Ethan Allen Interiors Inc.

ETD

NYSE; consumer durables; SIC 2511, Wood Household Furniture, (No Upholstered); CIK 0000896156

B

second fifth of 460 graded peers in the pooled consumer group

rank 147 of 460; percentile 32.5; sampling error 2.3 points; lower is stronger

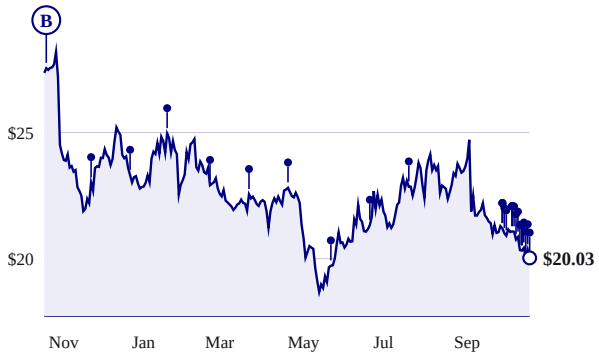
A B C D E

B, the elk



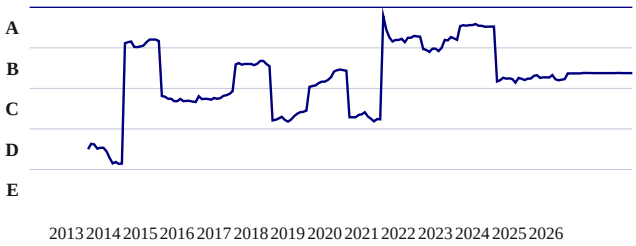
Scoreboard	
Profitability	B/C percentile 41.3
Solvency	A/B percentile 17.9
Growth and financing	D percentile 68.9
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $719.7M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet
Inputs computable	12 of 14
Graded from	filings received through Sep 3, 2026 46 days before the rescan; latest periodic filing 10-K received Sep 3, 2026
Last close	$20.04 2026-10-16; market equity $505.1M; no price enters the letter

Share price, twelve months to the rescan



Split-adjusted close. Each lollipop is a rescan and carries the letter held then.

Letter at every rescan, 2012 to 2026



Sector percentile at each rescan, 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 Sep 3, 2026

Ethan Allen is a leading interior design company, manufacturer and retailer in the home furnishings marketplace. We are a global luxury home fashion brand that is vertically integrated from product design through home delivery, which offers our customers stylish product offerings, artisanal quality, and personalized service. We are known for the quality and craftsmanship of our products as well as for the exceptional personal service from design to delivery, and for our commitment to social responsibility and sustainable operations.

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 41.3						
Gross profitability	49.3%	34.4%		30.1	476	2026-06-30
Return on invested capital	not computable	8.9%				

latest aligned inputs end 2021-06-30; latest annual assets end 2026-06-30

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Accruals ratio	(1.7%)	(5.1%)	78.9	526	2026-06-30
Gross margin stability, five years	0.7 pts	1.7 pts	15.0	408	2026-06-30
Solvency, sleeve percentile 17.9					
Twelve-month failure probability	0.03%	0.04%	29.4	35	2026-06-30
Altman Z double-prime	7.37	2.11	8.5	403	2026-06-30
Net debt to EBITDA	not computable	2.11x			
latest aligned inputs end 2021-06-30; latest annual assets end 2026-06-30					
Interest coverage	198.31x	2.57x	0.0	128	2026-06-30
Current ratio	2.06x	1.56x	33.8	542	2026-06-30
Growth and financing, sleeve percentile 68.9					
Revenue growth, three-year compound	(9.9%)	1.4%	87.9	482	2026-06-30
Free cash flow growth, three-year compound	(21.8%)	8.3%	88.4	250	2026-06-30
Reinvestment rate	(12.4%)	12.0%	70.5	265	2026-06-30
Asset growth, three years	(1.2%)	1.7%	59.7	487	2026-06-30
Net share issuance, one year	(0.9%)	(0.3%)	38.2	381	2026-08-27

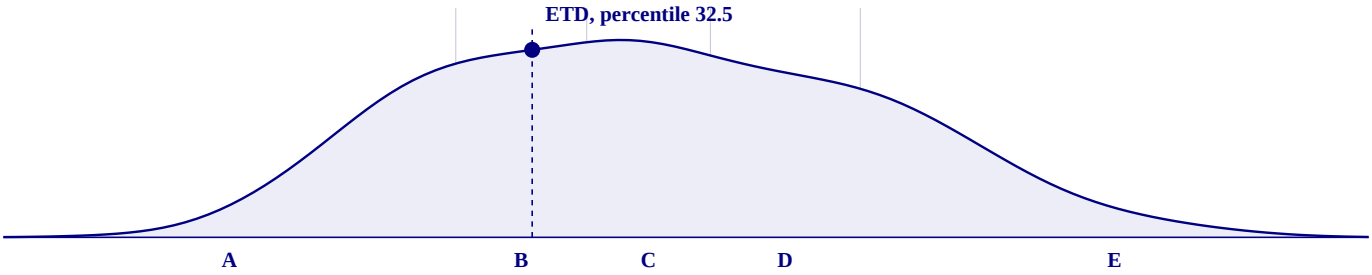
Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Fortress balance sheet	cash minus debt is 104,596,000 USD; Altman Z is not used

Among 460 peers

consumer durables; 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
142	Biglari Holdings Inc. (BH)	31.7	B	
143	Biglari Holdings Inc. (BH-A)	31.7	B	
144	Aptiv plc (APTV)	32.0	B	
145	Oshkosh Corp. (OSK)	32.2	B	
146	Home Depot, Inc. (HD)	32.3	B	
147	Ethan Allen Interiors Inc. (ETD)	32.5	B	fortress balance sheet
148	Cal-Maine Foods Inc. (CALM)	32.5	B	fortress balance sheet
149	Coupang, Inc. (CPNG)	32.7	B	fortress balance sheet
150	Pool Corp. (POOL)	33.1	B	
151	Levi Strauss & Co. (LEVI)	33.3	B	
152	Burlington Stores, Inc. (BURL)	33.5	B	

