

Wesco International Inc. (WCC)

NYSE; shops; SIC 5063, Wholesale-Electrical Apparatus & Equipment, Wiring Supplies ; CIK 0000929008

Wesco International Inc. WCC; shops	
Grade	A/B A B C D E on the A/B boundary of 258 graded peers percentile 21.8; sampling error 2.9 points; lower is stronger
Rank	57 of 258
Profitability	C percentile 56.4
Solvency	B percentile 23.3
Growth and financing	B/C percentile 39.1
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: short runway, distress
Inputs computable	9 of 14
Graded from	filings received through Feb 13, 2026 238 days before the rescans; latest periodic filing 10-Q received Jul 30, 2026
Last close	\$355.82 2026-10-08; market equity \$17.3B
Price used in grade	None



A/B, the bull

on the A/B boundary of its sector; letters are fifths of the 258 graded peers

Share price, twelve months to the rescans

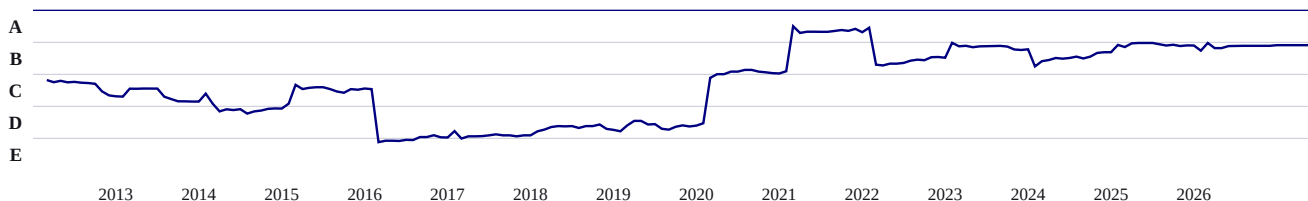
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: B from Feb 21, 2026, A/B from Mar 21, 2026, B from Apr 21, 2026, A/B 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 Feb 13, 2026

In this Annual Report on Form 10-K, "Wesco" refers to WESCO International, Inc., and its subsidiaries and its predecessors unless the context otherwise requires. References to "we," "us," "our" and the "Company" refer to Wesco and its subsidiaries. WESCO International, Inc. ("Wesco International") and its subsidiaries (collectively, "Wesco" or the "Company"), headquartered in Pittsburgh, Pennsylvania, is a leading provider of business-to-business distribution, logistics services and supply chain solutions. We

employ approximately 21,000 people, maintain relationships with more than 35,000 suppliers, and serve nearly 130,000 customers worldwide.

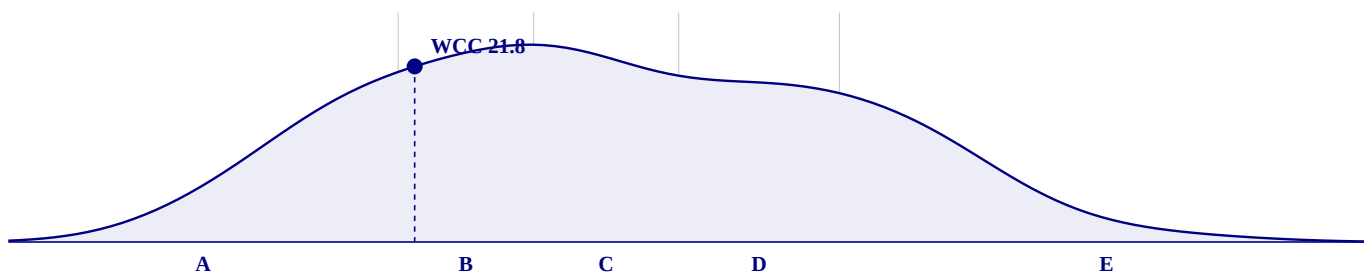
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 56.4						
Gross profitability		30.1%	42.6%	68.0	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		3.3%	(4.9%)	94.4	287	2025-12-31
Gross margin stability, five years		0.4 pts	1.2 pts	6.9	219	2025-12-31
Solvency, sleeve percentile 23.3						
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		4.10	1.92	21.7	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 2014-12-31; latest annual assets end 2025-12-31
Current ratio		2.20x	1.37x	24.8	295	2025-12-31
Growth and financing, sleeve percentile 39.1						
Revenue growth, three-year compound		3.2%	1.5%	40.7	269	2025-12-31
Free cash flow growth, three-year compound		not computable	5.6%			current FCF must be positive and base FCF must exceed \$100,000
Reinvestment rate		67.8%	7.3%	19.2	152	2025-12-31
Asset growth, three years		3.7%	3.4%	45.8	272	2025-12-31
Net share issuance, one year		(0.3%)	(0.6%)	51.0	211	2026-02-12

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
52	Cardinal Health Inc. (CAH)	19.8	A/B	
53	Amazon COM Inc. (AMZN)	20.2	A/B	fortress
				balance sheet
54	Chewy, Inc. (CHWY)	20.6	A/B	
55	Buckle Inc. (BKE)	21.0	A/B	
56	Hour Loop, Inc. (HOUR)	21.4	A/B	
57	Wesco International Inc. (WCC) <	21.8	A/B	
58	Sprouts Farmers Market, Inc. (SFM)	22.2	A/B	fortress
				balance sheet
59	Arhaus, Inc. (ARHS)	22.6	A/B	
60	MSC Industrial Direct Co. Inc. (MSM)	23.0	B	
61	TE Connectivity plc (TEL)	23.3	B	
62	Carmax Inc. (KMX)	23.7	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	61.5%	(0.1%)	91
Distance from 52-week high	(7.3%)	(24.1%)	87
EBIT to enterprise value	6.7%	5.3%	66
Free cash flow yield	0.1%	4.2%	22
Book value to price	0.30	0.36	44
Sales to price	1.36	1.75	43
Composite equity issuance, five years	(6.1%)	(16.7%)	68
Relative strength against the sector, log excess return	0.50	0.02	91

