Genesco Inc.

GCO

NYSE; shops; SIC 5661, Retail-Shoe Stores; CIK 0000018498

B

second fifth of 255 graded peers in shops

rank 70 of 255; percentile 27.2; sampling error 3.0 points; lower is stronger

A B C D E

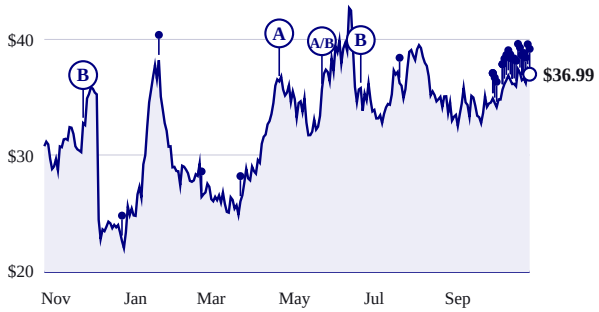
B, the elk



Scoreboard

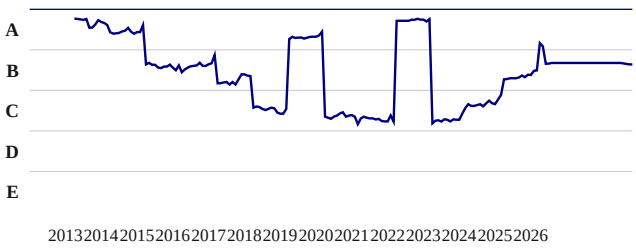
Profitability	B percentile 23.4
Solvency	B/C percentile 37.0
Growth and financing	C/D percentile 61.3
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $1.4B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: dilution, distress
Inputs computable	7 of 14
Graded from	filings received through Jun 1, 2026 146 days before the rescan; latest periodic filing 10-Q received Sep 10, 2026
Last close	$36.98 2026-10-23; market equity $400.1M; 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 Mar 25, 2026

Genesco Inc., incorporated in 1934 in the State of Tennessee, is a leading retailer and wholesaler of branded footwear, apparel and accessories with net sales for Fiscal 2026 of $2.4 billion. During Fiscal 2026, we operated four reportable business segments (not including corporate): (i) Journeys Group, comprised of the Journeys®, Journeys Kidz® and Little Burgundy® retail footwear chains and e-commerce operations; (ii) Schuh Group, comprised of the Schuh retail footwear chain and e-commerce operations; (iii) Johnston & Murphy Group, comprised of Johnston & Murphy® retail operations, e-commerce operations and wholesale distribution of products under the Johnston & Murphy® brand; and (iv)...

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 23.4						
Gross profitability	80.9%	42.3%		13.0	240	2026-01-31
Return on invested capital	not computable	10.9%				

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latest aligned inputs end 2022-01-29; latest annual assets end 2026-01-31					
Accruals ratio	(9.7%)	(4.9%)	24.3	285	2026-01-31
Gross margin stability, five years	0.8 pts	1.2 pts	32.9	217	2026-01-31
Solvency, sleeve percentile 37.0					
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	2.57	1.93	36.9	207	2026-01-31
Net debt to EBITDA	not computable	1.84x			
latest aligned inputs end 2022-01-29; latest annual assets end 2026-01-31					
Interest coverage	not computable	2.49x			
latest aligned inputs end 2024-02-03; latest annual assets end 2026-01-31					
Current ratio	1.64x	1.38x	37.2	294	2026-01-31
Growth and financing, sleeve percentile 61.3					
Revenue growth, three-year compound	0.7%	1.6%	54.3	266	2026-01-31
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	not computable	8.4%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	(1.5%)	3.4%	68.3	269	2026-01-31
Net share issuance, one year	not computable	(0.6%)			
prior share count is 66 days earlier					

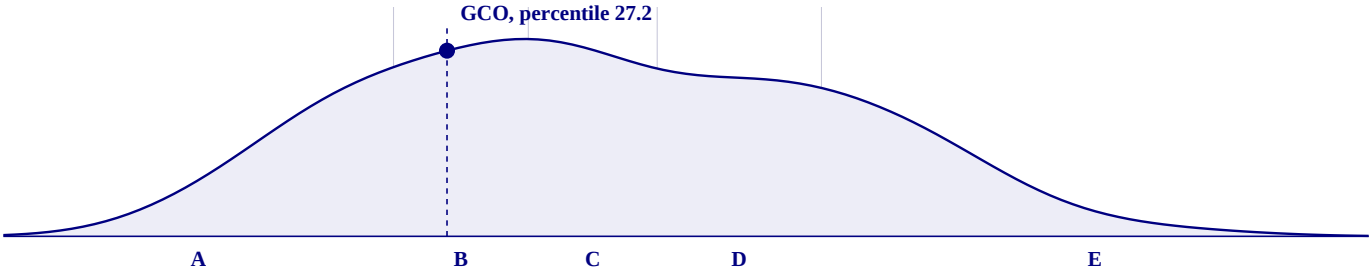
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 304,846,000 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
65	GameStop Corp. (GME-WT)	25.0	B	fortress balance sheet
66	Dillard'S, Inc. (DDS)	25.8	B	
67	Dillard'S, Inc. (DDT)	25.8	B	
68	MSC Industrial Direct Co. Inc. (MSM)	26.4	B	
69	ONE Group Hospitality, Inc. (STKS)	26.8	B	late filer
70	Genesco Inc. (GCO)	27.2	B	fortress balance sheet
71	BJs Restaurants Inc. (BJRI)	27.6	B	
72	Hawkins Inc. (HWKN)	28.0	B	
73	Texas Roadhouse, Inc. (TXRH)	28.3	B	fortress balance sheet
74	Nathans Famous, Inc. (NATH)	28.7	B	
75	Performance Food Group Co. (PFGC)	29.1	B	

