# G III Apparel Group Ltd. GIII

Nasdaq; consumer nondurables; SIC 2300, Apparel & Other Finishd Prods of Fabrics & Similar Matl; CIK 0000821002

**A**

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

rank 16 of 126; percentile 12.0; sampling error 3.7 points; lower is stronger

A B C D E

**A, the bull**



## Scoreboard

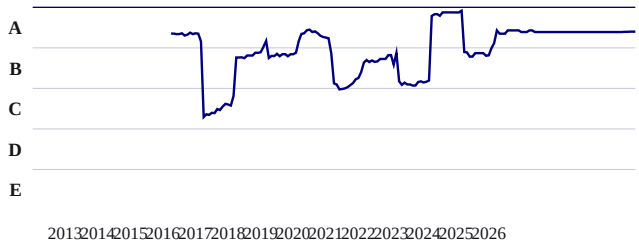
| | | |
|---|---|---|
| **Profitability** | C | percentile 46.2 |
| **Solvency** | A | percentile 13.9 |
| **Growth and financing** | B/C | percentile 36.3 |
| **Reliability** | 0.91 AUC | filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025 |
| **Peer failure rate** | 1.01% a year | Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $591M to $2.67B assets | total assets $2.6B |
| **Standard universe** | inside | revenue above $1M and assets above $10M |
| **Warnings** | none triggered; fortress balance sheet | not computable: distress |
| **Inputs computable** | 11 of 14 | |
| **Graded from** | filings received through Mar 24, 2026 | 236 days before the rescan; latest periodic filing 10-Q received Sep 8, 2026 |
| **Last close** | $31.82 | 2026-11-13; market equity $1.4B; 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 24, 2026*

Unless the context otherwise requires, "G-III," "Company," "us," "we" and "our" refer to G-III Apparel Group, Ltd. and its subsidiaries. References to fiscal years refer to the year ended or ending on January 31 of that year. For example, our fiscal year ended January 31, 2026 is referred to as "fiscal 2026." G-III Apparel Group, Ltd. is a Delaware corporation that was formed in 1989. We and our predecessors have conducted our business since 1974.

## 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 46.2** | | | | | | |
| Gross profitability | 44.6% | 29.8% | | 32.4 | 146 | 2026-01-31 |
| Return on invested capital | 4.6% | 5.6% | | 58.3 | 49 | 2026-01-31 |
| Accruals ratio | (9.1%) | (5.1%) | | 30.7 | 151 | 2026-01-31 |
| Gross margin stability, five years | 2.6 pts | 1.9 pts | | 63.2 | 118 | 2026-01-31 |

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

| | | | | | | |
|---|---|---|---|---|---|---|
| **Solvency, sleeve percentile 13.9** | | | | | | |
| 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 | 6.54 | 2.97 | | 15.8 | 121 | 2026-01-31 |
| Net debt to EBITDA | (3.03x) | 2.58x | | 1.9 | 55 | 2026-01-31 |
| Interest coverage | not computable | 2.36x | | | | |
| *latest aligned inputs end 2013-01-31; latest annual assets end 2026-01-31* | | | | | | |
| Current ratio | 2.69x | 1.81x | | 24.0 | 155 | 2026-01-31 |
| **Growth and financing, sleeve percentile 36.3** | | | | | | |
| Revenue growth, three-year compound | (2.9%) | (0.1%) | | 68.7 | 135 | 2026-01-31 |
| Free cash flow growth, three-year compound | not computable | 14.9% | | | | |
| *current FCF must be positive and base FCF must exceed $100,000* | | | | | | |
| Reinvestment rate | 166.1% | 11.0% | | 8.6 | 71 | 2026-01-31 |
| Asset growth, three years | (1.3%) | 0.2% | | 55.2 | 135 | 2026-01-31 |
| Net share issuance, one year | (3.9%) | 0.05% | | 12.6 | 104 | 2026-03-20 |

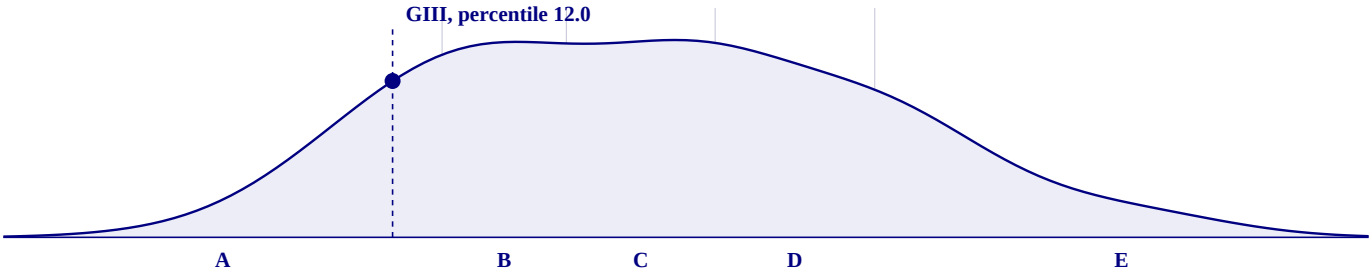
## Warnings

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

| Check | Measured |
|---|---|
| Fortress balance sheet | cash minus debt is 402,024,000 USD; Altman Z is not used |

