Cable One, Inc.

CABO

NYSE; telecom; SIC 4841, Cable & Other Pay Television Services; CIK 0001632127

E

weakest fifth of 509 graded peers in the pooled technology a...

rank 462 of 509; percentile 91.7; sampling error 2.2 points; lower is stronger

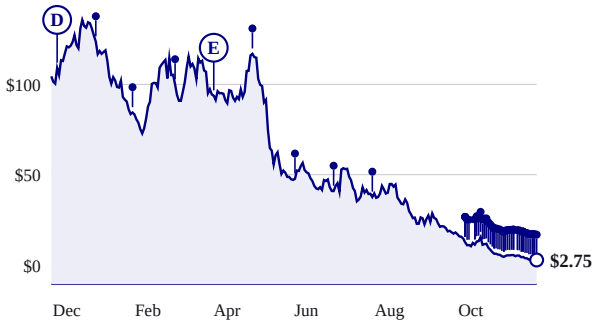
A B C D E

E, the bear



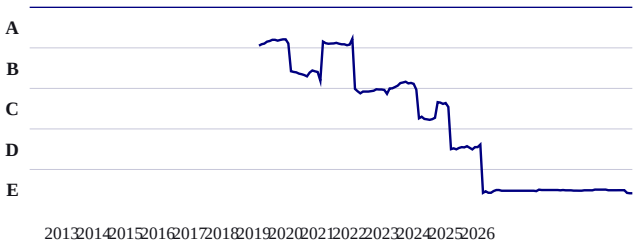
Scoreboard	
Profitability	C percentile 55.2
Solvency	E percentile 83.6
Growth and financing	D percentile 68.7
Reliability	0.94 AUC filers with over $2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over $2.67B assets total assets $5.6B
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: distress
Inputs computable	8 of 13
Graded from	filings received through Feb 26, 2026 266 days before the rescan; latest periodic filing 10-Q received Nov 5, 2026
Last close	$2.75 2026-11-18; market equity $15.6M; 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 26, 2026

Cable One, Inc. ("Cable One," "us," "our," "we" or the "Company") is a leading broadband communications provider delivering exceptional service and enabling our customers to thrive and stay connected to what matters most. Through Sparklight®, the brand our customers know and trust, we are transforming the future of connectivity with a commitment to innovation, reliability and customer experience. We serve our customers with technologically advanced fiber-based infrastructure that provides for delivery of a full suite of data, video and voice products.

The thirteen inputs

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

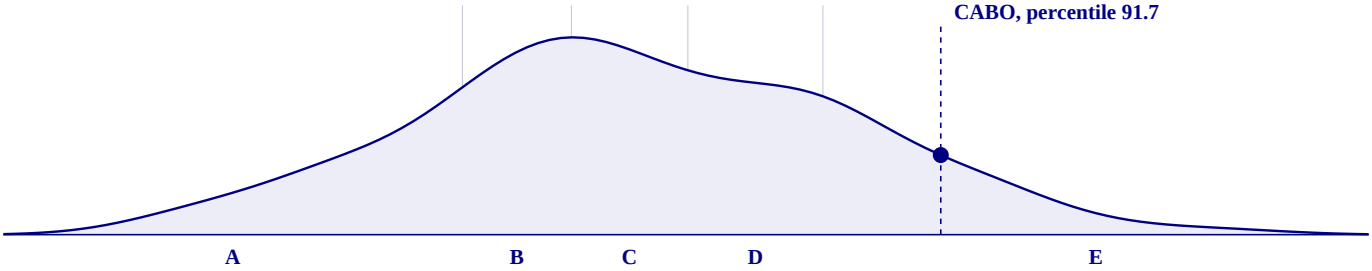
Input	Value	Peer median	Percentile, 0 to 100	Pct	Peers	Period end
Profitability, sleeve percentile 55.2						
Gross profitability	not computable	29.0%				
one or more required annual facts are missing						
Return on invested capital	(3.3%)	8.9%		84.1	152	2025-12-31

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Accruals ratio	(15.2%)	(7.3%)	26.2	622	2025-12-31
Gross margin stability, five years	not computable	2.3 pts			
five annual gross margins are required; found 0					
Solvency, sleeve percentile 83.6					
Altman Z double-prime	0.36	2.07	56.4	563	2025-12-31
Net debt to EBITDA	18.66x	1.48x	98.2	166	2025-12-31
Interest coverage	not computable	3.73x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	0.40x	1.95x	96.2	665	2025-12-31
Growth and financing, sleeve percentile 68.7					
Revenue growth, three-year compound	(4.2%)	6.1%	77.8	554	2025-12-31
Free cash flow growth, three-year compound	(5.0%)	15.9%	77.9	281	2025-12-31
Reinvestment rate	not computable	18.8%			
NOPAT must exceed $100,000					
Asset growth, three years	not computable	4.3%			
four consecutive annual observations are required					
Net share issuance, one year	0.8%	0.5%	50.5	431	2026-02-20

