Alliance Entertainment Holding Corp. AENT

Nasdaq; shops; SIC 5099, Wholesale-Durable Goods, NEC; CIK 0001823584

D/E

on the D/E boundary of 254 graded peers in shops

rank 204 of 254; percentile 80.4; sampling error 3.0 points; lower is stronger

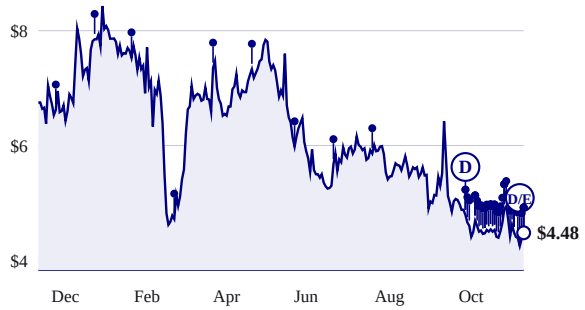


D/E, the sloth



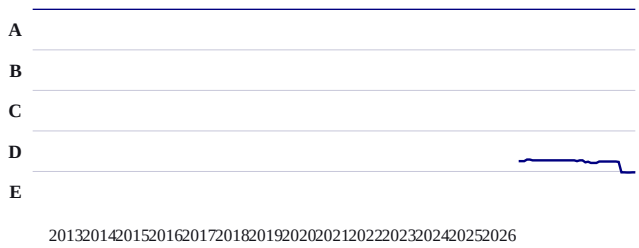
Scoreboard	
Profitability	E percentile 95.6
Solvency	B/C percentile 41.2
Growth and financing	C percentile 46.3
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $397.6M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, short runway, distress, fortress balance sheet
Inputs computable	7 of 14
Graded from	filings received through Sep 10, 2026 61 days before the rescan; latest periodic filing 10-K received Sep 10, 2026
Last close	$4.47 2026-11-09; market equity $0; 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 10, 2026

Entertainment is a leading global distributor and retailer of physical entertainment and collectible products, including vinyl records, CDs, DVDs, Blu-rays, video games, electronics, and licensed fan merchandise. The Company's unique position in the entertainment ecosystem is supported by a diverse portfolio of direct-to-consumer brands, including Critics' Choice Video, Collectors' Choice Music, Movies Unlimited, DeepDiscount, PopMarket, Blowitoutahere, Fulfillment Express, ImportCDs, GamerCandy, and WowHD. connects top content creators, including Universal Pictures, Warner Bros.

The fourteen inputs

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

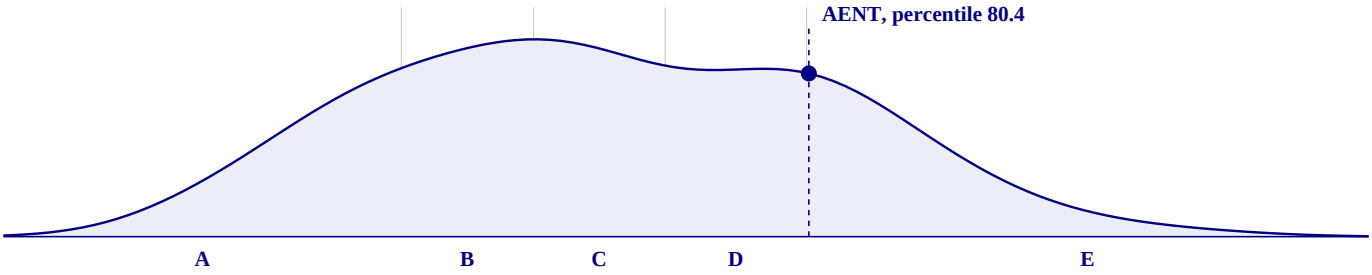
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 95.6						
Gross profitability	not computable	42.0%				
latest aligned inputs end 2025-06-30; latest annual assets end 2026-06-30						
Return on invested capital	not computable	10.9%				

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one or more required annual facts are missing						
Accruals ratio	3.9%	(4.9%)		95.6	283	2026-06-30
Gross margin stability, five years	not computable	1.3 pts				
five annual gross margins are required; found 2						
Solvency, sleeve percentile 41.2						
Twelve-month failure probability	not computable	0.03%				
firm-wide XBRL shares cannot be assigned to one ticker class						
Altman Z double-prime	2.48	1.93		38.2	204	2026-06-30
Net debt to EBITDA	not computable	1.38x				
one or more required annual facts are missing						
Interest coverage	5.55x	3.27x		34.2	58	2026-06-30
Current ratio	1.34x	1.37x		51.2	295	2026-06-30
Growth and financing, sleeve percentile 46.3						
Revenue growth, three-year compound	(0.3%)	1.6%		58.5	265	2026-06-30
Free cash flow growth, three-year compound	not computable	4.6%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	86.2%	17.6%		20.3	151	2026-06-30
Asset growth, three years	0.7%	3.4%		60.0	267	2026-06-30
Net share issuance, one year	not computable	(0.6%)				
firm-wide XBRL shares cannot be assigned to one ticker class						

