Hooker Furnishings Corp.

HOFT

Nasdaq; consumer durables; SIC 2510, Household Furniture; CIK 0001077688

C

middle fifth of 460 graded peers in the pooled consumer group

rank 202 of 460; percentile 45.1; sampling error 2.3 points; lower is stronger

A B C D E

C, the tortoise



Scoreboard	
Profitability	C percentile 47.8
Solvency	A percentile 13.3
Growth and financing	E percentile 82.3
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 $225.9M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress
Inputs computable	7 of 14
Graded from	filings received through Apr 17, 2026 187 days before the rescan; latest periodic filing 10-Q received Sep 11, 2026
Last close	$12.83 2026-10-20; market equity $137.2M; 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 17, 2026

Virginia in 1924, is a designer, marketer and importer of casegoods (wooden and metal furniture), leather furniture, fabric-upholstered furniture, lighting, accessories, and home decor for the residential, hospitality and contract markets. We also domestically manufacture premium residential custom leather, custom fabric-upholstered furniture and outdoor furniture. the Pulaski Furniture ("PFC") and Samuel Lawrence Furniture ("SLF") brands within the Home Meridian segment no longer aligned with the Company's long-term strategic direction.

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 47.8						
Gross profitability	32.5%	34.4%		50.6	473	2026-02-01
Return on invested capital	not computable	8.9%				

latest aligned inputs end 2019-02-03; latest annual assets end 2026-02-01

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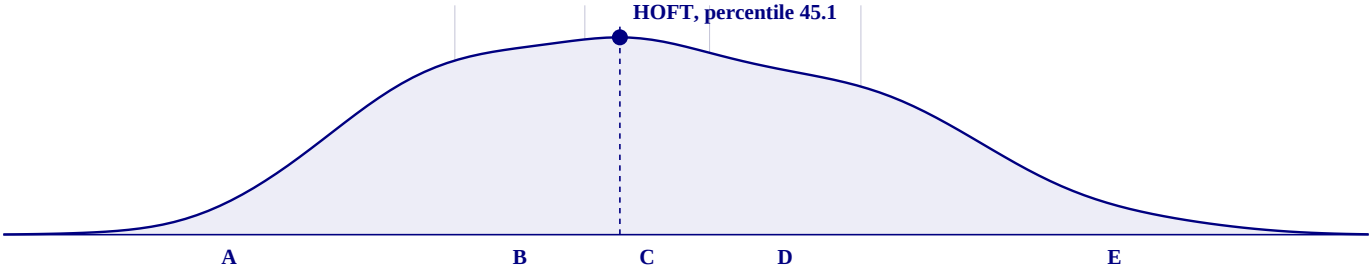
Accruals ratio	(37.7%)	(5.1%)	4.6	523	2026-02-01
Gross margin stability, five years	4.8 pts	1.7 pts	88.2	408	2026-02-01
Solvency, sleeve percentile 13.3					
Twelve-month failure probability	not computable	0.04%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	6.24	2.11	13.8	400	2026-02-01
Net debt to EBITDA	not computable	2.11x			
latest aligned inputs end 2019-02-03; latest annual assets end 2026-02-01					
Interest coverage	not computable	2.57x			
one or more required annual facts are missing					
Current ratio	3.37x	1.56x	12.8	539	2026-02-01
Growth and financing, sleeve percentile 82.3					
Revenue growth, three-year compound	(21.9%)	1.4%	96.5	482	2026-02-01
Free cash flow growth, three-year compound	not computable	8.3%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	12.0%			
NOPAT must exceed $100,000					
Asset growth, three years	not computable	1.7%			
four consecutive annual observations are required					
Net share issuance, one year	0.7%	(0.3%)	68.2	381	2026-04-10

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
197	Bridgford Foods Corp. (BRID)	43.9	C	
198	US Foods Holding Corp. (USFD)	44.0	C	
199	LKQ Corp. (LKQ)	44.4	C	
200	Hershey Co. (HSY)	44.7	C	
201	Cannae Holdings, Inc. (CNNE)	44.7	C	fortress balance sheet
202	Hooker Furnishings Corp. (HOFT)	45.1	C	
203	Herbalife Ltd. (HLF)	45.1	C	
204	Sonic Automotive Inc. (SAH)	45.5	C	
205	Post Holdings, Inc. (POST)	45.5	C	
206	Adient plc (ADNT)	45.5	C	
207	Honest Company, Inc. (HNST)	45.9	C	

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	31.5%	(0.1%)	80
Distance from 52-week high	(28.0%)	(24.0%)	46
EBIT to enterprise value	(10.7%)	4.9%	17

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Free cash flow yield	11.0%	4.4%	80
Book value to price	1.23	0.44	84
Sales to price	2.03	1.45	61
Composite equity issuance, five years	(36.4%)	(16.0%)	13
Relative strength against the sector, log excess return	0.30	(0.01)	82

