Zumiez Inc.

ZUMZ

Nasdaq; shops; SIC 5600, Retail-Apparel & Accessory Stores; CIK 0001318008

B/C

on the B/C boundary of 254 graded peers in shops

rank 97 of 254; percentile 37.9; sampling error 3.0 points; lower is stronger

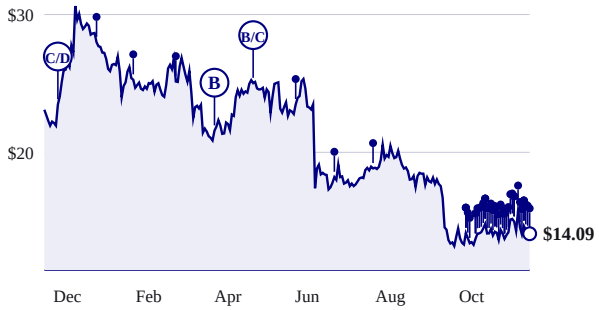
A B C D E

B/C, the elk



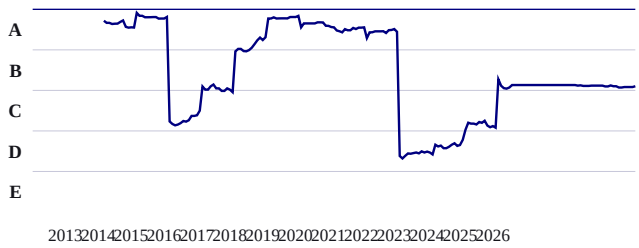
Scoreboard	
Profitability	C percentile 48.2
Solvency	B percentile 28.1
Growth and financing	C/D percentile 59.5
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $644.2M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	9 of 14
Graded from	filings received through Mar 12, 2026 246 days before the rescan; latest periodic filing 10-Q received Sep 10, 2026
Last close	$14.10 2026-11-12; market equity $216.2M; 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 12, 2026

Zumiez Inc., including its wholly-owned subsidiaries, is a leading specialty retailer of apparel, footwear, accessories and hardgoods for young men and women who want to express their individuality through the fashion, music, art and culture of action sports, streetwear and other unique lifestyles. Zumiez Inc. was formed in August 1978 and is a Washington State corporation. We operate under the names Zumiez, Blue Tomato and Fast Times. We operate ecommerce websites at zumiez.com, zumiez.ca, blue-tomato.com and fasttimes.com.au. At January 31, 2026, we operated 719 stores; 561 in the United States ("U.S."), 45 in Canada, 85 in Europe and 28 in Australia.

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 48.2						
Gross profitability	51.6%	42.6%		33.8	238	2026-01-31
Return on invested capital	not computable	11.2%				

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latest aligned inputs end 2014-02-01; latest annual assets end 2026-01-31						
Accruals ratio	(6.3%)	(4.9%)		41.1	283	2026-01-31
Gross margin stability, five years	2.2 pts	1.3 pts		69.8	216	2026-01-31
Solvency, sleeve percentile 28.1						
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	3.59	1.93		28.6	204	2026-01-31
Net debt to EBITDA	not computable	1.38x				
latest aligned inputs end 2014-02-01; latest annual assets end 2026-01-31						
Interest coverage	not computable	2.71x				
one or more required annual facts are missing						
Current ratio	2.01x	1.37x		27.6	295	2026-01-31
Growth and financing, sleeve percentile 59.5						
Revenue growth, three-year compound	(1.0%)	1.6%		61.7	265	2026-01-31
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	(89.5%)	16.4%		95.3	151	2026-01-31
Asset growth, three years	(4.9%)	3.1%		78.6	267	2026-01-31
Net share issuance, one year	(11.4%)	(0.6%)		2.4	209	2026-02-28

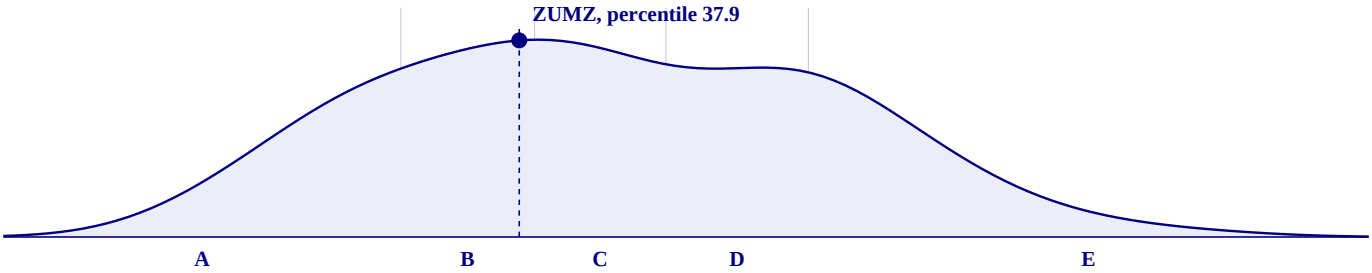
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 17,701,000 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
92	Alta Equipment Group Inc. (ALTG)	36.2	B	
93	Alta Equipment Group Inc. (ALTG-PA)	36.2	B	
94	Live Ventures Inc. (LIVE)	36.8	B	
95	Avnet Inc. (AVT)	37.2	B/C	short runway
96	Giftify, Inc. (GIFT)	37.5	B/C	
97	Zumiez Inc. (ZUMZ)	37.9	B/C	fortress balance sheet
98	Dollar General Corp. (DG)	38.3	B/C	
99	Murphy USA Inc. (MUSA)	38.7	B/C	
100	YUM Brands Inc. (YUM)	39.1	B/C	
101	Dollar Tree, Inc. (DLTR)	39.5	B/C	
102	Sysco Corp. (SYY)	39.9	B/C	

