Citi Trends Inc.

CTRN

Nasdaq; shops; SIC 5600, Retail-Apparel & Accessory Stores; CIK 0001318484

E

weakest fifth of 256 graded peers in shops

rank 218 of 256; percentile 85.1; sampling error 2.9 points; lower is stronger

A B C D E

E, the bear



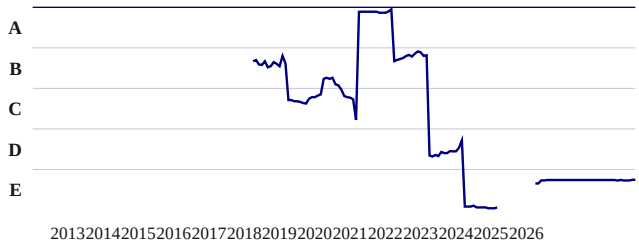
Scoreboard	
Profitability	D percentile 69.7
Solvency	C percentile 50.6
Growth and financing	D percentile 71.1
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $471.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: short runway, distress, fortress balance sheet
Inputs computable	7 of 14
Graded from	filings received through Apr 15, 2026 196 days before the rescan; latest periodic filing 10-Q received Sep 9, 2026
Last close	$45.33 2026-10-27; market equity $378.0M; 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 15, 2026

Citi Trends, Inc. ("CITITRENDS" or the "Company") is a highly differentiated off-price value retailer known for trendy fashions, great brands and amazing prices. We are the leading off-price retailer specifically focused on Black customers, delivering the styles, brands, and trends at amazing prices that resonate with our primary and secondary customers. Our product offering is Women's, Men's and Children's apparel, family footwear, accessories and products for the home, with a three-tiered mix of product. At the opening price point, we offer value-focused basics for our most budget-conscious customers.

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 69.7						
Gross profitability	not computable	42.0%				
latest aligned inputs end 2013-02-02; latest annual assets end 2026-01-31						
Return on invested capital	not computable	10.9%				

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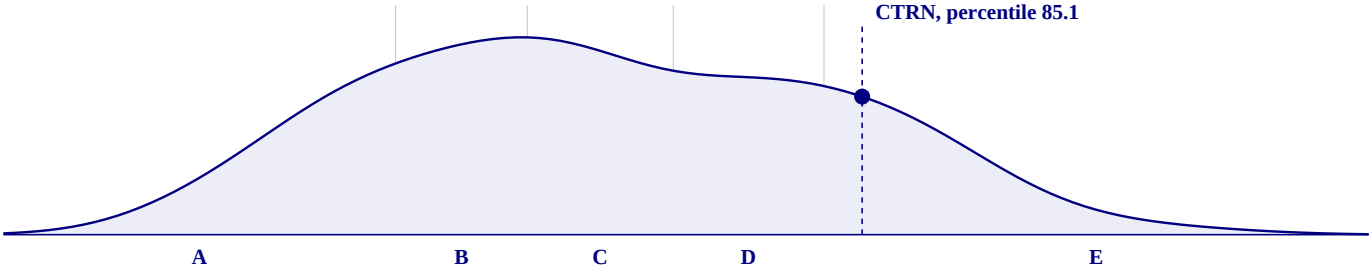
one or more required annual facts are missing						
Accruals ratio	(3.4%)	(4.9%)		69.7	285	2026-01-31
Gross margin stability, five years	not computable	1.2 pts				
five annual gross margins are required; found 0						
Solvency, sleeve percentile 50.6						
Twelve-month failure probability	not computable	0.04%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	2.62	1.93		35.8	205	2026-01-31
Net debt to EBITDA	not computable	1.84x				
one or more required annual facts are missing						
Interest coverage	not computable	2.28x				
latest aligned inputs end 2024-02-03; latest annual assets end 2026-01-31						
Current ratio	1.11x	1.38x		65.4	293	2026-01-31
Growth and financing, sleeve percentile 71.1						
Revenue growth, three-year compound	1.0%	1.6%		52.6	267	2026-01-31
Free cash flow growth, three-year compound	not computable	4.8%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	(32.4%)	8.4%		80.1	152	2026-01-31
Asset growth, three years	(4.7%)	3.4%		77.7	270	2026-01-31
Net share issuance, one year	0.8%	(0.6%)		73.9	208	2026-04-10

