Envela Corp.

ELA

NYSE; shops; SIC 5944, Retail-Jewelry Stores; CIK 0000701719

A

strongest fifth of 239 graded peers in shops

rank 39 of 239; percentile 16.0; sampling error 3.0 points; lower is stronger

A B C D E

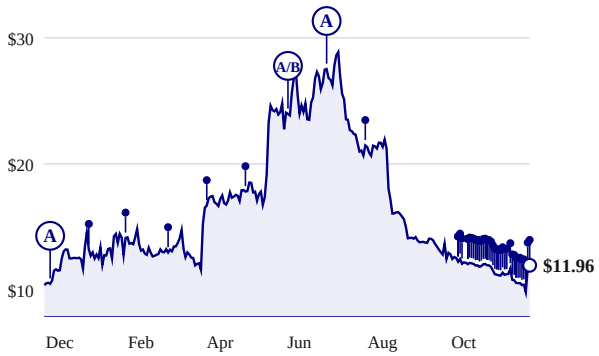
A, the bull



Scoreboard

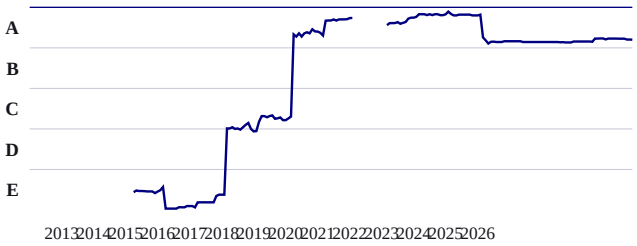
Profitability	C percentile 56.8
Solvency	A percentile 7.9
Growth and financing	C percentile 45.8
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $96.0M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	late filer; fortress balance sheet not computable: short runway, distress
Inputs computable	9 of 13
Graded from	filings received through Mar 18, 2026 246 days before the rescan; latest periodic filing 10-Q received Nov 17, 2026
Last close	$11.99 2026-11-18; market equity $310.5M; 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 18, 2026

Envela is a leading provider of recommerce and recycling services at the forefront of the circular economy. Motivated by building long-lasting relationships rooted in trust and transparency, Envela's brands address a broad range of sustainability and value-driven initiatives that impact consumers and businesses alike. Our core business lines focus on extending product lifespans by buying and selling goods in the secondary market. The Company is primarily comprised of two key operating and reportable segments: consumer and commercial.

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 56.8						
Gross profitability	56.2%	43.5%		27.9	223	2025-12-31
Return on invested capital	not computable	11.5%				

latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31

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Accruals ratio	13.8%	(4.9%)	99.6	268	2025-12-31
Gross margin stability, five years	1.1 pts	1.2 pts	42.8	202	2025-12-31
Solvency, sleeve percentile 7.9					
Altman Z double-prime	7.96	1.93	5.6	197	2025-12-31
Net debt to EBITDA	not computable	1.46x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Interest coverage	not computable	2.71x			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Current ratio	3.50x	1.34x	10.3	274	2025-12-31
Growth and financing, sleeve percentile 45.8					
Revenue growth, three-year compound	9.7%	1.8%	17.7	250	2025-12-31
Free cash flow growth, three-year compound	(47.9%)	4.7%	96.4	138	2025-12-31
Reinvestment rate	not computable	13.3%			
latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31					
Asset growth, three years	10.4%	3.3%	18.0	251	2025-12-31
Net share issuance, one year	(0.1%)	(0.6%)	51.2	206	2026-03-17

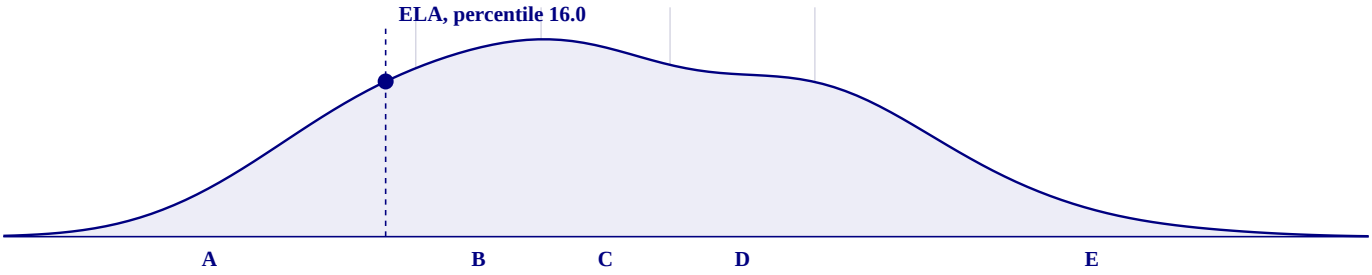
Warnings

2 of 7 checks triggered; none of them enters the letter

Check	Measured
Late filer	found 1 NT 10-K/Q filings in the last eight quarters
Fortress balance sheet	cash minus debt is 2,920,362 USD; Altman Z is not used

Among 239 peers

shops; 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
34	Sally Beauty Holdings, Inc. (SBH)	13.9	A	
35	Signet Jewelers Ltd. (SIG)	14.3	A	
36	Core & Main, Inc. (CNM)	14.7	A	
37	Unifirst Corp. (UNF)	15.1	A	fortress balance sheet
38	American Eagle Outfitters Inc. (AEO)	15.5	A	fortress balance sheet
39	Envela Corp. (ELA)	16.0	A	late filer, fortress balance sheet
40	Carvana Co. (CVNA)	16.4	A	
41	Rush Enterprises Inc. \Tx\ (RUSHA)	16.8	A	
42	Build-A-Bear Workshop Inc. (BBW)	17.2	A/B	
43	Dominos Pizza Inc. (DPZ)	17.6	A/B	
44	BJ's Wholesale Club Holdings, Inc. (BJ)	18.1	A/B	

