Stitch Fix, Inc.

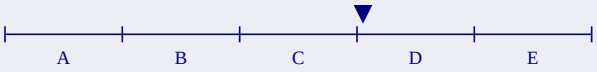
SFIX

Nasdaq; shops; SIC 5961, Retail-Catalog & Mail-Order Houses; CIK 0001576942

C/D

on the C/D boundary of 255 graded peers in shops

rank 156 of 255; percentile 61.0; sampling error 3.0 points; lower is stronger

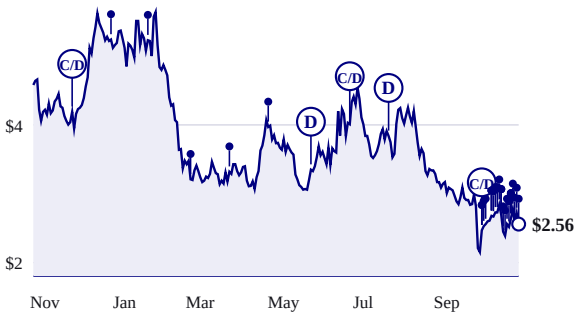


C/D, the tortoise



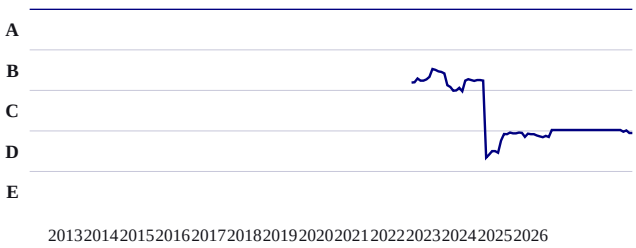
Scoreboard	
Profitability	A/B percentile 18.5
Solvency	C/D percentile 60.4
Growth and financing	E percentile 84.1
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $479.4M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, distress, fortress balance sheet
Inputs computable	8 of 14
Graded from	filings received through Sep 24, 2026 31 days before the rescan; latest periodic filing 10-K received Sep 24, 2026
Last close	$2.56 2026-10-23; market equity $0; 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 Sep 24, 2026

Stitch Fix is the leading online personal styling service that helps people discover the styles they will love that fit perfectly so they always look - and feel - their best. In 2011, Stitch Fix, Inc. ("we," "our," "us," "the Company," or "Stitch Fix") introduced an innovative approach to shopping for clothing and accessories. We were inspired by the opportunity to create a client-first styling experience, offering an alternative to impersonal, time-consuming and inconvenient traditional shopping. Since inception, our business has been grounded in our commitment to developing and fostering client relationships and making people happier and more confident in what they wear.

The fourteen inputs

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

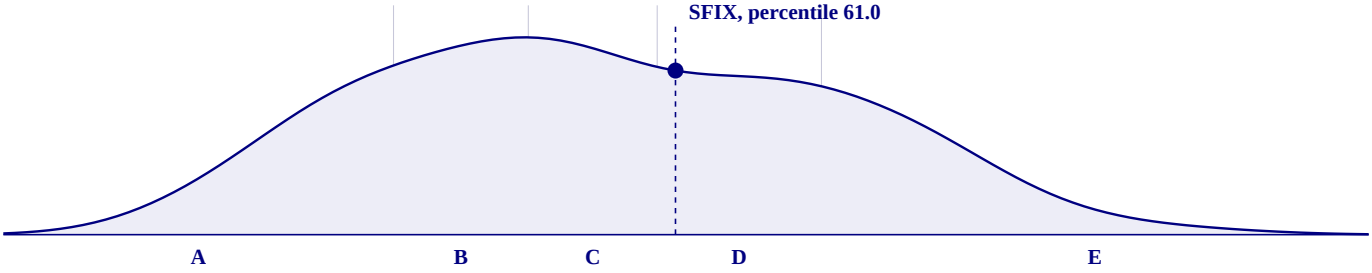
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 18.5						
Gross profitability	122.8%	42.3%		4.6	240	2026-08-01
Return on invested capital	not computable	10.9%				

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one or more required annual facts are missing						
Accruals ratio	(10.8%)	(4.9%)		22.5	285	2026-08-01
Gross margin stability, five years	0.7 pts	1.2 pts		28.2	217	2026-08-01
Solvency, sleeve percentile 60.4						
Twelve-month failure probability	not computable	0.04%				
liabilities and a nearby cover-page share count are required at 2026-08-01						
Altman Z double-prime	(1.49)	1.93		75.7	207	2026-08-01
Net debt to EBITDA	not computable	1.84x				
one or more required annual facts are missing						
Interest coverage	not computable	2.49x				
one or more required annual facts are missing						
Current ratio	1.48x	1.38x		45.1	294	2026-08-01
Growth and financing, sleeve percentile 84.1						
Revenue growth, three-year compound	(5.4%)	1.6%		77.7	266	2026-08-01
Free cash flow growth, three-year compound	(28.5%)	5.5%		92.5	147	2026-08-01
Reinvestment rate	not computable	8.4%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						
Asset growth, three years	(7.9%)	3.4%		82.1	269	2026-08-01
Net share issuance, one year	not computable	(0.6%)				
two annual share counts are required; found 0						

