022-12-31	2024-02-15	10-K	0001665918-24-000014
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	220,541,957	2026-02-06	2026-02-12	10-K	0001665918-26-000008
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	230,378,989	2025-02-07	2025-02-13	10-K	0001665918-25-000017