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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	15.5%	0.6%	64
Distance from 52-week high	(13.4%)	(22.7%)	66
EBIT to enterprise value	4.8%	5.3%	43
Free cash flow yield	20.9%	4.1%	96
Book value to price	1.39	0.35	89
Sales to price	6.09	1.68	87
Composite equity issuance, five years	(32.4%)	(16.8%)	21
Relative strength against the sector, log excess return	0.17	0.03	64

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None 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	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$57.1M
Operating cash flow, four quarters	$134.1M
Months of runway	not finite
Days since last periodic filing	45 (10-Q received Sep 10, 2026)
Median daily dollar volume, 63 sessions	$5.5M

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	$1.1B	2026-01-31	2026-03-25	10-K	26-123492
2	assets	us-gaap:Assets	$1.4B	2026-01-31	2026-03-25	10-K	26-123492
3	operating income	us-gaap:OperatingIncomeLoss	$155.6M	2022-01-29	2024-03-27	10-K	24-036902
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$153.0M	2022-01-29	2024-03-27	10-K	24-036902
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$38.0M	2022-01-29	2024-03-27	10-K	24-036902
6	total debt	us-gaap:LongTermDebt	$15.7M	2022-01-29	2023-03-22	10-K	23-009103
7	book equity	us-gaap:StockholdersEquity	$602.5M	2022-01-29	2025-03-26	10-K	25-044864
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$320.5M	2022-01-29	2022-03-23	10-K	22-004397
9	total debt	us-gaap:LongTermDebt	$33.0M	2021-01-30	2022-03-23	10-K	22-004397
10	book equity	us-gaap:StockholdersEquity	$566.8M	2021-01-30	2024-03-27	10-K	24-036902
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$215.1M	2021-01-30	2022-03-23	10-K	22-004397
12	net income	us-gaap:NetIncomeLoss	$13.3M	2026-01-31	2026-03-25	10-K	26-123492
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$145.8M	2026-01-31	2026-03-25	10-K	26-123492
14	assets	us-gaap:Assets	$1.3B	2025-02-01	2026-03-25	10-K	26-123492
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.4B	2026-01-31	2026-03-25	10-K	26-123492
16	gross profit	us-gaap:GrossProfit	$1.1B	2025-02-01	2026-03-25	10-K	26-123492
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.3B	2025-02-01	2026-03-25	10-K	26-123492
18	gross profit	us-gaap:GrossProfit	$1.1B	2024-02-03	2026-03-25	10-K	26-123492

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19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.3B	2024-02-03	2026-03-25	10-K	26-123492
20	gross profit	us-gaap:GrossProfit	$1.1B	2023-01-28	2025-03-26	10-K	25-044864
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.4B	2023-01-28	2025-03-26	10-K	25-044864
22	gross profit	us-gaap:GrossProfit	$1.2B	2022-01-29	2024-03-27	10-K	24-036902
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.4B	2022-01-29	2024-03-27	10-K	24-036902
24	current assets	us-gaap:AssetsCurrent	$618.5M	2026-01-31	2026-03-25	10-K	26-123492
25	current liabilities	us-gaap:LiabilitiesCurrent	$376.3M	2026-01-31	2026-03-25	10-K	26-123492
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$265.8M	2026-01-31	2026-03-25	10-K	26-123492
27	operating income	us-gaap:OperatingIncomeLoss	$17.3M	2026-01-31	2026-03-25	10-K	26-123492
28	book equity	us-gaap:StockholdersEquity	$567.0M	2026-01-31	2026-03-25	10-K	26-123492
29	liabilities	us-gaap:Liabilities	$825.9M	2026-01-31	2026-03-25	10-K	26-123492
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$43.0M	2022-01-29	2024-03-27	10-K	24-036902
31	operating income	us-gaap:OperatingIncomeLoss	-$13.5M	2024-02-03	2026-03-25	10-K	26-123492
32	interest expense	us-gaap:InterestExpense	$7.8M	2024-02-03	2024-03-27	10-K	24-036902
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$62.1M	2026-01-31	2026-03-25	10-K	26-123492
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$87.9M	2025-02-01	2026-03-25	10-K	26-123492
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$41.1M	2025-02-01	2026-03-25	10-K	26-123492
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$94.8M	2024-02-03	2026-03-25	10-K	26-123492
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$60.3M	2024-02-03	2026-03-25	10-K	26-123492
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$164.9M	2023-01-28	2025-03-26	10-K	25-044864
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$59.9M	2023-01-28	2025-03-26	10-K	25-044864
40	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$53.3M	2026-01-31	2026-03-25	10-K	26-123492
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$12.6M	2026-01-31	2026-03-25	10-K	26-123492
42	income tax	us-gaap:IncomeTaxExpenseBenefit	-$685,000	2026-01-31	2026-03-25	10-K	26-123492
43	current assets	us-gaap:AssetsCurrent	$608.8M	2025-02-01	2026-03-25	10-K	26-123492
44	current liabilities	us-gaap:LiabilitiesCurrent	$379.8M	2025-02-01	2026-03-25	10-K	26-123492
45	assets	us-gaap:Assets	$1.3B	2024-02-03	2026-03-25	10-K	26-123492
46	assets	us-gaap:Assets	$1.5B	2023-01-28	2025-03-26	10-K	25-044864
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	11,103,175	2026-05-18	2026-06-01	10-K/A	26-251478
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,858,224	2026-03-13	2026-03-25	10-K	26-123492

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