# Ooma Inc.

**OOMA**

NYSE; business equipment; SIC 7374, Services-Computer Processing & Data Preparation; CIK 0001327688

**B**

**second fifth of 496 graded peers in business equipment**

rank 111 of 496; percentile 22.2; sampling error 2.2 points; lower is stronger

A B C D E

**B, the elk**



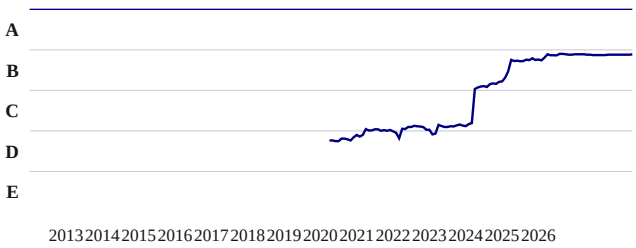
| Scoreboard | |
|---|---|
| **Profitability** | A/B<br>percentile 19.9 |
| **Solvency** | D<br>percentile 73.3 |
| **Growth and financing** | B<br>percentile 26.9 |
| **Reliability** | 0.87 AUC<br>filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025 |
| **Peer failure rate** | 1.03% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $120M to $591M assets<br>total assets $227.5M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress |
| **Inputs computable** | 9 of 14 |
| **Graded from** | filings received through Apr 3, 2026<br>202 days before the rescan; latest periodic filing 10-Q received Sep 4, 2026 |
| **Last close** | $19.86<br>2026-10-21; market equity $548.0M; 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 3, 2026*

Ooma provides leading communications services and related technologies that bring unique features, ease of use, and affordability to business and residential customers through our smart software-as-a-service ("SaaS") and unified communications platforms. For businesses of all sizes, we deliver advanced voice and collaboration features including messaging, intelligent virtual attendants and video conferencing to help them run more efficiently. Ooma's all-in-one replacement solution for analog phone lines helps businesses maintain mission-critical systems by moving connectivity to the cloud.

## 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 19.9** | | | | | | |
| Gross profitability | 73.5% | 28.6% | | 5.0 | 556 | 2026-01-31 |
| Return on invested capital | not computable | 11.2% | | | | |
| *pretax income must exceed the validity floor and imply a 0%-100% tax rate* | | | | | | |

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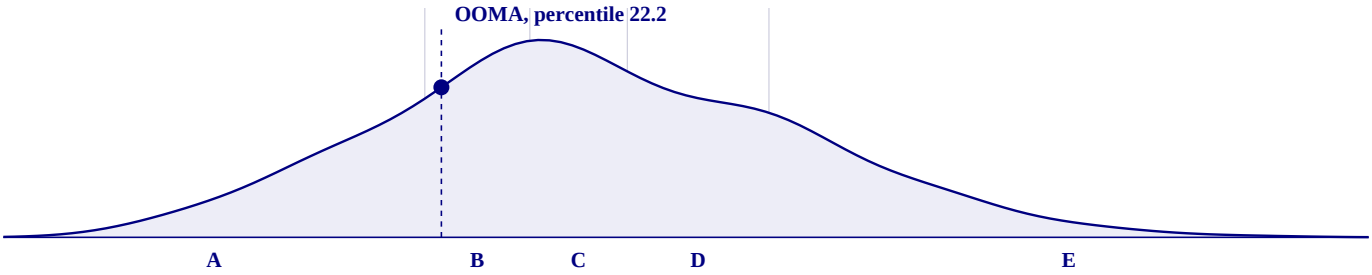
| | | | | | | |
|---|---|---|---|---|---|---|
| Accruals ratio | (11.3%) | (7.3%) | | 37.7 | 616 | 2026-01-31 |
| Gross margin stability, five years | 1.0 pts | 2.3 pts | | 16.9 | 426 | 2026-01-31 |
| **Solvency, sleeve percentile 73.3** | | | | | | |
| Twelve-month failure probability | not computable | 0.05% | | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | | |
| Altman Z double-prime | (1.21) | 2.15 | | 62.8 | 563 | 2026-01-31 |
| Net debt to EBITDA | not computable | 1.11x | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Interest coverage | not computable | 3.77x | | | | |
| *interest expense must exceed $100,000* | | | | | | |
| Current ratio | 0.93x | 2.01x | | 83.8 | 660 | 2026-01-31 |
| **Growth and financing, sleeve percentile 26.9** | | | | | | |
| Revenue growth, three-year compound | 8.2% | 6.4% | | 44.7 | 536 | 2026-01-31 |
| Free cash flow growth, three-year compound | 83.7% | 18.1% | | 9.9 | 264 | 2026-01-31 |
| Reinvestment rate | not computable | 14.3% | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Asset growth, three years | 20.2% | 5.0% | | 17.5 | 561 | 2026-01-31 |
| Net share issuance, one year | (0.4%) | 0.5% | | 35.5 | 409 | 2026-03-31 |

