Holley Inc.

HLLY

NYSE; consumer durables; SIC 3714, Motor Vehicle Parts & Accessories; CIK 0001822928

D/E

on the D/E boundary of 428 graded peers in the pooled cons...

rank 343 of 428; percentile 80.1; sampling error 2.4 points; lower is stronger

A B C D E

D/E, the sloth



Scoreboard

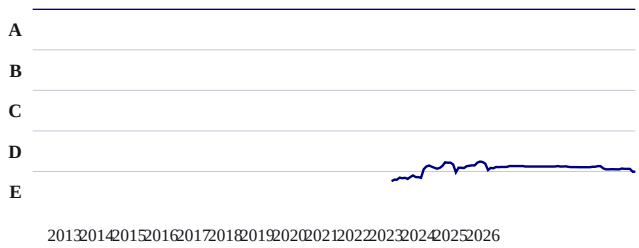
Profitability	D	percentile 67.6
Solvency	C	percentile 50.2
Growth and financing	D	percentile 66.7
Reliability	0.91 AUC	filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year	Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets	total assets $1.2B
Standard universe	inside	revenue above $1M and assets above $10M
Warnings	none triggered	not computable: distress
Inputs computable	11 of 13	
Graded from	filings received through Mar 16, 2026	247 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$2.47	2026-11-17; market equity $300.5M; 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 Mar 16, 2026

Founded in 1903, Holley, Inc. has been a part of the automotive industry for well over a century. We design, manufacture, and distribute high-performance automotive aftermarket products to car and truck enthusiasts primarily in the United States, Canada and Europe. Our products span a number of automotive platforms and are sold across multiple channels. We are a leading manufacturer of a diversified line of performance automotive products, including carburetors, fuel pumps, fuel injection systems, nitrous oxide injection systems, superchargers, exhaust headers, mufflers, distributors, ignition components, engine tuners and automotive performance plumbing products.

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 67.6						
Gross profitability	22.9%	35.0%		67.4	439	2025-12-31
Return on invested capital	6.0%	9.2%		62.5	145	2025-12-31

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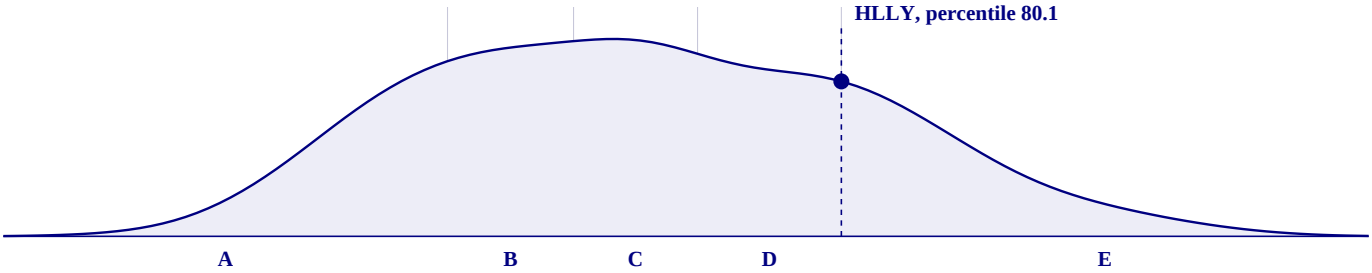
Accruals ratio	(2.4%)	(5.1%)	76.5	486	2025-12-31
Gross margin stability, five years	2.2 pts	1.7 pts	63.9	378	2025-12-31
Solvency, sleeve percentile 50.2					
Altman Z double-prime	2.45	2.13	43.4	374	2025-12-31
Net debt to EBITDA	5.19x	2.09x	88.6	168	2025-12-31
Interest coverage	not computable	2.97x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	2.75x	1.56x	18.6	500	2025-12-31
Growth and financing, sleeve percentile 66.7					
Revenue growth, three-year compound	(3.8%)	1.5%	71.1	447	2025-12-31
Free cash flow growth, three-year compound	not computable	7.1%			
current FCF must be positive and base FCF must exceed $100,000					
Reinvestment rate	2.7%	18.0%	60.7	248	2025-12-31
Asset growth, three years	(2.3%)	2.0%	65.4	449	2025-12-31
Net share issuance, one year	0.8%	(0.3%)	69.5	378	2026-03-09

Among 428 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
338	Alliance Entertainment Holding Corp. (AENT)	78.7	D/E	
339	GrowGeneration Corp. (GRWG)	79.1	D/E	fortress balance sheet
340	Callaway Golf Co. (CALY)	79.5	D/E	
341	RED Robin Gourmet Burgers Inc. (RRGB)	79.5	D/E	late filer
342	Ashland Inc. (ASH)	79.9	D/E	
343	Holley Inc. (HLLY)	80.1	D/E	
344	Service Corp. International (SCI)	80.3	D/E	
345	Tyson Foods, Inc. (TSN)	80.3	D/E	
346	Cenntro Inc. (CENN)	80.6	D/E	dilution, short runway, late filer
347	Martin Midstream Partners L.P. (MMLP)	80.8	D/E	
348	Traeger, Inc. (COOK)	80.8	D/E	

