Vita Coco Company, Inc.

COCO

Nasdaq; consumer nondurables; SIC 2080, Beverages; CIK 0001482981

A

strongest fifth of 124 graded peers in consumer nondurables

rank 15 of 124; percentile 11.4; sampling error 3.8 points; lower is stronger

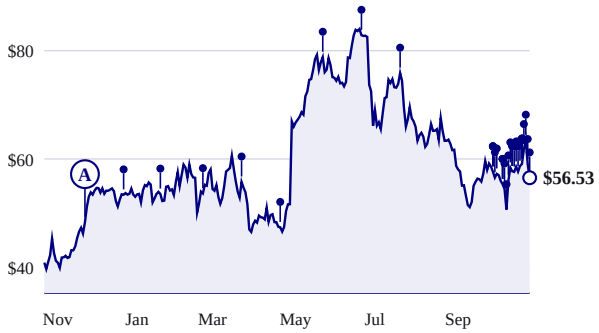
A B C D E

A, the bull



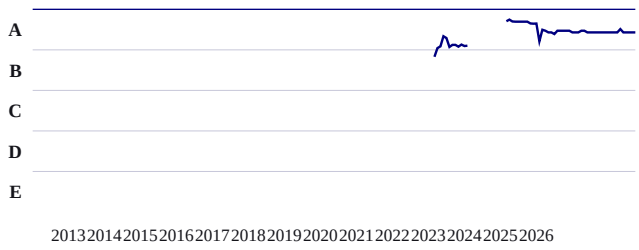
Scoreboard	
Profitability	D percentile 71.7
Solvency	A percentile 8.0
Growth and financing	A/B percentile 18.9
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $461.2M
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 Feb 18, 2026 248 days before the rescan; latest periodic filing 10-Q received Oct 22, 2026
Last close	$56.51 2026-10-23; market equity $3.2B; 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 Feb 18, 2026

The Vita Coco Company pioneered packaged coconut water in 2004 and we have extended our business into other categories. Our mission is to deliver great tasting, natural and nutritious products that we believe are better for consumers and better for the world. We are one of the largest brands globally in the coconut and other plant waters category, and a large supplier of Private Label coconut water. Our branded portfolio is led by our Vita Coco brand, which is the leader in the coconut water category in the United States, and also includes coconut oil, juice, and milk offerings. Our portfolio also includes PWR LIFT, a protein-infused fitness drink.

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 71.7						
Gross profitability	48.3%	29.8%		28.4	142	2025-12-31
Return on invested capital	not computable	5.6%				

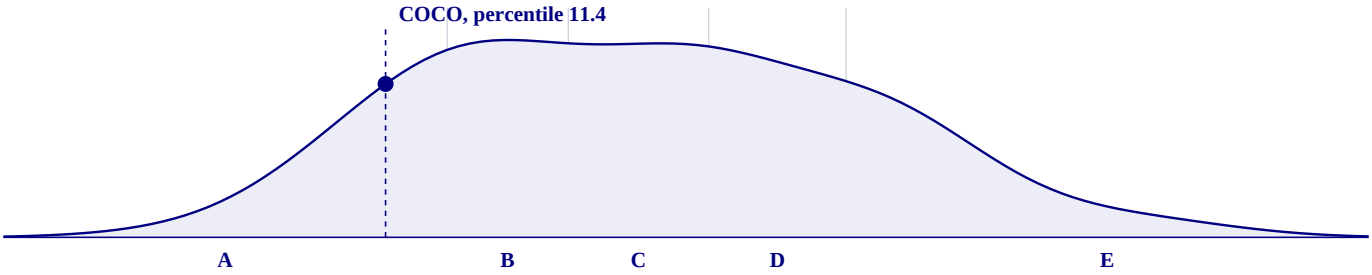
one or more required annual facts are missing

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Accruals ratio	5.9%	(5.0%)	94.6	149	2025-12-31
Gross margin stability, five years	5.4 pts	1.9 pts	92.2	116	2025-12-31
Solvency, sleeve percentile 8.0					
Twelve-month failure probability	not computable	0.03%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	9.84	3.11	4.2	119	2025-12-31
Net debt to EBITDA	not computable	2.54x			
one or more required annual facts are missing					
Interest coverage	not computable	2.51x			
interest expense must exceed $100,000					
Current ratio	3.62x	1.81x	11.8	153	2025-12-31
Growth and financing, sleeve percentile 18.9					
Revenue growth, three-year compound	12.5%	0.2%	8.3	133	2025-12-31
Free cash flow growth, three-year compound	not computable	14.9%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	117.0%	10.7%	11.6	70	2025-12-31
Asset growth, three years	32.6%	0.5%	3.8	134	2025-12-31
Net share issuance, one year	0.2%	0.03%	52.0	103	2026-02-16