## 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 |
|---|---|---|---|---|
| 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 | |
| 18 | Yeti Holdings, Inc. (YETI) | 13.6 | A | |
| 19 | Escalade Inc. (ESCA) | 14.4 | A | fortress balance sheet |
| 20 | Tootsie Roll Industries Inc. (TR) | 15.2 | A | |
| 21 | American Outdoor Brands, Inc. (AOUT) | 16.0 | 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 | 2.0% | (1.6%) | 55 |
| Distance from 52-week high | (13.6%) | (19.6%) | 62 |
| EBIT to enterprise value | 12.9% | 3.2% | 94 |

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

| | | | |
|---|---|---|---|
| Free cash flow yield | 19.4% | 4.0% | 94 |
| Book value to price | 1.33 | 0.55 | 85 |
| Sales to price | 2.17 | 1.21 | 72 |
| Composite equity issuance, five years | (13.0%) | (16.6%) | 59 |
| Relative strength against the sector, log excess return | (0.06) | (0.09) | 55 |

## Diagnostics

*shown on every report; none enters the grade*

| Measure | Value |
|---|---|
| **Piotroski F-score 6 of 9, period end 2026-01-31** | |
| 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 | pass |
| No new shares issued | pass |
| Gross margin improved | fail |
| Asset turnover improved | pass |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $529.2M |
| Operating cash flow, four quarters | $309.0M |
| Months of runway | not finite |
| Days since last periodic filing | 68 (10-Q received Sep 8, 2026) |
| Median daily dollar volume, 63 sessions | $15.7M |

## 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 | $1.2B | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 2 | assets | us-gaap:Assets | $2.6B | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $108.0M | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $110.7M | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $43.3M | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 6 | total debt | us-gaap:LongTermDebt | $4.6M | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 7 | book equity | us-gaap:StockholdersEquity | $1.8B | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $406.7M | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 9 | total debt | us-gaap:LongTermDebt | $3.0M | 2025-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 10 | book equity | us-gaap:StockholdersEquity | $1.7B | 2025-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $181.4M | 2025-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 12 | net income | us-gaap:NetIncomeLoss | $67.4M | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $299.1M | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 14 | assets | us-gaap:Assets | $2.5B | 2025-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 15 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $3.0B | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 16 | gross profit | us-gaap:GrossProfit | $1.3B | 2025-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 17 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $3.2B | 2025-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 18 | gross profit | us-gaap:GrossProfit | $1.2B | 2024-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $3.1B | 2024-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 20 | gross profit | us-gaap:GrossProfit | $1.1B | 2023-01-31 | 2025-03-24 | 10-K | 25-003540 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $3.2B | 2023-01-31 | 2025-03-24 | 10-K | 25-003540 |
| 22 | gross profit | us-gaap:GrossProfit | $988.2M | 2022-01-31 | 2024-03-25 | 10-K | 24-003856 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerIncludingAs... | $2.8B | 2022-01-31 | 2024-03-25 | 10-K | 24-003856 |
| 24 | current assets | us-gaap:AssetsCurrent | $1.5B | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $545.7M | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $1.4B | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 27 | liabilities | us-gaap:Liabilities | $850.5M | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 28 | depreciation amortization | us-gaap:Depreciation | $24.6M | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 29 | operating income | us-gaap:OperatingIncomeLoss | $100.2M | 2013-01-31 | 2015-03-30 | 10-K | 15-002473 |
| 30 | interest expense | us-gaap:InterestExpense | $7.8M | 2013-01-31 | 2013-04-12 | 10-K | 13-153157 |
| 31 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $35.2M | 2026-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $316.4M | 2025-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $41.5M | 2025-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $587.6M | 2024-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $24.7M | 2024-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | -$104.6M | 2023-01-31 | 2025-03-24 | 10-K | 25-003540 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquireProductiveAssets | $21.5M | 2023-01-31 | 2025-03-24 | 10-K | 25-003540 |
| 38 | current assets | us-gaap:AssetsCurrent | $1.3B | 2025-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 39 | current liabilities | us-gaap:LiabilitiesCurrent | $510.5M | 2025-01-31 | 2026-03-24 | 10-K | 26-033891 |
| 40 | assets | us-gaap:Assets | $2.7B | 2024-01-31 | 2025-03-24 | 10-K | 25-003540 |
| 41 | assets | us-gaap:Assets | $2.7B | 2023-01-31 | 2024-03-25 | 10-K | 24-003856 |
| 42 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 42,189,287 | 2026-03-20 | 2026-03-24 | 10-K | 26-033891 |
| 43 | shares outstanding | dei:EntityCommonStockSharesOutstanding | 43,883,207 | 2025-03-19 | 2025-03-24 | 10-K | 25-003540 |

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.