# Ethan Allen Interiors Inc.

**ETD**

NYSE; consumer durables; SIC 2511, Wood Household Furniture, (No Upholstered); CIK 0000896156

**B**

**second fifth of 458 graded peers in the pooled consumer group**

rank 146 of 458; percentile 32.6; sampling error 2.3 points; lower is stronger

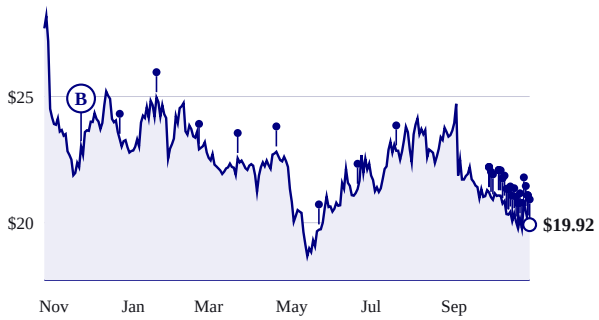
A B C D E

**B, the elk**



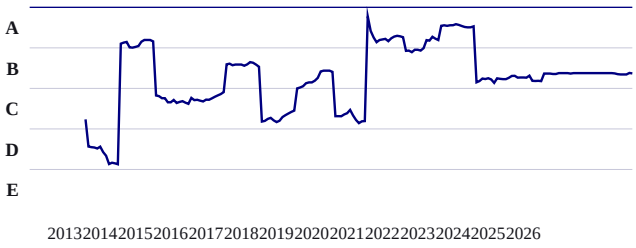
| Scoreboard | |
|---|---|
| **Profitability** | B/C<br>percentile 41.3 |
| **Solvency** | A/B<br>percentile 18.1 |
| **Growth and financing** | D<br>percentile 69.2 |
| **Reliability** | 0.91 AUC<br>filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025 |
| **Peer failure rate** | 1.01% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $591M to $2.67B assets<br>total assets $719.7M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered; fortress balance sheet |
| **Inputs computable** | 12 of 14 |
| **Graded from** | filings received through Sep 3, 2026<br>55 days before the rescan; latest periodic filing 10-K received Sep 3, 2026 |
| **Last close** | $19.90<br>2026-10-27; market equity $501.5M; 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 3, 2026*

Ethan Allen is a leading interior design company, manufacturer and retailer in the home furnishings marketplace. We are a global luxury home fashion brand that is vertically integrated from product design through home delivery, which offers our customers stylish product offerings, artisanal quality, and personalized service. We are known for the quality and craftsmanship of our products as well as for the exceptional personal service from design to delivery, and for our commitment to social responsibility and sustainable operations.

## 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 41.3** | | | | | | |
| Gross profitability | 49.3% | 34.4% | | 29.5 | 472 | 2026-06-30 |
| Return on invested capital | not computable | 8.9% | | | | |

*latest aligned inputs end 2021-06-30; latest annual assets end 2026-06-30*

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| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (1.7%) | (5.1%) | 79.3 | 519 | 2026-06-30 |
| Gross margin stability, five years | 0.7 pts | 1.7 pts | 15.1 | 406 | 2026-06-30 |
| **Solvency, sleeve percentile 18.1** | | | | | |
| Twelve-month failure probability | 0.03% | 0.04% | 29.4 | 35 | 2026-06-30 |
| Altman Z double-prime | 7.37 | 2.13 | 8.6 | 396 | 2026-06-30 |
| Net debt to EBITDA | not computable | 2.08x | | | |
| *latest aligned inputs end 2021-06-30; latest annual assets end 2026-06-30* | | | | | |
| Interest coverage | 198.31x | 2.64x | 0.0 | 127 | 2026-06-30 |
| Current ratio | 2.06x | 1.56x | 34.5 | 535 | 2026-06-30 |
| **Growth and financing, sleeve percentile 69.2** | | | | | |
| Revenue growth, three-year compound | (9.9%) | 1.4% | 88.1 | 480 | 2026-06-30 |
| Free cash flow growth, three-year compound | (21.8%) | 7.6% | 88.4 | 250 | 2026-06-30 |
| Reinvestment rate | (12.4%) | 12.3% | 70.9 | 266 | 2026-06-30 |
| Asset growth, three years | (1.2%) | 1.7% | 60.1 | 485 | 2026-06-30 |
| Net share issuance, one year | (0.9%) | (0.3%) | 38.7 | 378 | 2026-08-27 |

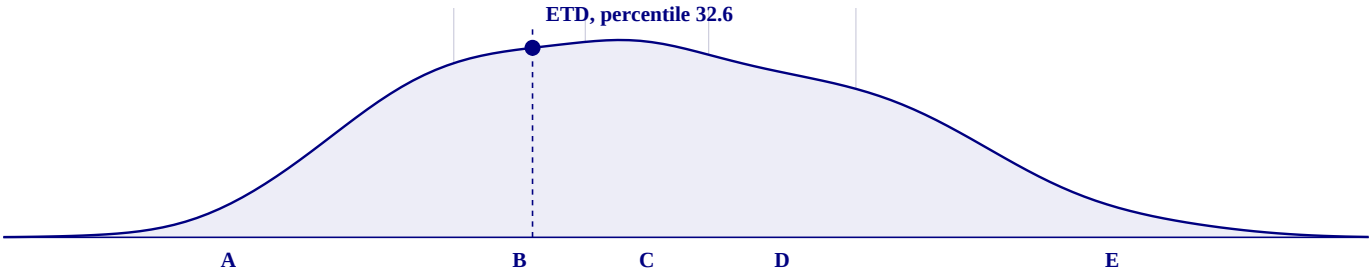
## Warnings

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

| Check | Measured |
|---|---|
| Fortress balance sheet | cash minus debt is 104,596,000 USD; Altman Z is not used |

