Agilysys Inc.

AGYS

Nasdaq; business equipment; SIC 7373, Services-Computer Integrated Systems Design; CIK 0000078749

A

strongest fifth of 469 graded peers in business equipment

rank 25 of 469; percentile 5.1; sampling error 2.3 points; lower is stronger

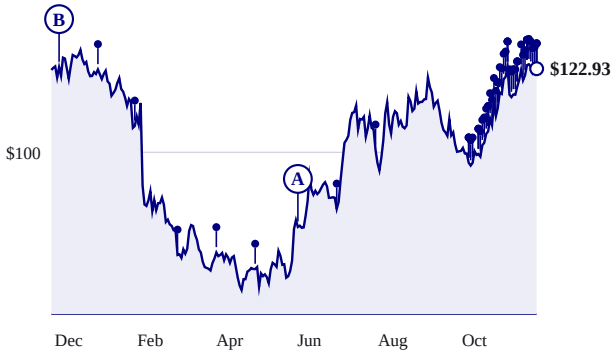
A B C D E

A, the bull



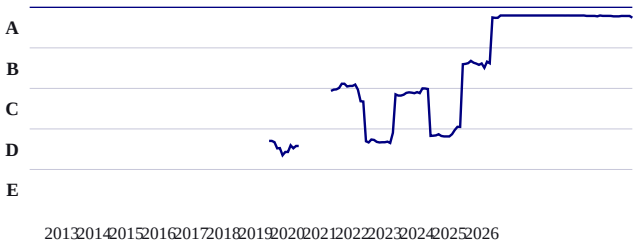
Scoreboard	
Profitability	B percentile 30.1
Solvency	B percentile 35.9
Growth and financing	B percentile 24.8
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $481.5M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress, fortress balance sheet
Inputs computable	10 of 13
Graded from	filings received through May 21, 2026 180 days before the rescan; latest periodic filing 10-Q received Oct 26, 2026
Last close	$123.03 2026-11-16; market equity $3.5B; 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 May 21, 2026

Agilysys has been a leader in hospitality software for more than 45 years, delivering innovative cloud-native SaaS and on-premise solutions for hotels, multi-amenity resorts, cruise lines, casinos, corporate foodservice management, restaurants, universities, stadiums, and healthcare facilities. The Company's software solutions include point-of-sale (POS), property management (PMS), inventory and procurement, payments, and related applications that manage and enhance the entire guest journey. Agilysys is also known for its world-class customer-centric service.

The thirteen inputs

lower percentile is stronger; sleeves and inputs within a sleeve carry equal weight

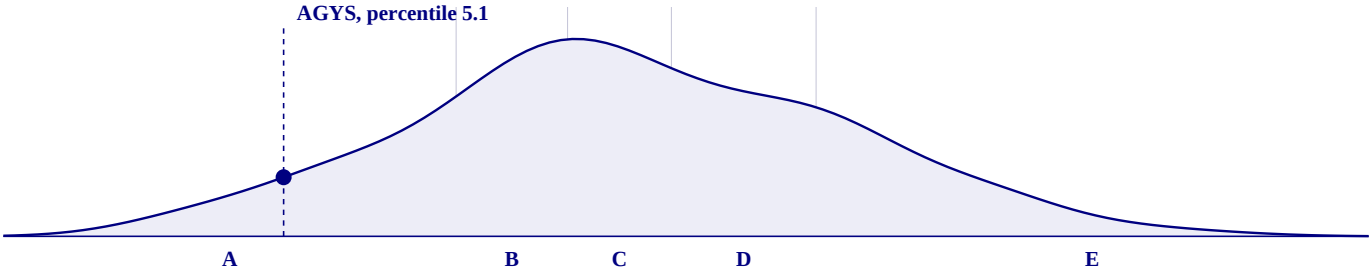
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 30.1						
Gross profitability	41.5%	29.1%		26.6	512	2026-03-31
Return on invested capital	not computable	11.2%				
one or more required annual facts are missing						

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Accruals ratio	(6.8%)	(7.4%)	54.3	566	2026-03-31
Gross margin stability, five years	0.8 pts	2.3 pts	9.4	406	2026-03-31
Solvency, sleeve percentile 35.9					
Altman Z double-prime	not computable	2.19			
one or more required annual facts are missing					
Net debt to EBITDA	not computable	1.15x			
one or more required annual facts are missing					
Interest coverage	87.25x	4.90x	6.3	80	2026-03-31
Current ratio	1.47x	1.98x	65.4	599	2026-03-31
Growth and financing, sleeve percentile 24.8					
Revenue growth, three-year compound	17.3%	6.4%	22.8	502	2026-03-31
Free cash flow growth, three-year compound	35.8%	18.2%	26.0	251	2026-03-31
Reinvestment rate	129.2%	14.3%	16.0	213	2026-03-31
Asset growth, three years	25.6%	5.0%	11.8	519	2026-03-31
Net share issuance, one year	0.5%	0.5%	47.3	405	2026-05-08

