Lovesac Co.

LOVE

Nasdaq; shops; SIC 5712, Retail-Furniture Stores; CIK 0001701758

A

strongest fifth of 255 graded peers in shops

rank 32 of 255; percentile 12.2; sampling error 3.0 points; lower is stronger

A B C D E

A, the bull



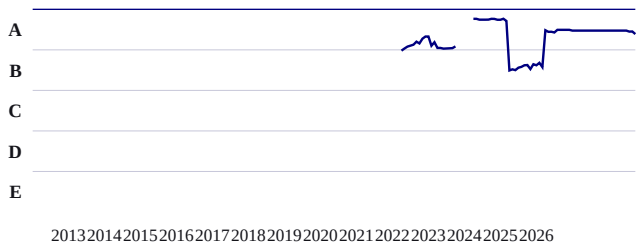
Scoreboard	
Profitability	B percentile 36.6
Solvency	B/C percentile 41.2
Growth and financing	B percentile 27.1
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $534.7M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	9 of 14
Graded from	filings received through Apr 2, 2026 205 days before the rescan; latest periodic filing 10-Q received Sep 10, 2026
Last close	$15.46 2026-10-23; market equity $223.1M; 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 2, 2026

When used in this report, the terms "we," "us," "our," "Lovesac" and the "Company" mean The Lovesac Company. We are a technology driven company that designs, manufactures and sells unique, high quality furniture derived through our proprietary Designed for Life® approach which results in products that are built to last a lifetime and designed to evolve as our customers' lives do.

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 36.6						
Gross profitability	73.5%	42.3%		15.1	240	2026-02-01
Return on invested capital	not computable	10.9%				
a prior annual debt, equity, and cash observation is required						
Accruals ratio	(8.5%)	(4.9%)		28.5	285	2026-02-01

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Gross margin stability, five years	2.0 pts	1.2 pts		66.2	217	2026-02-01
Solvency, sleeve percentile 41.2						
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	2.04	1.93		44.2	207	2026-02-01
Net debt to EBITDA	not computable	1.84x				
latest aligned inputs end 2021-01-31; latest annual assets end 2026-02-01						
Interest coverage	not computable	2.49x				
one or more required annual facts are missing						
Current ratio	1.61x	1.38x		38.2	294	2026-02-01
Growth and financing, sleeve percentile 27.1						
Revenue growth, three-year compound	2.3%	1.6%		45.7	266	2026-02-01
Free cash flow growth, three-year compound	not computable	5.5%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	192.2%	8.4%		2.0	152	2026-02-01
Asset growth, three years	9.4%	3.4%		22.0	269	2026-02-01
Net share issuance, one year	(1.2%)	(0.6%)		38.6	208	2026-03-30

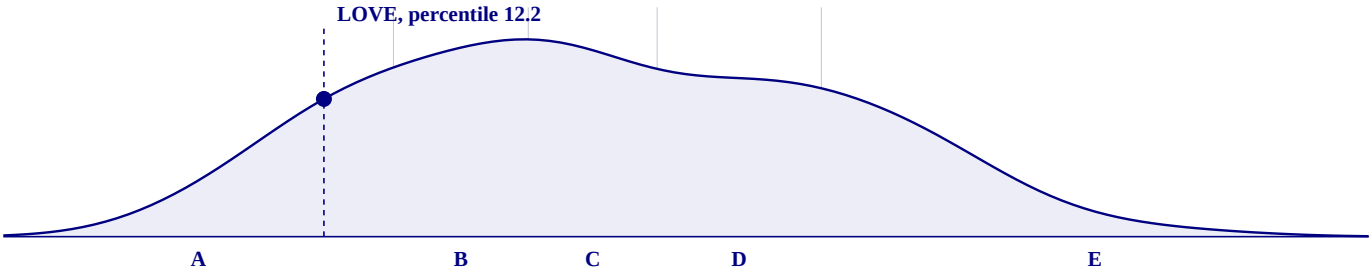
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 341,000 USD; Altman Z is not used

Among 255 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
27	Ulta Beauty, Inc. (ULTA)	10.2	A	
28	Dutch Bros Inc. (BROS)	10.6	A	fortress balance sheet
29	Eplus Inc. (PLUS)	11.0	A	fortress balance sheet
30	Watsco Inc. (WSO)	11.6	A	fortress balance sheet
31	Watsco Inc. (WSO-B)	11.6	A	fortress balance sheet
32	Lovesac Co. (LOVE)	12.2	A	fortress balance sheet
33	Unifirst Corp. (UNF)	12.6	A	late filer, fortress balance sheet
34	Ollie's Bargain Outlet Holdings, Inc. (OLLI)	13.0	A	fortress balance sheet
35	Village Super Market Inc. (VLGEA)	13.4	A	fortress balance sheet
36	Richardson Electronics, Ltd. (RELL)	13.8	A	
37	Amcon Distributing Co. (DIT)	14.2	A	