Among 124 peers

consumer nondurables; 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
10	Lifeway Foods, Inc. (LWAY)	7.3	A	fortress balance sheet
11	Sanfilippo John B & SON Inc. (JBSS)	8.1	A	
12	Jerash Holdings (Us), Inc. (JRSH)	8.9	A	fortress balance sheet
13	Columbia Sportswear Co. (COLM)	9.8	A	
14	Steven Madden, Ltd. (SHOO)	10.6	A	
15	Vita Coco Company, Inc. (COCO)	11.4	A	
16	G III Apparel Group Ltd. (GIII)	12.2	A	fortress balance sheet
17	Kontoor Brands, Inc. (KTB)	13.0	A	
18	Yeti Holdings, Inc. (YETI)	13.8	A	
19	Tootsie Roll Industries Inc. (TR)	14.6	A	
20	American Outdoor Brands, Inc. (AOUT)	15.4	A	

What the price implies

at the 2026-10-23 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	38.3%	(0.2%)	85
Distance from 52-week high	(32.7%)	(23.0%)	30
EBIT to enterprise value	not computable	3.9%	
Free cash flow yield	1.2%	4.6%	28
Book value to price	0.13	0.57	18

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Sales to price	0.19	1.21	7
Composite equity issuance, five years	not computable	(16.3%)	
Relative strength against the sector, log excess return	0.23	(0.10)	85

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-31	
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	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$152.0M
Operating cash flow, four quarters	$148.0M
Months of runway	not finite
Days since last periodic filing	2 (10-Q received Oct 22, 2026)
Median daily dollar volume, 63 sessions	$59.1M

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	$222.6M	2025-12-31	2026-02-18	10-K	26-000022
2	assets	us-gaap:Assets	$461.2M	2025-12-31	2026-02-18	10-K	26-000022
3	net income	us-gaap:NetIncomeLoss	$71.3M	2025-12-31	2026-02-18	10-K	26-000022
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$47.2M	2025-12-31	2026-02-18	10-K	26-000022
5	assets	us-gaap:Assets	$362.4M	2024-12-31	2026-02-18	10-K	26-000022
6	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$609.8M	2025-12-31	2026-02-18	10-K	26-000022
7	gross profit	us-gaap:GrossProfit	$198.8M	2024-12-31	2026-02-18	10-K	26-000022
8	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$516.0M	2024-12-31	2026-02-18	10-K	26-000022
9	gross profit	us-gaap:GrossProfit	$180.7M	2023-12-31	2026-02-18	10-K	26-000022
10	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$493.6M	2023-12-31	2026-02-18	10-K	26-000022
11	gross profit	us-gaap:GrossProfit	$103.4M	2022-12-31	2025-02-26	10-K	25-000032
12	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$427.8M	2022-12-31	2025-02-26	10-K	25-000032
13	gross profit	us-gaap:GrossProfit	$113.1M	2021-12-31	2024-02-29	10-K	24-000012
14	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$379.5M	2021-12-31	2024-02-29	10-K	24-000012
15	current assets	us-gaap:AssetsCurrent	$421.4M	2025-12-31	2026-02-18	10-K	26-000022
16	current liabilities	us-gaap:LiabilitiesCurrent	$116.4M	2025-12-31	2026-02-18	10-K	26-000022
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$228.0M	2025-12-31	2026-02-18	10-K	26-000022
18	operating income	us-gaap:OperatingIncomeLoss	$82.5M	2025-12-31	2026-02-18	10-K	26-000022
19	book equity	us-gaap:StockholdersEquity	$331.5M	2025-12-31	2026-02-18	10-K	26-000022
20	liabilities	us-gaap:Liabilities	$129.6M	2025-12-31	2026-02-18	10-K	26-000022
21	operating income	us-gaap:OperatingIncomeLoss	$56.5M	2023-12-31	2026-02-18	10-K	26-000022
22	interest expense	us-gaap:InterestExpense	$31,000	2023-12-31	2024-02-29	10-K	24-000012
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$8.1M	2025-12-31	2026-02-18	10-K	26-000022
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$42.9M	2024-12-31	2026-02-18	10-K	26-000022
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$974,000	2024-12-31	2026-02-18	10-K	26-000022
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$107.2M	2023-12-31	2026-02-18	10-K	26-000022
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$599,000	2023-12-31	2026-02-18	10-K	26-000022

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28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$10.9M	2022-12-31	2025-02-26	10-K	25-000032
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$982,000	2022-12-31	2025-02-26	10-K	25-000032
30	depreciation amortization	us-gaap:Depreciation	$1.1M	2025-12-31	2026-02-18	10-K	26-000022
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$93.0M	2025-12-31	2026-02-18	10-K	26-000022
32	income tax	us-gaap:IncomeTaxExpenseBenefit	$21.7M	2025-12-31	2026-02-18	10-K	26-000022
33	current assets	us-gaap:AssetsCurrent	$341.3M	2024-12-31	2026-02-18	10-K	26-000022
34	current liabilities	us-gaap:LiabilitiesCurrent	$103.3M	2024-12-31	2026-02-18	10-K	26-000022
35	assets	us-gaap:Assets	$285.7M	2023-12-31	2026-02-18	10-K	26-000022
36	assets	us-gaap:Assets	$197.8M	2022-12-31	2025-02-26	10-K	25-000032
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	57,082,173	2026-02-16	2026-02-18	10-K	26-000022
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	56,986,193	2025-02-24	2025-02-26	10-K	25-000032

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