Williams Sonoma Inc.

WSM

NYSE; shops; SIC 5700, Retail-Home Furniture, Furnishings & Equipment Stores; CIK 0000719955

B

second fifth of 254 graded peers in shops

rank 72 of 254; percentile 28.1; sampling error 3.0 points; lower is stronger

A B C D E

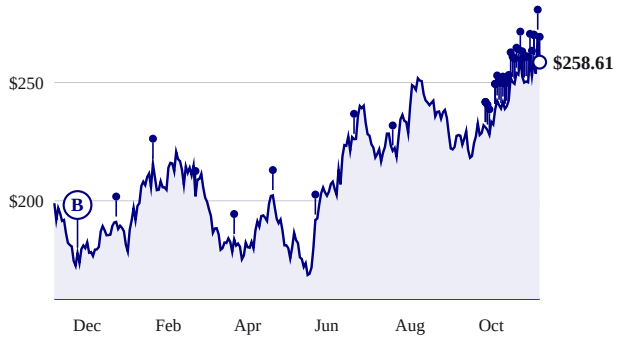
B, the elk



Scoreboard

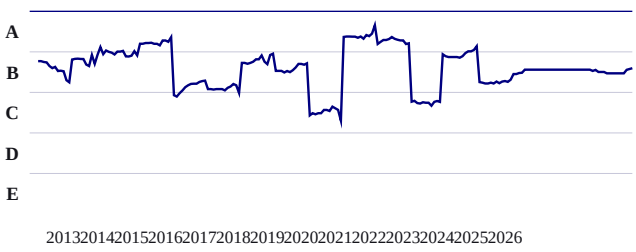
Profitability	C percentile 45.7
Solvency	B percentile 34.7
Growth and financing	C percentile 46.4
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $5.4B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Mar 26, 2026 225 days before the rescan; latest periodic filing 10-Q received Aug 28, 2026
Last close	$258.29 2026-11-05; market equity $30.4B; 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 Mar 26, 2026

Williams-Sonoma, Inc., (the "Company", "we", or "us") incorporated in 1973, is an omni-channel specialty retailer of high-quality products for the home. In 1956, our founder, Chuck Williams, turned a passion for cooking and eating with friends into a small business with a big idea. He opened a store in Sonoma, California to sell the French cookware that intrigued him while visiting Europe but that could not be found in America. Chuck's business, which set a standard for customer service, took off and helped fuel a revolution in American cooking and entertaining that continues today.

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 45.7						
Gross profitability	66.6%	42.6%		19.8	238	2026-02-01
Return on invested capital	not computable	10.9%				

latest aligned inputs end 2015-02-01; latest annual assets end 2026-02-01

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Accruals ratio	(4.2%)	(4.8%)	59.2	283	2026-02-01
Gross margin stability, five years	1.7 pts	1.3 pts	58.1	216	2026-02-01
Solvency, sleeve percentile 34.7					
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	4.24	1.93	21.2	204	2026-02-01
Net debt to EBITDA	not computable	1.37x			
latest aligned inputs end 2015-02-01; latest annual assets end 2026-02-01					
Interest coverage	not computable	3.83x			
one or more required annual facts are missing					
Current ratio	1.39x	1.37x	48.3	291	2026-02-01
Growth and financing, sleeve percentile 46.4					
Revenue growth, three-year compound	(3.5%)	1.6%	71.2	265	2026-02-01
Free cash flow growth, three-year compound	14.7%	4.6%	29.1	152	2026-02-01
Reinvestment rate	(5.2%)	12.2%	71.5	152	2026-02-01
Asset growth, three years	5.1%	3.4%	38.7	267	2026-02-01
Net share issuance, one year	(3.6%)	(0.6%)	21.6	209	2026-03-22

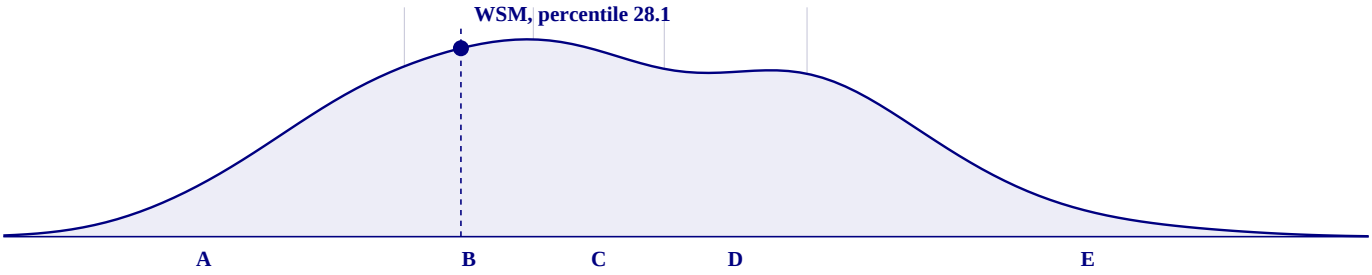
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 222,927,000 USD; Altman Z is not used

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
67	MSC Industrial Direct Co. Inc. (MSM)	26.1	B	
68	BJs Restaurants Inc. (BJRI)	26.5	B	
69	Genesco Inc. (GCO)	26.9	B	fortress balance sheet
70	Texas Roadhouse, Inc. (TXRH)	27.3	B	fortress balance sheet
71	Hawkins Inc. (HWKN)	27.7	B	
72	Williams Sonoma Inc. (WSM)	28.1	B	fortress balance sheet
73	Nathans Famous, Inc. (NATH)	28.5	B	
74	Macy's, Inc. (M)	28.9	B	
75	GameStop Corp. (GME)	29.2	B	fortress balance sheet
76	Ingles Markets Inc. (IMKTA)	29.6	B	late filer
77	GAP Inc. (GAP)	30.0	B	fortress balance sheet

