Signet Jewelers Ltd.

SIG

NYSE; shops; SIC 5944, Retail-Jewelry Stores; CIK 0000832988

A

strongest fifth of 256 graded peers in shops

rank 38 of 256; percentile 14.5; sampling error 2.9 points; lower is stronger



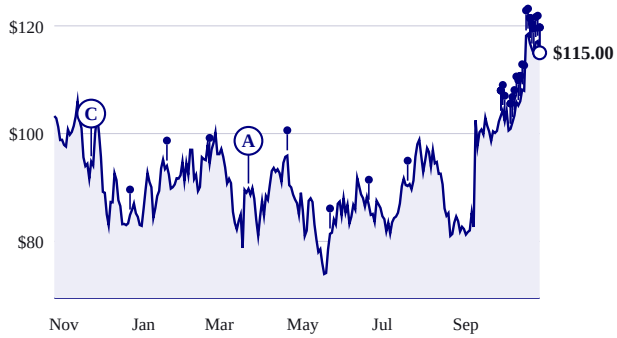
A, the bull



Scoreboard

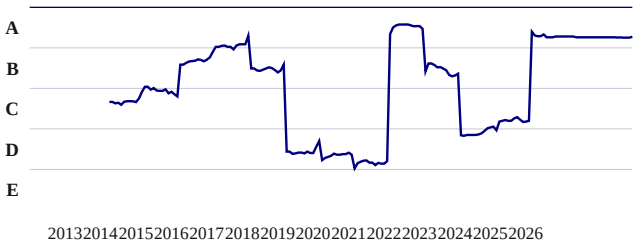
Profitability	B	percentile 29.9
Solvency	B	percentile 29.8
Growth and financing	C	percentile 49.8
Reliability	0.94 AUC	filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets	total assets $6.0B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	10 of 14	
Graded from	filings received through Mar 19, 2026	222 days before the rescan; latest periodic filing 10-Q received Sep 9, 2026
Last close	$115.09	2026-10-26; market equity $4.4B; 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

Signet's Purpose is Inspiring Love, with the mission to enable individuals to "celebrate life and express love". The Company's new vision, announced in Fiscal 2026, is to "Create an influential community of distinct jewelry brands, designs, and experiences for every significant milestone, every special moment, every expression of self, every kind of love, every day." Signet aims to lead innovation and market share in the jewelry category, expanding its market presence and achieving profitable growth by fostering brand loyalty through emotional and engaging customer connections while fully leveraging the benefits of our scale.

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 29.9						
Gross profitability	45.3%	42.0%		44.4	240	2026-01-31
Return on invested capital	not computable	10.9%				

latest aligned inputs end 2020-02-01; latest annual assets end 2026-01-31

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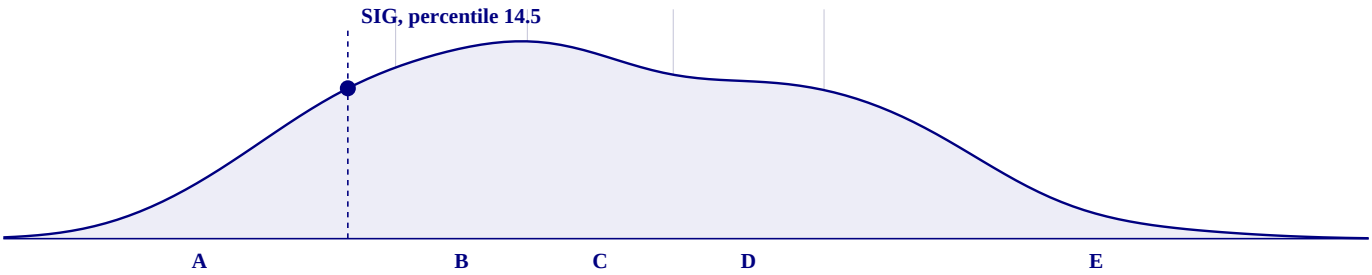
Accruals ratio	(6.6%)	(4.9%)	39.8	285	2026-01-31
Gross margin stability, five years	0.3 pts	1.2 pts	5.5	218	2026-01-31
Solvency, sleeve percentile 29.8					
Twelve-month failure probability	not computable	0.04%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	4.40	1.93	20.6	205	2026-01-31
Net debt to EBITDA	not computable	1.84x			
latest aligned inputs end 2020-02-01; latest annual assets end 2026-01-31					
Interest coverage	not computable	2.28x			
latest aligned inputs end 2023-01-28; latest annual assets end 2026-01-31					
Current ratio	1.60x	1.38x	39.0	293	2026-01-31
Growth and financing, sleeve percentile 49.8					
Revenue growth, three-year compound	(4.6%)	1.6%	73.7	267	2026-01-31
Free cash flow growth, three-year compound	(7.3%)	4.8%	74.0	147	2026-01-31
Reinvestment rate	89.4%	8.4%	15.2	152	2026-01-31
Asset growth, three years	(3.5%)	3.4%	75.5	270	2026-01-31
Net share issuance, one year	(6.6%)	(0.6%)	10.6	208	2026-03-13

Among 256 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
33	Ollie's Bargain Outlet Holdings, Inc. (OLLI)	12.5	A	fortress balance sheet
34	Village Super Market Inc. (VLGEA)	12.9	A	fortress balance sheet
35	Richardson Electronics, Ltd. (RELL)	13.3	A	
36	Amcon Distributing Co. (DIT)	13.7	A	
37	Core & Main, Inc. (CNM)	14.1	A	
38	Signet Jewelers Ltd. (SIG)	14.5	A	
39	Sally Beauty Holdings, Inc. (SBH)	14.9	A	
40	American Eagle Outfitters Inc. (AEO)	15.3	A	fortress balance sheet
41	Rush Enterprises Inc. \Tx\ (RUSHA)	15.9	A	
42	Rush Enterprises Inc. \Tx\ (RUSHB)	15.9	A	
43	Carvana Co. (CVNA)	16.5	A	