Among 509 peers

telecom; 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
457	Sypris Solutions Inc. (SYPR)	90.8	E	fortress balance sheet
458	8X8 Inc. (EGHT)	91.0	E	
459	BIO KEY International Inc. (BKYI)	91.2	E	short runway, late filer
460	FingerMotion, Inc. (FNGR)	91.4	E	short runway
461	Firefly Neuroscience, Inc. (AIFF)	91.6	E	dilution, late filer, fortress balance sheet
462	Cable One, Inc. (CABO)	91.7	E	
463	Lase Corp. (LASE)	91.9	E	late filer
464	Marketwise, Inc. (MKTW)	92.1	E	
465	Cyngn Inc. (CYN)	92.3	E	dilution, short runway, late filer, distress
466	Liberty Media Corp. (FWONA)	92.3	E	
467	Tucows Inc. (TCX)	92.5	E	

What the price implies

at the 2026-11-18 close; none of these enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(92.6%)	(2.4%)	2
Distance from 52-week high	(98.0%)	(37.1%)	1
EBIT to enterprise value	(7.2%)	1.8%	18
Free cash flow yield	1,780.1%	3.0%	100

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Book value to price	(5.53)	0.28	1
Sales to price	96.11	0.35	100
Composite equity issuance, five years	(13.3%)	3.5%	23
Relative strength against the sector, log excess return	(2.58)	(0.27)	2
Twelve-month failure probability, CHS model	not computable	0.05%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score None of 9, period end 2025-12-31	
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	pass
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$674.8M
Operating cash flow, four quarters	$477.2M
Months of runway	not finite
Days since last periodic filing	14 (10-Q received Nov 5, 2026)
Median daily dollar volume, 63 sessions	$5.5M

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	operating income	us-gaap:OperatingIncomeLoss	-$207.4M	2025-12-31	2026-02-26	10-K	26-000005
2	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$306.4M	2025-12-31	2026-02-26	10-K	26-000005
3	income tax	us-gaap:IncomeTaxExpenseBenefit	-$87.9M	2025-12-31	2026-02-26	10-K	26-000005
4	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$2.6B	2025-12-31	2026-02-26	10-K	26-000005
5	book equity	us-gaap:StockholdersEquity	$1.4B	2025-12-31	2026-02-26	10-K	26-000005
6	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$152.8M	2025-12-31	2026-02-26	10-K	26-000005
7	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	$3.6B	2024-12-31	2026-02-26	10-K	26-000005
8	book equity	us-gaap:StockholdersEquity	$1.8B	2024-12-31	2026-02-26	10-K	26-000005
9	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$153.6M	2024-12-31	2026-02-26	10-K	26-000005
10	net income	us-gaap:NetIncomeLoss	-$356.5M	2025-12-31	2026-02-26	10-K	26-000005
11	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$563.3M	2025-12-31	2026-02-26	10-K	26-000005
12	assets	us-gaap:Assets	$5.6B	2025-12-31	2026-02-26	10-K	26-000005
13	assets	us-gaap:Assets	$6.5B	2024-12-31	2026-02-26	10-K	26-000005
14	current assets	us-gaap:AssetsCurrent	$306.6M	2025-12-31	2026-02-26	10-K	26-000005
15	current liabilities	us-gaap:LiabilitiesCurrent	$759.3M	2025-12-31	2026-02-26	10-K	26-000005
16	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$1.3B	2025-12-31	2026-02-26	10-K	26-000005
17	liabilities	us-gaap:Liabilities	$4.2B	2025-12-31	2026-02-26	10-K	26-000005
18	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$338.5M	2025-12-31	2026-02-26	10-K	26-000005
19	operating income	us-gaap:OperatingIncomeLoss	$526.9M	2023-12-31	2026-02-26	10-K	26-000005
20	interest expense	us-gaap:InterestExpense	$170.1M	2023-12-31	2024-10-02	10-K/A	24-000123
21	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$1.5B	2025-12-31	2026-02-26	10-K	26-000005
22	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$1.6B	2024-12-31	2026-02-26	10-K	26-000005
23	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$1.7B	2023-12-31	2026-02-26	10-K	26-000005
24	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAs...	$1.7B	2022-12-31	2025-02-28	10-K	25-000033
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$285.3M	2025-12-31	2026-02-26	10-K	26-000005

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26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$664.1M	2024-12-31	2026-02-26	10-K	26-000005
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$286.4M	2024-12-31	2026-02-26	10-K	26-000005
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$663.2M	2023-12-31	2026-02-26	10-K	26-000005
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$371.0M	2023-12-31	2026-02-26	10-K	26-000005
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$738.0M	2022-12-31	2025-02-28	10-K	25-000033
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$414.1M	2022-12-31	2025-02-28	10-K	25-000033
32	current assets	us-gaap:AssetsCurrent	$279.2M	2024-12-31	2026-02-26	10-K	26-000005
33	current liabilities	us-gaap:LiabilitiesCurrent	$213.9M	2024-12-31	2026-02-26	10-K	26-000005
34	assets	us-gaap:Assets	$6.8B	2023-12-31	2025-02-28	10-K	25-000033
35	assets	us-gaap:Assets	$6.8B	2023-09-30	2024-10-02	10-K/A	24-000123
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,672,182	2026-02-20	2026-02-26	10-K	26-000005
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	5,627,529	2025-02-21	2025-02-28	10-K	25-000033

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