# Agilysys Inc.

**AGYS**

Nasdaq; business equipment; SIC 7373, Services-Computer Integrated Systems Design; CIK 0000078749

**A**

**strongest fifth of 497 graded peers in business equipment**

rank 21 of 497; percentile 4.0; sampling error 2.2 points; lower is stronger

A B C D E

**A, the bull**



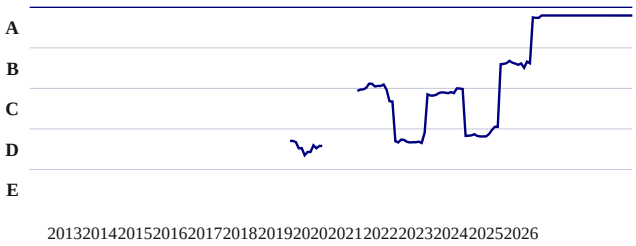
| Scoreboard | |
|---|---|
| **Profitability** | B<br>percentile 29.9 |
| **Solvency** | B<br>percentile 35.2 |
| **Growth and financing** | B<br>percentile 25.0 |
| **Reliability** | 0.87 AUC<br>filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025 |
| **Peer failure rate** | 1.03% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $120M to $591M assets<br>total assets $481.5M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: distress, fortress balance sheet |
| **Inputs computable** | 10 of 14 |
| **Graded from** | filings received through May 21, 2026<br>161 days before the rescan; latest periodic filing 10-Q received Oct 26, 2026 |
| **Last close** | $115.09<br>2026-10-28; market equity $3.2B; 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 May 21, 2026*

Agilysys has been a leader in hospitality software for more than 45 years, delivering innovative cloud-native SaaS and on-premise solutions for hotels, multi-amenity resorts, cruise lines, casinos, corporate foodservice management, restaurants, universities, stadiums, and healthcare facilities. The Company's software solutions include point-of-sale (POS), property management (PMS), inventory and procurement, payments, and related applications that manage and enhance the entire guest journey. Agilysys is also known for its world-class customer-centric service.

## The fourteen inputs

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

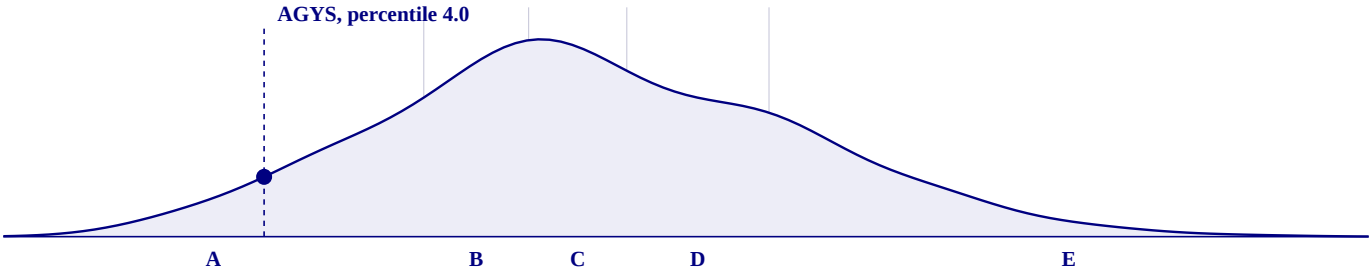
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 29.9** | | | | | | |
| Gross profitability | 41.5% | 28.6% | | 25.5 | 555 | 2026-03-31 |
| Return on invested capital | not computable | 11.2% | | | | |
| *one or more required annual facts are missing* | | | | | | |

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| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (6.8%) | (7.4%) | 54.9 | 618 | 2026-03-31 |
| Gross margin stability, five years | 0.8 pts | 2.3 pts | 9.2 | 426 | 2026-03-31 |
| **Solvency, sleeve percentile 35.2** | | | | | |
| Twelve-month failure probability | not computable | 0.05% | | | |
| *four consecutive discrete net-income quarters are required; found 4* | | | | | |
| Altman Z double-prime | not computable | 2.16 | | | |
| *one or more required annual facts are missing* | | | | | |
| Net debt to EBITDA | not computable | 1.11x | | | |
| *one or more required annual facts are missing* | | | | | |
| Interest coverage | 87.25x | 3.77x | 5.7 | 88 | 2026-03-31 |
| Current ratio | 1.47x | 2.01x | 64.8 | 662 | 2026-03-31 |
| **Growth and financing, sleeve percentile 25.0** | | | | | |
| Revenue growth, three-year compound | 17.3% | 6.3% | 22.8 | 535 | 2026-03-31 |
| Free cash flow growth, three-year compound | 35.8% | 18.0% | 25.8 | 265 | 2026-03-31 |
| Reinvestment rate | 129.2% | 14.3% | 16.1 | 224 | 2026-03-31 |
| Asset growth, three years | 25.6% | 5.1% | 12.3 | 560 | 2026-03-31 |
| Net share issuance, one year | 0.5% | 0.5% | 47.8 | 409 | 2026-05-08 |

