# Genesco Inc.

# GCO

NYSE; shops; SIC 5661, Retail-Shoe Stores; CIK 0000018498

# B

## second fifth of 256 graded peers in shops

rank 71 of 256; percentile 27.5; sampling error 2.9 points; lower is stronger

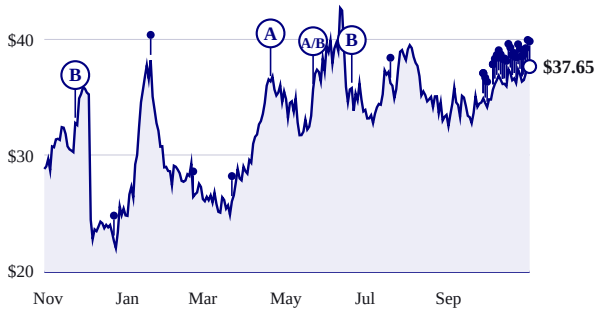
A B C D E

**B, the elk**



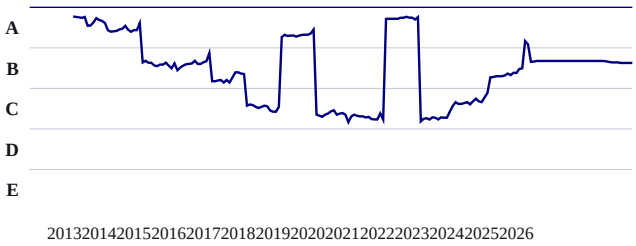
| Scoreboard | |
|---|---|
| **Profitability** | B<br>percentile 23.2 |
| **Solvency** | B/C<br>percentile 37.5 |
| **Growth and financing** | C/D<br>percentile 61.1 |
| **Reliability** | 0.91 AUC<br>filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025 |
| **Peer failure 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 $1.4B |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered; fortress balance sheet<br>not computable: dilution, distress |
| **Inputs computable** | 7 of 14 |
| **Graded from** | filings received through Jun 1, 2026<br>152 days before the rescan; latest periodic filing 10-Q received Sep 10, 2026 |
| **Last close** | $37.59<br>2026-10-30; market equity $406.7M; 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 25, 2026*

Genesco Inc., incorporated in 1934 in the State of Tennessee, is a leading retailer and wholesaler of branded footwear, apparel and accessories with net sales for Fiscal 2026 of $2.4 billion. During Fiscal 2026, we operated four reportable business segments (not including corporate): (i) Journeys Group, comprised of the Journeys®, Journeys Kidz® and Little Burgundy® retail footwear chains and e-commerce operations; (ii) Schuh Group, comprised of the Schuh retail footwear chain and e-commerce operations; (iii) Johnston & Murphy Group, comprised of Johnston & Murphy® retail operations, e-commerce operations and wholesale distribution of products under the Johnston & Murphy® brand; and (iv)...

## 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 23.2** | | | | | | |
| Gross profitability | 80.9% | 42.0% | | 12.6 | 240 | 2026-01-31 |
| Return on invested capital | not computable | 10.9% | | | | |

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| | | | | | |
|---|---|---|---|---|---|
| *latest aligned inputs end 2022-01-29; latest annual assets end 2026-01-31* | | | | | |
| Accruals ratio | (9.7%) | (4.8%) | 24.3 | 285 | 2026-01-31 |
| Gross margin stability, five years | 0.8 pts | 1.2 pts | 32.7 | 218 | 2026-01-31 |
| **Solvency, sleeve percentile 37.5** | | | | | |
| 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 | 2.57 | 1.93 | 37.3 | 205 | 2026-01-31 |
| Net debt to EBITDA | not computable | 1.84x | | | |
| *latest aligned inputs end 2022-01-29; latest annual assets end 2026-01-31* | | | | | |
| Interest coverage | not computable | 2.28x | | | |
| *latest aligned inputs end 2024-02-03; latest annual assets end 2026-01-31* | | | | | |
| Current ratio | 1.64x | 1.38x | 37.7 | 293 | 2026-01-31 |
| **Growth and financing, sleeve percentile 61.1** | | | | | |
| Revenue growth, three-year compound | 0.7% | 1.6% | 54.1 | 267 | 2026-01-31 |
| Free cash flow growth, three-year compound | not computable | 5.2% | | | |
| *current FCF must be positive and base FCF must exceed $100,000* | | | | | |
| Reinvestment rate | not computable | 8.4% | | | |
| *pretax income must exceed the validity floor and imply a 0%-100% tax rate* | | | | | |
| Asset growth, three years | (1.5%) | 3.4% | 68.0 | 270 | 2026-01-31 |
| Net share issuance, one year | not computable | (0.6%) | | | |
| *prior share count is 66 days earlier* | | | | | |