What the price implies

at the 2026-11-17 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(17.8%)	(1.6%)	33
Distance from 52-week high	(44.0%)	(23.8%)	24
EBIT to enterprise value	11.1%	4.9%	88
Free cash flow yield	11.3%	4.4%	80
Book value to price	1.53	0.46	89
Sales to price	2.05	1.46	61
Composite equity issuance, five years	not computable	(16.9%)	
Relative strength against the sector, log excess return	(0.11)	0.03	37

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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 7 of 9, period end 2025-12-31	
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	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$49.9M
Operating cash flow, four quarters	$64.5M
Months of runway	not finite
Days since last periodic filing	13 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$2.2M

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	$266.2M	2025-12-31	2026-03-16	10-K	26-018218
2	assets	us-gaap:Assets	$1.2B	2025-12-31	2026-03-16	10-K	26-018218
3	operating income	us-gaap:OperatingIncomeLoss	$82.5M	2025-12-31	2026-03-16	10-K	26-018218
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$28.6M	2025-12-31	2026-03-16	10-K	26-018218
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$9.5M	2025-12-31	2026-03-16	10-K	26-018218
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$516.1M	2025-12-31	2026-03-16	10-K	26-018218
7	book equity	us-gaap:StockholdersEquity	$448.9M	2025-12-31	2026-03-16	10-K	26-018218
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$37.2M	2025-12-31	2026-03-16	10-K	26-018218
9	total debt	us-gaap:LongTermDebt	$552.6M	2024-12-31	2025-03-14	10-K	25-007614
10	book equity	us-gaap:StockholdersEquity	$421.2M	2024-12-31	2026-03-16	10-K	26-018218
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$56.1M	2024-12-31	2026-03-16	10-K	26-018218
12	net income	us-gaap:NetIncomeLoss	$19.2M	2025-12-31	2026-03-16	10-K	26-018218
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$46.2M	2025-12-31	2026-03-16	10-K	26-018218
14	assets	us-gaap:Assets	$1.1B	2024-12-31	2026-03-16	10-K	26-018218
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$613.5M	2025-12-31	2026-03-16	10-K	26-018218
16	gross profit	us-gaap:GrossProfit	$238.5M	2024-12-31	2026-03-16	10-K	26-018218
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$602.2M	2024-12-31	2026-03-16	10-K	26-018218
18	gross profit	us-gaap:GrossProfit	$256.1M	2023-12-31	2025-03-14	10-K	25-007614
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$659.7M	2023-12-31	2025-03-14	10-K	25-007614
20	gross profit	us-gaap:GrossProfit	$253.7M	2022-12-31	2025-03-14	10-K	25-007614
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$688.4M	2022-12-31	2025-03-14	10-K	25-007614
22	gross profit	us-gaap:GrossProfit	$286.8M	2021-12-31	2024-03-14	10-K	24-007848
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$692.8M	2021-12-31	2024-03-14	10-K	24-007848
24	current assets	us-gaap:AssetsCurrent	$316.2M	2025-12-31	2026-03-16	10-K	26-018218
25	current liabilities	us-gaap:LiabilitiesCurrent	$115.1M	2025-12-31	2026-03-16	10-K	26-018218
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$63.9M	2025-12-31	2026-03-16	10-K	26-018218
27	liabilities	us-gaap:Liabilities	$715.0M	2025-12-31	2026-03-16	10-K	26-018218
28	depreciation amortization	us-gaap:Depreciation	$9.7M	2025-12-31	2026-03-16	10-K	26-018218
29	operating income	us-gaap:OperatingIncomeLoss	$94.0M	2023-12-31	2025-03-14	10-K	25-007614
30	interest expense	us-gaap:InterestExpense	$60.7M	2023-12-31	2024-03-14	10-K	24-007848

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31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$12.3M	2025-12-31	2026-03-16	10-K	26-018218
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$46.9M	2024-12-31	2026-03-16	10-K	26-018218
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$6.8M	2024-12-31	2026-03-16	10-K	26-018218
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$88.1M	2023-12-31	2025-03-14	10-K	25-007614
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$5.9M	2023-12-31	2025-03-14	10-K	25-007614
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$12.3M	2022-12-31	2025-03-14	10-K	25-007614
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$13.6M	2022-12-31	2025-03-14	10-K	25-007614
38	current assets	us-gaap:AssetsCurrent	$297.3M	2024-12-31	2026-03-16	10-K	26-018218
39	current liabilities	us-gaap:LiabilitiesCurrent	$95.2M	2024-12-31	2026-03-16	10-K	26-018218
40	assets	us-gaap:Assets	$1.2B	2023-12-31	2025-03-14	10-K	25-007614
41	assets	us-gaap:Assets	$1.2B	2022-12-31	2024-03-14	10-K	24-007848
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	120,941,585	2026-03-09	2026-03-16	10-K	26-018218
43	shares outstanding	dei:EntityCommonStockSharesOutstanding	119,958,936	2025-03-11	2025-03-14	10-K	25-007614

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