EVI Industries, Inc.

EVI

NYSE; shops; SIC 7200, Services-Personal Services; CIK 0000065312

A/B

on the A/B boundary of 254 graded peers in shops

rank 57 of 254; percentile 22.1; sampling error 3.0 points; lower is stronger

A B C D E

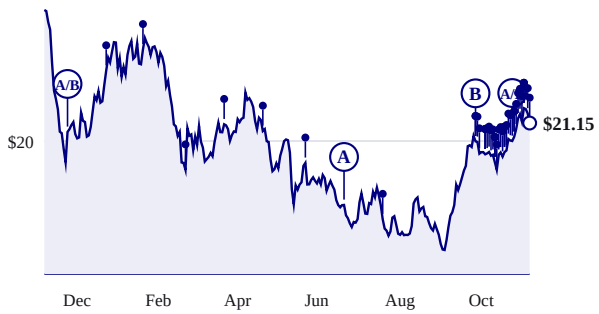
A/B, the bull



Scoreboard

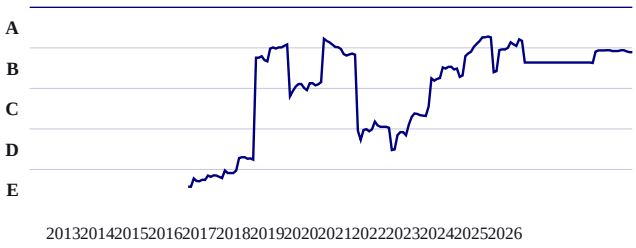
Profitability	C	percentile 50.9
Solvency	B	percentile 36.0
Growth and financing	B	percentile 31.1
Reliability	0.87 AUC	filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets	total assets $304.5M
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: dilution, short runway, distress
Inputs computable	8 of 14	
Graded from	filings received through Oct 22, 2026	15 days before the rescan; latest periodic filing 10-K received Sep 8, 2026
Last close	$21.09	2026-11-05; market equity $273.6M; 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 Sep 8, 2026

The Company was incorporated under the laws of the State of Delaware on June 13, 1963. The Company, through its wholly-owned subsidiaries, is a value-added distributor, and provides advisory and technical services. Through its vast sales organization, the Company provides its customers with planning, designing, and consulting services related to their commercial laundry operations. The Company sells and/or leases its customers commercial laundry equipment, specializing in washing, drying, finishing, material handling, water heating, power generation, and water reuse applications. In support of the suite of products it offers, the Company sells related parts and accessories.

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 50.9						
Gross profitability	46.2%	42.6%		43.0	238	2026-06-30
Return on invested capital	not computable	10.9%				

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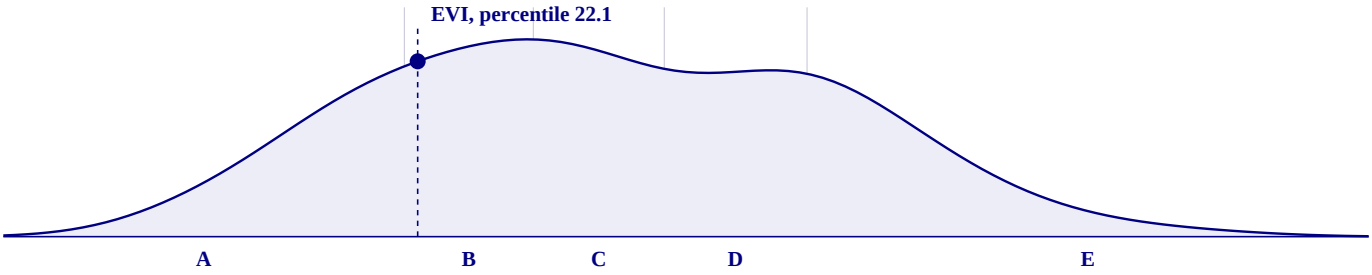
latest aligned inputs end 2019-06-30; latest annual assets end 2026-06-30						
Accruals ratio	(4.2%)	(4.8%)		59.6	283	2026-06-30
Gross margin stability, five years	1.3 pts	1.3 pts		50.2	216	2026-06-30
Solvency, sleeve percentile 36.0						
Twelve-month failure probability	not computable	0.03%				
liabilities and a nearby cover-page share count are required at 2026-06-30						
Altman Z double-prime	2.98	1.93		33.0	204	2026-06-30
Net debt to EBITDA	not computable	1.37x				
latest aligned inputs end 2019-06-30; latest annual assets end 2026-06-30						
Interest coverage	not computable	3.83x				
latest aligned inputs end 2025-06-30; latest annual assets end 2026-06-30						
Current ratio	1.64x	1.37x		39.0	291	2026-06-30
Growth and financing, sleeve percentile 31.1						
Revenue growth, three-year compound	8.0%	1.6%		20.1	265	2026-06-30
Free cash flow growth, three-year compound	not computable	4.6%				
four consecutive annual FCF observations are required; found 13						
Reinvestment rate	32.9%	12.2%		38.4	152	2026-06-30
Asset growth, three years	6.3%	3.4%		35.0	267	2026-06-30
Net share issuance, one year	not computable	(0.6%)				
prior share count is 43 days earlier						