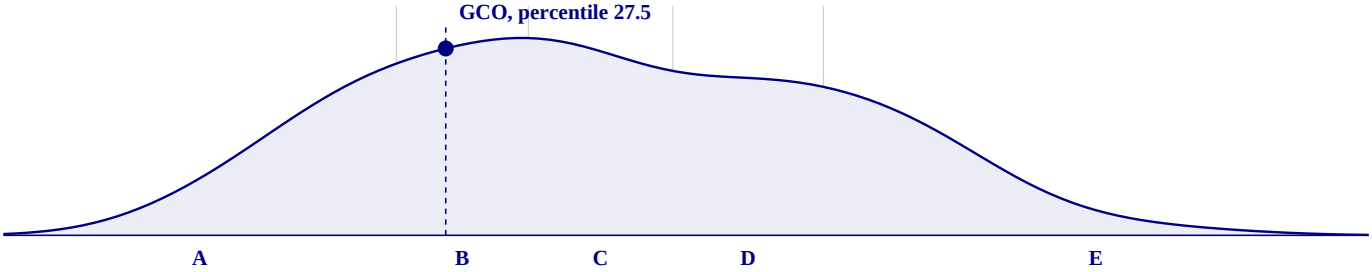
## Warnings

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

| Check | Measured |
|---|---|
| Fortress balance sheet | cash minus debt is 304,846,000 USD; Altman Z is not used |

## 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 |
|---|---|---|---|---|
| 66 | Dillard'S, Inc. (DDS) | 25.7 | B | |
| 67 | Dillard'S, Inc. (DDT) | 25.7 | B | |
| 68 | MSC Industrial Direct Co. Inc. (MSM) | 26.3 | B | |
| 69 | ONE Group Hospitality, Inc. (STKS) | 26.7 | B | late filer |
| 70 | Hawkins Inc. (HWKN) | 27.1 | B | |
| 71 | Genesco Inc. (GCO) | 27.5 | B | fortress balance sheet |
| 72 | BJs Restaurants Inc. (BJRI) | 27.8 | B | |
| 73 | Texas Roadhouse, Inc. (TXRH) | 28.2 | B | fortress balance sheet |
| 74 | Nathans Famous, Inc. (NATH) | 28.6 | B | |
| 75 | Ingles Markets Inc. (IMKTA) | 29.0 | B | late filer |
| 76 | Macy's, Inc. (M) | 29.4 | B | |

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## 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 | 15.5% | 0.7% | 64 |
| Distance from 52-week high | (11.9%) | (20.3%) | 65 |
| EBIT to enterprise value | 4.7% | 5.2% | 43 |
| Free cash flow yield | 20.5% | 3.9% | 96 |
| Book value to price | 1.37 | 0.35 | 90 |
| Sales to price | 5.98 | 1.59 | 87 |
| Composite equity issuance, five years | (32.4%) | (16.8%) | 21 |
| Relative strength against the sector, log excess return | 0.17 | 0.03 | 64 |

## 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 | fail |
| Gross margin improved | fail |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $57.1M |
| Operating cash flow, four quarters | $134.1M |
| Months of runway | not finite |
| Days since last periodic filing | 51 (10-Q received Sep 10, 2026) |
| Median daily dollar volume, 63 sessions | $5.4M |

