FOX Factory Holding Corp.

FOXF

Nasdaq; consumer durables; SIC 3751, Motorcycles, Bicycles & Parts; CIK 0001424929

D

fourth fifth of 429 graded peers in the pooled consumer group

rank 300 of 429; percentile 69.9; sampling error 2.4 points; lower is stronger

A B C D E

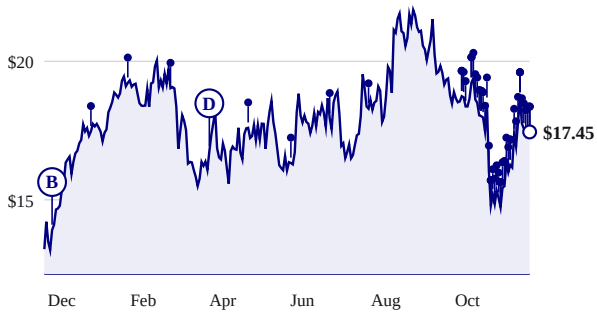
D, the sloth



Scoreboard

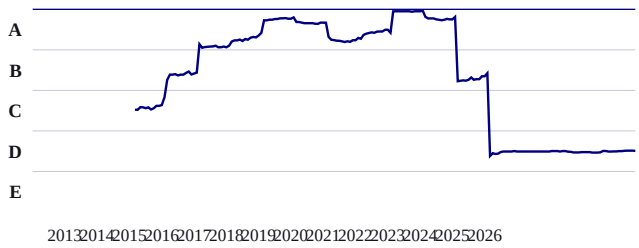
Profitability	C	percentile 50.8
Solvency	C	percentile 55.5
Growth and financing	D	percentile 68.1
Reliability	0.91 AUC	filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets	total assets $1.7B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: short runway, distress
Inputs computable	11 of 13	
Graded from	filings received through Feb 27, 2026	263 days before the rescan; latest periodic filing 10-Q received Nov 6, 2026
Last close	$17.45	2026-11-16; market equity $733.5M; 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 Feb 27, 2026

Item 5Market for Registrant's Common Equity, Related Stockholder Matters and Issuer Purchases of Equity Securities Item 7Management's Discussion and Analysis of Financial Condition and Results of Operations Item 7AQuantitative and Qualitative Disclosures About Market Risk Item 9Changes in and Disagreements with Accountants on Accounting and Financial Disclosure Item 9CDisclosure Regarding Foreign Jurisdictions that Prevent Inspections Item 10Directors, Executive Officers and Corporate Governance Item 12Security Ownership of Certain Beneficial Owners and Management and Related Stockholder Matters Item 13Certain Relationships and Related Transactions, and Director Independence Management's...

The thirteen inputs

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

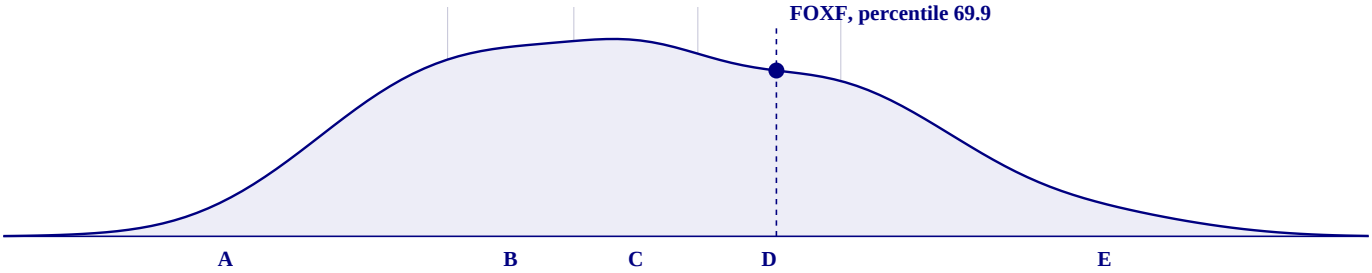
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 50.8						
Gross profitability	26.5%	35.0%		62.2	440	2026-01-02
Return on invested capital	(35.1%)	9.2%		93.8	146	2026-01-02

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Accruals ratio	(31.0%)	(5.1%)	6.8	487	2026-01-02
Gross margin stability, five years	1.3 pts	1.7 pts	40.5	379	2026-01-02
Solvency, sleeve percentile 55.5					
Altman Z double-prime	1.15	2.13	59.1	375	2026-01-02
Net debt to EBITDA	not computable	2.08x			
EBITDA must exceed $100,000					
Interest coverage	(9.74x)	2.97x	90.7	108	2026-01-02
Current ratio	2.86x	1.57x	16.8	501	2026-01-02
Growth and financing, sleeve percentile 68.1					
Revenue growth, three-year compound	(2.9%)	1.5%	68.7	448	2026-01-02
Free cash flow growth, three-year compound	(42.7%)	7.3%	94.4	234	2026-01-02
Reinvestment rate	not computable	18.0%			
NOPAT must exceed $100,000					
Asset growth, three years	1.1%	2.0%	51.0	450	2026-01-02
Net share issuance, one year	0.3%	(0.2%)	58.3	380	2026-02-19

