Yeti Holdings, Inc.

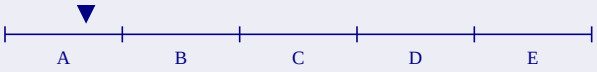
YETI

NYSE; consumer nondurables; SIC 3949, Sporting & Athletic Goods, NEC; CIK 0001670592

A

strongest fifth of 124 graded peers in consumer nondurables

rank 18 of 124; percentile 13.8; sampling error 3.8 points; lower is stronger



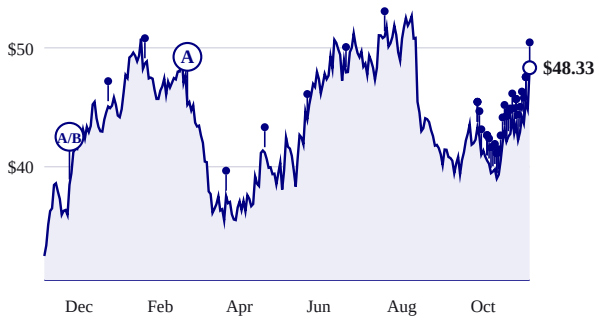
A, the bull



Scoreboard

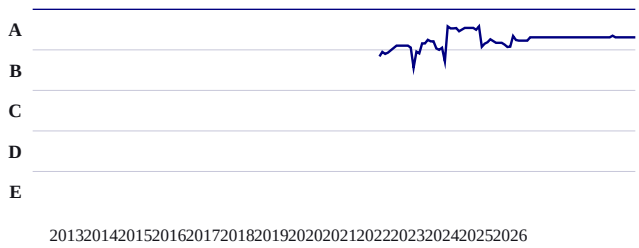
Profitability	B/C	percentile 43.4
Solvency	B	percentile 30.1
Growth and financing	B	percentile 30.2
Reliability	0.91 AUC	filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets	total assets $1.2B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: short runway, distress
Inputs computable	10 of 14	
Graded from	filings received through Feb 27, 2026	251 days before the rescan; latest periodic filing 10-Q received Aug 13, 2026
Last close	$48.34	2026-11-04; market equity $3.5B; 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 27, 2026

Headquartered in Austin, Texas, YETI is a global designer, retailer, and distributor of innovative outdoor products. From coolers and drinkware to bags and apparel, YETI products are built to meet the unique and varying needs of diverse outdoor pursuits, whether in the remote wilderness, at the beach, or anywhere life takes you. By consistently delivering high-performing, exceptional products, we have built a strong following of brand loyalists throughout the world, ranging from serious outdoor enthusiasts to individuals who simply value products of uncompromising quality and design.

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 43.4						
Gross profitability	86.8%	29.8%		4.9	144	2026-01-03
Return on invested capital	not computable	5.6%				

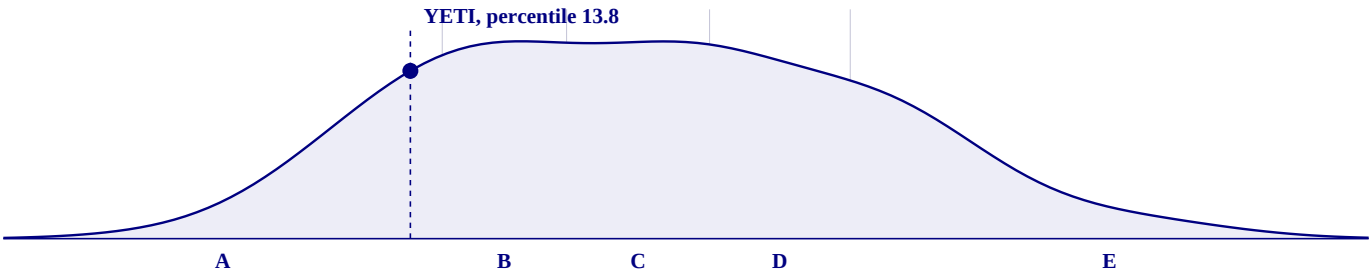
a prior annual debt, equity, and cash observation is required

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Accruals ratio	(7.1%)	(5.1%)	39.2	149	2026-01-03
Gross margin stability, five years	3.9 pts	1.9 pts	86.1	116	2026-01-03
Solvency, sleeve percentile 30.1					
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	6.12	3.11	19.5	119	2026-01-03
Net debt to EBITDA	not computable	2.54x			
latest aligned inputs end 2018-12-29; latest annual assets end 2026-01-03					
Interest coverage	not computable	2.51x			
latest aligned inputs end 2023-12-30; latest annual assets end 2026-01-03					
Current ratio	1.98x	1.81x	40.8	153	2026-01-03
Growth and financing, sleeve percentile 30.2					
Revenue growth, three-year compound	5.4%	0.2%	24.2	133	2026-01-03
Free cash flow growth, three-year compound	56.8%	14.9%	13.8	66	2026-01-03
Reinvestment rate	(82.8%)	11.0%	82.9	71	2026-01-03
Asset growth, three years	4.7%	0.2%	27.1	134	2026-01-03
Net share issuance, one year	(8.6%)	0.03%	2.9	103	2026-02-20

