Unifi Inc.

UFI

NYSE; consumer nondurables; SIC 2200, Textile Mill Products; CIK 0000100726

D/E

on the D/E boundary of 124 graded peers in consumer nond...

rank 104 of 124; percentile 83.7; sampling error 3.8 points; lower is stronger

A B C D E

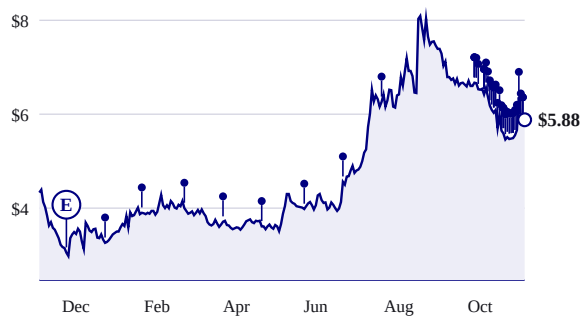
D/E, the sloth



Scoreboard

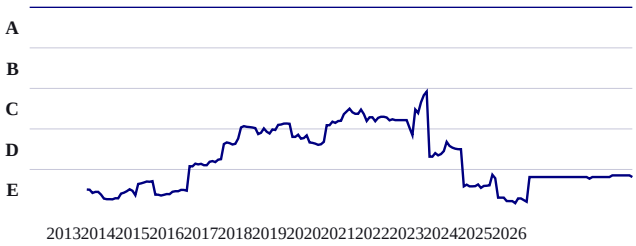
Profitability	C/D percentile 62.0
Solvency	C percentile 49.5
Growth and financing	D/E percentile 79.7
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$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	10 of 14
Graded from	filings received through Aug 26, 2026 70 days before the rescan; latest periodic filing 10-K received Aug 26, 2026
Last close	$5.91 2026-11-03; market equity $109.9M; 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 Aug 26, 2026

Unifi, Inc., a New York corporation formed in 1969 (together with its subsidiaries, "UNIFI," the "Company," "we," "us," or "our"), is a multinational company that manufactures and sells innovative recycled and synthetic products, made from polyester and nylon, primarily to other yarn manufacturers and knitters and weavers (UNIFI's "direct customers") that produce yarn and/or fabric for the apparel, hosiery, home furnishings, automotive, industrial, medical, and other end-use markets (UNIFI's "indirect customers"). We sometimes refer to these indirect customers as "brand partners.

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 62.0						
Gross profitability	7.9%	29.8%		90.3	145	2026-06-28
Return on invested capital	not computable	5.6%				

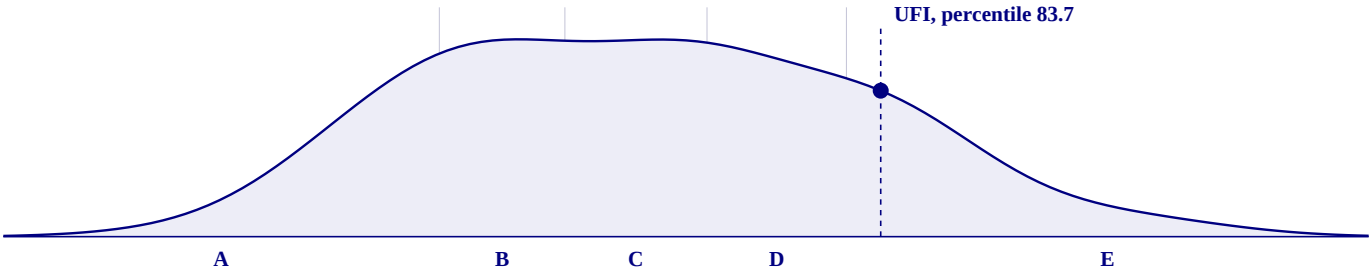
pretax income must exceed the validity floor and imply a 0%-100% tax rate

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Accruals ratio	(12.6%)	(5.1%)	20.1	150	2026-06-28
Gross margin stability, five years	3.1 pts	1.9 pts	75.7	116	2026-06-28
Solvency, sleeve percentile 49.5					
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	5.65	3.11	22.7	120	2026-06-28
Net debt to EBITDA	5.84x	2.54x	87.0	55	2026-06-28
Interest coverage	(2.15x)	2.51x	73.8	43	2026-06-28
Current ratio	3.33x	1.81x	14.4	154	2026-06-28
Growth and financing, sleeve percentile 79.7					
Revenue growth, three-year compound	(5.2%)	0.2%	76.5	133	2026-06-28
Free cash flow growth, three-year compound	not computable	14.9%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	not computable	11.0%			
pretax income must exceed the validity floor and imply a 0%-100% tax rate					
Asset growth, three years	(10.5%)	0.2%	86.5	134	2026-06-28
Net share issuance, one year	1.2%	0.03%	76.2	102	2026-08-20

