Ollie's Bargain Outlet Holdings, Inc.

OLLI

Nasdaq; shops; SIC 5331, Retail-Variety Stores; CIK 0001639300

A

strongest fifth of 257 graded peers in shops

rank 34 of 257; percentile 12.9; sampling error 2.9 points; lower is stronger

A B C D E

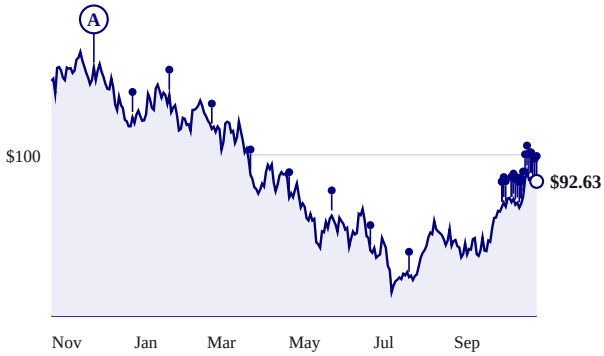
A, the bull



Scoreboard

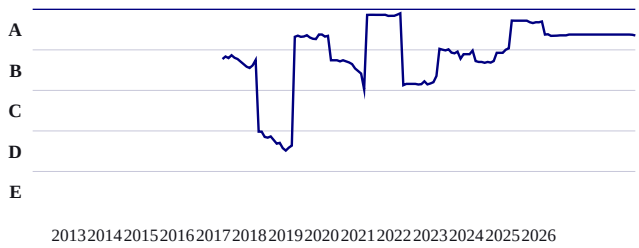
Profitability	C/D percentile 57.8
Solvency	A percentile 13.5
Growth and financing	B percentile 33.0
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $3.0B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	12 of 14
Graded from	filings received through Mar 19, 2026 218 days before the rescan; latest periodic filing 10-Q received Sep 2, 2026
Last close	$92.61 2026-10-22; market equity $5.5B; 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 Mar 19, 2026

We may not anticipate all of the challenges imposed by the expansion of our business operations into new geographic markets. Some new stores may be located in areas with different competitive and market conditions, customer demographics and tastes, and discretionary spending patterns than our existing markets. We may face a higher cost of entry, difficulties attracting labor, alternative customer demands, reduced brand recognition, and minimal operating experience in these geographic markets.

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 57.8						
Gross profitability	36.3%	42.9%		57.1	241	2026-01-31
Return on invested capital	14.5%	10.9%		36.1	84	2026-01-31
Accruals ratio	(2.0%)	(4.9%)		79.7	287	2026-01-31
Gross margin stability, five years	1.7 pts	1.2 pts		58.3	219	2026-01-31

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Solvency, sleeve percentile 13.5						
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	5.56	1.93	13.0	208	2026-01-31	
Net debt to EBITDA	(0.73x)	1.84x	6.1	100	2026-01-31	
Interest coverage	not computable	2.28x				
latest aligned inputs end 2016-01-30; latest annual assets end 2026-01-31						
Current ratio	2.41x	1.38x	21.4	295	2026-01-31	
Growth and financing, sleeve percentile 33.0						
Revenue growth, three-year compound	13.2%	1.5%	9.7	268	2026-01-31	
Free cash flow growth, three-year compound	45.9%	5.5%	13.0	147	2026-01-31	
Reinvestment rate	(35.0%)	8.4%	81.5	152	2026-01-31	
Asset growth, three years	13.1%	3.3%	11.9	271	2026-01-31	
Net share issuance, one year	(0.5%)	(0.6%)	49.0	209	2026-03-12	

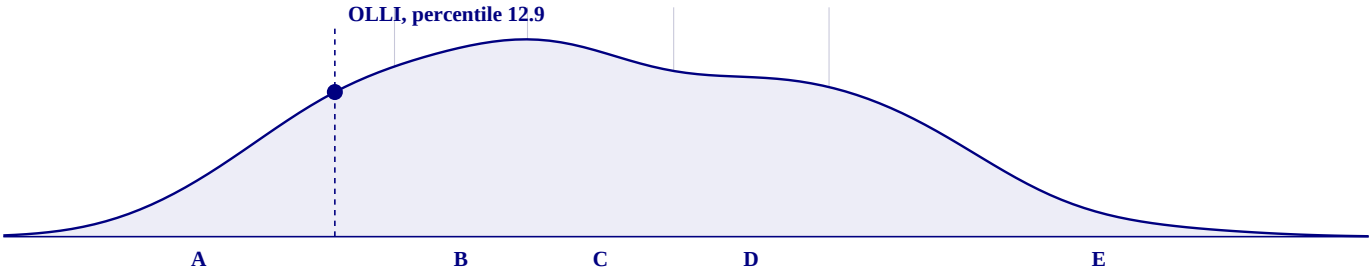
Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Fortress balance sheet	cash minus debt is 258,706,000 USD; Altman Z is not used