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 5 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	fail
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	71 (10-Q received Jul 30, 2026)

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$23.5B	2025-12-31	2026-02-13	10-K	0000929008-26-000008
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$18.5B	2025-12-31	2026-02-13	10-K	0000929008-26-000008
3	assets	us-gaap:Assets	\$16.5B	2025-12-31	2026-02-13	10-K	0000929008-26-000008
4	operating income	us-gaap:OperatingIncomeLoss	\$352.4M	2018-12-31	2021-03-01	10-K	0000929008-21-000006
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$211.0M	2018-12-31	2021-03-01	10-K	0000929008-21-000006
6	income tax	us-gaap:IncomeTaxExpenseBenefit	\$55.7M	2018-12-31	2021-03-01	10-K	0000929008-21-000006
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$1.2B	2018-12-31	2019-02-27	10-K	0000929008-19-000006
8	book equity	us-gaap:StockholdersEquity	\$2.1B	2018-12-31	2020-02-24	10-K	0000929008-20-000013
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$96.3M	2018-12-31	2022-02-25	10-K	0000929008-22-000009
10	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$1.3B	2017-12-31	2019-02-27	10-K	0000929008-19-000006
11	book equity	us-gaap:StockholdersEquity	\$2.1B	2017-12-31	2019-02-27	10-K	0000929008-19-000006
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$118.0M	2017-12-31	2021-03-01	10-K	0000929008-21-000006
13	net income	us-gaap:NetIncomeLoss	\$640.2M	2025-12-31	2026-02-13	10-K	0000929008-26-000008
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$125.0M	2025-12-31	2026-02-13	10-K	0000929008-26-000008
15	assets	us-gaap:Assets	\$15.1B	2024-12-31	2026-02-13	10-K	0000929008-26-000008
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$21.8B	2024-12-31	2026-02-13	10-K	0000929008-26-000008
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$17.1B	2024-12-31	2026-02-13	10-K	0000929008-26-000008
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$22.4B	2023-12-31	2026-02-13	10-K	0000929008-26-000008
19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$17.5B	2023-12-31	2026-02-13	10-K	0000929008-26-000008
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$21.4B	2022-12-31	2025-02-14	10-K	0000929008-25-000005
21	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$16.8B	2022-12-31	2025-02-14	10-K	0000929008-25-000005
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$18.2B	2021-12-31	2024-02-20	10-K	0000929008-24-000005
23	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	\$14.4B	2021-12-31	2024-02-20	10-K	0000929008-24-000005
24	current assets	us-gaap:AssetsCurrent	\$9.5B	2025-12-31	2026-02-13	10-K	0000929008-26-000008
25	current liabilities	us-gaap:LiabilitiesCurrent	\$4.3B	2025-12-31	2026-02-13	10-K	0000929008-26-000008
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$5.5B	2025-12-31	2026-02-13	10-K	0000929008-26-000008
27	operating income	us-gaap:OperatingIncomeLoss	\$1.2B	2025-12-31	2026-02-13	10-K	0000929008-26-000008
28	book equity	us-gaap:StockholdersEquity	\$5.0B	2025-12-31	2026-02-13	10-K	0000929008-26-000008
29	liabilities	us-gaap:Liabilities	\$11.5B	2025-12-31	2026-02-13	10-K	0000929008-26-000008
30	depreciation amortization	us-gaap:Depreciation	\$17.3M	2018-12-31	2021-03-01	10-K	0000929008-21-000006
31	operating income	us-gaap:OperatingIncomeLoss	\$466.2M	2014-12-31	2017-02-22	10-K	0000929008-17-000005
32	interest expense	us-gaap:InterestExpense	\$82.1M	2014-12-31	2015-02-24	10-K	0000929008-15-000006
33	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$99.8M	2025-12-31	2026-02-13	10-K	0000929008-26-000008
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.1B	2024-12-31	2026-02-13	10-K	0000929008-26-000008
35	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$94.7M	2024-12-31	2026-02-13	10-K	0000929008-26-000008
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$493.2M	2023-12-31	2026-02-13	10-K	0000929008-26-000008
37	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$92.3M	2023-12-31	2026-02-13	10-K	0000929008-26-000008
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$11.0M	2022-12-31	2025-02-14	10-K	0000929008-25-000005
39	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$99.4M	2022-12-31	2025-02-14	10-K	0000929008-25-000005
40	depreciation amortization	us-gaap:Depreciation	\$83.9M	2025-12-31	2026-02-13	10-K	0000929008-26-000008
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$55.9M	2025-12-31	2026-02-13	10-K	0000929008-26-000008
42	income tax	us-gaap:IncomeTaxExpenseBenefit	\$213.4M	2025-12-31	2026-02-13	10-K	0000929008-26-000008
43	current assets	us-gaap:AssetsCurrent	\$8.4B	2024-12-31	2026-02-13	10-K	0000929008-26-000008
44	current liabilities	us-gaap:LiabilitiesCurrent	\$3.8B	2024-12-31	2026-02-13	10-K	0000929008-26-000008
45	assets	us-gaap:Assets	\$15.1B	2023-12-31	2025-02-14	10-K	0000929008-25-000005
46	assets	us-gaap:Assets	\$14.8B	2022-12-31	2024-02-20	10-K	0000929008-24-000005
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	48,661,915	2026-02-12	2026-02-13	10-K	0000929008-26-000008
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	48,795,929	2025-02-13	2025-02-14	10-K	0000929008-25-000005