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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	32.9%	(0.7%)	78
Distance from 52-week high	(58.6%)	(21.1%)	9
EBIT to enterprise value	6.1%	5.1%	59
Free cash flow yield	0.4%	4.0%	25
Book value to price	0.27	0.36	39
Sales to price	0.78	1.55	29
Composite equity issuance, five years	(3.9%)	(17.2%)	72
Relative strength against the sector, log excess return	0.37	0.08	78
Twelve-month failure probability, CHS model	not computable	0.03%	

Diagnostics

shown on every report; none enters the grade

Measure	Value
Piotroski F-score 6 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	fail
Long-term leverage fell	pass
Current ratio improved	fail
No new shares issued	pass
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	2 (10-Q received Nov 17, 2026)
Median daily dollar volume, 63 sessions	$1.1M

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	$53.9M	2025-12-31	2026-03-18	10-K	26-000004
2	assets	us-gaap:Assets	$96.0M	2025-12-31	2026-03-18	10-K	26-000004
3	operating income	us-gaap:OperatingIncomeLoss	$8.8M	2023-12-31	2025-03-26	10-K	25-000007
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$9.0M	2023-12-31	2025-03-26	10-K	25-000007
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$1.9M	2023-12-31	2025-03-26	10-K	25-000007
6	total debt	us-gaap:LongTermDebt	$14.9M	2023-12-31	2025-03-26	10-K	25-000007
7	book equity	us-gaap:StockholdersEquity	$48.3M	2023-12-31	2026-03-18	10-K	26-000004
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$17.9M	2023-12-31	2024-03-21	10-K	24-003505
9	total debt	us-gaap:LongTermDebt	$14.7M	2022-12-31	2024-03-21	10-K	24-003505
10	book equity	us-gaap:StockholdersEquity	$43.3M	2022-12-31	2025-03-26	10-K	25-000007
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$17.2M	2022-12-31	2024-03-21	10-K	24-003505
12	net income	us-gaap:NetIncomeLoss	$14.6M	2025-12-31	2026-03-18	10-K	26-000004
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$2.6M	2025-12-31	2026-03-18	10-K	26-000004
14	assets	us-gaap:Assets	$77.9M	2024-12-31	2026-03-18	10-K	26-000004
15	revenue	us-gaap:Revenues	$241.0M	2025-12-31	2026-03-18	10-K	26-000004
16	gross profit	us-gaap:GrossProfit	$44.3M	2024-12-31	2026-03-18	10-K	26-000004
17	revenue	us-gaap:Revenues	$180.4M	2024-12-31	2026-03-18	10-K	26-000004

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18	gross profit	us-gaap:GrossProfit	$41.7M	2023-12-31	2025-03-26	10-K	25-000007
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$171.7M	2023-12-31	2024-03-21	10-K	24-003505
20	gross profit	us-gaap:GrossProfit	$44.8M	2022-12-31	2024-03-21	10-K	24-003505
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$182.7M	2022-12-31	2024-03-21	10-K	24-003505
22	gross profit	us-gaap:GrossProfit	$31.2M	2021-12-31	2023-03-16	10-K	23-003057
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$141.0M	2021-12-31	2023-03-16	10-K	23-003057
24	current assets	us-gaap:AssetsCurrent	$65.4M	2025-12-31	2026-03-18	10-K	26-000004
25	current liabilities	us-gaap:LiabilitiesCurrent	$18.7M	2025-12-31	2026-03-18	10-K	26-000004
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$31.4M	2025-12-31	2026-03-18	10-K	26-000004
27	operating income	us-gaap:OperatingIncomeLoss	$18.1M	2025-12-31	2026-03-18	10-K	26-000004
28	book equity	us-gaap:StockholdersEquity	$67.1M	2025-12-31	2026-03-18	10-K	26-000004
29	liabilities	us-gaap:Liabilities	$29.0M	2025-12-31	2026-03-18	10-K	26-000004
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$1.4M	2023-12-31	2024-03-21	10-K	24-003505
31	interest expense	us-gaap:InterestExpense	$463,201	2023-12-31	2024-03-21	10-K	24-003505
32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.2M	2025-12-31	2026-03-18	10-K	26-000004
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$10.2M	2024-12-31	2026-03-18	10-K	26-000004
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$3.5M	2024-12-31	2026-03-18	10-K	26-000004
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$5.8M	2023-12-31	2025-03-26	10-K	25-000007
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$2.0M	2023-12-31	2025-03-26	10-K	25-000007
37	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$10.0M	2022-12-31	2024-03-21	10-K	24-003505
38	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$272,748	2022-12-31	2024-03-21	10-K	24-003505
39	current assets	us-gaap:AssetsCurrent	$49.9M	2023-12-31	2025-03-26	10-K	25-000007
40	current liabilities	us-gaap:LiabilitiesCurrent	$9.0M	2023-12-31	2025-03-26	10-K	25-000007
41	current assets	us-gaap:AssetsCurrent	$45.7M	2022-12-31	2024-03-21	10-K	24-003505
42	current liabilities	us-gaap:LiabilitiesCurrent	$8.9M	2022-12-31	2024-03-21	10-K	24-003505
43	assets	us-gaap:Assets	$73.5M	2023-12-31	2025-03-26	10-K	25-000007
44	assets	us-gaap:Assets	$71.3M	2022-12-31	2024-03-21	10-K	24-003505
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	25,963,476	2026-03-17	2026-03-18	10-K	26-000004
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	25,993,075	2025-03-25	2025-03-26	10-K	25-000007

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