Roblox Corp. RBLX

NYSE; business equipment; SIC 7372, Services-Prepackaged Software; CIK 0001315098

B

second fifth of 496 graded peers in business equipment

rank 180 of 496; percentile 36.2; sampling error 2.2 points; lower is stronger

A B C D E

B, the elk



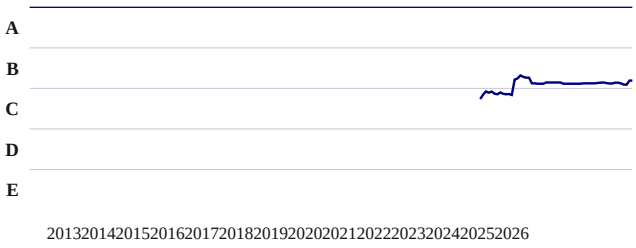
Scoreboard	
Profitability	B percentile 23.7
Solvency	D percentile 76.3
Growth and financing	B percentile 33.7
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $9.6B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet
Inputs computable	9 of 14
Graded from	filings received through Feb 11, 2026 264 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$42.98 2026-10-30; market equity $30.8B; 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 11, 2026

Roblox is an immersive gaming and creation platform (the "Roblox Platform" or "Platform") that offers people millions of ways to be together, inviting its community to explore, create, and share endless unique experiences. Our vision is to reimagine the way people come together- in a world that's safe, civil, and optimistic. To achieve this vision, we are building an innovative company that, together with the Roblox community, has the ability to strengthen our social fabric and support economic growth for people around the world. Our Platform consists of the Roblox Client, the Roblox Studio, and the Roblox Cloud.

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 23.7						
Gross profitability	40.0%	28.7%		27.7	554	2025-12-31
Return on invested capital	not computable	11.4%				
pretax income must exceed the validity floor and imply a 0%-100% tax rate						

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Accruals ratio	(34.2%)	(7.3%)	10.9	617	2025-12-31
Gross margin stability, five years	1.5 pts	2.3 pts	32.5	425	2025-12-31
Solvency, sleeve percentile 76.3					
Twelve-month failure probability	0.13%	0.05%	76.7	104	2026-09-30
Altman Z double-prime	(2.70)	2.15	68.7	564	2025-12-31
Net debt to EBITDA	not computable	1.09x			
EBITDA must exceed $100,000					
Interest coverage	not computable	3.77x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	0.96x	2.01x	83.3	661	2025-12-31
Growth and financing, sleeve percentile 33.7					
Revenue growth, three-year compound	30.0%	6.4%	10.1	534	2025-12-31
Free cash flow growth, three-year compound	not computable	18.1%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	13.5%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	21.1%	5.1%	16.7	559	2025-12-31
Net share issuance, one year	6.3%	0.5%	74.2	408	2025-12-31

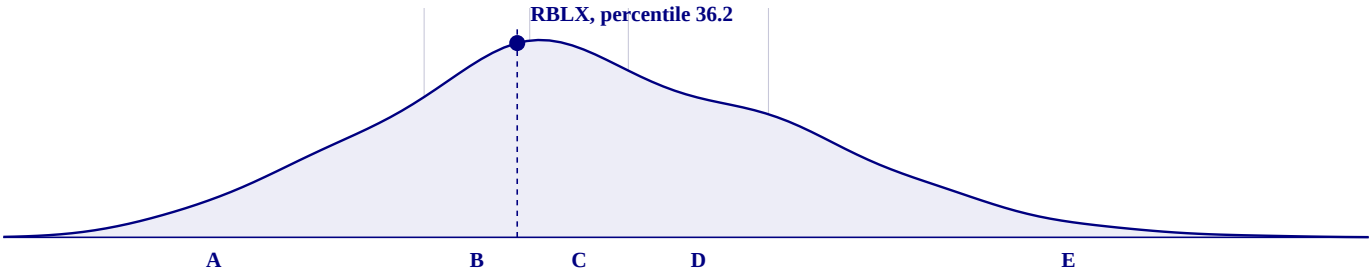
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 30,949,000 USD; Altman Z is not used

Among 496 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
175	Paylocity Holding Corp. (PCTY)	35.2	B	fortress balance sheet
176	Impinj Inc. (PI)	35.4	B	
177	Egain Corp. (EGAN)	35.6	B	
178	Kewaunee Scientific Corp. (KEQU)	35.8	B	
179	Ziprecruiter, Inc. (ZIP)	36.0	B	
180	Roblox Corp. (RBLX)	36.2	B	fortress balance sheet
181	Apple Inc. (AAPL)	36.4	B	
182	Match Group, Inc. (MTCH)	36.6	B	
183	R F Industries Ltd. (RFIL)	36.8	B	
184	Intest Corp. (INTT)	37.0	B	fortress balance sheet
185	indie Semiconductor, Inc. (INDI)	37.2	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	(62.7%)	(2.0%)	9
Distance from 52-week high	(62.2%)	(32.4%)	20
EBIT to enterprise value	(4.0%)	1.6%	22
Free cash flow yield	4.4%	2.8%	64
Book value to price	(0.00)	0.27	7
Sales to price	0.16	0.31	29
Composite equity issuance, five years	not computable	4.3%	
Relative strength against the sector, log excess return	(1.26)	(0.29)	9