## Among 497 peers

*business equipment; 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 |
|---|---|---|---|---|
| 16 | Nvidia Corp. (NVDA) | 3.0 | A | fortress balance sheet |
| 17 | Gitlab Inc. (GTLB) | 3.2 | A | late filer |
| 18 | Arista Networks, Inc. (ANET) | 3.4 | A | |
| 19 | Five9, Inc. (FIVN) | 3.6 | A | |
| 20 | Optex Systems Holdings Inc. (OPXS) | 3.8 | A | |
| 21 | Agilysys Inc. (AGYS) | 4.0 | A | |
| 22 | Micron Technology Inc. (MU) | 4.2 | A | fortress balance sheet |
| 23 | EverQuote, Inc. (EVER) | 4.4 | A | |
| 24 | A10 Networks, Inc. (ATEN) | 4.6 | A | |
| 25 | Aeluma, Inc. (ALMU) | 4.8 | A | fortress balance sheet |
| 26 | Veeva Systems Inc. (VEEV) | 5.0 | A | |

## What the price implies

*at the 2026-10-28 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 10.6% | 2.2% | 57 |
| Distance from 52-week high | (18.4%) | (30.5%) | 66 |
| EBIT to enterprise value | not computable | 1.5% | |
| Free cash flow yield | 2.1% | 2.8% | 42 |
| Book value to price | 0.11 | 0.25 | 25 |
| Sales to price | 0.10 | 0.31 | 19 |

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| | | | |
|---|---|---|---|
| Composite equity issuance, five years | 16.6% | 4.1% | 66 |
| Relative strength against the sector, log excess return | (0.18) | (0.26) | 57 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 7 of 9, period end 2026-03-31** | |
| 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 | pass |
| Current ratio improved | pass |
| No new shares issued | fail |
| Gross margin improved | pass |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $137.6M |
| Operating cash flow, four quarters | $82.1M |
| Months of runway | not finite |
| Days since last periodic filing | 3 (10-Q received Oct 26, 2026) |
| Median daily dollar volume, 63 sessions | $25.5M |

## 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 | $199.9M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 2 | assets | us-gaap:Assets | $481.5M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 3 | net income | us-gaap:NetIncomeLoss | $38.8M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 4 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $70.0M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 5 | assets | us-gaap:Assets | $434.4M | 2025-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 6 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $319.3M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 7 | gross profit | us-gaap:GrossProfit | $172.0M | 2025-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 8 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $275.6M | 2025-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 9 | gross profit | us-gaap:GrossProfit | $144.3M | 2024-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 10 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $237.5M | 2024-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 11 | gross profit | us-gaap:GrossProfit | $120.8M | 2023-03-31 | 2025-05-23 | 10-K | 25-076527 |
| 12 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $198.1M | 2023-03-31 | 2025-05-23 | 10-K | 25-076527 |
| 13 | gross profit | us-gaap:GrossProfit | $101.5M | 2022-03-31 | 2024-05-22 | 10-K | 24-063222 |
| 14 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $162.6M | 2022-03-31 | 2024-05-22 | 10-K | 24-063222 |
| 15 | operating income | us-gaap:OperatingIncomeLoss | $43.0M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 16 | interest expense | us-gaap:InterestExpense | $493,000 | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 17 | current assets | us-gaap:AssetsCurrent | $184.1M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 18 | current liabilities | us-gaap:LiabilitiesCurrent | $125.1M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 19 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $1.8M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 20 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $55.1M | 2025-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 21 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $2.8M | 2025-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 22 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $48.2M | 2024-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 23 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $8.1M | 2024-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 24 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $34.5M | 2023-03-31 | 2025-05-23 | 10-K | 25-076527 |
| 25 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $7.2M | 2023-03-31 | 2025-05-23 | 10-K | 25-076527 |
| 26 | depreciation amortization | us-gaap:Depreciation | $3.8M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 27 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $48.4M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 28 | income tax | us-gaap:IncomeTaxExpenseBenefit | $9.6M | 2026-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 29 | current assets | us-gaap:AssetsCurrent | $123.5M | 2025-03-31 | 2026-05-21 | 10-K | 26-234423 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 30 | current liabilities | us-gaap:LiabilitiesCurrent | $111.0M | 2025-03-31 | 2026-05-21 | 10-K | 26-234423 |
| 31 | assets | us-gaap:Assets | $350.4M | 2024-03-31 | 2025-05-23 | 10-K | 25-076527 |
| 32 | assets | us-gaap:Assets | $243.0M | 2023-03-31 | 2024-05-22 | 10-K | 24-063222 |
| 33 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 28,166,629 | 2026-05-08 | 2026-05-21 | 10-K | 26-234423 |
| 34 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 28,017,312 | 2025-05-16 | 2025-05-23 | 10-K | 25-076527 |

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