# Ralph Lauren Corp. RL

NYSE; consumer nondurables; SIC 2320, Men's & Boys' Furnishgs, Work Clothg, & Allied Garments; CIK 0001037038

**A**

**strongest fifth of 124 graded peers in consumer nondurables**

rank 8 of 124; percentile 5.7; sampling error 3.8 points; lower is stronger

A B C D E

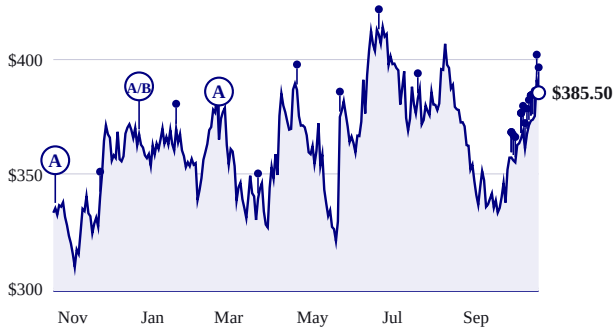
**A, the bull**



## Scoreboard

| | |
|---|---|
| **Profitability** | B/C<br>percentile 40.3 |
| **Solvency** | A/B<br>percentile 19.5 |
| **Growth and financing** | A/B<br>percentile 22.2 |
| **Reliability** | 0.94 AUC<br>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<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | over $2.67B assets<br>total assets $7.7B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered; fortress balance sheet<br>not computable: dilution, distress |
| **Inputs computable** | 8 of 14 |
| **Graded from** | filings received through May 21, 2026<br>151 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026 |
| **Last close** | $385.36<br>2026-10-16; market equity $0; 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 May 21, 2026*

Founded in 1967 by Mr. Ralph Lauren, we are a global leader in the design, marketing, and distribution of luxury lifestyle products, including apparel, handbags, footwear & accessories, fragrances, home, and hospitality. For nearly 60 years, Ralph Lauren has sought to inspire the dream of a better life through authenticity and timeless style. Our long-standing reputation and distinctive image have been developed across a wide range of products, brands, distribution channels, and international markets. We believe that our global reach, breadth of lifestyle product offerings, and multi-channel distribution network are unique among luxury and apparel companies.

## 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 40.3** | | | | | | |
| Gross profitability | 73.3% | 29.8% | | 7.6 | 146 | 2026-03-28 |
| Return on invested capital | not computable | 5.6% | | | | |

*latest aligned inputs end 2014-03-29; latest annual assets end 2026-03-28*

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| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (2.9%) | (5.0%) | 66.4 | 153 | 2026-03-28 |
| Gross margin stability, five years | 1.8 pts | 1.9 pts | 47.0 | 116 | 2026-03-28 |
| **Solvency, sleeve percentile 19.5** | | | | | |
| Twelve-month failure probability | not computable | 0.03% | | | |
| *liabilities and a nearby cover-page share count are required at 2026-06-27* | | | | | |
| Altman Z double-prime | 6.88 | 3.11 | 14.0 | 122 | 2026-03-28 |
| Net debt to EBITDA | not computable | 2.54x | | | |
| *latest aligned inputs end 2014-03-29; latest annual assets end 2026-03-28* | | | | | |
| Interest coverage | 21.76x | 2.51x | 7.1 | 43 | 2026-03-28 |
| Current ratio | 2.13x | 1.81x | 37.2 | 157 | 2026-03-28 |
| **Growth and financing, sleeve percentile 22.2** | | | | | |
| Revenue growth, three-year compound | 8.0% | 0.2% | 15.9 | 133 | 2026-03-28 |
| Free cash flow growth, three-year compound | not computable | 14.9% | | | |
| *latest aligned inputs end 2025-03-29; latest annual assets end 2026-03-28* | | | | | |
| Reinvestment rate | not computable | 10.7% | | | |
| *latest aligned inputs end 2025-03-29; latest annual assets end 2026-03-28* | | | | | |
| Asset growth, three years | 4.5% | 0.5% | 28.6 | 134 | 2026-03-28 |
| Net share issuance, one year | not computable | 0.05% | | | |
| *two annual share counts are required; found 0* | | | | | |

