Regis Corp.

RGS

Nasdaq; shops; SIC 7200, Services-Personal Services; CIK 0000716643

E

weakest fifth of 256 graded peers in shops

rank 254 of 256; percentile 99.2; sampling error 2.9 points; lower is stronger

A B C D E

E, the bear



Scoreboard	
Profitability	E percentile 83.9
Solvency	D percentile 73.2
Growth and financing	D percentile 74.7
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 $547.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	7 of 14
Graded from	filings received through Sep 1, 2026 51 days before the rescan; latest periodic filing 10-K received Sep 1, 2026
Last close	$28.70 2026-10-12; market equity $71.7M; 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 1, 2026

Regis Corporation franchises and owns hair care salons. The Company is listed on the Nasdaq Global Market under the ticker symbol "RGS." Unless the context otherwise provides, when we refer to the "Company," "we," "our," or "us," we are referring to Regis Corporation, the Registrant, together with its subsidiaries. As of June 30, 2026, the Company franchised or owned 3,712 locations, primarily in North America. The Company's locations consist of 3,448 franchised salons and 264 company-owned salons. Each of the Company's salon concepts generally offers similar salon products and hair services.

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 83.9						
Gross profitability	not computable	42.6%				
latest aligned inputs end 2012-06-30; latest annual assets end 2026-06-30						
Return on invested capital	not computable	10.9%				

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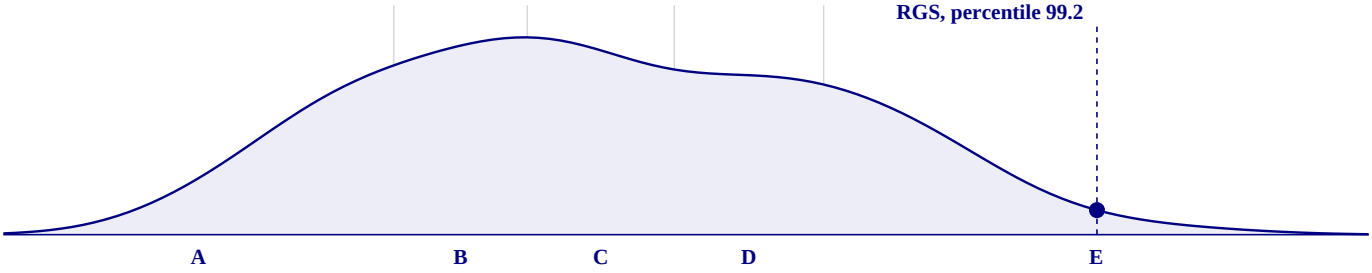
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Accruals ratio	(1.1%)	(4.9%)	83.9	286	2026-06-30	
Gross margin stability, five years	not computable	1.2 pts				
five annual gross margins are required; found 2						
Solvency, sleeve percentile 73.2						
Twelve-month failure probability	not computable	0.04%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	1.11	1.93	56.3	207	2026-06-30	
Net debt to EBITDA	3.22x	1.84x	74.7	100	2026-06-30	
Interest coverage	not computable	2.28x				
latest aligned inputs end 2024-06-30; latest annual assets end 2026-06-30						
Current ratio	0.62x	1.38x	88.4	294	2026-06-30	
Growth and financing, sleeve percentile 74.7						
Revenue growth, three-year compound	(1.3%)	1.6%	63.9	267	2026-06-30	
Free cash flow growth, three-year compound	not computable	5.6%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	not computable	7.3%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	(3.4%)	3.4%	75.1	270	2026-06-30	
Net share issuance, one year	2.6%	(0.6%)	85.1	209	2026-08-25	

Among 256 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
249	Cato Corp. (CATO)	97.3	E	
250	Rent the Runway, Inc. (RENT)	97.6	E	
251	Digital Brands Group, Inc. (DBGI)	98.0	E	dilution, short runway, late filer
252	LiveOne, Inc. (LVO)	98.4	E	dilution, late filer
253	iPower Inc. (IPW)	98.8	E	dilution, late filer, fortress balance sheet
254	Regis Corp. (RGS)	99.2	E	
255	Playboy, Inc. (PLBY)	99.6	E	
256	Hydrofarm Holdings Group, Inc. (HYFM)	100.0	E	fortress balance sheet

What the price implies

at the 2026-10-12 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(6.3%)	0.6%	41
Distance from 52-week high	(3.1%)	(21.0%)	92
EBIT to enterprise value	14.8%	5.4%	94
Free cash flow yield	15.1%	4.1%	89
Book value to price	2.63	0.35	96