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2025-12-31	
Return on assets above zero	fail
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	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$1.1B
Operating cash flow, four quarters	$1.9B
Months of runway	not finite
Days since last periodic filing	4 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$424.3M

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.9B	2025-12-31	2026-02-11	10-K	26-000024
2	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$1.1B	2025-12-31	2026-02-11	10-K	26-000024
3	assets	us-gaap:Assets	$9.6B	2025-12-31	2026-02-11	10-K	26-000024
4	operating income	us-gaap:OperatingIncomeLoss	-$1.2B	2025-12-31	2026-02-11	10-K	26-000024
5	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$1.1B	2025-12-31	2026-02-11	10-K	26-000024
6	income tax	us-gaap:IncomeTaxExpenseBenefit	$3.6M	2025-12-31	2026-02-11	10-K	26-000024
7	total debt	us-gaap:LongTermDebt	$1.2B	2025-12-31	2026-02-11	10-K	26-000024
8	book equity	us-gaap:StockholdersEquity	$394.5M	2025-12-31	2026-02-11	10-K	26-000024
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.2B	2025-12-31	2026-02-11	10-K	26-000024
10	total debt	us-gaap:LongTermDebt	$1.2B	2024-12-31	2025-02-18	10-K	25-000033
11	book equity	us-gaap:StockholdersEquity	$221.4M	2024-12-31	2026-02-11	10-K	26-000024
12	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$711.7M	2024-12-31	2026-02-11	10-K	26-000024
13	net income	us-gaap:NetIncomeLoss	-$1.1B	2025-12-31	2026-02-11	10-K	26-000024
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.8B	2025-12-31	2026-02-11	10-K	26-000024
15	assets	us-gaap:Assets	$7.2B	2024-12-31	2026-02-11	10-K	26-000024
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$3.6B	2024-12-31	2026-02-11	10-K	26-000024
17	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$801.2M	2024-12-31	2026-02-11	10-K	26-000024
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$2.8B	2023-12-31	2026-02-11	10-K	26-000024

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19	cost of revenue	us-gaap:CostOfGoodsAndServicesSold	$649.1M	2023-12-31	2026-02-11	10-K	26-000024
20	revenue	us-gaap:Revenues	$2.2B	2022-12-31	2023-02-28	10-K	23-000035
21	cost of revenue	us-gaap:CostOfRevenue	$547.7M	2022-12-31	2023-02-28	10-K	23-000035
22	revenue	us-gaap:Revenues	$1.9B	2021-12-31	2023-02-28	10-K	23-000035
23	cost of revenue	us-gaap:CostOfRevenue	$496.9M	2021-12-31	2023-02-28	10-K	23-000035
24	current assets	us-gaap:AssetsCurrent	$4.9B	2025-12-31	2026-02-11	10-K	26-000024
25	current liabilities	us-gaap:LiabilitiesCurrent	$5.1B	2025-12-31	2026-02-11	10-K	26-000024
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$5.1B	2025-12-31	2026-02-11	10-K	26-000024
27	liabilities	us-gaap:Liabilities	$9.2B	2025-12-31	2026-02-11	10-K	26-000024
28	depreciation amortization	us-gaap:Depreciation	$207.4M	2025-12-31	2026-02-11	10-K	26-000024
29	operating income	us-gaap:OperatingIncomeLoss	-$1.3B	2023-12-31	2026-02-11	10-K	26-000024
30	interest expense	us-gaap:InterestExpense	$40.7M	2023-12-31	2024-02-21	10-K	24-000026
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$441.0M	2025-12-31	2026-02-11	10-K	26-000024
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$822.3M	2024-12-31	2026-02-11	10-K	26-000024
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$179.6M	2024-12-31	2026-02-11	10-K	26-000024
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$458.2M	2023-12-31	2026-02-11	10-K	26-000024
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$320.7M	2023-12-31	2026-02-11	10-K	26-000024
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$369.3M	2022-12-31	2025-02-18	10-K	25-000033
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$426.2M	2022-12-31	2025-02-18	10-K	25-000033
38	current assets	us-gaap:AssetsCurrent	$3.7B	2024-12-31	2026-02-11	10-K	26-000024
39	current liabilities	us-gaap:LiabilitiesCurrent	$3.7B	2024-12-31	2026-02-11	10-K	26-000024
40	assets	us-gaap:Assets	$6.2B	2023-12-31	2025-02-18	10-K	25-000033
41	assets	us-gaap:Assets	$5.4B	2022-12-31	2024-02-21	10-K	24-000026
42	shares outstanding	us-gaap:CommonStockSharesOutstanding	708,359,000	2025-12-31	2026-02-11	10-K	26-000024
43	shares outstanding	us-gaap:CommonStockSharesOutstanding	666,419,000	2024-12-31	2026-02-11	10-K	26-000024

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