Among 429 peers

consumer durables; 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
295	AerSale Corp. (ASLE)	68.6	D	short runway, fortress balance sheet
296	Educational Development Corp. (EDUC)	69.0	D	fortress balance sheet
297	Kraft Heinz Co. (KHC)	69.2	D	
298	Adient plc (ADNT)	69.4	D	
299	Bloomin' Brands, Inc. (BLMN)	69.5	D	
300	FOX Factory Holding Corp. (FOXF)	69.9	D	
301	OneWater Marine Inc. (ONEW)	69.9	D	
302	Deluxe Corp. (DLX)	70.1	D	
303	Dauch Corp. (DCH)	70.1	D	dilution
304	Marinemax Inc. (HZO)	70.3	D	
305	Builders FirstSource, Inc. (BLDR)	70.7	D	

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	(16.9%)	(1.3%)	33
Distance from 52-week high	(20.1%)	(22.8%)	55
EBIT to enterprise value	(54.0%)	4.8%	8
Free cash flow yield	3.7%	4.3%	44
Book value to price	0.77	0.44	68
Sales to price	2.00	1.44	61
Composite equity issuance, five years	0.5%	(16.7%)	77
Relative strength against the sector, log excess return	(0.10)	0.03	38

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Twelve-month failure probability, CHS model	not computable	0.04%

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 4 of 9, period end 2026-01-02	
Return on assets above zero	fail
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	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	n/a
Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	11 (10-Q received Nov 6, 2026)
Median daily dollar volume, 63 sessions	$10.1M

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	$443.2M	2026-01-02	2026-02-27	10-K	26-000012
2	assets	us-gaap:Assets	$1.7B	2026-01-02	2026-02-27	10-K	26-000012
3	operating income	us-gaap:OperatingIncomeLoss	-$522.9M	2026-01-02	2026-02-27	10-K	26-000012
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$576.3M	2026-01-02	2026-02-27	10-K	26-000012
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-$31.6M	2026-01-02	2026-02-27	10-K	26-000012
6	total debt	us-gaap:LongTermDebt	$523.5M	2026-01-02	2026-02-27	10-K	26-000012
7	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$670.2M	2026-01-02	2026-02-27	10-K	26-000012
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$58.0M	2026-01-02	2026-02-27	10-K	26-000012
9	total debt	us-gaap:LongTermDebt	$552.1M	2025-01-03	2025-02-28	10-K	25-000007
10	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$1.2B	2025-01-03	2026-02-27	10-K	26-000012
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$71.7M	2025-01-03	2026-02-27	10-K	26-000012
12	net income	us-gaap:NetIncomeLoss	-$544.6M	2026-01-02	2026-02-27	10-K	26-000012
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$60.9M	2026-01-02	2026-02-27	10-K	26-000012
14	assets	us-gaap:Assets	$2.2B	2025-01-03	2026-02-27	10-K	26-000012
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2026-01-02	2026-02-27	10-K	26-000012
16	gross profit	us-gaap:GrossProfit	$423.6M	2025-01-03	2026-02-27	10-K	26-000012
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.4B	2025-01-03	2026-02-27	10-K	26-000012
18	gross profit	us-gaap:GrossProfit	$464.8M	2023-12-29	2026-02-27	10-K	26-000012
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.5B	2023-12-29	2026-02-27	10-K	26-000012
20	gross profit	us-gaap:GrossProfit	$531.3M	2022-12-30	2025-02-28	10-K	25-000007
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.6B	2022-12-30	2025-02-28	10-K	25-000007
22	gross profit	us-gaap:GrossProfit	$432.3M	2021-12-31	2024-02-23	10-K	24-000006
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.3B	2021-12-31	2024-02-23	10-K	24-000006
24	current assets	us-gaap:AssetsCurrent	$745.7M	2026-01-02	2026-02-27	10-K	26-000012
25	current liabilities	us-gaap:LiabilitiesCurrent	$260.3M	2026-01-02	2026-02-27	10-K	26-000012
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$330.8M	2026-01-02	2026-02-27	10-K	26-000012
27	liabilities	us-gaap:Liabilities	$1.0B	2026-01-02	2026-02-27	10-K	26-000012
28	depreciation amortization	us-gaap:Depreciation	$48.1M	2026-01-02	2026-02-27	10-K	26-000012
29	interest expense	us-gaap:InterestExpense	$53.7M	2026-01-02	2026-02-27	10-K	26-000012
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$34.0M	2026-01-02	2026-02-27	10-K	26-000012

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31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$131.8M	2025-01-03	2026-02-27	10-K	26-000012
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$44.0M	2025-01-03	2026-02-27	10-K	26-000012
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$178.7M	2023-12-29	2026-02-27	10-K	26-000012
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$46.9M	2023-12-29	2026-02-27	10-K	26-000012
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$187.1M	2022-12-30	2025-02-28	10-K	25-000007
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$43.7M	2022-12-30	2025-02-28	10-K	25-000007
37	current assets	us-gaap:AssetsCurrent	$727.7M	2025-01-03	2026-02-27	10-K	26-000012
38	current liabilities	us-gaap:LiabilitiesCurrent	$259.8M	2025-01-03	2026-02-27	10-K	26-000012
39	assets	us-gaap:Assets	$2.2B	2023-12-29	2025-02-28	10-K	25-000007
40	assets	us-gaap:Assets	$1.6B	2022-12-30	2024-02-23	10-K	24-000006
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	41,802,281	2026-02-19	2026-02-27	10-K	26-000012
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	41,683,905	2025-02-20	2025-02-28	10-K	25-000007

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