Among 469 peers

business equipment; 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
20	Monolithic Power Systems, Inc. (MPWR)	4.1	A	
21	Five9, Inc. (FIVN)	4.3	A	
22	Optex Systems Holdings Inc. (OPXS)	4.5	A	
23	Credo Technology Group Holding Ltd. (CRDO)	4.7	A	
24	Micron Technology Inc. (MU)	4.9	A	fortress balance sheet
25	Agilysys Inc. (AGYS)	5.1	A	
26	EverQuote, Inc. (EVER)	5.3	A	
27	A10 Networks, Inc. (ATEN)	5.6	A	
28	Aeluma, Inc. (ALMU)	5.8	A	fortress balance sheet
29	Veeva Systems Inc. (VEEV)	6.0	A	
30	Byrna Technologies Inc. (BYRN)	6.2	A	

What the price implies

at the 2026-11-16 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(22.6%)	(2.0%)	33
Distance from 52-week high	(5.1%)	(36.5%)	90
EBIT to enterprise value	not computable	1.8%	
Free cash flow yield	2.0%	2.9%	39
Book value to price	0.10	0.28	21
Sales to price	0.09	0.32	14
Composite equity issuance, five years	16.6%	4.4%	64
Relative strength against the sector, log excess return	(0.53)	(0.29)	33

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Twelve-month failure probability, CHS model	not computable	0.05%

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 7 of 9, period end 2026-03-31	
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	pass
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$137.6M
Operating cash flow, four quarters	$82.1M
Months of runway	not finite
Days since last periodic filing	22 (10-Q received Oct 26, 2026)
Median daily dollar volume, 63 sessions	$25.5M

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	$199.9M	2026-03-31	2026-05-21	10-K	26-234423
2	assets	us-gaap:Assets	$481.5M	2026-03-31	2026-05-21	10-K	26-234423
3	net income	us-gaap:NetIncomeLoss	$38.8M	2026-03-31	2026-05-21	10-K	26-234423
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$70.0M	2026-03-31	2026-05-21	10-K	26-234423
5	assets	us-gaap:Assets	$434.4M	2025-03-31	2026-05-21	10-K	26-234423
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$319.3M	2026-03-31	2026-05-21	10-K	26-234423
7	gross profit	us-gaap:GrossProfit	$172.0M	2025-03-31	2026-05-21	10-K	26-234423
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$275.6M	2025-03-31	2026-05-21	10-K	26-234423
9	gross profit	us-gaap:GrossProfit	$144.3M	2024-03-31	2026-05-21	10-K	26-234423
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$237.5M	2024-03-31	2026-05-21	10-K	26-234423
11	gross profit	us-gaap:GrossProfit	$120.8M	2023-03-31	2025-05-23	10-K	25-076527
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$198.1M	2023-03-31	2025-05-23	10-K	25-076527
13	gross profit	us-gaap:GrossProfit	$101.5M	2022-03-31	2024-05-22	10-K	24-063222
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$162.6M	2022-03-31	2024-05-22	10-K	24-063222
15	operating income	us-gaap:OperatingIncomeLoss	$43.0M	2026-03-31	2026-05-21	10-K	26-234423
16	interest expense	us-gaap:InterestExpense	$493,000	2026-03-31	2026-05-21	10-K	26-234423
17	current assets	us-gaap:AssetsCurrent	$184.1M	2026-03-31	2026-05-21	10-K	26-234423
18	current liabilities	us-gaap:LiabilitiesCurrent	$125.1M	2026-03-31	2026-05-21	10-K	26-234423
19	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$1.8M	2026-03-31	2026-05-21	10-K	26-234423
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$55.1M	2025-03-31	2026-05-21	10-K	26-234423
21	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$2.8M	2025-03-31	2026-05-21	10-K	26-234423
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$48.2M	2024-03-31	2026-05-21	10-K	26-234423
23	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$8.1M	2024-03-31	2026-05-21	10-K	26-234423
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$34.5M	2023-03-31	2025-05-23	10-K	25-076527
25	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	$7.2M	2023-03-31	2025-05-23	10-K	25-076527
26	depreciation amortization	us-gaap:Depreciation	$3.8M	2026-03-31	2026-05-21	10-K	26-234423
27	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$48.4M	2026-03-31	2026-05-21	10-K	26-234423
28	income tax	us-gaap:IncomeTaxExpenseBenefit	$9.6M	2026-03-31	2026-05-21	10-K	26-234423
29	current assets	us-gaap:AssetsCurrent	$123.5M	2025-03-31	2026-05-21	10-K	26-234423
30	current liabilities	us-gaap:LiabilitiesCurrent	$111.0M	2025-03-31	2026-05-21	10-K	26-234423

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31	assets	us-gaap:Assets	$350.4M	2024-03-31	2025-05-23	10-K	25-076527
32	assets	us-gaap:Assets	$243.0M	2023-03-31	2024-05-22	10-K	24-063222
33	shares outstanding	dei:EntityCommonStockSharesOutstanding	28,166,629	2026-05-08	2026-05-21	10-K	26-234423
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	28,017,312	2025-05-16	2025-05-23	10-K	25-076527