Among 124 peers

consumer nondurables; 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
99	Callaway Golf Co. (CALY)	79.7	D/E	
100	Westrock Coffee Co. (WEST)	80.5	D/E	
101	Primo Brands Corp. (PRMB)	81.3	D/E	
102	B&G Foods, Inc. (BGS)	82.1	D/E	
103	Keurig Dr Pepper Inc. (KDP)	82.9	D/E	
104	Unifi Inc. (UFI)	83.7	D/E	
105	Molson Coors Beverage Co. (TAP)	85.0	E	
106	Molson Coors Beverage Co. (TAP-A)	85.0	E	
107	Wolverine World Wide Inc. (WWW)	86.2	E	
108	Tyson Foods, Inc. (TSN)	87.0	E	
109	Utz Brands, Inc. (UTZ)	87.8	E	

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	46.4%	(1.3%)	88
Distance from 52-week high	(27.3%)	(20.3%)	42
EBIT to enterprise value	(8.9%)	3.7%	20
Free cash flow yield	19.7%	4.3%	94
Book value to price	2.12	0.55	95
Sales to price	4.86	1.22	96

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Composite equity issuance, five years	0.4%	(16.7%)	80
Relative strength against the sector, log excess return	0.31	(0.09)	88

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2026-06-28	
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	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$25.1M
Operating cash flow, four quarters	$26.5M
Months of runway	not finite
Days since last periodic filing	70 (10-K received Aug 26, 2026)
Median daily dollar volume, 63 sessions	$490,443

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	$30.5M	2026-06-28	2026-08-26	10-K	26-000012
2	assets	us-gaap:Assets	$386.4M	2026-06-28	2026-08-26	10-K	26-000012
3	operating income	us-gaap:OperatingIncomeLoss	-$14.6M	2026-06-28	2026-08-26	10-K	26-000012
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$20.0M	2026-06-28	2026-08-26	10-K	26-000012
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$4.5M	2026-06-28	2026-08-26	10-K	26-000012
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$80.0M	2026-06-28	2026-08-26	10-K	26-000012
7	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$232.2M	2026-06-28	2026-08-26	10-K	26-000012
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$25.1M	2026-06-28	2026-08-26	10-K	26-000012
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$95.7M	2025-06-29	2026-08-26	10-K	26-000012
10	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$249.5M	2025-06-29	2026-08-26	10-K	26-000012
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$22.7M	2025-06-29	2026-08-26	10-K	26-000012
12	net income	us-gaap:NetIncomeLoss	-$24.6M	2026-06-28	2026-08-26	10-K	26-000012
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$26.5M	2026-06-28	2026-08-26	10-K	26-000012
14	assets	us-gaap:Assets	$426.9M	2025-06-29	2026-08-26	10-K	26-000012
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$531.3M	2026-06-28	2026-08-26	10-K	26-000012
16	gross profit	us-gaap:GrossProfit	$8.4M	2025-06-29	2026-08-26	10-K	26-000012
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$571.3M	2025-06-29	2026-08-26	10-K	26-000012
18	gross profit	us-gaap:GrossProfit	$16.6M	2024-06-30	2026-08-26	10-K	26-000012
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$582.2M	2024-06-30	2026-08-26	10-K	26-000012
20	gross profit	us-gaap:GrossProfit	$14.2M	2023-07-02	2025-08-26	10-K	25-111331
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$623.5M	2023-07-02	2025-08-26	10-K	25-111331
22	gross profit	us-gaap:GrossProfit	$80.5M	2022-07-03	2024-08-23	10-K	24-100146
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$815.8M	2022-07-03	2024-08-23	10-K	24-100146
24	current assets	us-gaap:AssetsCurrent	$211.5M	2026-06-28	2026-08-26	10-K	26-000012
25	current liabilities	us-gaap:LiabilitiesCurrent	$63.6M	2026-06-28	2026-08-26	10-K	26-000012
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$214.5M	2026-06-28	2026-08-26	10-K	26-000012
27	liabilities	us-gaap:Liabilities	$154.2M	2026-06-28	2026-08-26	10-K	26-000012
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$24.1M	2026-06-28	2026-08-26	10-K	26-000012
29	interest expense	us-gaap:InterestExpense	$6.8M	2026-06-28	2026-08-26	10-K	26-000012

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30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$5.0M	2026-06-28	2026-08-26	10-K	26-000012
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$21.3M	2025-06-29	2026-08-26	10-K	26-000012
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$10.5M	2025-06-29	2026-08-26	10-K	26-000012
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.1M	2024-06-30	2026-08-26	10-K	26-000012
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$11.2M	2024-06-30	2026-08-26	10-K	26-000012
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$4.7M	2023-07-02	2025-08-26	10-K	25-111331
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$36.4M	2023-07-02	2025-08-26	10-K	25-111331
37	current assets	us-gaap:AssetsCurrent	$235.6M	2025-06-29	2026-08-26	10-K	26-000012
38	current liabilities	us-gaap:LiabilitiesCurrent	$70.9M	2025-06-29	2026-08-26	10-K	26-000012
39	assets	us-gaap:Assets	$469.2M	2024-06-30	2025-08-26	10-K	25-111331
40	assets	us-gaap:Assets	$538.8M	2023-07-02	2024-08-23	10-K	24-100146
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	18,588,837	2026-08-20	2026-08-26	10-K	26-000012
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	18,360,663	2025-08-21	2025-08-26	10-K	25-111331

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