# Hooker Furnishings Corp.

**HOFT**

Nasdaq; consumer durables; SIC 2510, Household Furniture; CIK 0001077688

**C**

**middle fifth of 456 graded peers in the pooled consumer group**

rank 197 of 456; percentile 44.0; sampling error 2.3 points; lower is stronger

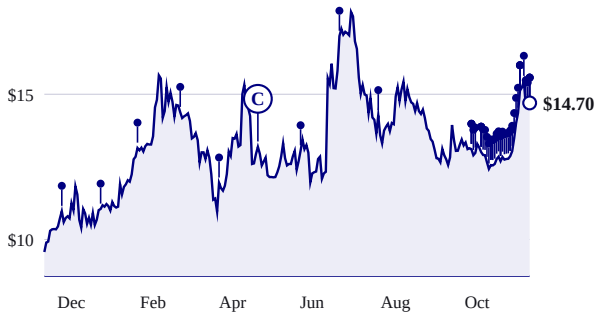
A B C D E

**C, the tortoise**



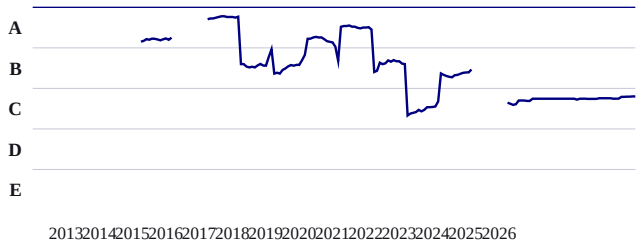
| Scoreboard | |
|---|---|
| **Profitability** | C<br>percentile 47.8 |
| **Solvency** | A<br>percentile 13.0 |
| **Growth and financing** | D/E<br>percentile 81.6 |
| **Reliability** | 0.87 AUC<br>filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025 |
| **Peer failure rate** | 1.03% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $120M to $591M assets<br>total assets $225.9M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: short runway, distress |
| **Inputs computable** | 7 of 14 |
| **Graded from** | filings received through Apr 17, 2026<br>207 days before the rescan; latest periodic filing 10-Q received Sep 11, 2026 |
| **Last close** | $14.74<br>2026-11-09; market equity $157.7M; 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 Apr 17, 2026*

Virginia in 1924, is a designer, marketer and importer of casegoods (wooden and metal furniture), leather furniture, fabric-upholstered furniture, lighting, accessories, and home decor for the residential, hospitality and contract markets. We also domestically manufacture premium residential custom leather, custom fabric-upholstered furniture and outdoor furniture. the Pulaski Furniture ("PFC") and Samuel Lawrence Furniture ("SLF") brands within the Home Meridian segment no longer aligned with the Company's long-term strategic direction.

## 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 47.8** | | | | | | |
| Gross profitability | 32.5% | 34.4% | | 50.4 | 471 | 2026-02-01 |
| Return on invested capital | not computable | 8.9% | | | | |

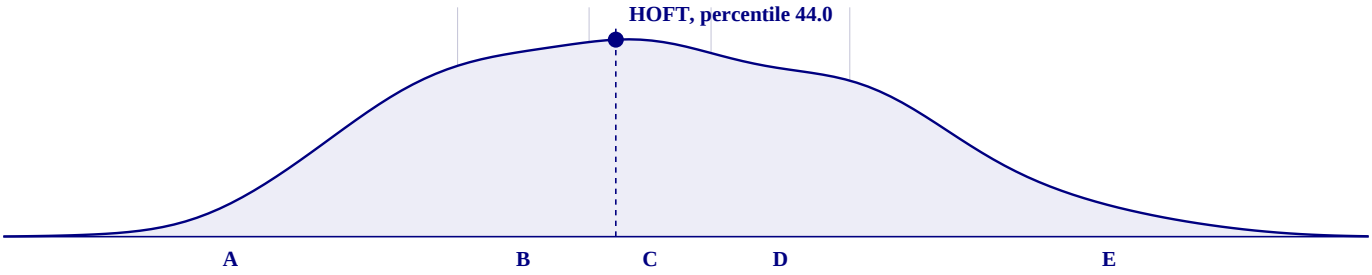
*latest aligned inputs end 2019-02-03; latest annual assets end 2026-02-01*

