Agilysys Inc.

AGYS

Nasdaq; business equipment; SIC 7373, Services-Computer Integrated Systems Design; CIK 0000078749

A

strongest fifth of 497 graded peers in business equipment

rank 21 of 497; percentile 4.0; sampling error 2.2 points; lower is stronger

A B C D E

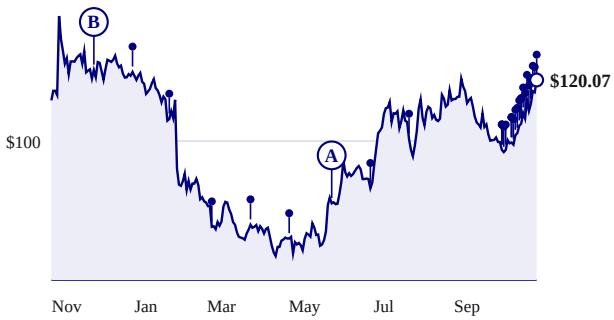
A, the bull



Scoreboard

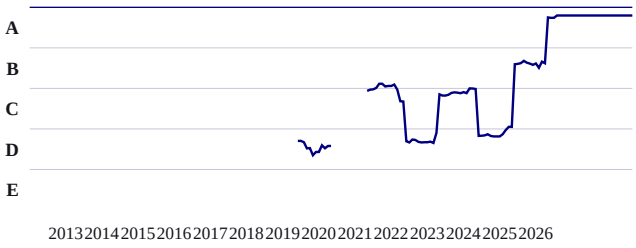
Profitability	B percentile 29.9
Solvency	B percentile 35.0
Growth and financing	B percentile 25.1
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $481.5M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	10 of 14
Graded from	filings received through May 21, 2026 155 days before the rescan; latest periodic filing 10-Q received Jul 27, 2026
Last close	$119.64 2026-10-22; market equity $3.4B; 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 May 21, 2026

Agilysys has been a leader in hospitality software for more than 45 years, delivering innovative cloud-native SaaS and on-premise solutions for hotels, multi-amenity resorts, cruise lines, casinos, corporate foodservice management, restaurants, universities, stadiums, and healthcare facilities. The Company's software solutions include point-of-sale (POS), property management (PMS), inventory and procurement, payments, and related applications that manage and enhance the entire guest journey. Agilysys is also known for its world-class customer-centric service.

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

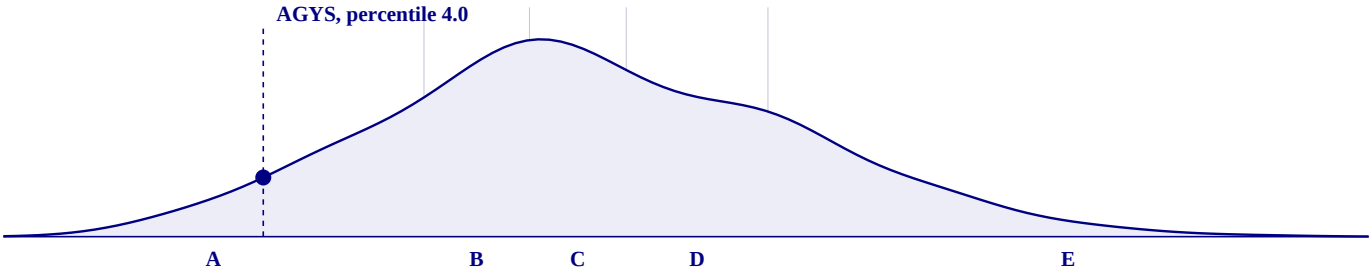
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 29.9						
Gross profitability	41.5%	28.6%		25.3	558	2026-03-31
Return on invested capital	not computable	11.2%				
one or more required annual facts are missing						

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Accruals ratio	(6.8%)	(7.4%)	55.2	621	2026-03-31
Gross margin stability, five years	0.8 pts	2.3 pts	9.2	427	2026-03-31
Solvency, sleeve percentile 35.0					
Twelve-month failure probability	not computable	0.05%			
four consecutive discrete net-income quarters are required; found 4					
Altman Z double-prime	not computable	2.16			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.11x			
one or more required annual facts are missing					
Interest coverage	87.25x	3.77x	5.7	88	2026-03-31
Current ratio	1.47x	2.01x	64.2	665	2026-03-31
Growth and financing, sleeve percentile 25.1					
Revenue growth, three-year compound	17.3%	6.4%	22.8	537	2026-03-31
Free cash flow growth, three-year compound	35.8%	18.0%	26.1	265	2026-03-31
Reinvestment rate	129.2%	14.3%	16.1	224	2026-03-31
Asset growth, three years	25.6%	5.0%	12.3	562	2026-03-31
Net share issuance, one year	0.5%	0.5%	47.9	410	2026-05-08

