Hilton Grand Vacations Inc.

HGV

NYSE; other; SIC 7000, Hotels, Rooming Houses, Camps & Other Lodging Places; CIK 0001674168

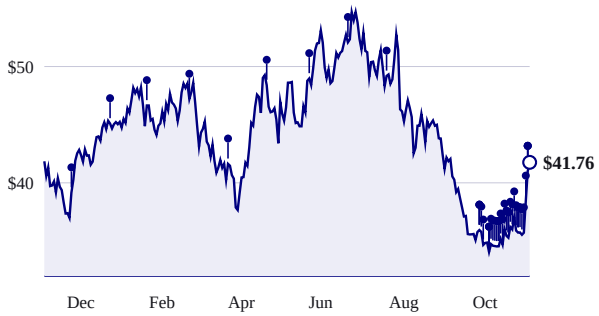
None

No letter

5 of 14 inputs computable; 7 are required, with a score in every sleeve

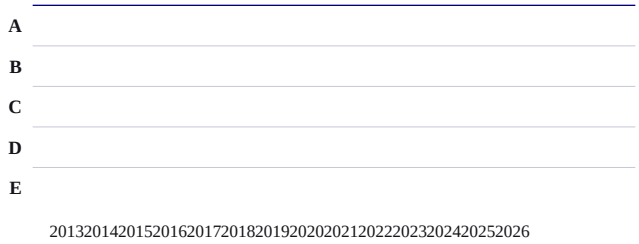
Scoreboard	
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $11.5B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	thin data not computable: distress
Inputs computable	5 of 14
Graded from	filings received through Feb 26, 2026 251 days before the rescan; latest periodic filing 10-Q received Oct 29, 2026
Last close	$41.77 2026-11-03; 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 Feb 26, 2026

We will rely on Hilton to consent to our use of its trademarks at new properties we manage in the future. Under the terms of our license agreement with Hilton, we are required to obtain Hilton's consent to use its trademarks in circumstances specified in the license agreement. Hilton may reject a proposed project in certain circumstances.

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 76.8						
Gross profitability	not computable	27.1%				
one or more required annual facts are missing						
Return on invested capital	not computable	10.0%				
one or more required annual facts are missing						
Accruals ratio	(1.9%)	(5.8%)		76.8	502	2025-12-31

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Gross margin stability, five years	not computable	2.2 pts				
five annual gross margins are required; found 0						
Solvency						
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	not computable	2.06				
one or more required annual facts are missing						
Net debt to EBITDA	not computable	2.51x				
one or more required annual facts are missing						
Interest coverage	not computable	2.45x				
one or more required annual facts are missing						
Current ratio	not computable	1.33x				
one or more required annual facts are missing						
Growth and financing, sleeve percentile 40.2						
Revenue growth, three-year compound	5.6%	5.1%		45.6	396	2025-12-31
Free cash flow growth, three-year compound	(30.6%)	8.9%		90.3	218	2025-12-31
Reinvestment rate	not computable	11.9%				
one or more required annual facts are missing						
Asset growth, three years	13.0%	4.1%		23.9	432	2025-12-31
Net share issuance, one year	(14.5%)	(0.5%)		0.9	352	2026-02-19

Warnings

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

Check	Measured
Thin data	5 of 14 grade factors are computable; minimum is 7

What the price implies

at the 2026-11-03 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(16.4%)	(0.6%)	36
Distance from 52-week high	(23.6%)	(22.7%)	48
EBIT to enterprise value	not computable	4.2%	
Free cash flow yield	7.3%	4.1%	74
Book value to price	0.41	0.34	59
Sales to price	1.43	0.69	73
Composite equity issuance, five years	(11.7%)	(8.8%)	46
Relative strength against the sector, log excess return	(0.30)	(0.13)	36

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	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	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	fail

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Cash, filings, liquidity	
Cash and equivalents	$227.0M
Operating cash flow, four quarters	$516.0M
Months of runway	not finite
Days since last periodic filing	6 (10-Q received Oct 29, 2026)
Median daily dollar volume, 63 sessions	$40.2M

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	net income	us-gaap:NetIncomeLoss	$81.0M	2025-12-31	2026-02-26	10-K	26-000017
2	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$300.0M	2025-12-31	2026-02-26	10-K	26-000017
3	assets	us-gaap:Assets	$11.5B	2025-12-31	2026-02-26	10-K	26-000017
4	assets	us-gaap:Assets	$11.4B	2024-12-31	2026-02-26	10-K	26-000017
5	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.5B	2025-12-31	2026-02-26	10-K	26-000017
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$4.5B	2024-12-31	2026-02-26	10-K	26-000017
7	revenue	us-gaap:Revenues	$4.0B	2023-12-31	2026-02-26	10-K	26-000017
8	revenue	us-gaap:Revenues	$3.8B	2022-12-31	2025-03-03	10-K	25-009254
9	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$70.0M	2025-12-31	2026-02-26	10-K	26-000017
10	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$309.0M	2024-12-31	2026-02-26	10-K	26-000017
11	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$42.0M	2024-12-31	2026-02-26	10-K	26-000017
12	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$312.0M	2023-12-31	2026-02-26	10-K	26-000017
13	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$31.0M	2023-12-31	2026-02-26	10-K	26-000017
14	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$747.0M	2022-12-31	2025-03-03	10-K	25-009254
15	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$58.0M	2022-12-31	2025-03-03	10-K	25-009254
16	assets	us-gaap:Assets	$8.7B	2023-12-31	2025-03-03	10-K	25-009254
17	assets	us-gaap:Assets	$8.0B	2022-12-31	2024-02-29	10-K	24-007940
18	shares outstanding	dei:EntityCommonStockSharesOutstanding	81,423,992	2026-02-19	2026-02-26	10-K	26-000017
19	shares outstanding	dei:EntityCommonStockSharesOutstanding	95,280,832	2025-02-20	2025-03-03	10-K	25-009254

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