Build-A-Bear Workshop Inc.

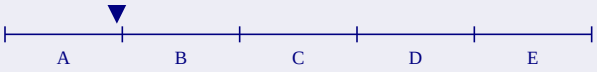
BBW

NYSE; shops; SIC 5945, Retail-Hobby, Toy & Game Shops; CIK 0001113809

A/B

on the A/B boundary of 258 graded peers in shops

rank 50 of 258; percentile 19.1; sampling error 2.9 points; lower is stronger



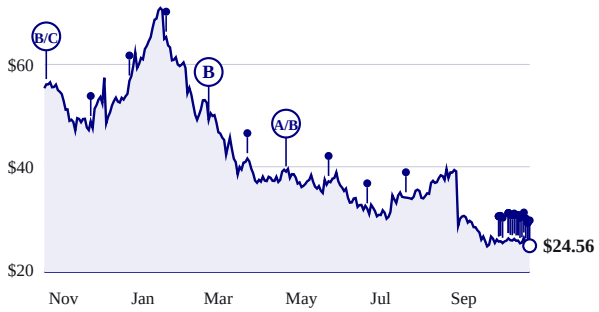
A/B, the bull



Scoreboard

Profitability	B/C percentile 40.6
Solvency	B/C percentile 40.7
Growth and financing	B percentile 33.6
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $345.5M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	8 of 14
Graded from	filings received through Apr 17, 2026 187 days before the rescan; latest periodic filing 10-Q received Sep 10, 2026
Last close	$24.59 2026-10-20; market equity $302.9M; 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 Apr 16, 2026

Build-A-Bear Workshop, Inc., a Delaware corporation, was formed in 1997 as a mall-based, experiential specialty retailer for children. Build?A?Bear has evolved to become a leading global "retailtainment" brand on a mission to add a little more heart to life. At Build-A-Bear, guests are invited to create personalized furry friends through a unique stuffing, dressing, accessorizing and naming process, accentuated by a memorable Heart Ceremony that creates moments of connection for people of all ages. Over the years, Build?A?Bear has grown into a multi?generational phenomenon, positioned at the intersection of pop?culture trends.

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 40.6						
Gross profitability	85.6%	43.0%		10.8	242	2026-01-31
Return on invested capital	not computable	10.9%				

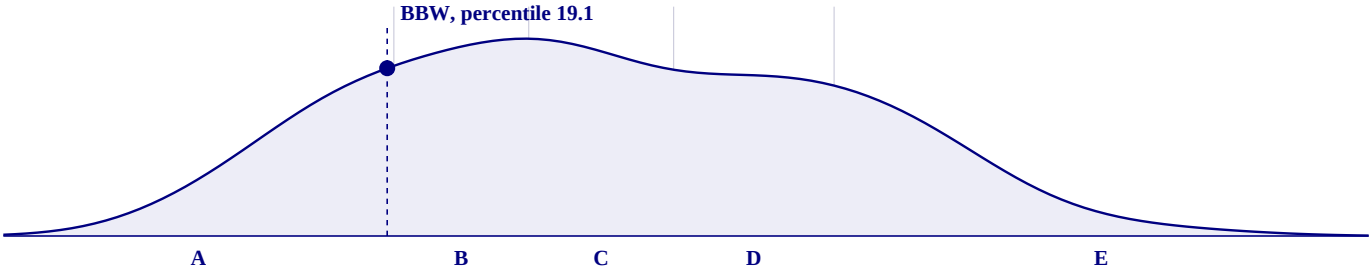
one or more required annual facts are missing

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Accruals ratio	(4.0%)	(4.9%)	63.1	288	2026-01-31
Gross margin stability, five years	1.2 pts	1.2 pts	47.9	220	2026-01-31
Solvency, sleeve percentile 40.7					
Twelve-month failure probability	not computable	0.04%			
liabilities and a nearby cover-page share count are required at 2026-08-01					
Altman Z double-prime	not computable	1.92			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.84x			
one or more required annual facts are missing					
Interest coverage	not computable	2.26x			
one or more required annual facts are missing					
Current ratio	1.55x	1.38x	40.7	296	2026-01-31
Growth and financing, sleeve percentile 33.6					
Revenue growth, three-year compound	4.2%	1.5%	35.4	269	2026-01-31
Free cash flow growth, three-year compound	5.5%	5.6%	50.7	147	2026-01-31
Reinvestment rate	not computable	7.3%			
one or more required annual facts are missing					
Asset growth, three years	7.2%	3.1%	32.1	272	2026-01-31
Net share issuance, one year	(4.3%)	(0.6%)	16.3	210	2026-04-14

