Live Ventures Inc.

LIVE

Nasdaq; shops; SIC 5900, Retail-Miscellaneous Retail; CIK 0001045742

B

second fifth of 256 graded peers in shops

rank 90 of 256; percentile 34.9; sampling error 2.9 points; lower is stronger

A B C D E

B, the elk



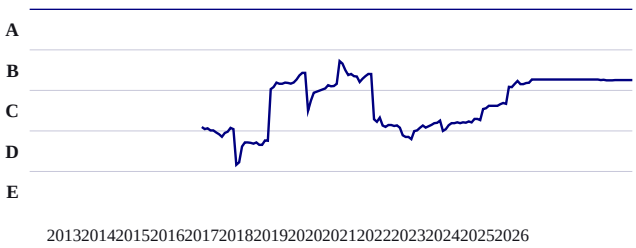
Scoreboard	
Profitability	D percentile 67.3
Solvency	C percentile 44.8
Growth and financing	A/B percentile 21.3
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $386.4M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	9 of 14
Graded from	filings received through Dec 17, 2025 320 days before the rescan; latest periodic filing 10-Q received Aug 13, 2026
Last close	$7.37 2026-10-26; market equity $22.6M; 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 Dec 17, 2025

The "Company," "Live Ventures", "Live", "we," "our," and "us" are used interchangeably to refer to Live Ventures Incorporated and its subsidiaries, as appropriate in the context. Live Ventures Incorporated (Nasdaq: LIVE) is a diversified holding company with a strategic focus on value-oriented acquisitions of domestic middle-market companies. Live Ventures' acquisition strategy is industry agnostic and focuses on well-run, closely held businesses with a demonstrated track record of earnings growth and cash flow generation. The Company looks for opportunities to partner with management to build increased stockholder value through a disciplined buy-build-hold, long-term focused strategy.

The fourteen inputs

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

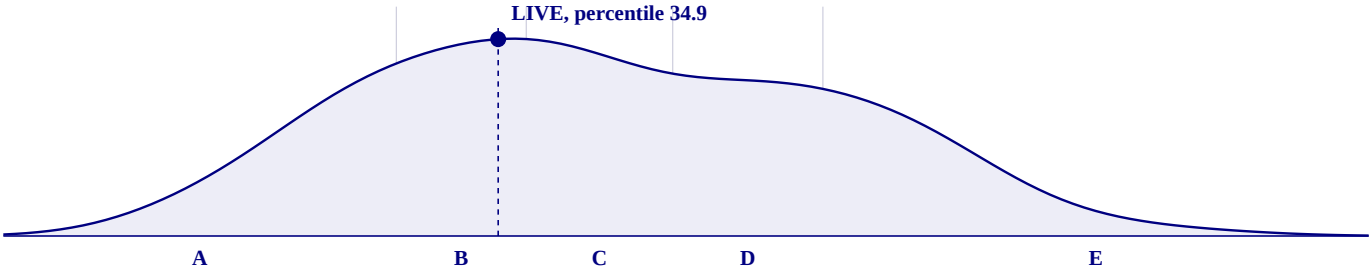
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 67.3						
Gross profitability	37.7%	42.0%		54.4	240	2025-09-30
Return on invested capital	not computable	10.9%				

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latest aligned inputs end 2018-09-30; latest annual assets end 2025-09-30						
Accruals ratio	(1.5%)	(4.8%)		82.0	285	2025-09-30
Gross margin stability, five years	1.9 pts	1.2 pts		65.4	218	2025-09-30
Solvency, sleeve percentile 44.8						
Twelve-month failure probability	not computable	0.03%				
latest liabilities, cash plus short-term investments, book equity, and shares are required						
Altman Z double-prime	1.90	1.93		49.5	205	2025-09-30
Net debt to EBITDA	not computable	1.84x				
latest aligned inputs end 2018-09-30; latest annual assets end 2025-09-30						
Interest coverage	not computable	2.28x				
latest aligned inputs end 2024-09-30; latest annual assets end 2025-09-30						
Current ratio	1.56x	1.38x		40.1	293	2025-09-30
Growth and financing, sleeve percentile 21.3						
Revenue growth, three-year compound	15.7%	1.6%		6.4	267	2025-09-30
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	44.5%	8.4%		29.8	152	2025-09-30
Asset growth, three years	11.5%	3.4%		13.8	270	2025-09-30
Net share issuance, one year	(1.6%)	(0.6%)		35.3	208	2025-12-05

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
85	Biglari Holdings Inc. (BH-A)	32.7	B	
86	Burlington Stores, Inc. (BURL)	33.3	B	
87	Pool Corp. (POOL)	33.7	B	
88	Weyco Group Inc. (WEYS)	34.1	B	
89	Flanigans Enterprises Inc. (BDL)	34.5	B	late filer, fortress balance sheet
90	Live Ventures Inc. (LIVE)	34.9	B	
91	Cencora, Inc. (COR)	35.3	B	
92	Reborn Coffee, Inc. (REBN)	35.7	B	dilution, late filer, fortress balance sheet
93	Alta Equipment Group Inc. (ALTG)	36.3	B	
94	Alta Equipment Group Inc. (ALTG-PA)	36.3	B	
95	Yum China Holdings, Inc. (YUMC)	36.9	B	

What the price implies

at the 2026-10-26 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(44.1%)	(0.4%)	11
Distance from 52-week high	(65.4%)	(20.3%)	6
EBIT to enterprise value	24.3%	5.2%	99