Among 497 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
16	Toast, Inc. (TOST)	3.0	A	
17	Gitlab Inc. (GTLB)	3.2	A	late filer
18	Arista Networks, Inc. (ANET)	3.4	A	
19	Five9, Inc. (FIVN)	3.6	A	
20	Optex Systems Holdings Inc. (OPXS)	3.8	A	
21	Agilysys Inc. (AGYS)	4.0	A	
22	Micron Technology Inc. (MU)	4.2	A	fortress balance sheet
23	EverQuote, Inc. (EVER)	4.4	A	
24	Aeluma, Inc. (ALMU)	4.6	A	fortress balance sheet
25	A10 Networks, Inc. (ATEN)	4.8	A	
26	Veeva Systems Inc. (VEEV)	5.0	A	

What the price implies

at the 2026-10-22 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	10.6%	2.2%	57
Distance from 52-week high	(14.9%)	(33.0%)	73
EBIT to enterprise value	not computable	1.5%	
Free cash flow yield	2.0%	2.8%	41
Book value to price	0.10	0.26	24
Sales to price	0.09	0.31	17

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Composite equity issuance, five years	16.6%	4.2%	67
Relative strength against the sector, log excess return	(0.18)	(0.26)	57

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 of 9, period end 2026-03-31	
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	pass
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$123.7M
Operating cash flow, four quarters	$82.2M
Months of runway	not finite
Days since last periodic filing	88 (10-Q received Jul 27, 2026)
Median daily dollar volume, 63 sessions	$25.5M

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	$199.9M	2026-03-31	2026-05-21	10-K	26-234423
2	assets	us-gaap:Assets	$481.5M	2026-03-31	2026-05-21	10-K	26-234423
3	net income	us-gaap:NetIncomeLoss	$38.8M	2026-03-31	2026-05-21	10-K	26-234423
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$70.0M	2026-03-31	2026-05-21	10-K	26-234423
5	assets	us-gaap:Assets	$434.4M	2025-03-31	2026-05-21	10-K	26-234423
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$319.3M	2026-03-31	2026-05-21	10-K	26-234423
7	gross profit	us-gaap:GrossProfit	$172.0M	2025-03-31	2026-05-21	10-K	26-234423
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$275.6M	2025-03-31	2026-05-21	10-K	26-234423
9	gross profit	us-gaap:GrossProfit	$144.3M	2024-03-31	2026-05-21	10-K	26-234423
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$237.5M	2024-03-31	2026-05-21	10-K	26-234423
11	gross profit	us-gaap:GrossProfit	$120.8M	2023-03-31	2025-05-23	10-K	25-076527
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$198.1M	2023-03-31	2025-05-23	10-K	25-076527
13	gross profit	us-gaap:GrossProfit	$101.5M	2022-03-31	2024-05-22	10-K	24-063222
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$162.6M	2022-03-31	2024-05-22	10-K	24-063222
15	operating income	us-gaap:OperatingIncomeLoss	$43.0M	2026-03-31	2026-05-21	10-K	26-234423
16	interest expense	us-gaap:InterestExpense	$493,000	2026-03-31	2026-05-21	10-K	26-234423
17	current assets	us-gaap:AssetsCurrent	$184.1M	2026-03-31	2026-05-21	10-K	26-234423
18	current liabilities	us-gaap:LiabilitiesCurrent	$125.1M	2026-03-31	2026-05-21	10-K	26-234423
19	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.8M	2026-03-31	2026-05-21	10-K	26-234423
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$55.1M	2025-03-31	2026-05-21	10-K	26-234423
21	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$2.8M	2025-03-31	2026-05-21	10-K	26-234423
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$48.2M	2024-03-31	2026-05-21	10-K	26-234423
23	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$8.1M	2024-03-31	2026-05-21	10-K	26-234423
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$34.5M	2023-03-31	2025-05-23	10-K	25-076527
25	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$7.2M	2023-03-31	2025-05-23	10-K	25-076527
26	depreciation amortization	us-gaap:Depreciation	$3.8M	2026-03-31	2026-05-21	10-K	26-234423
27	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$48.4M	2026-03-31	2026-05-21	10-K	26-234423
28	income tax	us-gaap:IncomeTaxExpenseBenefit	$9.6M	2026-03-31	2026-05-21	10-K	26-234423
29	current assets	us-gaap:AssetsCurrent	$123.5M	2025-03-31	2026-05-21	10-K	26-234423

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30	current liabilities	us-gaap:LiabilitiesCurrent	$111.0M	2025-03-31	2026-05-21	10-K	26-234423
31	assets	us-gaap:Assets	$350.4M	2024-03-31	2025-05-23	10-K	25-076527
32	assets	us-gaap:Assets	$243.0M	2023-03-31	2024-05-22	10-K	24-063222
33	shares outstanding	dei:EntityCommonStockSharesOutstanding	28,166,629	2026-05-08	2026-05-21	10-K	26-234423
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	28,017,312	2025-05-16	2025-05-23	10-K	25-076527

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