Malibu Boats, Inc.

MBUU

Nasdaq; manufacturing; SIC 3730, Ship & Boat Building & Repairing; CIK 0001590976

E

weakest fifth of 255 graded peers in manufacturing

rank 237 of 255; percentile 92.9; sampling error 3.0 points; lower is stronger

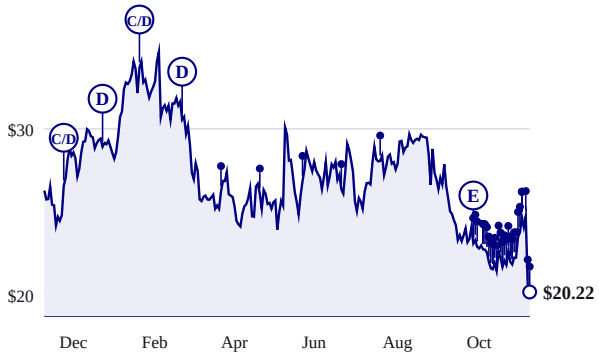
A B C D E

E, the bear



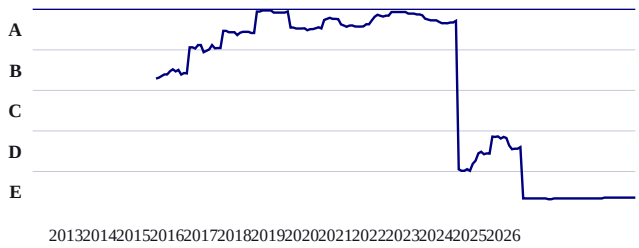
Scoreboard	
Profitability	D percentile 66.1
Solvency	D percentile 64.9
Growth and financing	D/E percentile 82.9
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $996.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, distress
Inputs computable	11 of 14
Graded from	filings received through Aug 27, 2026 73 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$20.29 2026-11-06; market equity $243; 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 27, 2026

Unless otherwise expressly indicated or the context otherwise requires, in this Annual Report on Form 10-K: ?We use the terms "Malibu Boats," the "Company," "MBI," "we," "us," "our" or similar references to refer (1) prior to the consummation of our initial public offering, or "IPO" on February 5, 2014, to Malibu Boats Holdings, LLC (the "LLC"), and its consolidated subsidiaries and (2) after our IPO, to Malibu Boats, Inc.

The fourteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

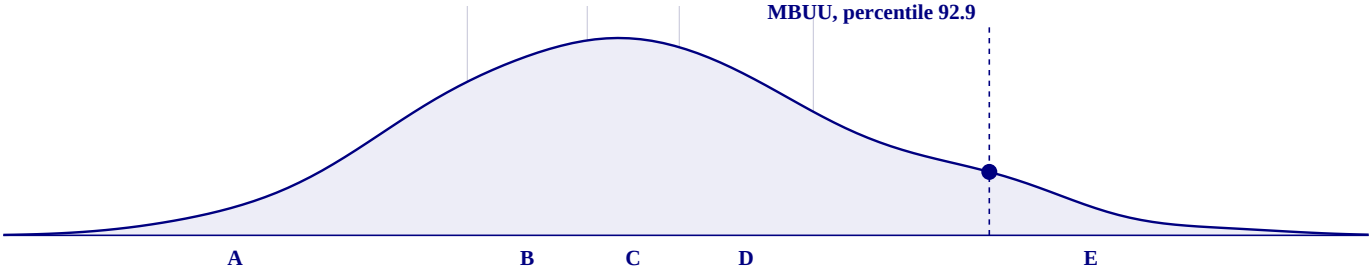
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 66.1						
Gross profitability	14.7%	21.9%		72.6	275	2026-06-30
Return on invested capital	0.4%	9.7%		87.0	101	2026-06-30
Accruals ratio	(7.6%)	(3.6%)		26.2	306	2026-06-30
Gross margin stability, five years	4.1 pts	2.1 pts		78.5	229	2026-06-30

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Solvency, sleeve percentile 64.9						
Twelve-month failure probability	not computable	0.04%				
liabilities and a nearby cover-page share count are required at 2026-09-30						
Altman Z double-prime	3.40	3.66	46.1	242	2026-06-30	
Net debt to EBITDA	2.50x	1.78x	72.5	121	2026-06-30	
Interest coverage	not computable	5.09x				
latest aligned inputs end 2021-06-30; latest annual assets end 2026-06-30						
Current ratio	1.43x	2.25x	76.1	323	2026-06-30	
Growth and financing, sleeve percentile 82.9						
Revenue growth, three-year compound	(13.0%)	2.2%	93.7	269	2026-06-30	
Free cash flow growth, three-year compound	(30.9%)	13.5%	95.0	141	2026-06-30	
Reinvestment rate	(30.8%)	26.1%	84.1	139	2026-06-30	
Asset growth, three years	2.5%	4.3%	59.1	277	2026-06-30	
Net share issuance, one year	not computable	0.01%				
two annual share counts are required; found 0						