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Free cash flow yield	93.6%	3.9%	99
Book value to price	4.10	0.35	97
Sales to price	19.84	1.59	96
Composite equity issuance, five years	68.1%	(16.8%)	95
Relative strength against the sector, log excess return	(0.49)	0.09	11

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-09-30	
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	pass
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$10.9M
Operating cash flow, four quarters	$21.4M
Months of runway	not finite
Days since last periodic filing	81 (10-Q received Aug 13, 2026)
Median daily dollar volume, 63 sessions	$38,184

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	$145.7M	2025-09-30	2025-12-17	10-K	25-057711
2	assets	us-gaap:Assets	$386.4M	2025-09-30	2025-12-17	10-K	25-057711
3	operating income	us-gaap:OperatingIncomeLoss	$10.8M	2018-09-30	2020-02-10	10-K	20-003917
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$10.3M	2018-09-30	2020-02-10	10-K	20-003917
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$4.4M	2018-09-30	2020-02-10	10-K	20-003917
6	total debt	us-gaap:LongTermDebt	$58.8M	2018-09-30	2018-12-27	10-K	18-003807
7	book equity	us-gaap:StockholdersEquity	$38.8M	2018-09-30	2020-02-10	10-K	20-003917
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$2.0M	2018-09-30	2018-12-27	10-K	18-003807
9	total debt	us-gaap:LongTermDebt	$26.6M	2017-09-30	2018-12-27	10-K	18-003807
10	book equity	us-gaap:StockholdersEquity	$32.9M	2017-09-30	2020-02-10	10-K	20-003917
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$4.0M	2017-09-30	2018-12-27	10-K	18-003807
12	net income	us-gaap:NetIncomeLoss	$22.7M	2025-09-30	2025-12-17	10-K	25-057711
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$28.7M	2025-09-30	2025-12-17	10-K	25-057711
14	assets	us-gaap:Assets	$407.5M	2024-09-30	2025-12-17	10-K	25-057711
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$444.9M	2025-09-30	2025-12-17	10-K	25-057711
16	gross profit	us-gaap:GrossProfit	$144.8M	2024-09-30	2025-12-17	10-K	25-057711
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$472.8M	2024-09-30	2025-12-17	10-K	25-057711
18	gross profit	us-gaap:GrossProfit	$115.6M	2023-09-30	2024-12-19	10-K	24-052099
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$355.2M	2023-09-30	2024-12-19	10-K	24-052099
20	gross profit	us-gaap:GrossProfit	$97.8M	2022-09-30	2023-12-22	10-K	23-042586
21	revenue	us-gaap:Revenues	$286.9M	2022-09-30	2023-12-22	10-K	23-042586
22	gross profit	us-gaap:GrossProfit	$99.5M	2021-09-30	2022-12-16	10-K	22-026675
23	revenue	us-gaap:Revenues	$273.0M	2021-09-30	2022-12-16	10-K	22-026675
24	current assets	us-gaap:AssetsCurrent	$173.1M	2025-09-30	2025-12-17	10-K	25-057711
25	current liabilities	us-gaap:LiabilitiesCurrent	$111.0M	2025-09-30	2025-12-17	10-K	25-057711

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26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$29.1M	2025-09-30	2025-12-17	10-K	25-057711
27	operating income	us-gaap:OperatingIncomeLoss	$14.6M	2025-09-30	2025-12-17	10-K	25-057711
28	book equity	us-gaap:StockholdersEquity	$95.3M	2025-09-30	2025-12-17	10-K	25-057711
29	liabilities	us-gaap:Liabilities	$291.1M	2025-09-30	2025-12-17	10-K	25-057711
30	depreciation amortization	us-gaap:Depreciation	$4.6M	2018-09-30	2020-02-10	10-K	20-003917
31	operating income	us-gaap:OperatingIncomeLoss	-$13.6M	2024-09-30	2025-12-17	10-K	25-057711
32	interest expense	us-gaap:InterestAndDebtExpense	$16.8M	2024-09-30	2024-12-19	10-K	24-052099
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.7M	2025-09-30	2025-12-17	10-K	25-057711
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$20.6M	2024-09-30	2025-12-17	10-K	25-057711
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$8.5M	2024-09-30	2025-12-17	10-K	25-057711
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$26.0M	2023-09-30	2024-12-19	10-K	24-052099
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$10.0M	2023-09-30	2024-12-19	10-K	24-052099
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$6.4M	2022-09-30	2023-12-22	10-K	23-042586
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$12.1M	2022-09-30	2023-12-22	10-K	23-042586
40	depreciation amortization	us-gaap:Depreciation	$12.3M	2025-09-30	2025-12-17	10-K	25-057711
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$28.4M	2025-09-30	2025-12-17	10-K	25-057711
42	income tax	us-gaap:IncomeTaxExpenseBenefit	$5.7M	2025-09-30	2025-12-17	10-K	25-057711
43	current assets	us-gaap:AssetsCurrent	$181.9M	2024-09-30	2025-12-17	10-K	25-057711
44	current liabilities	us-gaap:LiabilitiesCurrent	$129.7M	2024-09-30	2025-12-17	10-K	25-057711
45	assets	us-gaap:Assets	$421.8M	2023-09-30	2024-12-19	10-K	24-052099
46	assets	us-gaap:Assets	$278.6M	2022-09-30	2023-12-22	10-K	23-042586
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	3,071,656	2025-12-05	2025-12-17	10-K	25-057711
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	3,120,591	2024-12-06	2024-12-19	10-K	24-052099

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