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What the price implies

at the 2026-11-12 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(38.1%)	(0.8%)	17
Distance from 52-week high	(54.0%)	(19.8%)	13
EBIT to enterprise value	10.2%	5.1%	87
Free cash flow yield	19.6%	3.8%	95
Book value to price	1.29	0.35	88
Sales to price	4.30	1.53	78
Composite equity issuance, five years	(51.4%)	(16.9%)	5
Relative strength against the sector, log excess return	(0.39)	0.08	17

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-01-31	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$50.3M
Operating cash flow, four quarters	$35.7M
Months of runway	not finite
Days since last periodic filing	64 (10-Q received Sep 10, 2026)
Median daily dollar volume, 63 sessions	$3.9M

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	$332.5M	2026-01-31	2026-03-12	10-K	26-104063
2	assets	us-gaap:Assets	$644.2M	2026-01-31	2026-03-12	10-K	26-104063
3	operating income	us-gaap:OperatingIncomeLoss	$72.8M	2014-02-01	2016-03-14	10-K	16-502868
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$72.0M	2014-02-01	2015-03-19	10-K/A	15-098445
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$26.0M	2014-02-01	2016-03-14	10-K	16-502868
6	total debt	us-gaap:LongTermDebt	$1.9M	2014-02-01	2015-03-19	10-K/A	15-098445
7	book equity	us-gaap:StockholdersEquity	$335.7M	2014-02-01	2016-03-14	10-K	16-502868
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$19.6M	2014-02-01	2016-03-14	10-K	16-502868
9	total debt	us-gaap:LongTermDebt	$2.3M	2013-02-02	2014-03-18	10-K	14-103495
10	book equity	us-gaap:StockholdersEquity	$303.4M	2013-02-02	2016-03-14	10-K	16-502868
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$17.6M	2013-02-02	2016-03-14	10-K	16-502868
12	net income	us-gaap:NetIncomeLoss	$13.4M	2026-01-31	2026-03-12	10-K	26-104063
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$53.5M	2026-01-31	2026-03-12	10-K	26-104063
14	assets	us-gaap:Assets	$634.9M	2025-02-01	2026-03-12	10-K	26-104063
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$929.1M	2026-01-31	2026-03-12	10-K	26-104063
16	gross profit	us-gaap:GrossProfit	$303.0M	2025-02-01	2026-03-12	10-K	26-104063
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$889.2M	2025-02-01	2026-03-12	10-K	26-104063
18	gross profit	us-gaap:GrossProfit	$280.9M	2024-02-03	2026-03-12	10-K	26-104063

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19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$875.5M	2024-02-03	2026-03-12	10-K	26-104063
20	gross profit	us-gaap:GrossProfit	$324.7M	2023-01-28	2025-03-13	10-K	25-038692
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$958.4M	2023-01-28	2025-03-13	10-K	25-038692
22	gross profit	us-gaap:GrossProfit	$456.7M	2022-01-29	2024-03-14	10-K	24-031449
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2022-01-29	2024-03-14	10-K	24-031449
24	current assets	us-gaap:AssetsCurrent	$336.0M	2026-01-31	2026-03-12	10-K	26-104063
25	current liabilities	us-gaap:LiabilitiesCurrent	$167.5M	2026-01-31	2026-03-12	10-K	26-104063
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$124.0M	2026-01-31	2026-03-12	10-K	26-104063
27	operating income	us-gaap:OperatingIncomeLoss	$17.0M	2026-01-31	2026-03-12	10-K	26-104063
28	book equity	us-gaap:StockholdersEquity	$324.3M	2026-01-31	2026-03-12	10-K	26-104063
29	liabilities	us-gaap:Liabilities	$319.9M	2026-01-31	2026-03-12	10-K	26-104063
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$26.6M	2014-02-01	2016-03-14	10-K	16-502868
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$11.1M	2026-01-31	2026-03-12	10-K	26-104063
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$20.7M	2025-02-01	2026-03-12	10-K	26-104063
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$15.0M	2025-02-01	2026-03-12	10-K	26-104063
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$14.8M	2024-02-03	2026-03-12	10-K	26-104063
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$20.4M	2024-02-03	2026-03-12	10-K	26-104063
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$379,000	2023-01-28	2025-03-13	10-K	25-038692
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$25.6M	2023-01-28	2025-03-13	10-K	25-038692
38	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$21.1M	2026-01-31	2026-03-12	10-K	26-104063
39	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$24.1M	2026-01-31	2026-03-12	10-K	26-104063
40	income tax	us-gaap:IncomeTaxExpenseBenefit	$10.7M	2026-01-31	2026-03-12	10-K	26-104063
41	current assets	us-gaap:AssetsCurrent	$322.4M	2025-02-01	2026-03-12	10-K	26-104063
42	current liabilities	us-gaap:LiabilitiesCurrent	$155.5M	2025-02-01	2026-03-12	10-K	26-104063
43	assets	us-gaap:Assets	$664.2M	2024-02-03	2025-03-13	10-K	25-038692
44	assets	us-gaap:Assets	$747.9M	2023-01-28	2024-03-14	10-K	24-031449
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	16,969,650	2026-02-28	2026-03-12	10-K	26-104063
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	19,159,216	2025-03-01	2025-03-13	10-K	25-038692

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