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
45	Envela Corp. (ELA)	17.1	A/B	fortress balance sheet
46	PC Connection Inc. (CNXN)	17.5	A/B	
47	Dominos Pizza Inc. (DPZ)	17.9	A/B	
48	BJ's Wholesale Club Holdings, Inc. (BJ)	18.3	A/B	
49	Copart Inc. (CPRT)	18.7	A/B	
50	Build-A-Bear Workshop Inc. (BBW)	19.1	A/B	
51	Dick'S Sporting Goods, Inc. (DKS)	19.5	A/B	fortress balance sheet
52	Cardinal Health Inc. (CAH)	19.8	A/B	
53	Chewy, Inc. (CHWY)	20.2	A/B	
54	Amazon COM Inc. (AMZN)	20.6	A/B	fortress balance sheet
55	Buckle Inc. (BKE)	21.0	A/B	

What the price implies

at the 2026-10-20 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(53.2%)	0.2%	6
Distance from 52-week high	(65.4%)	(20.6%)	8
EBIT to enterprise value	not computable	5.3%	
Free cash flow yield	13.1%	4.0%	87

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Book value to price	0.53	0.34	63
Sales to price	1.75	1.66	51
Composite equity issuance, five years	(44.0%)	(16.7%)	7
Relative strength against the sector, log excess return	(0.74)	0.03	6

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-01-31	
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	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$14.0M
Operating cash flow, four quarters	$59.2M
Months of runway	not finite
Days since last periodic filing	41 (10-Q received Sep 10, 2026)
Median daily dollar volume, 63 sessions	$13.0M

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	$295.6M	2026-01-31	2026-04-16	10-K	26-012501
2	assets	us-gaap:Assets	$345.5M	2026-01-31	2026-04-16	10-K	26-012501
3	net income	us-gaap:NetIncomeLoss	$52.2M	2026-01-31	2026-04-16	10-K	26-012501
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$65.1M	2026-01-31	2026-04-16	10-K	26-012501
5	assets	us-gaap:Assets	$290.0M	2025-02-01	2026-04-16	10-K	26-012501
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$529.8M	2026-01-31	2026-04-16	10-K	26-012501
7	gross profit	us-gaap:GrossProfit	$272.5M	2025-02-01	2026-04-16	10-K	26-012501
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$496.4M	2025-02-01	2026-04-16	10-K	26-012501
9	gross profit	us-gaap:GrossProfit	$264.4M	2024-02-03	2026-04-16	10-K	26-012501
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$486.1M	2024-02-03	2026-04-16	10-K	26-012501
11	gross profit	us-gaap:GrossProfit	$245.9M	2023-01-28	2025-04-17	10-K	25-012234
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$467.9M	2023-01-28	2025-04-17	10-K	25-012234
13	gross profit	us-gaap:GrossProfit	$218.0M	2022-01-29	2023-04-13	10-K	23-010169
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$411.5M	2022-01-29	2023-04-13	10-K	23-010169
15	current assets	us-gaap:AssetsCurrent	$140.0M	2026-01-31	2026-04-16	10-K	26-012501
16	current liabilities	us-gaap:LiabilitiesCurrent	$90.6M	2026-01-31	2026-04-16	10-K	26-012501
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$25.5M	2026-01-31	2026-04-16	10-K	26-012501
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$47.1M	2025-02-01	2026-04-16	10-K	26-012501
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$19.3M	2025-02-01	2026-04-16	10-K	26-012501
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$64.3M	2024-02-03	2026-04-16	10-K	26-012501
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$18.3M	2024-02-03	2026-04-16	10-K	26-012501
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$47.3M	2023-01-28	2025-04-17	10-K	25-012234
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$13.6M	2023-01-28	2025-04-17	10-K	25-012234
24	assets	us-gaap:Assets	$272.3M	2024-02-03	2025-04-17	10-K	25-012234
25	assets	us-gaap:Assets	$280.8M	2023-01-28	2024-04-18	10-K	24-012440
26	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,580,479	2026-04-14	2026-04-17	10-K/A	26-012597

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27	shares outstanding	dei:EntityCommonStockSharesOutstanding	13,144,130	2025-04-14	2025-04-17	10-K	25-012234