## 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 | $1.1B | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 2 | assets | us-gaap:Assets | $1.4B | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $155.6M | 2022-01-29 | 2024-03-27 | 10-K | 24-036902 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $153.0M | 2022-01-29 | 2024-03-27 | 10-K | 24-036902 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $38.0M | 2022-01-29 | 2024-03-27 | 10-K | 24-036902 |
| 6 | total debt | us-gaap:LongTermDebt | $15.7M | 2022-01-29 | 2023-03-22 | 10-K | 23-009103 |
| 7 | book equity | us-gaap:StockholdersEquity | $602.5M | 2022-01-29 | 2025-03-26 | 10-K | 25-044864 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $320.5M | 2022-01-29 | 2022-03-23 | 10-K | 22-004397 |
| 9 | total debt | us-gaap:LongTermDebt | $33.0M | 2021-01-30 | 2022-03-23 | 10-K | 22-004397 |
| 10 | book equity | us-gaap:StockholdersEquity | $566.8M | 2021-01-30 | 2024-03-27 | 10-K | 24-036902 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $215.1M | 2021-01-30 | 2022-03-23 | 10-K | 22-004397 |
| 12 | net income | us-gaap:NetIncomeLoss | $13.3M | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $145.8M | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 14 | assets | us-gaap:Assets | $1.3B | 2025-02-01 | 2026-03-25 | 10-K | 26-123492 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $2.4B | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 16 | gross profit | us-gaap:GrossProfit | $1.1B | 2025-02-01 | 2026-03-25 | 10-K | 26-123492 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $2.3B | 2025-02-01 | 2026-03-25 | 10-K | 26-123492 |
| 18 | gross profit | us-gaap:GrossProfit | $1.1B | 2024-02-03 | 2026-03-25 | 10-K | 26-123492 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $2.3B | 2024-02-03 | 2026-03-25 | 10-K | 26-123492 |
| 20 | gross profit | us-gaap:GrossProfit | $1.1B | 2023-01-28 | 2025-03-26 | 10-K | 25-044864 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $2.4B | 2023-01-28 | 2025-03-26 | 10-K | 25-044864 |
| 22 | gross profit | us-gaap:GrossProfit | $1.2B | 2022-01-29 | 2024-03-27 | 10-K | 24-036902 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $2.4B | 2022-01-29 | 2024-03-27 | 10-K | 24-036902 |
| 24 | current assets | us-gaap:AssetsCurrent | $618.5M | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $376.3M | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $265.8M | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 27 | operating income | us-gaap:OperatingIncomeLoss | $17.3M | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 28 | book equity | us-gaap:StockholdersEquity | $567.0M | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 29 | liabilities | us-gaap:Liabilities | $825.9M | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 30 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $43.0M | 2022-01-29 | 2024-03-27 | 10-K | 24-036902 |
| 31 | operating income | us-gaap:OperatingIncomeLoss | -$13.5M | 2024-02-03 | 2026-03-25 | 10-K | 26-123492 |
| 32 | interest expense | us-gaap:InterestExpense | $7.8M | 2024-02-03 | 2024-03-27 | 10-K | 24-036902 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $62.1M | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $87.9M | 2025-02-01 | 2026-03-25 | 10-K | 26-123492 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $41.1M | 2025-02-01 | 2026-03-25 | 10-K | 26-123492 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $94.8M | 2024-02-03 | 2026-03-25 | 10-K | 26-123492 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $60.3M | 2024-02-03 | 2026-03-25 | 10-K | 26-123492 |
| 38 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$164.9M | 2023-01-28 | 2025-03-26 | 10-K | 25-044864 |
| 39 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $59.9M | 2023-01-28 | 2025-03-26 | 10-K | 25-044864 |
| 40 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $53.3M | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 41 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $12.6M | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 42 | income tax | us-gaap:IncomeTaxExpenseBenefit | -$685,000 | 2026-01-31 | 2026-03-25 | 10-K | 26-123492 |
| 43 | current assets | us-gaap:AssetsCurrent | $608.8M | 2025-02-01 | 2026-03-25 | 10-K | 26-123492 |
| 44 | current liabilities | us-gaap:LiabilitiesCurrent | $379.8M | 2025-02-01 | 2026-03-25 | 10-K | 26-123492 |
| 45 | assets | us-gaap:Assets | $1.3B | 2024-02-03 | 2026-03-25 | 10-K | 26-123492 |
| 46 | assets | us-gaap:Assets | $1.5B | 2023-01-28 | 2025-03-26 | 10-K | 25-044864 |
| 47 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 11,103,175 | 2026-05-18 | 2026-06-01 | 10-K/A | 26-251478 |
| 48 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 10,858,224 | 2026-03-13 | 2026-03-25 | 10-K | 26-123492 |

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