What the price implies

at the 2026-10-26 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(13.0%)	0.7%	35
Distance from 52-week high	(2.9%)	(22.3%)	91
EBIT to enterprise value	8.7%	5.3%	82
Free cash flow yield	11.9%	4.0%	84
Book value to price	0.42	0.34	54
Sales to price	1.55	1.67	47

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Composite equity issuance, five years	(38.1%)	(16.8%)	12
Relative strength against the sector, log excess return	(0.12)	0.03	35

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	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$526.8M
Operating cash flow, four quarters	$694.3M
Months of runway	not finite
Days since last periodic filing	48 (10-Q received Sep 9, 2026)
Median daily dollar volume, 63 sessions	$69.3M

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	$2.7B	2026-01-31	2026-03-19	10-K	26-000055
2	assets	us-gaap:Assets	$6.0B	2026-01-31	2026-03-19	10-K	26-000055
3	operating income	us-gaap:OperatingIncomeLoss	$158.3M	2020-02-01	2022-03-17	10-K	22-000019
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$129.7M	2020-02-01	2021-03-19	10-K	21-000025
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$24.2M	2020-02-01	2022-03-17	10-K	22-000019
6	total debt	us-gaap:LongTermDebt	$613.1M	2020-02-01	2020-03-26	10-K	20-000018
7	book equity	us-gaap:StockholdersEquity	$1.2B	2020-02-01	2023-03-16	10-K	23-000032
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$374.5M	2020-02-01	2021-03-19	10-K	21-000025
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$734.0M	2019-02-02	2019-04-03	10-K	19-000003
10	book equity	us-gaap:StockholdersEquity	$1.2B	2019-02-02	2022-03-17	10-K	22-000019
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$195.4M	2019-02-02	2020-03-26	10-K	20-000018
12	net income	us-gaap:NetIncomeLoss	$294.4M	2026-01-31	2026-03-19	10-K	26-000055
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$678.8M	2026-01-31	2026-03-19	10-K	26-000055
14	assets	us-gaap:Assets	$5.7B	2025-02-01	2026-03-19	10-K	26-000055
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$6.8B	2026-01-31	2026-03-19	10-K	26-000055
16	gross profit	us-gaap:GrossProfit	$2.6B	2025-02-01	2026-03-19	10-K	26-000055
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$6.7B	2025-02-01	2026-03-19	10-K	26-000055
18	gross profit	us-gaap:GrossProfit	$2.8B	2024-02-03	2026-03-19	10-K	26-000055
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.2B	2024-02-03	2026-03-19	10-K	26-000055
20	gross profit	us-gaap:GrossProfit	$3.1B	2023-01-28	2025-03-19	10-K	25-000018
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.8B	2023-01-28	2025-03-19	10-K	25-000018
22	gross profit	us-gaap:GrossProfit	$3.1B	2022-01-29	2024-03-21	10-K	24-000083
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.8B	2022-01-29	2024-03-21	10-K	24-000083
24	current assets	us-gaap:AssetsCurrent	$3.0B	2026-01-31	2026-03-19	10-K	26-000055
25	current liabilities	us-gaap:LiabilitiesCurrent	$1.9B	2026-01-31	2026-03-19	10-K	26-000055
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$4.0B	2026-01-31	2026-03-19	10-K	26-000055
27	operating income	us-gaap:OperatingIncomeLoss	$393.1M	2026-01-31	2026-03-19	10-K	26-000055
28	book equity	us-gaap:StockholdersEquity	$2.0B	2026-01-31	2026-03-19	10-K	26-000055
29	liabilities	us-gaap:Liabilities	$4.0B	2026-01-31	2026-03-19	10-K	26-000055

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30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$178.0M	2020-02-01	2022-03-17	10-K	22-000019
31	operating income	us-gaap:OperatingIncomeLoss	$604.9M	2023-01-28	2025-03-19	10-K	25-000018
32	interest expense	us-gaap:InterestExpense	$13.5M	2023-01-28	2023-03-16	10-K	23-000032
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$153.5M	2026-01-31	2026-03-19	10-K	26-000055
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$590.9M	2025-02-01	2026-03-19	10-K	26-000055
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$153.0M	2025-02-01	2026-03-19	10-K	26-000055
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$546.9M	2024-02-03	2026-03-19	10-K	26-000055
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$125.5M	2024-02-03	2026-03-19	10-K	26-000055
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$797.9M	2023-01-28	2025-03-19	10-K	25-000018
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$138.9M	2023-01-28	2025-03-19	10-K	25-000018
40	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$147.5M	2026-01-31	2026-03-19	10-K	26-000055
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$398.1M	2026-01-31	2026-03-19	10-K	26-000055
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$103.7M	2026-01-31	2026-03-19	10-K	26-000055
43	current assets	us-gaap:AssetsCurrent	$2.7B	2025-02-01	2026-03-19	10-K	26-000055
44	current liabilities	us-gaap:LiabilitiesCurrent	$1.8B	2025-02-01	2026-03-19	10-K	26-000055
45	assets	us-gaap:Assets	$6.8B	2024-02-03	2025-03-19	10-K	25-000018
46	assets	us-gaap:Assets	$6.6B	2023-01-28	2024-03-21	10-K	24-000083
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	40,067,774	2026-03-13	2026-03-19	10-K	26-000055
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	42,895,787	2025-03-14	2025-03-19	10-K	25-000018

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