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Sales to price	3.04	1.70	68
Composite equity issuance, five years	33.3%	(16.8%)	92
Relative strength against the sector, log excess return	(0.04)	0.03	41

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	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$26.0M
Operating cash flow, four quarters	$13.1M
Months of runway	not finite
Days since last periodic filing	51 (10-K received Sep 1, 2026)
Median daily dollar volume, 63 sessions	$132,981

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	$998.4M	2012-06-30	2012-08-29	10-K	12-008600
2	assets	us-gaap:Assets	$1.6B	2012-06-30	2013-08-27	10-K	13-008674
3	operating income	us-gaap:OperatingIncomeLoss	$24.4M	2026-06-30	2026-09-01	10-K	26-000031
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$5.9M	2026-06-30	2026-09-01	10-K	26-000031
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-$1.1M	2026-06-30	2026-09-01	10-K	26-000031
6	total debt	us-gaap:LongTermDebt	$117.1M	2026-06-30	2026-09-01	10-K	26-000031
7	book equity	us-gaap:StockholdersEquity	$193.8M	2026-06-30	2026-09-01	10-K	26-000031
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$26.0M	2026-06-30	2026-09-01	10-K	26-000031
9	total debt	us-gaap:LongTermDebt	$110.8M	2025-06-30	2026-09-01	10-K	26-000031
10	book equity	us-gaap:StockholdersEquity	$185.6M	2025-06-30	2026-09-01	10-K	26-000031
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$17.0M	2025-06-30	2026-09-01	10-K	26-000031
12	net income	us-gaap:NetIncomeLoss	$6.9M	2026-06-30	2026-09-01	10-K	26-000031
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$13.1M	2026-06-30	2026-09-01	10-K	26-000031
14	assets	us-gaap:Assets	$547.2M	2026-06-30	2026-09-01	10-K	26-000031
15	assets	us-gaap:Assets	$599.0M	2025-06-30	2026-09-01	10-K	26-000031
16	current assets	us-gaap:AssetsCurrent	$57.4M	2026-06-30	2026-09-01	10-K	26-000031
17	current liabilities	us-gaap:LiabilitiesCurrent	$91.9M	2026-06-30	2026-09-01	10-K	26-000031
18	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$108.9M	2026-06-30	2026-09-01	10-K	26-000031
19	liabilities	us-gaap:Liabilities	$353.4M	2026-06-30	2026-09-01	10-K	26-000031
20	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$3.9M	2026-06-30	2026-09-01	10-K	26-000031
21	operating income	us-gaap:OperatingIncomeLoss	$20.9M	2024-06-30	2026-09-01	10-K	26-000031
22	interest expense	us-gaap:InterestAndDebtExpense	$25.4M	2024-06-30	2024-08-28	10-K	24-000031
23	revenue	us-gaap:Revenues	$224.5M	2026-06-30	2026-09-01	10-K	26-000031
24	revenue	us-gaap:Revenues	$210.1M	2025-06-30	2026-09-01	10-K	26-000031
25	revenue	us-gaap:Revenues	$203.0M	2024-06-30	2026-09-01	10-K	26-000031
26	revenue	us-gaap:Revenues	$233.3M	2023-06-30	2025-09-03	10-K	25-000031
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.0M	2026-06-30	2026-09-01	10-K	26-000031

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28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$13.7M	2025-06-30	2026-09-01	10-K	26-000031
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.3M	2025-06-30	2026-09-01	10-K	26-000031
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$2.0M	2024-06-30	2026-09-01	10-K	26-000031
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$376,000	2024-06-30	2026-09-01	10-K	26-000031
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$7.9M	2023-06-30	2025-09-03	10-K	25-000031
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$481,000	2023-06-30	2025-09-03	10-K	25-000031
34	current assets	us-gaap:AssetsCurrent	$50.5M	2025-06-30	2026-09-01	10-K	26-000031
35	current liabilities	us-gaap:LiabilitiesCurrent	$101.7M	2025-06-30	2026-09-01	10-K	26-000031
36	assets	us-gaap:Assets	$530.5M	2024-06-30	2025-09-03	10-K	25-000031
37	assets	us-gaap:Assets	$607.4M	2023-06-30	2024-08-28	10-K	24-000031
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	2,498,778	2026-08-25	2026-09-01	10-K	26-000031
39	shares outstanding	dei:EntityCommonStockSharesOutstanding	2,435,981	2025-08-29	2025-09-03	10-K	25-000031

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