# Sanfilippo John B & SON Inc.

**JBSS**

Nasdaq; consumer nondurables; SIC 2060, Sugar & Confectionery Products; CIK 0000880117

**A**

**strongest fifth of 126 graded peers in consumer nondurables**

rank 12 of 126; percentile 8.8; sampling error 3.7 points; lower is stronger

A B C D E

**A, the bull**



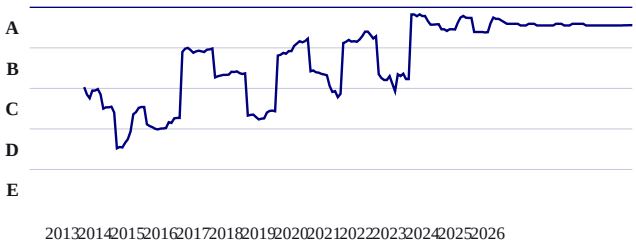
| Scoreboard | |
|---|---|
| **Profitability** | B<br>percentile 30.7 |
| **Solvency** | B<br>percentile 25.0 |
| **Growth and financing** | B/C<br>percentile 37.2 |
| **Reliability** | 0.91 AUC<br>filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025 |
| **Peer failure rate** | 1.01% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $591M to $2.67B assets<br>total assets $658.6M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: dilution, distress |
| **Inputs computable** | 11 of 14 |
| **Graded from** | filings received through Aug 19, 2026<br>87 days before the rescan; latest periodic filing 10-Q received Oct 28, 2026 |
| **Last close** | $59.11<br>2026-11-13; 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 Aug 19, 2026*

", sales to Walmart and Target represented a majority of such sales to our five largest customers. There can be no assurance that all significant customers will continue to purchase our branded or private brand products in the same quantities, same product mix or on the same terms as in the past, particularly as increasingly powerful retailers demand supplier diversification, lower pricing, different packaging, larger marketing support or payments for retail space, establish private brands or request other terms of sale which negatively impact our profitability or sales. We have recently made equipment purchases to, among other things, better serve our most significant customers.

## 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 30.7** | | | | | | |
| Gross profitability | 32.1% | 29.8% | | 44.8 | 146 | 2026-06-25 |
| Return on invested capital | 16.7% | 5.6% | | 22.9 | 49 | 2026-06-25 |

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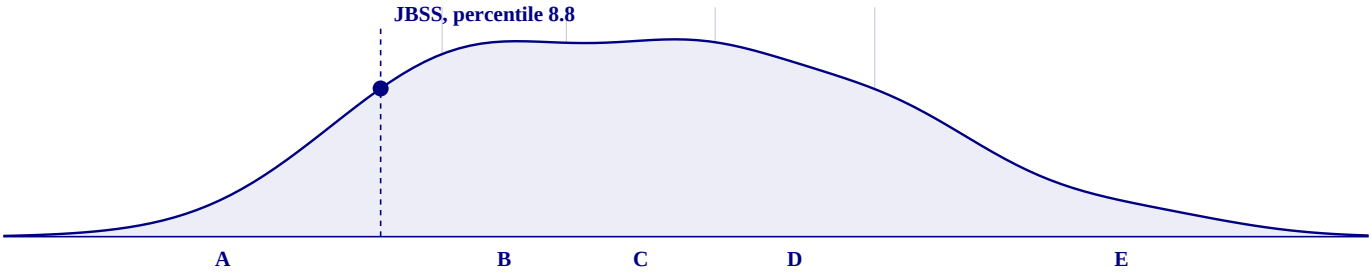
| | | | | | |
|---|---|---|---|---|---|
| Accruals ratio | (9.9%) | (5.1%) | 25.3 | 151 | 2026-06-25 |
| Gross margin stability, five years | 1.3 pts | 1.9 pts | 29.9 | 118 | 2026-06-25 |
| **Solvency, sleeve percentile 25.0** | | | | | |
| Twelve-month failure probability | not computable | 0.04% | | | |
| *liabilities and a nearby cover-page share count are required at 2026-09-24* | | | | | |
| Altman Z double-prime | 5.32 | 2.97 | 24.2 | 121 | 2026-06-25 |
| Net debt to EBITDA | 0.36x | 2.58x | 11.1 | 55 | 2026-06-25 |
| Interest coverage | not computable | 2.36x | | | |
| *latest aligned inputs end 2024-06-27; latest annual assets end 2026-06-25* | | | | | |
| Current ratio | 2.08x | 1.81x | 39.6 | 155 | 2026-06-25 |
| **Growth and financing, sleeve percentile 37.2** | | | | | |
| Revenue growth, three-year compound | 5.6% | (0.1%) | 23.1 | 135 | 2026-06-25 |
| Free cash flow growth, three-year compound | (29.9%) | 14.9% | 93.8 | 66 | 2026-06-25 |
| Reinvestment rate | 76.4% | 11.0% | 22.9 | 71 | 2026-06-25 |
| Asset growth, three years | 15.7% | 0.2% | 9.0 | 135 | 2026-06-25 |
| Net share issuance, one year | not computable | 0.05% | | | |
| *two annual share counts are required; found 0* | | | | | |

