Cable One, Inc.

CABO

NYSE; telecom; SIC 4841, Cable & Other Pay Television Services; CIK 0001632127

E

weakest fifth of 556 graded peers in the pooled technology a...

rank 493 of 556; percentile 90.3; sampling error 2.1 points; lower is stronger

A B C D E

E, the bear



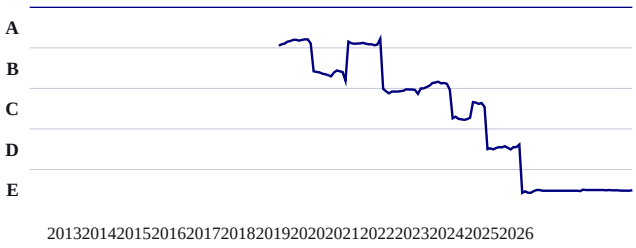
Scoreboard	
Profitability	C percentile 55.8
Solvency	E percentile 82.8
Growth and financing	D percentile 68.1
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $5.6B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	8 of 14
Graded from	filings received through Feb 26, 2026 247 days before the rescan; latest periodic filing 10-Q received Aug 6, 2026
Last close	$5.46 2026-10-30; market equity $31.0M; 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 Feb 26, 2026

Cable One, Inc. ("Cable One," "us," "our," "we" or the "Company") is a leading broadband communications provider delivering exceptional service and enabling our customers to thrive and stay connected to what matters most. Through Sparklight®, the brand our customers know and trust, we are transforming the future of connectivity with a commitment to innovation, reliability and customer experience. We serve our customers with technologically advanced fiber-based infrastructure that provides for delivery of a full suite of data, video and voice products.

The fourteen inputs

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

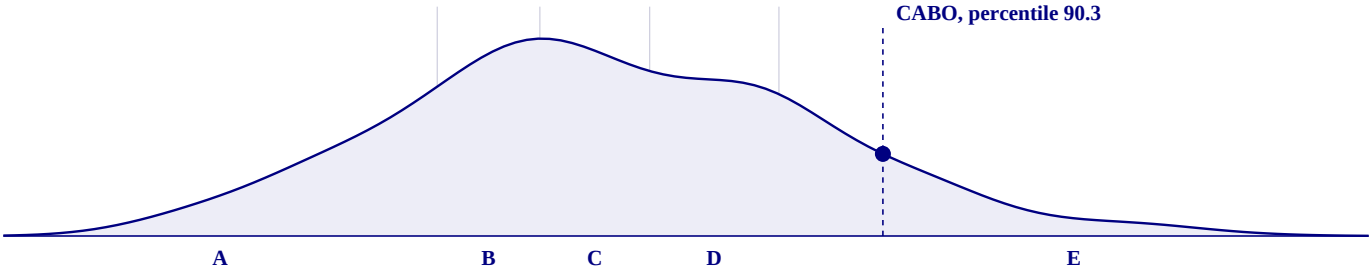
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 55.8						
Gross profitability	not computable	28.3%				
one or more required annual facts are missing						
Return on invested capital	(3.3%)	8.9%		84.6	176	2025-12-31

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Accruals ratio	(15.2%)	(7.3%)	27.0	697	2025-12-31
Gross margin stability, five years	not computable	2.3 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 82.8					
Twelve-month failure probability	not computable	0.05%			
latest liabilities, cash plus short-term investments, book equity, and shares are required					
Altman Z double-prime	0.36	1.91	54.8	621	2025-12-31
Net debt to EBITDA	18.66x	1.69x	98.4	188	2025-12-31
Interest coverage	not computable	2.81x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	0.40x	1.95x	95.2	754	2025-12-31
Growth and financing, sleeve percentile 68.1					
Revenue growth, three-year compound	(4.2%)	5.3%	76.8	609	2025-12-31
Free cash flow growth, three-year compound	(5.0%)	15.4%	77.3	309	2025-12-31
Reinvestment rate	not computable	15.1%			
NOPAT must exceed $100,000					
Asset growth, three years	not computable	3.8%			
four consecutive annual observations are required					
Net share issuance, one year	0.8%	0.6%	50.3	434	2026-02-20

Among 556 peers

telecom; 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
488	Sypris Solutions Inc. (SYPR)	89.3	E	fortress balance sheet
489	Senseonics Holdings, Inc. (SENS)	89.5	E	dilution, short runway, fortress balance sheet
490	Solaredge Technologies, Inc. (SEDG)	89.7	E	
491	Motorsport Games Inc. (MSGM)	89.9	E	
492	8X8 Inc. (EGHT)	90.1	E	
493	Cable One, Inc. (CABO)	90.3	E	
494	FingerMotion, Inc. (FNGR)	90.3	E	short runway
495	BIO KEY International Inc. (BKYI)	90.5	E	short runway, late filer
496	Firefly Neuroscience, Inc. (AIFF)	90.7	E	dilution, late filer, fortress balance sheet
497	Liberty Media Corp. (FWONA)	90.7	E	
498	Liberty Media Corp. (FWONK)	90.7	E	

