Lands' END, Inc.

LE

Nasdaq; shops; SIC 5651, Retail-Family Clothing Stores; CIK 0000799288

D

fourth fifth of 254 graded peers in shops

rank 187 of 254; percentile 73.5; sampling error 3.0 points; lower is stronger

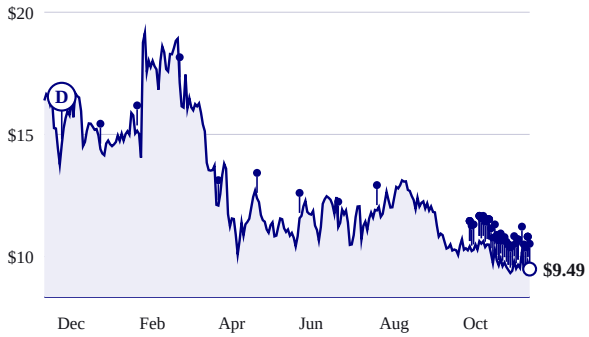
A B C D E

D, the sloth



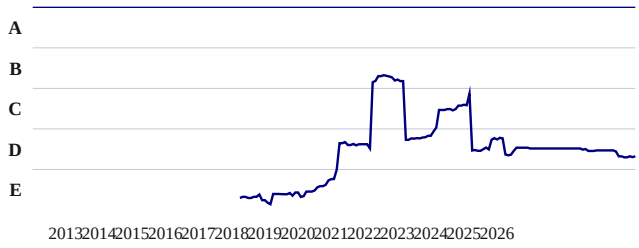
Scoreboard	
Profitability	C percentile 47.1
Solvency	C percentile 50.4
Growth and financing	D/E percentile 81.2
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $751.1M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	short runway not computable: dilution, distress
Inputs computable	9 of 14
Graded from	filings received through Mar 26, 2026 230 days before the rescan; latest periodic filing 10-Q received Sep 3, 2026
Last close	$9.54 2026-11-10; market equity $281.7M; 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 Mar 26, 2026

As used in this Annual Report on Form 10-K, references to the "Company", "Lands' End", "we", "us", "our" and similar terms refer to Lands' End, Inc. and its subsidiaries. Our fiscal year ends on the Friday preceding the Saturday closest to January 31. Other terms commonly used in this Annual Report on Form 10-K are defined as follows: ABL Facility - Asset-based senior secured credit agreements, providing for a revolving facility, dated as of November 16, 2017, with Wells Fargo, N.A.

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 47.1						
Gross profitability	86.6%	42.0%		9.7	238	2026-01-30
Return on invested capital	not computable	10.9%				
prior invested-capital observation is 1092 days earlier						
Accruals ratio	(5.8%)	(4.9%)		44.7	283	2026-01-30

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Gross margin stability, five years	3.9 pts	1.3 pts		87.0	216	2026-01-30
Solvency, sleeve percentile 50.4						
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	1.71	1.93		51.2	204	2026-01-30
Net debt to EBITDA	not computable	1.38x				
latest aligned inputs end 2021-01-29; latest annual assets end 2026-01-30						
Interest coverage	1.21x	2.71x		60.7	57	2026-01-30
Current ratio	1.61x	1.37x		39.1	295	2026-01-30
Growth and financing, sleeve percentile 81.2						
Revenue growth, three-year compound	(5.0%)	1.6%		75.8	265	2026-01-30
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	(21.4%)	17.6%		80.0	151	2026-01-30
Asset growth, three years	(11.5%)	3.1%		88.0	267	2026-01-30
Net share issuance, one year	not computable	(0.6%)				
prior share count is 721 days earlier						

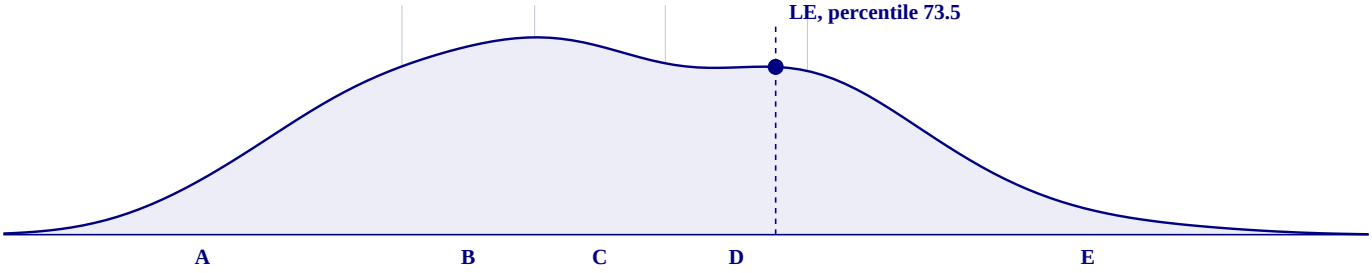
Warnings

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

Check	Measured
Short runway	cash runway is 5.2 months

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
182	HF Foods Group Inc. (HFFG)	71.5	D	
183	Target Corp. (TGT)	71.9	D	
184	Willis Lease Finance Corp. (WLFC)	72.3	D	
185	Sherwin Williams Co. (SHW)	72.7	D	
186	Ingram Micro Holding Corp. (INGM)	73.1	D	
187	Lands' END, Inc. (LE)	73.5	D	short runway
188	El Pollo Loco Holdings, Inc. (LOCO)	73.9	D	
189	Aramark (ARMK)	74.3	D	
190	Cracker Barrel OLD Country Store, Inc. (CBRL)	74.7	D	
191	Dave & Buster's Entertainment, Inc. (PLAY)	75.1	D	
192	1 800 Flowers COM Inc. (FLWS)	75.5	D	