Among 254 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
52	Cardinal Health Inc. (CAH)	20.2	A/B	
53	Chewy, Inc. (CHWY)	20.6	A/B	
54	Hour Loop, Inc. (HOUR)	20.9	A/B	
55	Buckle Inc. (BKE)	21.3	A/B	
56	Arhaus, Inc. (ARHS)	21.7	A/B	
57	EVI Industries, Inc. (EVI)	22.1	A/B	
58	Sprouts Farmers Market, Inc. (SFM)	22.5	A/B	fortress balance sheet
59	Pricesmart Inc. (PSMT)	22.9	A/B	fortress balance sheet
60	Wesco International Inc. (WCC)	23.3	B	
61	TE Connectivity plc (TEL)	23.7	B	
62	Carmax Inc. (KMX)	24.1	B	

What the price implies

at the 2026-11-05 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(28.8%)	(0.7%)	24
Distance from 52-week high	(25.5%)	(21.0%)	42
EBIT to enterprise value	4.9%	5.1%	47

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Free cash flow yield	4.9%	3.8%	60
Book value to price	0.55	0.36	65
Sales to price	1.63	1.62	50
Composite equity issuance, five years	1.8%	(16.9%)	80
Relative strength against the sector, log excess return	(0.25)	0.08	24

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-06-30	
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	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
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	59 (10-K received Sep 8, 2026)
Median daily dollar volume, 63 sessions	$1.1M

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	$140.7M	2026-06-30	2026-09-08	10-K	26-029759
2	assets	us-gaap:Assets	$304.5M	2026-06-30	2026-09-08	10-K	26-029759
3	operating income	us-gaap:OperatingIncomeLoss	$7.0M	2019-06-30	2020-09-14	10-K	20-000945
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$5.6M	2019-06-30	2020-09-14	10-K	20-000945
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$1.9M	2019-06-30	2020-09-14	10-K	20-000945
6	total debt	us-gaap:LongTermDebt	$40.6M	2019-06-30	2020-09-14	10-K	20-000945
7	book equity	us-gaap:StockholdersEquity	$77.3M	2019-06-30	2021-09-13	10-K	21-000839
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$5.0M	2019-06-30	2019-09-13	10-K	19-001060
9	total debt	us-gaap:LongTermDebt	$10.0M	2018-06-30	2019-09-13	10-K	19-001060
10	book equity	us-gaap:StockholdersEquity	$57.0M	2018-06-30	2020-09-14	10-K	20-000945
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$1.3M	2018-06-30	2019-09-13	10-K	19-001060
12	net income	us-gaap:NetIncomeLoss	$7.7M	2026-06-30	2026-09-08	10-K	26-029759
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$20.6M	2026-06-30	2026-09-08	10-K	26-029759
14	assets	us-gaap:Assets	$307.0M	2025-06-30	2026-09-08	10-K	26-029759
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$446.6M	2026-06-30	2026-09-08	10-K	26-029759
16	gross profit	us-gaap:GrossProfit	$118.3M	2025-06-30	2026-09-08	10-K	26-029759
17	revenue	us-gaap:Revenues	$389.8M	2025-06-30	2025-09-11	10-K	25-000107
18	gross profit	us-gaap:GrossProfit	$105.3M	2024-06-30	2025-09-11	10-K	25-000107
19	revenue	us-gaap:Revenues	$353.6M	2024-06-30	2025-09-11	10-K	25-000107
20	gross profit	us-gaap:GrossProfit	$103.7M	2023-06-30	2024-09-13	10-K/A	24-001066
21	revenue	us-gaap:Revenues	$354.2M	2023-06-30	2024-09-13	10-K/A	24-001066
22	gross profit	us-gaap:GrossProfit	$73.7M	2022-06-30	2023-10-05	10-K	23-001191
23	revenue	us-gaap:Revenues	$267.3M	2022-06-30	2023-10-05	10-K	23-001191
24	current assets	us-gaap:AssetsCurrent	$141.0M	2026-06-30	2026-09-08	10-K	26-029759
25	current liabilities	us-gaap:LiabilitiesCurrent	$86.1M	2026-06-30	2026-09-08	10-K	26-029759

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26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$39.8M	2026-06-30	2026-09-08	10-K	26-029759
27	operating income	us-gaap:OperatingIncomeLoss	$15.7M	2026-06-30	2026-09-08	10-K	26-029759
28	book equity	us-gaap:StockholdersEquity	$150.1M	2026-06-30	2026-09-08	10-K	26-029759
29	liabilities	us-gaap:Liabilities	$154.4M	2026-06-30	2026-09-08	10-K	26-029759
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$2.7M	2019-06-30	2020-09-14	10-K	20-000945
31	operating income	us-gaap:OperatingIncomeLoss	$13.8M	2025-06-30	2026-09-08	10-K	26-029759
32	interest expense	us-gaap:InterestExpense	$2.7M	2025-06-30	2025-09-11	10-K	25-000107
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$7.2M	2026-06-30	2026-09-08	10-K	26-029759
34	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$8.1M	2026-06-30	2026-09-08	10-K	26-029759
35	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$11.8M	2026-06-30	2026-09-08	10-K	26-029759
36	income tax	us-gaap:IncomeTaxExpenseBenefit	$4.1M	2026-06-30	2026-09-08	10-K	26-029759
37	current assets	us-gaap:AssetsCurrent	$145.4M	2025-06-30	2026-09-08	10-K	26-029759
38	current liabilities	us-gaap:LiabilitiesCurrent	$94.9M	2025-06-30	2026-09-08	10-K	26-029759
39	assets	us-gaap:Assets	$230.7M	2024-06-30	2025-09-11	10-K	25-000107
40	assets	us-gaap:Assets	$253.8M	2023-06-30	2024-09-13	10-K/A	24-001066
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,971,181	2026-10-16	2026-10-22	10-K/A	26-033252
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,878,532	2026-09-03	2026-09-08	10-K	26-029759

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