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| | | | | | | |
|---|---|---|---|---|---|---|
| Accruals ratio | (37.7%) | (5.1%) | | 5.0 | 519 | 2026-02-01 |
| Gross margin stability, five years | 4.8 pts | 1.7 pts | | 88.1 | 404 | 2026-02-01 |
| **Solvency, sleeve percentile 13.0** | | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | | |
| *latest liabilities, cash plus short-term investments, book equity, and shares are required* | | | | | | |
| Altman Z double-prime | 6.24 | 2.12 | | 13.4 | 397 | 2026-02-01 |
| Net debt to EBITDA | not computable | 2.11x | | | | |
| *latest aligned inputs end 2019-02-03; latest annual assets end 2026-02-01* | | | | | | |
| Interest coverage | not computable | 2.81x | | | | |
| *one or more required annual facts are missing* | | | | | | |
| Current ratio | 3.37x | 1.60x | | 12.6 | 539 | 2026-02-01 |
| **Growth and financing, sleeve percentile 81.6** | | | | | | |
| Revenue growth, three-year compound | (21.9%) | 1.4% | | 95.4 | 478 | 2026-02-01 |
| Free cash flow growth, three-year compound | not computable | 7.4% | | | | |
| *current FCF must be positive and base FCF must exceed $100,000* | | | | | | |
| Reinvestment rate | not computable | 22.6% | | | | |
| *NOPAT must exceed $100,000* | | | | | | |
| Asset growth, three years | not computable | 2.0% | | | | |
| *four consecutive annual observations are required* | | | | | | |
| Net share issuance, one year | 0.7% | (0.3%) | | 67.8 | 380 | 2026-04-10 |

## Among 456 peers

*consumer durables; 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 |
|---|---|---|---|---|
| 192 | Boston Beer Co. Inc. (SAM) | 43.1 | B/C | fortress balance sheet |
| 193 | Yum China Holdings, Inc. (YUMC) | 43.5 | C | |
| 194 | XMax Inc. (XMAX) | 43.5 | C | dilution, late filer |
| 195 | US Foods Holding Corp. (USFD) | 43.9 | C | |
| 196 | Bridgford Foods Corp. (BRID) | 43.9 | C | |
| 197 | Hooker Furnishings Corp. (HOFT) | 44.0 | C | |
| 198 | Cannae Holdings, Inc. (CNNE) | 44.3 | C | fortress balance sheet |
| 199 | First Watch Restaurant Group, Inc. (FWRG) | 44.7 | C | |
| 200 | Post Holdings, Inc. (POST) | 44.7 | C | |
| 201 | Adient plc (ADNT) | 44.8 | C | |
| 202 | Central Garden & PET Co. (CENT) | 45.3 | C | |

## 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 | 46.9% | (1.9%) | 87 |
| Distance from 52-week high | (17.6%) | (21.3%) | 57 |
| EBIT to enterprise value | (9.5%) | 4.7% | 18 |

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| | | | |
|---|---|---|---|
| Free cash flow yield | 9.6% | 4.1% | 76 |
| Book value to price | 1.07 | 0.43 | 83 |
| Sales to price | 1.77 | 1.39 | 59 |
| Composite equity issuance, five years | (36.4%) | (16.4%) | 14 |
| Relative strength against the sector, log excess return | 0.48 | 0.04 | 88 |

## 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 | fail |
| 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 | 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 | 60 (10-Q received Sep 11, 2026) |
| Median daily dollar volume, 63 sessions | $432,043 |