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
213	Vestis Corp. (VSTS)	83.1	E	
214	Gold.com, Inc. (GOLD)	83.5	E	
215	Carriage Services Inc. (CSV)	83.9	E	
216	TheRealReal, Inc. (REAL)	84.3	E	
217	RH (RH)	84.7	E	
218	Citi Trends Inc. (CTRN)	85.1	E	
219	ThredUp Inc. (TDUP)	85.5	E	
220	Restaurant Brands International Inc. (QSR)	85.9	E	
221	Sportsman'S Warehouse Holdings, Inc. (SPWH)	86.3	E	
222	Tilly'S, Inc. (TLYS)	86.7	E	
223	Petmed Express Inc. (PETS)	87.1	E	late filer

What the price implies

at the 2026-10-27 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	119.4%	0.7%	98
Distance from 52-week high	(40.5%)	(21.6%)	24
EBIT to enterprise value	not computable	5.3%	

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Free cash flow yield	0.2%	4.1%	23
Book value to price	0.33	0.34	46
Sales to price	2.17	1.65	58
Composite equity issuance, five years	(12.2%)	(16.8%)	58
Relative strength against the sector, log excess return	0.81	0.03	98

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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	49 (10-Q received Sep 9, 2026)
Median daily dollar volume, 63 sessions	$8.2M

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	$227.7M	2013-02-02	2013-04-17	10-K	13-030133
2	assets	us-gaap:Assets	$292.1M	2013-02-02	2014-04-16	10-K	14-027998
3	net income	us-gaap:NetIncomeLoss	$5.2M	2026-01-31	2026-04-15	10-K	26-043813
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$21.0M	2026-01-31	2026-04-15	10-K	26-043813
5	assets	us-gaap:Assets	$471.2M	2026-01-31	2026-04-15	10-K	26-043813
6	assets	us-gaap:Assets	$462.8M	2025-02-01	2026-04-15	10-K	26-043813
7	current assets	us-gaap:AssetsCurrent	$193.0M	2026-01-31	2026-04-15	10-K	26-043813
8	current liabilities	us-gaap:LiabilitiesCurrent	$173.4M	2026-01-31	2026-04-15	10-K	26-043813
9	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$281.1M	2026-01-31	2026-04-15	10-K	26-043813
10	operating income	us-gaap:OperatingIncomeLoss	$3.9M	2026-01-31	2026-04-15	10-K	26-043813
11	book equity	us-gaap:StockholdersEquity	$116.3M	2026-01-31	2026-04-15	10-K	26-043813
12	liabilities	us-gaap:Liabilities	$354.9M	2026-01-31	2026-04-15	10-K	26-043813
13	operating income	us-gaap:OperatingIncomeLoss	-$19.5M	2024-02-03	2026-04-15	10-K	26-043813
14	interest expense	us-gaap:InterestExpense	$306,000	2024-02-03	2024-04-18	10-K	24-005294
15	revenue	us-gaap:Revenues	$820.0M	2026-01-31	2026-04-15	10-K	26-043813
16	revenue	us-gaap:Revenues	$753.1M	2025-02-01	2026-04-15	10-K	26-043813
17	revenue	us-gaap:Revenues	$747.9M	2024-02-03	2026-04-15	10-K	26-043813
18	revenue	us-gaap:Revenues	$795.0M	2023-01-28	2025-04-16	10-K	25-004897
19	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$20.3M	2026-01-31	2026-04-15	10-K	26-043813
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$3.8M	2025-02-01	2026-04-15	10-K	26-043813
21	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$10.1M	2025-02-01	2026-04-15	10-K	26-043813
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$9.6M	2024-02-03	2026-04-15	10-K	26-043813
23	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$14.9M	2024-02-03	2026-04-15	10-K	26-043813
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$5.8M	2023-01-28	2025-04-16	10-K	25-004897
25	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$22.3M	2023-01-28	2025-04-16	10-K	25-004897

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26	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$18.5M	2026-01-31	2026-04-15	10-K	26-043813
27	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$5.5M	2026-01-31	2026-04-15	10-K	26-043813
28	income tax	us-gaap:IncomeTaxExpenseBenefit	$296,000	2026-01-31	2026-04-15	10-K	26-043813
29	current assets	us-gaap:AssetsCurrent	$197.1M	2025-02-01	2026-04-15	10-K	26-043813
30	current liabilities	us-gaap:LiabilitiesCurrent	$174.4M	2025-02-01	2026-04-15	10-K	26-043813
31	assets	us-gaap:Assets	$518.7M	2024-02-03	2025-04-16	10-K	25-004897
32	assets	us-gaap:Assets	$544.3M	2023-01-28	2024-04-18	10-K	24-005294
33	shares outstanding	dei:EntityCommonStockSharesOutstanding	8,343,340	2026-04-10	2026-04-15	10-K	26-043813
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	8,277,733	2025-04-10	2025-04-16	10-K	25-004897

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