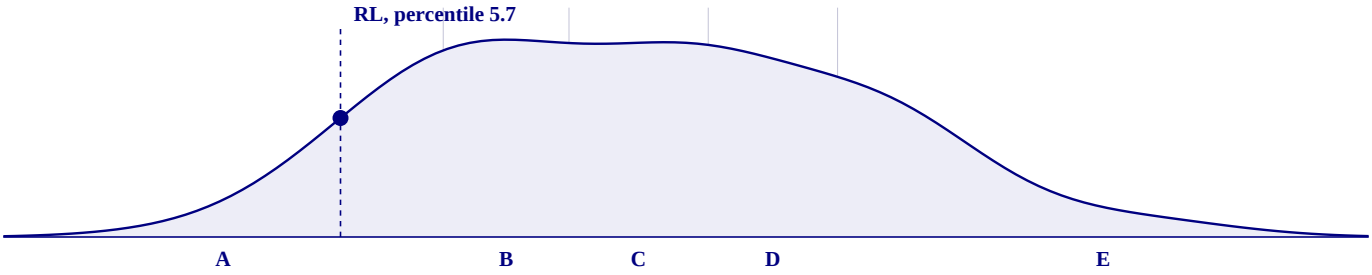
## Warnings

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

| Check | Measured |
|---|---|
| Fortress balance sheet | cash minus debt is 497,400,000 USD; Altman Z is not used |

## Among 124 peers

*consumer nondurables; 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 |
|---|---|---|---|---|
| 3 | J&J Snack Foods Corp. (JJSF) | 1.6 | A | |
| 4 | National Beverage Corp. (FIZZ) | 2.4 | A | |
| 5 | lululemon athletica Inc. (LULU) | 3.3 | A | |
| 6 | Bellring Brands, Inc. (BRBR) | 4.1 | A | |
| 7 | Mama's Creations, Inc. (MAMA) | 4.9 | A | fortress balance sheet |
| 8 | Ralph Lauren Corp. (RL) | 5.7 | A | fortress balance sheet |
| 9 | Monster Beverage Corp. (MNST) | 6.5 | A | fortress balance sheet |
| 10 | Lifeway Foods, Inc. (LWAY) | 7.3 | A | fortress balance sheet |
| 11 | Jerash Holdings (Us), Inc. (JRSH) | 8.1 | A | fortress balance sheet |
| 12 | Sanfilippo John B & SON Inc. (JBSS) | 8.9 | A | |
| 13 | Vita Coco Company, Inc. (COCO) | 9.8 | A | |

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## 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 | 11.2% | (0.2%) | 63 |
| Distance from 52-week high | (6.9%) | (22.4%) | 80 |
| EBIT to enterprise value | not computable | 4.0% | |
| Free cash flow yield | not computable | 4.7% | |
| Book value to price | not computable | 0.54 | |
| Sales to price | not computable | 1.23 | |
| Composite equity issuance, five years | not computable | (16.3%) | |
| Relative strength against the sector, log excess return | 0.01 | (0.10) | 63 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score None of 9, period end 2026-03-28** | |
| 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 | fail |
| Current ratio improved | pass |
| No new shares issued | fail |
| Gross margin improved | pass |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $1.7B |
| Operating cash flow, four quarters | $1.3B |
| Months of runway | not finite |
| Days since last periodic filing | 74 (10-Q received Aug 6, 2026) |
| Median daily dollar volume, 63 sessions | $211.8M |