## 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 | $73.5M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 2 | assets | us-gaap:Assets | $225.9M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $52.7M | 2019-02-03 | 2021-04-16 | 10-K | 21-000547 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $51.6M | 2019-02-03 | 2021-04-16 | 10-K | 21-000547 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $11.7M | 2019-02-03 | 2021-04-16 | 10-K | 21-000547 |
| 6 | total debt | us-gaap:LongTermDebt | $35.5M | 2019-02-03 | 2019-04-19 | 10-K | 19-000568 |
| 7 | book equity | us-gaap:StockholdersEquity | $263.2M | 2019-02-03 | 2022-04-15 | 10-K | 22-000451 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $11.4M | 2019-02-03 | 2021-04-16 | 10-K | 21-000547 |
| 9 | total debt | us-gaap:LongTermDebt | $53.4M | 2018-01-28 | 2018-04-13 | 10-K | 18-000692 |
| 10 | book equity | us-gaap:StockholdersEquity | $229.5M | 2018-01-28 | 2021-04-16 | 10-K | 21-000547 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $30.9M | 2018-01-28 | 2021-04-16 | 10-K | 21-000547 |
| 12 | net income | us-gaap:NetIncomeLoss | -$27.0M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivitiesC... | $18.3M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 14 | assets | us-gaap:Assets | $14.5M | 2025-03-31 | 2025-04-18 | 10-K | 25-000321 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $278.1M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 16 | gross profit | us-gaap:GrossProfit | $78.1M | 2025-02-02 | 2026-04-17 | 10-K | 26-001420 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $317.4M | 2025-02-02 | 2026-04-17 | 10-K | 26-001420 |
| 18 | gross profit | us-gaap:GrossProfit | $94.0M | 2024-01-28 | 2026-04-17 | 10-K | 26-001420 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $344.6M | 2024-01-28 | 2026-04-17 | 10-K | 26-001420 |
| 20 | gross profit | us-gaap:GrossProfit | $93.3M | 2023-01-29 | 2025-04-18 | 10-K | 25-000321 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $583.1M | 2023-01-29 | 2025-04-18 | 10-K | 25-000321 |
| 22 | gross profit | us-gaap:GrossProfit | $101.7M | 2022-01-30 | 2024-04-12 | 10-K | 24-000378 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $593.6M | 2022-01-30 | 2024-04-12 | 10-K | 24-000378 |
| 24 | current assets | us-gaap:AssetsCurrent | $92.9M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $27.6M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $117.6M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 27 | operating income | us-gaap:OperatingIncomeLoss | -$16.5M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 28 | book equity | us-gaap:StockholdersEquity | $169.2M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 29 | liabilities | us-gaap:Liabilities | $56.6M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 30 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $7.4M | 2019-02-03 | 2021-04-16 | 10-K | 21-000547 |
| 31 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $3.2M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$23.0M | 2025-02-02 | 2025-04-18 | 10-K | 25-000321 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $3.1M | 2025-02-02 | 2026-04-17 | 10-K | 26-001420 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $55.5M | 2024-01-28 | 2025-04-18 | 10-K | 25-000321 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $5.2M | 2024-01-28 | 2026-04-17 | 10-K | 26-001420 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$21.7M | 2023-01-29 | 2025-04-18 | 10-K | 25-000321 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $4.2M | 2023-01-29 | 2025-04-18 | 10-K | 25-000321 |
| 38 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $7.1M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 39 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | -$17.0M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 40 | income tax | us-gaap:IncomeTaxExpenseBenefit | -$4.3M | 2026-02-01 | 2026-04-17 | 10-K | 26-001420 |
| 41 | current assets | us-gaap:AssetsCurrent | $141.1M | 2025-02-02 | 2026-04-17 | 10-K | 26-001420 |
| 42 | current liabilities | us-gaap:LiabilitiesCurrent | $40.0M | 2025-02-02 | 2026-04-17 | 10-K | 26-001420 |
| 43 | assets | us-gaap:Assets | $313.9M | 2025-02-02 | 2026-04-17 | 10-K | 26-001420 |
| 44 | assets | us-gaap:Assets | $343.6M | 2024-01-28 | 2025-04-18 | 10-K | 25-000321 |
| 45 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 10,779,729 | 2026-04-10 | 2026-04-17 | 10-K | 26-001420 |
| 46 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 10,702,685 | 2025-04-07 | 2025-04-18 | 10-K | 25-000321 |

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