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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	(7.9%)	0.6%	40
Distance from 52-week high	(17.2%)	(22.7%)	58
EBIT to enterprise value	2.3%	5.3%	22
Free cash flow yield	11.7%	4.1%	84
Book value to price	0.94	0.35	81
Sales to price	3.12	1.68	70
Composite equity issuance, five years	(4.0%)	(16.8%)	71
Relative strength against the sector, log excess return	(0.06)	0.03	40

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-02-01	
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	pass
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$68.8M
Operating cash flow, four quarters	$67.1M
Months of runway	not finite
Days since last periodic filing	44 (10-Q received Sep 10, 2026)
Median daily dollar volume, 63 sessions	$3.0M

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	$393.2M	2026-02-01	2026-04-02	10-K	26-022929
2	assets	us-gaap:Assets	$534.7M	2026-02-01	2026-04-02	10-K	26-022929
3	operating income	us-gaap:OperatingIncomeLoss	$14.9M	2021-01-31	2023-11-30	10-K/A	23-040367
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$14.8M	2021-01-31	2021-04-14	10-K	21-021548
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$86,000	2021-01-31	2023-11-30	10-K/A	23-040367
6	total debt	us-gaap:LongTermDebt	$78.0M	2021-01-31	2021-04-14	10-K	21-021548
7	book equity	us-gaap:StockholdersEquity	$107.9M	2021-01-31	2024-04-11	10-K	24-015804
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$78.3M	2021-01-31	2022-03-30	10-K	22-007882
9	net income	us-gaap:NetIncomeLoss	$4.1M	2026-02-01	2026-04-02	10-K	26-022929
10	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$49.3M	2026-02-01	2026-04-02	10-K	26-022929
11	assets	us-gaap:Assets	$532.2M	2025-02-02	2026-04-02	10-K	26-022929
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$697.1M	2026-02-01	2026-04-02	10-K	26-022929
13	gross profit	us-gaap:GrossProfit	$397.8M	2025-02-02	2026-04-02	10-K	26-022929
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$680.6M	2025-02-02	2026-04-02	10-K	26-022929
15	gross profit	us-gaap:GrossProfit	$401.0M	2024-02-04	2026-04-02	10-K	26-022929
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$700.3M	2024-02-04	2026-04-02	10-K	26-022929
17	gross profit	us-gaap:GrossProfit	$343.7M	2023-01-29	2025-04-10	10-K	25-017241
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$651.2M	2023-01-29	2025-04-10	10-K	25-017241

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19	gross profit	us-gaap:GrossProfit	$273.5M	2022-01-30	2024-04-11	10-K	24-015804
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$498.2M	2022-01-30	2024-04-11	10-K	24-015804
21	current assets	us-gaap:AssetsCurrent	$236.6M	2026-02-01	2026-04-02	10-K	26-022929
22	current liabilities	us-gaap:LiabilitiesCurrent	$147.1M	2026-02-01	2026-04-02	10-K	26-022929
23	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$23.9M	2026-02-01	2026-04-02	10-K	26-022929
24	operating income	us-gaap:OperatingIncomeLoss	$5.4M	2026-02-01	2026-04-02	10-K	26-022929
25	book equity	us-gaap:StockholdersEquity	$218.7M	2026-02-01	2026-04-02	10-K	26-022929
26	liabilities	us-gaap:Liabilities	$316.0M	2026-02-01	2026-04-02	10-K	26-022929
27	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$6.1M	2021-01-31	2023-11-30	10-K/A	23-040367
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$23.1M	2026-02-01	2026-04-02	10-K	26-022929
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$39.0M	2025-02-02	2026-04-02	10-K	26-022929
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$21.0M	2025-02-02	2026-04-02	10-K	26-022929
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$76.4M	2024-02-04	2026-04-02	10-K	26-022929
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$28.7M	2024-02-04	2026-04-02	10-K	26-022929
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$21.4M	2023-01-29	2025-04-10	10-K	25-017241
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$25.2M	2023-01-29	2025-04-10	10-K	25-017241
35	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$14.9M	2026-02-01	2026-04-02	10-K	26-022929
36	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$6.7M	2026-02-01	2026-04-02	10-K	26-022929
37	income tax	us-gaap:IncomeTaxExpenseBenefit	$2.6M	2026-02-01	2026-04-02	10-K	26-022929
38	current assets	us-gaap:AssetsCurrent	$246.6M	2025-02-02	2026-04-02	10-K	26-022929
39	current liabilities	us-gaap:LiabilitiesCurrent	$155.1M	2025-02-02	2026-04-02	10-K	26-022929
40	assets	us-gaap:Assets	$482.2M	2024-02-04	2025-04-10	10-K	25-017241
41	assets	us-gaap:Assets	$408.6M	2023-01-29	2024-04-11	10-K	24-015804
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	14,617,106	2026-03-30	2026-04-02	10-K	26-022929
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	14,793,504	2025-04-07	2025-04-10	10-K	25-017241

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