Vince Holding Corp.

VNCE

Nasdaq; shops; SIC 5600, Retail-Apparel & Accessory Stores; CIK 0001579157

D

fourth fifth of 256 graded peers in shops

rank 172 of 256; percentile 67.1; sampling error 2.9 points; lower is stronger

A B C D E

D, the sloth



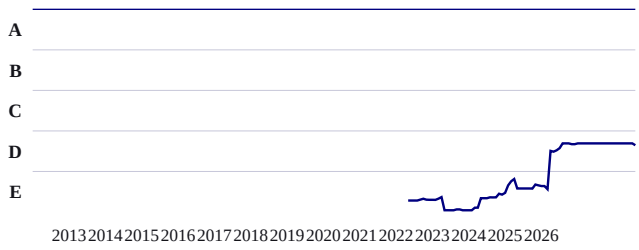
Scoreboard	
Profitability	D percentile 67.2
Solvency	C percentile 46.4
Growth and financing	C percentile 55.5
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $225.0M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	9 of 14
Graded from	filings received through Apr 16, 2026 189 days before the rescan; latest periodic filing 10-Q received Sep 11, 2026
Last close	$11.73 2026-10-21; market equity $151.8M; 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

We are a global retail company that operates the Vince brand women's and men's ready to wear business. Previously, the Company also owned and operated the Rebecca Taylor and Parker brands until the sale of the respective intellectual property was completed, as discussed below under "Recent Developments". We serve our customers through a variety of channels that reinforce the brand images. We have a select number of wholesale partners who account for a significant portion of our net sales. In fiscal 2025 and fiscal 2024, sales to one wholesale partner, Nordstrom Inc., accounted for more than ten percent of the Company's net sales.

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 67.2						
Gross profitability	66.3%	42.6%		20.5	240	2026-01-31
Return on invested capital	not computable	10.9%				

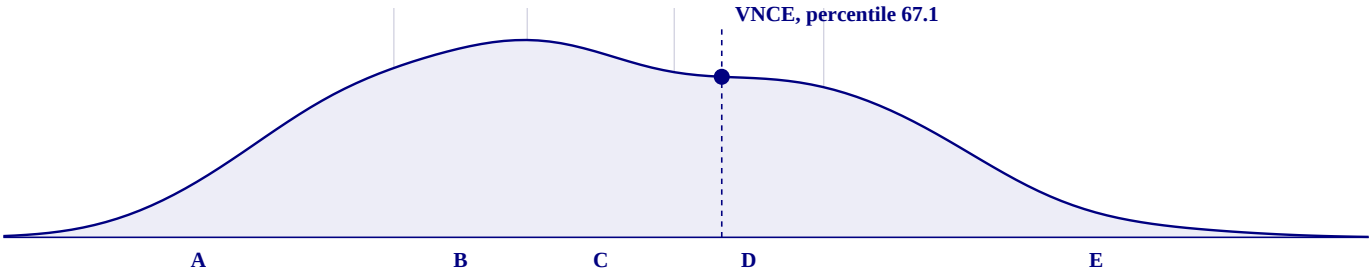
one or more required annual facts are missing

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Accruals ratio	1.5%	(4.9%)	92.6	286	2026-01-31
Gross margin stability, five years	4.0 pts	1.2 pts	88.5	218	2026-01-31
Solvency, sleeve percentile 46.4					
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	1.93			
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	2.70x	2.28x	48.4	63	2026-01-31
Current ratio	1.49x	1.38x	44.4	294	2026-01-31
Growth and financing, sleeve percentile 55.5					
Revenue growth, three-year compound	(5.7%)	1.6%	78.2	267	2026-01-31
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	190.3%	7.3%	2.6	152	2026-01-31
Asset growth, three years	(9.5%)	3.4%	85.9	270	2026-01-31
Net share issuance, one year	0.03%	(0.6%)	55.3	209	2026-03-31

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
167	Duluth Holdings Inc. (DLTH)	65.1	D	
168	A.K.A. Brands Holding Corp. (AKA)	65.5	D	
169	O Reilly Automotive Inc. (ORLY)	65.9	D	
170	AerSale Corp. (ASLE)	66.3	D	short runway, fortress balance sheet
171	World Kinect Corp. (WKC)	66.7	D	
172	Vince Holding Corp. (VNCE)	67.1	D	
173	Star Group, L.P. (SGU)	67.5	D	
174	Aspen Aerogels Inc. (ASPN)	67.8	D	fortress balance sheet
175	Arko Corp. (ARKO)	68.2	D	
176	Seaboard Corp. (SEB)	68.6	D	
177	Bloomin' Brands, Inc. (BLMN)	69.0	D	