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
151	United Natural Foods Inc. (UNFI)	59.1	C/D	
152	Autozone Inc. (AZO)	59.4	C/D	
153	Papa Johns International Inc. (PZZA)	59.8	C/D	
154	Genuine Parts Co. (GPC)	60.2	C/D	
155	Albertsons Companies, Inc. (ACI)	60.6	C/D	
156	Stitch Fix, Inc. (SFIX)	61.0	C/D	
157	Resideo Technologies, Inc. (REZI)	61.4	C/D	short runway
158	Wayfair Inc. (W)	61.8	C/D	
159	Kohls Corp. (KSS)	62.2	C/D	
160	MGP Ingredients Inc. (MGPI)	62.6	C/D	
161	Marinemax Inc. (HZO)	63.0	D	

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	(27.1%)	0.6%	22
Distance from 52-week high	(54.6%)	(22.7%)	15
EBIT to enterprise value	not computable	5.3%	

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Free cash flow yield	not computable	4.1%	
Book value to price	not computable	0.35	
Sales to price	not computable	1.68	
Composite equity issuance, five years	not computable	(16.8%)	
Relative strength against the sector, log excess return	(0.29)	0.03	22

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-08-01	
Return on assets above zero	fail
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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$95.3M
Operating cash flow, four quarters	$39.1M
Months of runway	not finite
Days since last periodic filing	31 (10-K received Sep 24, 2026)
Median daily dollar volume, 63 sessions	$5.8M

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	$588.5M	2026-08-01	2026-09-24	10-K	26-063365
2	assets	us-gaap:Assets	$479.4M	2026-08-01	2026-09-24	10-K	26-063365
3	net income	us-gaap:NetIncomeLoss	-$12.6M	2026-08-01	2026-09-24	10-K	26-063365
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$39.1M	2026-08-01	2026-09-24	10-K	26-063365
5	assets	us-gaap:Assets	$480.6M	2025-08-02	2026-09-24	10-K	26-063365
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2026-08-01	2026-09-24	10-K	26-063365
7	gross profit	us-gaap:GrossProfit	$562.9M	2025-08-02	2026-09-24	10-K	26-063365
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2025-08-02	2026-09-24	10-K	26-063365
9	gross profit	us-gaap:GrossProfit	$592.0M	2024-08-03	2026-09-24	10-K	26-063365
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2024-08-03	2026-09-24	10-K	26-063365
11	gross profit	us-gaap:GrossProfit	$675.6M	2023-07-29	2025-09-25	10-K	25-042782
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.6B	2023-07-29	2025-09-25	10-K	25-042782
13	gross profit	us-gaap:GrossProfit	$886.7M	2022-07-30	2024-09-25	10-K	24-000099
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.0B	2022-07-30	2024-09-25	10-K	24-000099
15	current assets	us-gaap:AssetsCurrent	$348.3M	2026-08-01	2026-09-24	10-K	26-063365
16	current liabilities	us-gaap:LiabilitiesCurrent	$235.7M	2026-08-01	2026-09-24	10-K	26-063365
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$508.6M	2026-08-01	2026-09-24	10-K	26-063365
18	operating income	us-gaap:OperatingIncomeLoss	-$21.7M	2026-08-01	2026-09-24	10-K	26-063365
19	book equity	us-gaap:StockholdersEquity	$196.1M	2026-08-01	2026-09-24	10-K	26-063365
20	liabilities	us-gaap:Liabilities	$283.3M	2026-08-01	2026-09-24	10-K	26-063365
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$19.2M	2026-08-01	2026-09-24	10-K	26-063365
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesC...	$25.6M	2025-08-02	2026-09-24	10-K	26-063365
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$16.3M	2025-08-02	2026-09-24	10-K	26-063365
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$28.2M	2024-08-03	2024-09-25	10-K	24-000099
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$14.0M	2024-08-03	2026-09-24	10-K	26-063365

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26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$73.2M	2023-07-29	2024-09-25	10-K	24-000099
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$18.9M	2023-07-29	2025-09-25	10-K	25-042782
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$22.6M	2026-08-01	2026-09-24	10-K	26-063365
29	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$12.3M	2026-08-01	2026-09-24	10-K	26-063365
30	income tax	us-gaap:IncomeTaxExpenseBenefit	$338,000	2026-08-01	2026-09-24	10-K	26-063365
31	current assets	us-gaap:AssetsCurrent	$373.9M	2025-08-02	2026-09-24	10-K	26-063365
32	current liabilities	us-gaap:LiabilitiesCurrent	$206.2M	2025-08-02	2026-09-24	10-K	26-063365
33	assets	us-gaap:Assets	$486.9M	2024-08-03	2025-09-25	10-K	25-042782
34	assets	us-gaap:Assets	$614.5M	2023-07-29	2024-09-25	10-K	24-000099

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