## Among 496 peers

*business equipment; 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 |
|---|---|---|---|---|
| 106 | Novanta Inc. (NOVT) | 21.3 | A/B | fortress balance sheet |
| 107 | Novanta Inc. (NOVTU) | 21.3 | A/B | fortress balance sheet |
| 108 | Tenable Holdings, Inc. (TENB) | 21.6 | A/B | |
| 109 | ReposiTrak, Inc. (TRAK) | 21.8 | A/B | |
| 110 | Vicor Corp. (VICR) | 22.0 | A/B | |
| 111 | Ooma Inc. (OOMA) | 22.2 | B | |
| 112 | Cognex Corp. (CGNX) | 22.4 | B | |
| 113 | ServiceNow, Inc. (NOW) | 22.6 | B | |
| 114 | Eos Energy Enterprises, Inc. (EOSE) | 22.9 | B | |
| 115 | Eos Energy Enterprises, Inc. (EOSEW) | 22.9 | B | |
| 116 | Transcat Inc. (TRNS) | 23.2 | B | |

## What the price implies

*at the 2026-10-21 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 88.8% | 2.2% | 89 |
| Distance from 52-week high | (15.1%) | (30.2%) | 73 |
| EBIT to enterprise value | 0.7% | 1.5% | 44 |
| Free cash flow yield | 4.0% | 2.7% | 62 |
| Book value to price | 0.18 | 0.25 | 39 |

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| | | | |
|---|---|---|---|
| Sales to price | 0.50 | 0.32 | 62 |
| Composite equity issuance, five years | 17.4% | 4.2% | 68 |
| Relative strength against the sector, log excess return | 0.35 | (0.26) | 89 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 7 of 9, period end 2026-01-31** | |
| 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 | fail |
| No new shares issued | pass |
| Gross margin improved | pass |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $17.5M |
| Operating cash flow, four quarters | $37.1M |
| Months of runway | not finite |
| Days since last periodic filing | 48 (10-Q received Sep 4, 2026) |
| Median daily dollar volume, 63 sessions | $8.4M |

## 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 | $167.2M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 2 | assets | us-gaap:Assets | $227.5M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $4.3M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $4.4M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | -$2.1M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 6 | total debt | us-gaap:LongTermDebt | $51.5M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 7 | book equity | us-gaap:StockholdersEquity | $92.9M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $20.1M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 9 | total debt | us-gaap:LongTermDebt | $0 | 2025-01-31 | 2025-04-01 | 10-K | 25-048692 |
| 10 | book equity | us-gaap:StockholdersEquity | $85.3M | 2025-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $17.9M | 2025-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 12 | net income | us-gaap:NetIncomeLoss | $6.5M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $27.7M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 14 | assets | us-gaap:Assets | $149.2M | 2025-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $273.6M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 16 | gross profit | us-gaap:GrossProfit | $156.0M | 2025-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $256.9M | 2025-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 18 | gross profit | us-gaap:GrossProfit | $147.2M | 2024-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $236.7M | 2024-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 20 | gross profit | us-gaap:GrossProfit | $137.6M | 2023-01-31 | 2025-04-01 | 10-K | 25-048692 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $216.2M | 2023-01-31 | 2025-04-01 | 10-K | 25-048692 |
| 22 | gross profit | us-gaap:GrossProfit | $118.4M | 2022-01-31 | 2024-04-02 | 10-K | 24-040394 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $192.3M | 2022-01-31 | 2024-04-02 | 10-K | 24-040394 |
| 24 | current assets | us-gaap:AssetsCurrent | $66.7M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $71.7M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | -$133.7M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 27 | liabilities | us-gaap:Liabilities | $134.6M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 28 | operating income | us-gaap:OperatingIncomeLoss | -$13.3M | 2017-01-31 | 2019-04-03 | 10-K | 19-010638 |
| 29 | interest expense | us-gaap:InterestExpense | $18,000 | 2017-01-31 | 2017-04-11 | 10-K | 17-006395 |
| 30 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $5.6M | 2026-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 31 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $26.6M | 2025-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 32 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $6.4M | 2025-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 33 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $12.3M | 2024-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 34 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $6.2M | 2024-01-31 | 2026-04-03 | 10-K | 26-000009 |
| 35 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $8.8M | 2023-01-31 | 2025-04-01 | 10-K | 25-048692 |
| 36 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $5.2M | 2023-01-31 | 2025-04-01 | 10-K | 25-048692 |
| 37 | assets | us-gaap:Assets | $159.3M | 2024-01-31 | 2025-04-01 | 10-K | 25-048692 |
| 38 | assets | us-gaap:Assets | $131.0M | 2023-01-31 | 2024-04-02 | 10-K | 24-040394 |
| 39 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 27,500,000 | 2026-03-31 | 2026-04-03 | 10-K | 26-000009 |
| 40 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 27,600,000 | 2025-03-31 | 2025-04-01 | 10-K | 25-048692 |

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