Among 257 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
29	Lovesac Co. (LOVE)	10.9	A	fortress balance sheet
30	Dutch Bros Inc. (BROS)	11.3	A	fortress balance sheet
31	Watsco Inc. (WSO)	11.9	A	fortress balance sheet
32	Watsco Inc. (WSO-B)	11.9	A	fortress balance sheet
33	Unifirst Corp. (UNF)	12.5	A	late filer, fortress balance sheet
34	Ollie's Bargain Outlet Holdings, Inc. (OLLI)	12.9	A	fortress balance sheet
35	Village Super Market Inc. (VLGEA)	13.3	A	fortress balance sheet
36	Richardson Electronics, Ltd. (RELL)	13.7	A	
37	Amcon Distributing Co. (DIT)	14.1	A	
38	Core & Main, Inc. (CNM)	14.5	A	
39	Signet Jewelers Ltd. (SIG)	14.8	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	(41.3%)	0.2%	10
Distance from 52-week high	(28.0%)	(20.8%)	43
EBIT to enterprise value	5.5%	5.3%	53
Free cash flow yield	3.5%	3.9%	45

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Book value to price	0.34	0.34	51
Sales to price	0.48	1.64	15
Composite equity issuance, five years	(9.8%)	(16.7%)	61
Relative strength against the sector, log excess return	(0.51)	0.03	10

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 8 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	pass
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$120.8M
Operating cash flow, four quarters	$340.8M
Months of runway	not finite
Days since last periodic filing	51 (10-Q received Sep 2, 2026)
Median daily dollar volume, 63 sessions	$132.6M

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	$1.1B	2026-01-31	2026-03-19	10-K	26-010409
2	assets	us-gaap:Assets	$3.0B	2026-01-31	2026-03-19	10-K	26-010409
3	operating income	us-gaap:OperatingIncomeLoss	$297.7M	2026-01-31	2026-03-19	10-K	26-010409
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$316.4M	2026-01-31	2026-03-19	10-K	26-010409
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$75.8M	2026-01-31	2026-03-19	10-K	26-010409
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$974,000	2026-01-31	2026-03-19	10-K	26-010409
7	book equity	us-gaap:StockholdersEquity	$1.9B	2026-01-31	2026-03-19	10-K	26-010409
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$259.7M	2026-01-31	2026-03-19	10-K	26-010409
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$1.0M	2025-02-01	2026-03-19	10-K	26-010409
10	book equity	us-gaap:StockholdersEquity	$1.7B	2025-02-01	2026-03-19	10-K	26-010409
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$205.1M	2025-02-01	2026-03-19	10-K	26-010409
12	net income	us-gaap:NetIncomeLoss	$240.6M	2026-01-31	2026-03-19	10-K	26-010409
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$296.5M	2026-01-31	2026-03-19	10-K	26-010409
14	assets	us-gaap:Assets	$2.6B	2025-02-01	2026-03-19	10-K	26-010409
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.6B	2026-01-31	2026-03-19	10-K	26-010409
16	gross profit	us-gaap:GrossProfit	$914.5M	2025-02-01	2026-03-19	10-K	26-010409
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.3B	2025-02-01	2026-03-19	10-K	26-010409
18	gross profit	us-gaap:GrossProfit	$832.4M	2024-02-03	2026-03-19	10-K	26-010409
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.1B	2024-02-03	2026-03-19	10-K	26-010409
20	gross profit	us-gaap:GrossProfit	$656.1M	2023-01-28	2025-03-26	10-K	25-010442
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.8B	2023-01-28	2025-03-26	10-K	25-010442
22	gross profit	us-gaap:GrossProfit	$681.2M	2022-01-29	2024-03-27	10-K	24-015681
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.8B	2022-01-29	2024-03-27	10-K	24-015681
24	current assets	us-gaap:AssetsCurrent	$964.1M	2026-01-31	2026-03-19	10-K	26-010409
25	current liabilities	us-gaap:LiabilitiesCurrent	$400.4M	2026-01-31	2026-03-19	10-K	26-010409
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.6B	2026-01-31	2026-03-19	10-K	26-010409

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27	liabilities	us-gaap:Liabilities	$1.1B	2026-01-31	2026-03-19	10-K	26-010409
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$55.2M	2026-01-31	2026-03-19	10-K	26-010409
29	operating income	us-gaap:OperatingIncomeLoss	$79.6M	2016-01-30	2018-04-04	10-K	18-017136
30	interest expense	us-gaap:InterestExpense	$15.4M	2016-01-30	2016-04-11	10-K	16-536766
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$101.9M	2026-01-31	2026-03-19	10-K	26-010409
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$227.5M	2025-02-01	2026-03-19	10-K	26-010409
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$120.6M	2025-02-01	2026-03-19	10-K	26-010409
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$254.5M	2024-02-03	2026-03-19	10-K	26-010409
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$124.4M	2024-02-03	2026-03-19	10-K	26-010409
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$114.3M	2023-01-28	2025-03-26	10-K	25-010442
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$51.7M	2023-01-28	2025-03-26	10-K	25-010442
38	current assets	us-gaap:AssetsCurrent	$993.8M	2025-02-01	2026-03-19	10-K	26-010409
39	current liabilities	us-gaap:LiabilitiesCurrent	$304.3M	2025-02-01	2026-03-19	10-K	26-010409
40	assets	us-gaap:Assets	$2.3B	2024-02-03	2025-03-26	10-K	25-010442
41	assets	us-gaap:Assets	$2.0B	2023-01-28	2024-03-27	10-K	24-015681
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	60,956,213	2026-03-12	2026-03-19	10-K	26-010409
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	61,251,018	2025-03-21	2025-04-11	10-K/A	25-013535

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