What the price implies

at the 2026-10-16 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(23.5%)	(0.1%)	24
Distance from 52-week high	(28.9%)	(24.7%)	44
EBIT to enterprise value	10.4%	4.9%	88

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Free cash flow yield	8.2%	4.4%	72
Book value to price	0.93	0.44	77
Sales to price	1.15	1.49	42
Composite equity issuance, five years	(37.9%)	(16.0%)	11
Relative strength against the sector, log excess return	(0.24)	(0.01)	26

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-06-30	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$73.6M
Operating cash flow, four quarters	$52.5M
Months of runway	not finite
Days since last periodic filing	46 (10-K received Sep 3, 2026)
Median daily dollar volume, 63 sessions	$10.7M

Sources

every fact behind the inputs; each row links to its filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	$354.8M	2026-06-30	2026-09-03	10-K	26-029578
2	assets	us-gaap:Assets	$719.7M	2026-06-30	2026-09-03	10-K	26-029578
3	operating income	us-gaap:OperatingIncomeLoss	$77.3M	2021-06-30	2023-08-24	10-K	23-024609
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$76.4M	2021-06-30	2023-08-24	10-K	23-024609
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$16.4M	2021-06-30	2023-08-24	10-K	23-024609
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$0	2021-06-30	2021-08-19	10-K	21-020534
7	book equity	us-gaap:StockholdersEquity	$351.4M	2021-06-30	2022-08-29	10-K	22-021450
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$104.6M	2021-06-30	2022-08-29	10-K	22-021450
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$50.0M	2020-06-30	2021-08-19	10-K	21-020534
10	book equity	us-gaap:StockholdersEquity	$328.1M	2020-06-30	2021-08-19	10-K	21-020534
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$72.3M	2020-06-30	2021-08-19	10-K	21-020534
12	net income	us-gaap:ProfitLoss	$39.9M	2026-06-30	2026-09-03	10-K	26-029578
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$52.5M	2026-06-30	2026-09-03	10-K	26-029578
14	assets	us-gaap:Assets	$737.1M	2025-06-30	2026-09-03	10-K	26-029578
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$579.5M	2026-06-30	2026-09-03	10-K	26-029578
16	gross profit	us-gaap:GrossProfit	$372.1M	2025-06-30	2026-09-03	10-K	26-029578
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$614.6M	2025-06-30	2026-09-03	10-K	26-029578
18	gross profit	us-gaap:GrossProfit	$393.1M	2024-06-30	2026-09-03	10-K	26-029578
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$646.2M	2024-06-30	2026-09-03	10-K	26-029578
20	gross profit	us-gaap:GrossProfit	$480.4M	2023-06-30	2025-08-22	10-K	25-027594
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$791.4M	2023-06-30	2025-08-22	10-K	25-027594
22	gross profit	us-gaap:GrossProfit	$484.7M	2022-06-30	2024-08-23	10-K	24-027664
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$817.8M	2022-06-30	2024-08-23	10-K	24-027664
24	current assets	us-gaap:AssetsCurrent	$305.5M	2026-06-30	2026-09-03	10-K	26-029578
25	current liabilities	us-gaap:LiabilitiesCurrent	$148.4M	2026-06-30	2026-09-03	10-K	26-029578

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26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$778.5M	2026-06-30	2026-09-03	10-K	26-029578
27	operating income	us-gaap:OperatingIncomeLoss	$45.0M	2026-06-30	2026-09-03	10-K	26-029578
28	book equity	us-gaap:StockholdersEquity	$471.5M	2026-06-30	2026-09-03	10-K	26-029578
29	liabilities	us-gaap:Liabilities	$248.2M	2026-06-30	2026-09-03	10-K	26-029578
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$16.4M	2021-06-30	2023-08-24	10-K	23-024609
31	interest expense	us-gaap:InterestAndDebtExpense	$227,000	2026-06-30	2026-09-03	10-K	26-029578
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$11.0M	2026-06-30	2026-09-03	10-K	26-029578
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$61.7M	2025-06-30	2026-09-03	10-K	26-029578
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$11.3M	2025-06-30	2026-09-03	10-K	26-029578
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$80.2M	2024-06-30	2026-09-03	10-K	26-029578
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$9.6M	2024-06-30	2026-09-03	10-K	26-029578
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$100.7M	2023-06-30	2025-08-22	10-K	25-027594
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$13.9M	2023-06-30	2025-08-22	10-K	25-027594
39	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$15.2M	2026-06-30	2026-09-03	10-K	26-029578
40	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$53.2M	2026-06-30	2026-09-03	10-K	26-029578
41	income tax	us-gaap:IncomeTaxExpenseBenefit	$13.3M	2026-06-30	2026-09-03	10-K	26-029578
42	current assets	us-gaap:AssetsCurrent	$309.9M	2025-06-30	2026-09-03	10-K	26-029578
43	current liabilities	us-gaap:LiabilitiesCurrent	$152.9M	2025-06-30	2026-09-03	10-K	26-029578
44	assets	us-gaap:Assets	$744.9M	2024-06-30	2026-09-03	10-K	26-029578
45	assets	us-gaap:Assets	$745.5M	2023-06-30	2025-08-22	10-K	25-027594
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	25,202,503	2026-08-27	2026-09-03	10-K	26-029578
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	25,441,838	2025-08-15	2025-08-22	10-K	25-027594

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