What the price implies

at the 2026-10-30 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(84.5%)	(0.7%)	2
Distance from 52-week high	(96.3%)	(32.2%)	1

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EBIT to enterprise value	(7.2%)	1.6%	19
Free cash flow yield	897.6%	2.8%	100
Book value to price	10.54	0.27	98
Sales to price	48.46	0.33	100
Composite equity issuance, five years	(13.5%)	3.8%	23
Relative strength against the sector, log excess return	(1.81)	(0.23)	4

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-31	
Return on assets above zero	fail
Operating cash flow above zero	pass
Return on assets improved	fail
Operating cash flow exceeds net income	pass
Long-term leverage fell	pass
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$166.2M
Operating cash flow, four quarters	$541.1M
Months of runway	not finite
Days since last periodic filing	86 (10-Q received Aug 6, 2026)
Median daily dollar volume, 63 sessions	$6.5M

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	operating income	us-gaap:OperatingIncomeLoss	-$207.4M	2025-12-31	2026-02-26	10-K	26-000005
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$306.4M	2025-12-31	2026-02-26	10-K	26-000005
3	income tax	us-gaap:IncomeTaxExpenseBenefit	-$87.9M	2025-12-31	2026-02-26	10-K	26-000005
4	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.6B	2025-12-31	2026-02-26	10-K	26-000005
5	book equity	us-gaap:StockholdersEquity	$1.4B	2025-12-31	2026-02-26	10-K	26-000005
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$152.8M	2025-12-31	2026-02-26	10-K	26-000005
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$3.6B	2024-12-31	2026-02-26	10-K	26-000005
8	book equity	us-gaap:StockholdersEquity	$1.8B	2024-12-31	2026-02-26	10-K	26-000005
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$153.6M	2024-12-31	2026-02-26	10-K	26-000005
10	net income	us-gaap:NetIncomeLoss	-$356.5M	2025-12-31	2026-02-26	10-K	26-000005
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$563.3M	2025-12-31	2026-02-26	10-K	26-000005
12	assets	us-gaap:Assets	$5.6B	2025-12-31	2026-02-26	10-K	26-000005
13	assets	us-gaap:Assets	$6.5B	2024-12-31	2026-02-26	10-K	26-000005
14	current assets	us-gaap:AssetsCurrent	$306.6M	2025-12-31	2026-02-26	10-K	26-000005
15	current liabilities	us-gaap:LiabilitiesCurrent	$759.3M	2025-12-31	2026-02-26	10-K	26-000005
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.3B	2025-12-31	2026-02-26	10-K	26-000005
17	liabilities	us-gaap:Liabilities	$4.2B	2025-12-31	2026-02-26	10-K	26-000005
18	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$338.5M	2025-12-31	2026-02-26	10-K	26-000005
19	operating income	us-gaap:OperatingIncomeLoss	$526.9M	2023-12-31	2026-02-26	10-K	26-000005
20	interest expense	us-gaap:InterestExpense	$170.1M	2023-12-31	2024-10-02	10-K/A	24-000123
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$1.5B	2025-12-31	2026-02-26	10-K	26-000005
22	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$1.6B	2024-12-31	2026-02-26	10-K	26-000005
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$1.7B	2023-12-31	2026-02-26	10-K	26-000005
24	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$1.7B	2022-12-31	2025-02-28	10-K	25-000033

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25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$285.3M	2025-12-31	2026-02-26	10-K	26-000005
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$664.1M	2024-12-31	2026-02-26	10-K	26-000005
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$286.4M	2024-12-31	2026-02-26	10-K	26-000005
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$663.2M	2023-12-31	2026-02-26	10-K	26-000005
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$371.0M	2023-12-31	2026-02-26	10-K	26-000005
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$738.0M	2022-12-31	2025-02-28	10-K	25-000033
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$414.1M	2022-12-31	2025-02-28	10-K	25-000033
32	current assets	us-gaap:AssetsCurrent	$279.2M	2024-12-31	2026-02-26	10-K	26-000005
33	current liabilities	us-gaap:LiabilitiesCurrent	$213.9M	2024-12-31	2026-02-26	10-K	26-000005
34	assets	us-gaap:Assets	$6.8B	2023-12-31	2025-02-28	10-K	25-000033
35	assets	us-gaap:Assets	$6.8B	2023-09-30	2024-10-02	10-K/A	24-000123
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,672,182	2026-02-20	2026-02-26	10-K	26-000005
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,627,529	2025-02-21	2025-02-28	10-K	25-000033

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