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	104.8%	0.6%	97
Distance from 52-week high	(12.0%)	(21.0%)	67
EBIT to enterprise value	1.7%	5.4%	20
Free cash flow yield	(0.9%)	4.1%	19
Book value to price	0.39	0.35	53

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Sales to price	1.97	1.70	56
Composite equity issuance, five years	9.2%	(16.8%)	88
Relative strength against the sector, log excess return	0.74	0.03	97

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 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	fail
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	$1.0M
Operating cash flow, four quarters	$19.8M
Months of runway	not finite
Days since last periodic filing	41 (10-Q received Sep 11, 2026)
Median daily dollar volume, 63 sessions	$1.3M

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	$149.1M	2026-01-31	2026-04-16	10-K	26-158986
2	assets	us-gaap:Assets	$225.0M	2026-01-31	2026-04-16	10-K	26-158986
3	net income	us-gaap:NetIncomeLoss	$6.4M	2026-01-31	2026-04-16	10-K	26-158986
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.0M	2026-01-31	2026-04-16	10-K	26-158986
5	assets	us-gaap:Assets	$222.7M	2025-02-01	2026-04-16	10-K	26-158986
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$300.0M	2026-01-31	2026-04-16	10-K	26-158986
7	gross profit	us-gaap:GrossProfit	$145.2M	2025-02-01	2026-04-16	10-K	26-158986
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$293.5M	2025-02-01	2026-04-16	10-K	26-158986
9	gross profit	us-gaap:GrossProfit	$133.3M	2024-02-03	2025-05-02	10-K	25-062847
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$292.9M	2024-02-03	2025-05-02	10-K	25-062847
11	gross profit	us-gaap:GrossProfit	$138.0M	2023-01-28	2024-05-02	10-K	24-052254
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$357.4M	2023-01-28	2024-05-02	10-K	24-052254
13	gross profit	us-gaap:GrossProfit	$146.6M	2022-01-29	2023-04-28	10-K	23-015755
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$322.7M	2022-01-29	2023-04-28	10-K	23-015755
15	operating income	us-gaap:OperatingIncomeLoss	$9.2M	2026-01-31	2026-04-16	10-K	26-158986
16	interest expense	us-gaap:InterestExpense	$3.4M	2026-01-31	2026-04-16	10-K	26-158986
17	current assets	us-gaap:AssetsCurrent	$101.0M	2026-01-31	2026-04-16	10-K	26-158986
18	current liabilities	us-gaap:LiabilitiesCurrent	$67.9M	2026-01-31	2026-04-16	10-K	26-158986
19	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$4.3M	2026-01-31	2026-04-16	10-K	26-158986
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$22.1M	2025-02-01	2026-04-16	10-K	26-158986
21	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$4.2M	2025-02-01	2026-04-16	10-K	26-158986
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.6M	2024-02-03	2025-05-02	10-K	25-062847
23	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.5M	2024-02-03	2025-05-02	10-K	25-062847
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$19.3M	2023-01-28	2024-05-02	10-K	24-052254
25	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$2.8M	2023-01-28	2024-05-02	10-K	24-052254
26	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$2.9M	2026-01-31	2026-04-16	10-K	26-158986
27	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$7.4M	2026-01-31	2026-04-16	10-K	26-158986

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28	income tax	us-gaap:IncomeTaxExpenseBenefit	$2.6M	2026-01-31	2026-04-16	10-K	26-158986
29	current assets	us-gaap:AssetsCurrent	$96.6M	2025-02-01	2026-04-16	10-K	26-158986
30	current liabilities	us-gaap:LiabilitiesCurrent	$73.5M	2025-02-01	2026-04-16	10-K	26-158986
31	assets	us-gaap:Assets	$225.1M	2024-02-03	2025-05-02	10-K	25-062847
32	assets	us-gaap:Assets	$303.3M	2023-01-28	2024-05-02	10-K	24-052254
33	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,847,294	2026-03-31	2026-04-16	10-K	26-158986
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,843,067	2025-04-21	2025-05-02	10-K	25-062847

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