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
13	Jerash Holdings (Us), Inc. (JRSH)	9.8	A	fortress balance sheet
14	Vita Coco Company, Inc. (COCO)	10.6	A	
15	Steven Madden, Ltd. (SHOO)	11.4	A	
16	G III Apparel Group Ltd. (GIII)	12.2	A	fortress balance sheet
17	Kontoor Brands, Inc. (KTB)	13.0	A	
18	Yeti Holdings, Inc. (YETI)	13.8	A	
19	Tootsie Roll Industries Inc. (TR)	14.6	A	
20	Escalade Inc. (ESCA)	15.4	A	fortress balance sheet
21	American Outdoor Brands, Inc. (AOUT)	16.3	A/B	
22	Simply Good Foods Co. (SMPL)	17.1	A/B	
23	Interface Inc. (TILE)	17.9	A/B	

What the price implies

at the 2026-11-04 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	20.7%	(1.3%)	72
Distance from 52-week high	(8.3%)	(19.2%)	63
EBIT to enterprise value	6.0%	3.5%	70
Free cash flow yield	6.0%	4.1%	59
Book value to price	0.17	0.54	22
Sales to price	0.53	1.17	22

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Composite equity issuance, five years	(17.8%)	(16.7%)	42
Relative strength against the sector, log excess return	0.11	(0.09)	72

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2026-01-03	
Return on assets above zero	pass
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	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	84 (10-Q received Aug 13, 2026)
Median daily dollar volume, 63 sessions	$65.8M

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	2026-01-03	2026-02-27	10-K	26-000013
2	assets	us-gaap:Assets	$1.2B	2026-01-03	2026-02-27	10-K	26-000013
3	operating income	us-gaap:OperatingIncomeLoss	$102.2M	2018-12-29	2021-03-01	10-K	21-000004
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$69.6M	2018-12-29	2021-03-01	10-K	21-000004
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$11.9M	2018-12-29	2021-03-01	10-K	21-000004
6	total debt	us-gaap:LongTermDebt	$332.9M	2018-12-29	2019-03-20	10-K	19-002297
7	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$29.0M	2018-12-29	2020-02-18	10-K	20-001627
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$80.1M	2018-12-29	2019-03-20	10-K	19-002297
9	net income	us-gaap:NetIncomeLoss	$165.4M	2026-01-03	2026-02-27	10-K	26-000013
10	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$254.7M	2026-01-03	2026-02-27	10-K	26-000013
11	assets	us-gaap:Assets	$1.3B	2024-12-28	2026-02-27	10-K	26-000013
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.9B	2026-01-03	2026-02-27	10-K	26-000013
13	gross profit	us-gaap:GrossProfit	$1.1B	2024-12-28	2026-02-27	10-K	26-000013
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.8B	2024-12-28	2026-02-27	10-K	26-000013
15	gross profit	us-gaap:GrossProfit	$943.2M	2023-12-30	2026-02-27	10-K	26-000013
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.7B	2023-12-30	2026-02-27	10-K	26-000013
17	gross profit	us-gaap:GrossProfit	$763.4M	2022-12-31	2025-02-24	10-K	25-000008
18	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.6B	2022-12-31	2025-02-24	10-K	25-000008
19	gross profit	us-gaap:GrossProfit	$816.1M	2022-01-01	2024-02-26	10-K	24-000007
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.4B	2022-01-01	2024-02-26	10-K	24-000007
21	current assets	us-gaap:AssetsCurrent	$660.3M	2026-01-03	2026-02-27	10-K	26-000013
22	current liabilities	us-gaap:LiabilitiesCurrent	$334.3M	2026-01-03	2026-02-27	10-K	26-000013
23	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$779.5M	2026-01-03	2026-02-27	10-K	26-000013
24	operating income	us-gaap:OperatingIncomeLoss	$213.6M	2026-01-03	2026-02-27	10-K	26-000013
25	book equity	us-gaap:StockholdersEquity	$650.3M	2026-01-03	2026-02-27	10-K	26-000013
26	liabilities	us-gaap:Liabilities	$585.1M	2026-01-03	2026-02-27	10-K	26-000013
27	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$24.8M	2018-12-29	2021-03-01	10-K	21-000004
28	operating income	us-gaap:OperatingIncomeLoss	$225.5M	2023-12-30	2026-02-27	10-K	26-000013
29	interest expense	us-gaap:InterestExpense	$942,000	2023-12-30	2024-02-26	10-K	24-000007

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30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$42.7M	2026-01-03	2026-02-27	10-K	26-000013
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$261.4M	2024-12-28	2026-02-27	10-K	26-000013
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$41.8M	2024-12-28	2026-02-27	10-K	26-000013
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$285.9M	2023-12-30	2026-02-27	10-K	26-000013
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$50.7M	2023-12-30	2026-02-27	10-K	26-000013
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$100.9M	2022-12-31	2025-02-24	10-K	25-000008
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$45.9M	2022-12-31	2025-02-24	10-K	25-000008
37	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$54.2M	2026-01-03	2026-02-27	10-K	26-000013
38	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$220.3M	2026-01-03	2026-02-27	10-K	26-000013
39	income tax	us-gaap:IncomeTaxExpenseBenefit	$54.9M	2026-01-03	2026-02-27	10-K	26-000013
40	current assets	us-gaap:AssetsCurrent	$826.8M	2024-12-28	2026-02-27	10-K	26-000013
41	current liabilities	us-gaap:LiabilitiesCurrent	$379.5M	2024-12-28	2026-02-27	10-K	26-000013
42	assets	us-gaap:Assets	$1.3B	2023-12-30	2025-02-24	10-K	25-000008
43	assets	us-gaap:Assets	$1.1B	2022-12-31	2024-02-26	10-K	24-000007
44	shares outstanding	dei:EntityCommonStockSharesOutstanding	75,268,367	2026-02-20	2026-02-27	10-K	26-000013
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	82,389,459	2025-02-18	2025-02-24	10-K	25-000008

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