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What the price implies

at the 2026-11-10 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(34.7%)	(0.8%)	19
Distance from 52-week high	(50.4%)	(19.8%)	15
EBIT to enterprise value	8.4%	5.1%	80
Free cash flow yield	7.3%	3.8%	74
Book value to price	1.76	0.35	93
Sales to price	4.76	1.55	81
Composite equity issuance, five years	(10.0%)	(16.9%)	61
Relative strength against the sector, log excess return	(0.33)	0.08	19

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-01-30	
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	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$16.1M
Operating cash flow, four quarters	-$37.3M
Months of runway	5.2
Days since last periodic filing	69 (10-Q received Sep 3, 2026)
Median daily dollar volume, 63 sessions	$1.7M

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	$650.2M	2026-01-30	2026-03-26	10-K	26-126210
2	assets	us-gaap:Assets	$751.1M	2026-01-30	2026-03-26	10-K	26-126210
3	operating income	us-gaap:OperatingIncomeLoss	$41.1M	2021-01-29	2023-04-10	10-K	23-012307
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$12.6M	2021-01-29	2023-04-10	10-K	23-012307
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$1.8M	2021-01-29	2023-04-10	10-K	23-012307
6	total debt	us-gaap:LongTermDebt	$271.6M	2021-01-29	2021-03-25	10-K	21-015555
7	book equity	us-gaap:StockholdersEquity	$369.7M	2021-01-29	2024-04-03	10-K	24-041066
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$33.9M	2021-01-29	2022-03-24	10-K	22-011688
9	total debt	us-gaap:LongTermDebt	$495.7M	2018-02-02	2019-03-28	10-K	19-000030
10	book equity	us-gaap:StockholdersEquity	$307.1M	2018-02-02	2021-03-25	10-K	21-015555
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$195.6M	2018-02-02	2018-03-29	10-K	18-000022
12	net income	us-gaap:NetIncomeLoss	$5.5M	2026-01-30	2026-03-26	10-K	26-126210
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$49.6M	2026-01-30	2026-03-26	10-K	26-126210
14	assets	us-gaap:Assets	$765.5M	2025-01-31	2026-03-26	10-K	26-126210
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2026-01-30	2026-03-26	10-K	26-126210
16	gross profit	us-gaap:GrossProfit	$653.3M	2025-01-31	2026-03-26	10-K	26-126210
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.4B	2025-01-31	2026-03-26	10-K	26-126210
18	gross profit	us-gaap:GrossProfit	$625.5M	2024-02-02	2026-03-26	10-K	26-126210

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19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2024-02-02	2026-03-26	10-K	26-126210
20	gross profit	us-gaap:GrossProfit	$593.8M	2023-01-27	2025-03-27	10-K	25-046044
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.6B	2023-01-27	2025-03-27	10-K	25-046044
22	gross profit	us-gaap:GrossProfit	$691.5M	2022-01-28	2024-04-03	10-K	24-041066
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.6B	2022-01-28	2024-04-03	10-K	24-041066
24	current assets	us-gaap:AssetsCurrent	$361.0M	2026-01-30	2026-03-26	10-K	26-126210
25	current liabilities	us-gaap:LiabilitiesCurrent	$223.9M	2026-01-30	2026-03-26	10-K	26-126210
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-$88.8M	2026-01-30	2026-03-26	10-K	26-126210
27	operating income	us-gaap:OperatingIncomeLoss	$44.3M	2026-01-30	2026-03-26	10-K	26-126210
28	book equity	us-gaap:StockholdersEquity	$244.3M	2026-01-30	2026-03-26	10-K	26-126210
29	liabilities	us-gaap:Liabilities	$506.8M	2026-01-30	2026-03-26	10-K	26-126210
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$37.3M	2021-01-29	2023-04-10	10-K	23-012307
31	interest expense	us-gaap:InterestExpense	$36.7M	2026-01-30	2026-03-26	10-K	26-126210
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$29.2M	2026-01-30	2026-03-26	10-K	26-126210
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$53.1M	2025-01-31	2026-03-26	10-K	26-126210
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$37.8M	2025-01-31	2026-03-26	10-K	26-126210
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$130.6M	2024-02-02	2026-03-26	10-K	26-126210
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$34.9M	2024-02-02	2026-03-26	10-K	26-126210
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$36.4M	2023-01-27	2025-03-27	10-K	25-046044
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$31.8M	2023-01-27	2025-03-27	10-K	25-046044
39	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$30.2M	2026-01-30	2026-03-26	10-K	26-126210
40	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$7.8M	2026-01-30	2026-03-26	10-K	26-126210
41	income tax	us-gaap:IncomeTaxExpenseBenefit	$2.2M	2026-01-30	2026-03-26	10-K	26-126210
42	current assets	us-gaap:AssetsCurrent	$370.5M	2025-01-31	2026-03-26	10-K	26-126210
43	current liabilities	us-gaap:LiabilitiesCurrent	$227.6M	2025-01-31	2026-03-26	10-K	26-126210
44	assets	us-gaap:Assets	$811.5M	2024-02-02	2025-03-27	10-K	25-046044
45	assets	us-gaap:Assets	$1.1B	2023-01-27	2024-04-03	10-K	24-041066
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	30,751,337	2026-03-23	2026-03-26	10-K	26-126210
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	31,491,974	2024-04-01	2024-04-03	10-K	24-041066

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