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-02-01	
Return on assets above zero	fail
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	fail
Gross margin improved	fail
Asset turnover improved	fail
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	40 (10-Q received Sep 11, 2026)
Median daily dollar volume, 63 sessions	$472,346

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	$73.5M	2026-02-01	2026-04-17	10-K	26-001420
2	assets	us-gaap:Assets	$225.9M	2026-02-01	2026-04-17	10-K	26-001420
3	operating income	us-gaap:OperatingIncomeLoss	$52.7M	2019-02-03	2021-04-16	10-K	21-000547
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$51.6M	2019-02-03	2021-04-16	10-K	21-000547
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$11.7M	2019-02-03	2021-04-16	10-K	21-000547
6	total debt	us-gaap:LongTermDebt	$35.5M	2019-02-03	2019-04-19	10-K	19-000568
7	book equity	us-gaap:StockholdersEquity	$263.2M	2019-02-03	2022-04-15	10-K	22-000451
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$11.4M	2019-02-03	2021-04-16	10-K	21-000547
9	total debt	us-gaap:LongTermDebt	$53.4M	2018-01-28	2018-04-13	10-K	18-000692
10	book equity	us-gaap:StockholdersEquity	$229.5M	2018-01-28	2021-04-16	10-K	21-000547
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$30.9M	2018-01-28	2021-04-16	10-K	21-000547
12	net income	us-gaap:NetIncomeLoss	-$27.0M	2026-02-01	2026-04-17	10-K	26-001420
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$18.3M	2026-02-01	2026-04-17	10-K	26-001420
14	assets	us-gaap:Assets	$14.5M	2025-03-31	2025-04-18	10-K	25-000321
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$278.1M	2026-02-01	2026-04-17	10-K	26-001420
16	gross profit	us-gaap:GrossProfit	$78.1M	2025-02-02	2026-04-17	10-K	26-001420
17	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$317.4M	2025-02-02	2026-04-17	10-K	26-001420
18	gross profit	us-gaap:GrossProfit	$94.0M	2024-01-28	2026-04-17	10-K	26-001420
19	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$344.6M	2024-01-28	2026-04-17	10-K	26-001420
20	gross profit	us-gaap:GrossProfit	$93.3M	2023-01-29	2025-04-18	10-K	25-000321
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$583.1M	2023-01-29	2025-04-18	10-K	25-000321
22	gross profit	us-gaap:GrossProfit	$101.7M	2022-01-30	2024-04-12	10-K	24-000378
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$593.6M	2022-01-30	2024-04-12	10-K	24-000378
24	current assets	us-gaap:AssetsCurrent	$92.9M	2026-02-01	2026-04-17	10-K	26-001420
25	current liabilities	us-gaap:LiabilitiesCurrent	$27.6M	2026-02-01	2026-04-17	10-K	26-001420

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26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$117.6M	2026-02-01	2026-04-17	10-K	26-001420
27	operating income	us-gaap:OperatingIncomeLoss	-$16.5M	2026-02-01	2026-04-17	10-K	26-001420
28	book equity	us-gaap:StockholdersEquity	$169.2M	2026-02-01	2026-04-17	10-K	26-001420
29	liabilities	us-gaap:Liabilities	$56.6M	2026-02-01	2026-04-17	10-K	26-001420
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$7.4M	2019-02-03	2021-04-16	10-K	21-000547
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.2M	2026-02-01	2026-04-17	10-K	26-001420
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$23.0M	2025-02-02	2025-04-18	10-K	25-000321
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.1M	2025-02-02	2026-04-17	10-K	26-001420
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$55.5M	2024-01-28	2025-04-18	10-K	25-000321
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$5.2M	2024-01-28	2026-04-17	10-K	26-001420
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$21.7M	2023-01-29	2025-04-18	10-K	25-000321
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.2M	2023-01-29	2025-04-18	10-K	25-000321
38	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$7.1M	2026-02-01	2026-04-17	10-K	26-001420
39	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$17.0M	2026-02-01	2026-04-17	10-K	26-001420
40	income tax	us-gaap:IncomeTaxExpenseBenefit	-$4.3M	2026-02-01	2026-04-17	10-K	26-001420
41	current assets	us-gaap:AssetsCurrent	$141.1M	2025-02-02	2026-04-17	10-K	26-001420
42	current liabilities	us-gaap:LiabilitiesCurrent	$40.0M	2025-02-02	2026-04-17	10-K	26-001420
43	assets	us-gaap:Assets	$313.9M	2025-02-02	2026-04-17	10-K	26-001420
44	assets	us-gaap:Assets	$343.6M	2024-01-28	2025-04-18	10-K	25-000321
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,779,729	2026-04-10	2026-04-17	10-K	26-001420
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,702,685	2025-04-07	2025-04-18	10-K	25-000321

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