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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	18.5%	(0.7%)	71
Distance from 52-week high	(4.2%)	(21.0%)	88
EBIT to enterprise value	4.8%	5.1%	45
Free cash flow yield	3.5%	3.8%	45
Book value to price	0.07	0.36	20
Sales to price	0.26	1.62	5
Composite equity issuance, five years	(35.9%)	(16.9%)	15
Relative strength against the sector, log excess return	0.26	0.08	71

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-02-01	
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	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$1.0B
Operating cash flow, four quarters	$1.6B
Months of runway	not finite
Days since last periodic filing	70 (10-Q received Aug 28, 2026)
Median daily dollar volume, 63 sessions	$255.2M

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	gross profit	us-gaap:GrossProfit	$3.6B	2026-02-01	2026-03-26	10-K	26-000059
2	assets	us-gaap:Assets	$5.4B	2026-02-01	2026-03-26	10-K	26-000059
3	operating income	us-gaap:OperatingIncomeLoss	$502.3M	2015-02-01	2017-03-30	10-K	17-104341
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$502.2M	2015-02-01	2016-03-31	10-K	16-525847
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$193.3M	2015-02-01	2017-03-30	10-K	17-104341
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$0	2015-02-01	2015-04-02	10-K	15-118009
7	book equity	us-gaap:StockholdersEquity	$1.2B	2015-02-01	2018-03-29	10-K	18-102232
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$222.9M	2015-02-01	2018-03-29	10-K	18-102232
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.0M	2014-02-02	2015-04-02	10-K	15-118009
10	book equity	us-gaap:StockholdersEquity	$1.3B	2014-02-02	2017-03-30	10-K	17-104341
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$330.1M	2014-02-02	2017-03-30	10-K	17-104341
12	net income	us-gaap:NetIncomeLoss	$1.1B	2026-02-01	2026-03-26	10-K	26-000059
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.3B	2026-02-01	2026-03-26	10-K	26-000059
14	assets	us-gaap:Assets	$5.3B	2025-02-02	2026-03-26	10-K	26-000059
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.8B	2026-02-01	2026-03-26	10-K	26-000059
16	gross profit	us-gaap:GrossProfit	$3.6B	2025-02-02	2026-03-26	10-K	26-000059
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.7B	2025-02-02	2026-03-26	10-K	26-000059
18	gross profit	us-gaap:GrossProfit	$3.3B	2024-01-28	2026-03-26	10-K	26-000059

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19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$7.8B	2024-01-28	2026-03-26	10-K	26-000059
20	gross profit	us-gaap:GrossProfit	$3.7B	2023-01-29	2025-03-27	10-K	25-015037
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$8.7B	2023-01-29	2025-03-27	10-K	25-015037
22	gross profit	us-gaap:GrossProfit	$3.6B	2022-01-30	2024-03-20	10-K	24-012221
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$8.2B	2022-01-30	2024-03-20	10-K	24-012221
24	current assets	us-gaap:AssetsCurrent	$2.7B	2026-02-01	2026-03-26	10-K	26-000059
25	current liabilities	us-gaap:LiabilitiesCurrent	$2.0B	2026-02-01	2026-03-26	10-K	26-000059
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.5B	2026-02-01	2026-03-26	10-K	26-000059
27	operating income	us-gaap:OperatingIncomeLoss	$1.4B	2026-02-01	2026-03-26	10-K	26-000059
28	book equity	us-gaap:StockholdersEquity	$2.1B	2026-02-01	2026-03-26	10-K	26-000059
29	liabilities	us-gaap:Liabilities	$3.3B	2026-02-01	2026-03-26	10-K	26-000059
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$162.3M	2015-02-01	2017-03-30	10-K	17-104341
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$259.4M	2026-02-01	2026-03-26	10-K	26-000059
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.4B	2025-02-02	2026-03-26	10-K	26-000059
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$221.6M	2025-02-02	2026-03-26	10-K	26-000059
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.7B	2024-01-28	2026-03-26	10-K	26-000059
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$188.5M	2024-01-28	2026-03-26	10-K	26-000059
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$1.1B	2023-01-29	2025-03-27	10-K	25-015037
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$354.1M	2023-01-29	2025-03-27	10-K	25-015037
38	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$231.4M	2026-02-01	2026-03-26	10-K	26-000059
39	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$1.5B	2026-02-01	2026-03-26	10-K	26-000059
40	income tax	us-gaap:IncomeTaxExpenseBenefit	$364.1M	2026-02-01	2026-03-26	10-K	26-000059
41	current assets	us-gaap:AssetsCurrent	$2.8B	2025-02-02	2026-03-26	10-K	26-000059
42	current liabilities	us-gaap:LiabilitiesCurrent	$1.9B	2025-02-02	2026-03-26	10-K	26-000059
43	assets	us-gaap:Assets	$5.3B	2024-01-28	2025-03-27	10-K	25-015037
44	assets	us-gaap:Assets	$4.7B	2023-01-29	2024-03-20	10-K	24-012221
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	119,016,049	2026-03-22	2026-03-26	10-K	26-000059
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	123,509,495	2025-03-23	2025-03-27	10-K	25-015037

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