## Among 126 peers

*consumer nondurables; 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 |
|---|---|---|---|---|
| 7 | Mama's Creations, Inc. (MAMA) | 4.8 | A | fortress balance sheet |
| 8 | Ralph Lauren Corp. (RL) | 5.6 | A | fortress balance sheet |
| 9 | Columbia Sportswear Co. (COLM) | 6.4 | A | |
| 10 | Monster Beverage Corp. (MNST) | 7.2 | A | fortress balance sheet |
| 11 | Lifeway Foods, Inc. (LWAY) | 8.0 | A | fortress balance sheet |
| 12 | Sanfilippo John B & SON Inc. (JBSS) | 8.8 | A | |
| 13 | Jerash Holdings (Us), Inc. (JRSH) | 9.6 | A | fortress balance sheet |
| 14 | Vita Coco Company, Inc. (COCO) | 10.4 | A | |
| 15 | Steven Madden, Ltd. (SHOO) | 11.2 | A | |
| 16 | G III Apparel Group Ltd. (GIII) | 12.0 | A | fortress balance sheet |
| 17 | Kontoor Brands, Inc. (KTB) | 12.8 | A | |

## What the price implies

*at the 2026-11-13 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 12.0% | (1.6%) | 65 |
| Distance from 52-week high | (34.8%) | (19.6%) | 26 |
| EBIT to enterprise value | not computable | 3.2% | |
| Free cash flow yield | not computable | 4.0% | |
| Book value to price | not computable | 0.55 | |
| Sales to price | not computable | 1.21 | |

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| | | | |
|---|---|---|---|
| Composite equity issuance, five years | not computable | (16.6%) | |
| Relative strength against the sector, log excess return | 0.04 | (0.09) | 65 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score None of 9, period end 2026-06-25** | |
| 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 | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $2.0M |
| Operating cash flow, four quarters | $102.3M |
| Months of runway | not finite |
| Days since last periodic filing | 17 (10-Q received Oct 28, 2026) |
| Median daily dollar volume, 63 sessions | $8.8M |

## 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 | $211.2M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 2 | assets | us-gaap:Assets | $658.6M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $89.2M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $83.0M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $21.0M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 6 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $43.6M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 7 | book equity | us-gaap:StockholdersEquity | $379.9M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $1.1M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 9 | total debt | us-gaap:LongTermDebtAndCapitalLeaseObligations | $14.6M | 2025-06-26 | 2026-08-19 | 10-K | 26-356919 |
| 10 | book equity | us-gaap:StockholdersEquity | $360.7M | 2025-06-26 | 2026-08-19 | 10-K | 26-356919 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $585,000 | 2025-06-26 | 2026-08-19 | 10-K | 26-356919 |
| 12 | net income | us-gaap:NetIncomeLoss | $61.9M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $123.8M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 14 | assets | us-gaap:Assets | $597.6M | 2025-06-26 | 2026-08-19 | 10-K | 26-356919 |
| 15 | revenue | us-gaap:Revenues | $1.2B | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 16 | gross profit | us-gaap:GrossProfit | $203.5M | 2025-06-26 | 2026-08-19 | 10-K | 26-356919 |
| 17 | revenue | us-gaap:Revenues | $1.1B | 2025-06-26 | 2026-08-19 | 10-K | 26-356919 |
| 18 | gross profit | us-gaap:GrossProfit | $214.1M | 2024-06-27 | 2026-08-19 | 10-K | 26-356919 |
| 19 | revenue | us-gaap:Revenues | $1.1B | 2024-06-27 | 2026-08-19 | 10-K | 26-356919 |
| 20 | gross profit | us-gaap:GrossProfit | $211.6M | 2023-06-29 | 2025-08-20 | 10-K | 25-110463 |
| 21 | revenue | us-gaap:Revenues | $999.7M | 2023-06-29 | 2025-08-20 | 10-K | 25-110463 |
| 22 | gross profit | us-gaap:GrossProfit | $199.6M | 2022-06-30 | 2024-08-21 | 10-K | 24-099489 |
| 23 | revenue | us-gaap:Revenues | $955.9M | 2022-06-30 | 2024-08-21 | 10-K | 24-099489 |
| 24 | current assets | us-gaap:AssetsCurrent | $349.3M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $167.9M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $236.7M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 27 | liabilities | us-gaap:Liabilities | $278.6M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 28 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $28.2M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 29 | operating income | us-gaap:OperatingIncomeLoss | $85.2M | 2024-06-27 | 2026-08-19 | 10-K | 26-356919 |

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| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 30 | interest expense | us-gaap:InterestExpense | $2.5M | 2024-06-27 | 2024-08-21 | 10-K | 24-099489 |
| 31 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $88.1M | 2026-06-25 | 2026-08-19 | 10-K | 26-356919 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $30.5M | 2025-06-26 | 2026-08-19 | 10-K | 26-356919 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $50.7M | 2025-06-26 | 2026-08-19 | 10-K | 26-356919 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $101.7M | 2024-06-27 | 2026-08-19 | 10-K | 26-356919 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $28.3M | 2024-06-27 | 2026-08-19 | 10-K | 26-356919 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $124.7M | 2023-06-29 | 2025-08-20 | 10-K | 25-110463 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $20.7M | 2023-06-29 | 2025-08-20 | 10-K | 25-110463 |
| 38 | current assets | us-gaap:AssetsCurrent | $346.4M | 2025-06-26 | 2026-08-19 | 10-K | 26-356919 |
| 39 | current liabilities | us-gaap:LiabilitiesCurrent | $156.0M | 2025-06-26 | 2026-08-19 | 10-K | 26-356919 |
| 40 | assets | us-gaap:Assets | $515.6M | 2024-06-27 | 2025-08-20 | 10-K | 25-110463 |
| 41 | assets | us-gaap:Assets | $425.3M | 2023-06-29 | 2024-08-21 | 10-K | 24-099489 |

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