## Among 458 peers

*consumer durables; 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 |
|---|---|---|---|---|
| 141 | Medifast Inc. (MED) | 31.7 | B | |
| 142 | Coupang, Inc. (CPNG) | 31.8 | B | fortress balance sheet |
| 143 | Aptiv plc (APTV) | 31.9 | B | |
| 144 | Home Depot, Inc. (HD) | 32.2 | B | |
| 145 | Levi Strauss & Co. (LEVI) | 32.5 | B | |
| 146 | Ethan Allen Interiors Inc. (ETD) | 32.6 | B | fortress balance sheet |
| 147 | Biglari Holdings Inc. (BH) | 32.7 | B | |
| 148 | Biglari Holdings Inc. (BH-A) | 32.7 | B | |
| 149 | Oshkosh Corp. (OSK) | 32.8 | B | |
| 150 | Burlington Stores, Inc. (BURL) | 33.3 | B | |
| 151 | Cal-Maine Foods Inc. (CALM) | 33.3 | B | fortress balance sheet |

## 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 | (23.5%) | (0.1%) | 23 |
| Distance from 52-week high | (29.3%) | (24.5%) | 43 |
| EBIT to enterprise value | 10.5% | 4.8% | 88 |

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| | | | |
|---|---|---|---|
| Free cash flow yield | 8.3% | 4.4% | 71 |
| Book value to price | 0.94 | 0.43 | 76 |
| Sales to price | 1.15 | 1.46 | 42 |
| Composite equity issuance, five years | (37.9%) | (16.0%) | 11 |
| Relative strength against the sector, log excess return | (0.24) | (0.01) | 26 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score None of 9, period end 2026-06-30** | |
| 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 | pass |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $73.6M |
| Operating cash flow, four quarters | $52.5M |
| Months of runway | not finite |
| Days since last periodic filing | 55 (10-K received Sep 3, 2026) |
| Median daily dollar volume, 63 sessions | $10.6M |

## 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 | $354.8M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 2 | assets | us-gaap:Assets | $719.7M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $77.3M | 2021-06-30 | 2023-08-24 | 10-K | 23-024609 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $76.4M | 2021-06-30 | 2023-08-24 | 10-K | 23-024609 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $16.4M | 2021-06-30 | 2023-08-24 | 10-K | 23-024609 |
| 6 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $0 | 2021-06-30 | 2021-08-19 | 10-K | 21-020534 |
| 7 | book equity | us-gaap:StockholdersEquity | $351.4M | 2021-06-30 | 2022-08-29 | 10-K | 22-021450 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $104.6M | 2021-06-30 | 2022-08-29 | 10-K | 22-021450 |
| 9 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $50.0M | 2020-06-30 | 2021-08-19 | 10-K | 21-020534 |
| 10 | book equity | us-gaap:StockholdersEquity | $328.1M | 2020-06-30 | 2021-08-19 | 10-K | 21-020534 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $72.3M | 2020-06-30 | 2021-08-19 | 10-K | 21-020534 |
| 12 | net income | us-gaap:ProfitLoss | $39.9M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $52.5M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 14 | assets | us-gaap:Assets | $737.1M | 2025-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $579.5M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 16 | gross profit | us-gaap:GrossProfit | $372.1M | 2025-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $614.6M | 2025-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 18 | gross profit | us-gaap:GrossProfit | $393.1M | 2024-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $646.2M | 2024-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 20 | gross profit | us-gaap:GrossProfit | $480.4M | 2023-06-30 | 2025-08-22 | 10-K | 25-027594 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $791.4M | 2023-06-30 | 2025-08-22 | 10-K | 25-027594 |
| 22 | gross profit | us-gaap:GrossProfit | $484.7M | 2022-06-30 | 2024-08-23 | 10-K | 24-027664 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $817.8M | 2022-06-30 | 2024-08-23 | 10-K | 24-027664 |
| 24 | current assets | us-gaap:AssetsCurrent | $305.5M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $148.4M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $778.5M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 27 | operating income | us-gaap:OperatingIncomeLoss | $45.0M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 28 | book equity | us-gaap:StockholdersEquity | $471.5M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 29 | liabilities | us-gaap:Liabilities | $248.2M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 30 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $16.4M | 2021-06-30 | 2023-08-24 | 10-K | 23-024609 |
| 31 | interest expense | us-gaap:InterestAndDebtExpense | $227,000 | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 32 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $11.0M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 33 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $61.7M | 2025-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 34 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $11.3M | 2025-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 35 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $80.2M | 2024-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 36 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $9.6M | 2024-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 37 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $100.7M | 2023-06-30 | 2025-08-22 | 10-K | 25-027594 |
| 38 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $13.9M | 2023-06-30 | 2025-08-22 | 10-K | 25-027594 |
| 39 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $15.2M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 40 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $53.2M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 41 | income tax | us-gaap:IncomeTaxExpenseBenefit | $13.3M | 2026-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 42 | current assets | us-gaap:AssetsCurrent | $309.9M | 2025-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 43 | current liabilities | us-gaap:LiabilitiesCurrent | $152.9M | 2025-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 44 | assets | us-gaap:Assets | $744.9M | 2024-06-30 | 2026-09-03 | 10-K | 26-029578 |
| 45 | assets | us-gaap:Assets | $745.5M | 2023-06-30 | 2025-08-22 | 10-K | 25-027594 |
| 46 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 25,202,503 | 2026-08-27 | 2026-09-03 | 10-K | 26-029578 |
| 47 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 25,441,838 | 2025-08-15 | 2025-08-22 | 10-K | 25-027594 |

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