## 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 | $5.7B | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 2 | assets | us-gaap:Assets | $7.7B | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $1.1B | 2014-03-29 | 2016-05-19 | 10-K | 16-000019 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $1.1B | 2014-03-29 | 2016-05-19 | 10-K | 16-000019 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $320.0M | 2014-03-29 | 2016-05-19 | 10-K | 16-000019 |
| 6 | total debt | us-gaap:LongTermDebt | $300.0M | 2014-03-29 | 2014-05-15 | 10-K | 14-000006 |
| 7 | book equity | us-gaap:StockholdersEquity | $4.0B | 2014-03-29 | 2017-05-18 | 10-K | 17-000004 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $797.4M | 2014-03-29 | 2017-05-18 | 10-K | 17-000004 |
| 9 | total debt | us-gaap:LongTermDebt | $267.0M | 2013-03-30 | 2014-05-15 | 10-K | 14-000006 |
| 10 | book equity | us-gaap:StockholdersEquity | $3.8B | 2013-03-30 | 2016-05-19 | 10-K | 16-000019 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $974.0M | 2013-03-30 | 2016-05-19 | 10-K | 16-000019 |
| 12 | net income | us-gaap:NetIncomeLoss | $941.1M | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.2B | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 14 | assets | us-gaap:Assets | $7.0B | 2025-03-29 | 2026-05-21 | 10-K | 26-037074 |
| 15 | revenue | us-gaap:Revenues | $8.1B | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 16 | gross profit | us-gaap:GrossProfit | $4.9B | 2025-03-29 | 2026-05-21 | 10-K | 26-037074 |
| 17 | revenue | us-gaap:Revenues | $7.1B | 2025-03-29 | 2026-05-21 | 10-K | 26-037074 |
| 18 | gross profit | us-gaap:GrossProfit | $4.4B | 2024-03-30 | 2026-05-21 | 10-K | 26-037074 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 19 | revenue | us-gaap:Revenues | $6.6B | 2024-03-30 | 2026-05-21 | 10-K | 26-037074 |
| 20 | gross profit | us-gaap:GrossProfit | $4.2B | 2023-04-01 | 2025-05-22 | 10-K | 25-000011 |
| 21 | revenue | us-gaap:Revenues | $6.4B | 2023-04-01 | 2025-05-22 | 10-K | 25-000011 |
| 22 | gross profit | us-gaap:GrossProfit | $4.1B | 2022-04-02 | 2024-05-23 | 10-K | 24-000014 |
| 23 | revenue | us-gaap:Revenues | $6.2B | 2022-04-02 | 2024-05-23 | 10-K | 24-000014 |
| 24 | current assets | us-gaap:AssetsCurrent | $3.9B | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $1.8B | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $8.3B | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 27 | operating income | us-gaap:OperatingIncomeLoss | $1.2B | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 28 | book equity | us-gaap:StockholdersEquity | $2.8B | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 29 | liabilities | us-gaap:Liabilities | $4.9B | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 30 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $258.0M | 2014-03-29 | 2016-05-19 | 10-K | 16-000019 |
| 31 | interest expense | us-gaap:InterestExpense | $54.2M | 2026-03-28 | 2026-05-21 | 10-K | 26-037074 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.2B | 2025-03-29 | 2026-05-21 | 10-K | 26-037074 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $216.2M | 2025-03-29 | 2025-05-22 | 10-K | 25-000011 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $1.1B | 2024-03-30 | 2026-05-21 | 10-K | 26-037074 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $164.8M | 2024-03-30 | 2025-05-22 | 10-K | 25-000011 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $411.0M | 2023-04-01 | 2025-05-22 | 10-K | 25-000011 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $217.5M | 2023-04-01 | 2025-05-22 | 10-K | 25-000011 |
| 38 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $715.9M | 2022-04-02 | 2024-05-23 | 10-K | 24-000014 |
| 39 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $166.9M | 2022-04-02 | 2024-05-23 | 10-K | 24-000014 |
| 40 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $219.6M | 2025-03-29 | 2026-05-21 | 10-K | 26-037074 |
| 41 | operating income | us-gaap:OperatingIncomeLoss | $932.1M | 2025-03-29 | 2026-05-21 | 10-K | 26-037074 |
| 42 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $950.7M | 2025-03-29 | 2026-05-21 | 10-K | 26-037074 |
| 43 | income tax | us-gaap:IncomeTaxExpenseBenefit | $207.8M | 2025-03-29 | 2026-05-21 | 10-K | 26-037074 |
| 44 | current assets | us-gaap:AssetsCurrent | $3.8B | 2025-03-29 | 2026-05-21 | 10-K | 26-037074 |
| 45 | current liabilities | us-gaap:LiabilitiesCurrent | $2.1B | 2025-03-29 | 2026-05-21 | 10-K | 26-037074 |
| 46 | current assets | us-gaap:AssetsCurrent | $3.4B | 2024-03-30 | 2025-05-22 | 10-K | 25-000011 |
| 47 | current liabilities | us-gaap:LiabilitiesCurrent | $1.5B | 2024-03-30 | 2025-05-22 | 10-K | 25-000011 |
| 48 | assets | us-gaap:Assets | $6.6B | 2024-03-30 | 2025-05-22 | 10-K | 25-000011 |
| 49 | assets | us-gaap:Assets | $6.8B | 2023-04-01 | 2024-05-23 | 10-K | 24-000014 |

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