Among 255 peers

manufacturing; 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
232	Greif, Inc. (GEF)	91.1	E	
233	Greif, Inc. (GEF-B)	91.1	E	
234	DSS, Inc. (DSS)	91.7	E	short runway, distress
235	Techprecision Corp. (TPCS)	92.1	E	late filer, fortress balance sheet
236	Rayonier Advanced Materials Inc. (RYAM)	92.5	E	
237	Malibu Boats, Inc. (MBUU)	92.9	E	
238	Newell Brands Inc. (NWL)	93.3	E	
239	Graftech International Ltd. (EAF)	93.7	E	
240	GoPro, Inc. (GPRO)	94.1	E	fortress balance sheet
241	AIR Industries Group (AIRI)	94.5	E	dilution, late filer
242	Ranpak Holdings Corp. (PACK)	94.9	E	

What the price implies

at the 2026-11-06 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(17.8%)	9.8%	22
Distance from 52-week high	(41.6%)	(27.4%)	29
EBIT to enterprise value	2.3%	4.2%	29
Free cash flow yield	not computable	3.5%	
Book value to price	not computable	0.37	
Sales to price	not computable	0.55	
Composite equity issuance, five years	not computable	(9.6%)	
Relative strength against the sector, log excess return	(0.28)	0.01	22

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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	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$40.3M
Operating cash flow, four quarters	$29.9M
Months of runway	not finite
Days since last periodic filing	3 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$5.4M

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	$146.5M	2026-06-30	2026-08-27	10-K	26-000037
2	assets	us-gaap:Assets	$996.2M	2026-06-30	2026-08-27	10-K	26-000037
3	operating income	us-gaap:OperatingIncomeLoss	$3.1M	2026-06-30	2026-08-27	10-K	26-000037
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$2.4M	2026-06-30	2026-08-27	10-K	26-000037
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$740,000	2026-06-30	2026-08-27	10-K	26-000037
6	total debt	us-gaap:LongTermDebt	$165.0M	2026-06-30	2026-08-27	10-K	26-000037
7	book equity	us-gaap:StockholdersEquity	$524.4M	2026-06-30	2026-08-27	10-K	26-000037
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$74.4M	2026-06-30	2026-08-27	10-K	26-000037
9	total debt	us-gaap:LongTermDebt	$18.0M	2025-06-30	2026-08-27	10-K	26-000037
10	book equity	us-gaap:StockholdersEquity	$515.5M	2025-06-30	2026-08-27	10-K	26-000037
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$37.0M	2025-06-30	2026-08-27	10-K	26-000037
12	net income	us-gaap:NetIncomeLoss	$1.7M	2026-06-30	2026-08-27	10-K	26-000037
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$67.5M	2026-06-30	2026-08-27	10-K	26-000037
14	assets	us-gaap:Assets	$734.6M	2025-06-30	2026-08-27	10-K	26-000037
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$914.6M	2026-06-30	2026-08-27	10-K	26-000037
16	gross profit	us-gaap:GrossProfit	$144.1M	2025-06-30	2026-08-27	10-K	26-000037
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$807.6M	2025-06-30	2026-08-27	10-K	26-000037
18	gross profit	us-gaap:GrossProfit	$147.1M	2024-06-30	2026-08-27	10-K	26-000037
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$829.0M	2024-06-30	2026-08-27	10-K	26-000037
20	gross profit	us-gaap:GrossProfit	$351.3M	2023-06-30	2025-08-28	10-K	25-000080
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.4B	2023-06-30	2025-08-28	10-K	25-000080
22	gross profit	us-gaap:GrossProfit	$310.1M	2022-06-30	2024-08-29	10-K	24-000073
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2022-06-30	2024-08-29	10-K	24-000073
24	current assets	us-gaap:AssetsCurrent	$308.5M	2026-06-30	2026-08-27	10-K	26-000037
25	current liabilities	us-gaap:LiabilitiesCurrent	$215.4M	2026-06-30	2026-08-27	10-K	26-000037
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$486.3M	2026-06-30	2026-08-27	10-K	26-000037
27	liabilities	us-gaap:Liabilities	$467.8M	2026-06-30	2026-08-27	10-K	26-000037
28	depreciation amortization	us-gaap:Depreciation	$33.1M	2026-06-30	2026-08-27	10-K	26-000037
29	operating income	us-gaap:OperatingIncomeLoss	$149.8M	2021-06-30	2023-08-29	10-K	23-000069
30	interest expense	us-gaap:InterestExpense	$2.5M	2021-06-30	2021-08-26	10-K	21-000065
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$24.7M	2026-06-30	2026-08-27	10-K	26-000037

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32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$56.5M	2025-06-30	2026-08-27	10-K	26-000037
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$27.9M	2025-06-30	2026-08-27	10-K	26-000037
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$55.6M	2024-06-30	2026-08-27	10-K	26-000037
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$76.0M	2024-06-30	2026-08-27	10-K	26-000037
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$184.7M	2023-06-30	2025-08-28	10-K	25-000080
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$54.8M	2023-06-30	2025-08-28	10-K	25-000080
38	current assets	us-gaap:AssetsCurrent	$219.9M	2025-06-30	2026-08-27	10-K	26-000037
39	current liabilities	us-gaap:LiabilitiesCurrent	$134.6M	2025-06-30	2026-08-27	10-K	26-000037
40	assets	us-gaap:Assets	$739.6M	2024-06-30	2025-08-28	10-K	25-000080
41	assets	us-gaap:Assets	$925.9M	2023-06-30	2024-08-29	10-K	24-000073

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