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
199	CHS Inc. (CHSCO)	77.9	D/E	
200	CHS Inc. (CHSCP)	77.9	D/E	
201	Ashland Inc. (ASH)	79.1	D/E	
202	Nextnrg, Inc. (NXXT)	79.4	D/E	dilution, late filer
203	RED Robin Gourmet Burgers Inc. (RRGB)	79.8	D/E	late filer
204	Alliance Entertainment Holding Corp. (AENT)	80.4	D/E	
205	Alliance Entertainment Holding Corp. (AENTW)	80.4	D/E	
206	Service Corp. International (SCI)	81.0	D/E	
207	Restaurant Brands International Limited Partnership (QSP)	81.4	D/E	
208	Ryerson Holding Corp. (RYZ)	81.8	D/E	dilution, short runway
209	Martin Midstream Partners L.P. (MMLP)	82.2	D/E	

What the price implies

at the 2026-11-09 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(28.3%)	(0.8%)	26
Distance from 52-week high	(46.9%)	(19.6%)	17
EBIT to enterprise value	not computable	5.1%	

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Free cash flow yield	not computable	3.8%	
Book value to price	not computable	0.35	
Sales to price	not computable	1.55	
Composite equity issuance, five years	not computable	(16.9%)	
Relative strength against the sector, log excess return	(0.24)	0.08	26

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	fail
Return on assets improved	fail
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
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	61 (10-K received Sep 10, 2026)
Median daily dollar volume, 63 sessions	$103,220

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	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2025-06-30	2026-09-10	10-K	26-042141
2	cost of revenue	us-gaap:CostOfRevenue	$0	2025-06-30	2025-09-10	10-K	25-012989
3	assets	us-gaap:Assets	$361.2M	2025-06-30	2026-09-10	10-K	26-042141
4	net income	us-gaap:NetIncomeLoss	$13.1M	2026-06-30	2026-09-10	10-K	26-042141
5	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.7M	2026-06-30	2026-09-10	10-K	26-042141
6	assets	us-gaap:Assets	$397.6M	2026-06-30	2026-09-10	10-K	26-042141
7	current assets	us-gaap:AssetsCurrent	$248.3M	2026-06-30	2026-09-10	10-K	26-042141
8	current liabilities	us-gaap:LiabilitiesCurrent	$185.9M	2026-06-30	2026-09-10	10-K	26-042141
9	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$67.8M	2026-06-30	2026-09-10	10-K	26-042141
10	operating income	us-gaap:OperatingIncomeLoss	$27.2M	2026-06-30	2026-09-10	10-K	26-042141
11	book equity	us-gaap:StockholdersEquity	$116.6M	2026-06-30	2026-09-10	10-K	26-042141
12	liabilities	us-gaap:Liabilities	$281.0M	2026-06-30	2026-09-10	10-K	26-042141
13	interest expense	us-gaap:InterestExpense	$4.9M	2026-06-30	2026-09-10	10-K	26-042141
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2026-06-30	2026-09-10	10-K	26-042141
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2024-06-30	2025-09-10	10-K	25-012989
16	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2023-06-30	2024-09-20	10-K	24-037185
17	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.1M	2026-06-30	2026-09-10	10-K	26-042141
18	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$26.8M	2025-06-30	2026-09-10	10-K	26-042141
19	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$54,000	2025-06-30	2026-09-10	10-K	26-042141
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$55.8M	2024-06-30	2025-09-10	10-K	25-012989
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$183,000	2024-06-30	2025-09-10	10-K	25-012989
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$3.4M	2023-06-30	2024-09-20	10-K	24-037185
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$825,000	2023-06-30	2024-09-20	10-K	24-037185
24	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.8M	2026-06-30	2026-09-10	10-K	26-042141
25	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$18.8M	2026-06-30	2026-09-10	10-K	26-042141

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26	income tax	us-gaap:IncomeTaxExpenseBenefit	$5.8M	2026-06-30	2026-09-10	10-K	26-042141
27	current assets	us-gaap:AssetsCurrent	$218.1M	2025-06-30	2026-09-10	10-K	26-042141
28	current liabilities	us-gaap:LiabilitiesCurrent	$172.7M	2025-06-30	2026-09-10	10-K	26-042141
29	assets	us-gaap:Assets	$340.8M	2024-06-30	2025-09-10	10-K	25-012989
30	assets	us-gaap:Assets	$389.5M	2023-06-30	2024-09-20	10-K	24-037185

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