

## Sherwin-Williams Company (The) Financial Snapshot (Dollars in 000's)

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### Important Credit Measures

Metric Name	Current Period 1Q - 03/31/2025	Comparative Period 1Q - 03/31/2024	% Change
Credit Rating	B1	B1	
Comparable Store Sales Average (8 Quarters)	2.8%	8.9%	-6.1%
Interest Coverage (TTM)	11.42	10.68	6.93%
Debt to Equity Ratio	2.61	3.06	-14.71%
Unused Credit Lines	\$2,148,000	\$2,445,000	-12.15%
Percentage Available Under Credit Facility	100.0%	81.4%	18.6%
Total Debt to TTM EBITDA	2.33	2.42	-3.72%

### Operating Performance

Metric Name	Current Period 1Q - 03/31/2025	Comparative Period 1Q - 03/31/2024	% Change
Sales (TTM)	\$23,036,900	\$22,976,800	0.26%
Store Count	4,791	4,701	1.91%
Comparable Store Sales (QTR)	1.2%	-0.1%	1.3%
Comparable Store Sales (YTD)	1.2%	-0.1%	1.3%
Gross Margin (TTM)	48.7%	47.3%	1.4%
SG&A Margin (TTM)	28.8%	28.0%	0.8%
EBITDA (TTM)	\$4,631,400	\$4,430,600	4.53%
EBITDA Margin (TTM)	20.1%	19.3%	0.8%
Operating Income (TTM)	\$3,999,700	\$3,809,000	5.01%
Interest Expense (TTM)	\$405,500	\$414,700	-2.22%
Net Income (TTM)	\$2,680,100	\$2,416,600	10.90%
Capital Expenditures (TTM)	\$975,500	\$962,300	1.37%
Free Cash Flow After Interest Expense (TTM)	\$2,175,500	\$2,412,500	-9.82%

### Balance Sheet and Efficiency Ratios

Metric Name	Current Period 1Q - 03/31/2025	Comparative Period 1Q - 03/31/2024	% Change
Cash & Cash Equivalents	\$199,800	\$179,900	11.06%
Inventory	\$2,515,200	\$2,378,000	5.77%
Inventory Turnover - Annualized	5.05	5.16	-2.13%
Accounts Payable	\$2,512,900	\$2,453,900	2.40%
Days Payable Outstanding	82.34	77.87	5.74%
Working Capital	\$-1,837,000	\$-1,641,100	11.94%
Current Ratio	0.77	0.78	-1.28%
Total Debt	\$10,776,400	\$10,734,900	0.39%
Stockholders' Equity (Net Worth)	\$4,130,100	\$3,503,700	17.88%