# Hamilton Beach Brands Holding Co. HBB

NYSE; consumer durables; SIC 3634, Electric Housewares & Fans; CIK 0001709164

**B**

**second fifth of 428 graded peers in the pooled consumer group**

rank 119 of 428; percentile 28.3; sampling error 2.4 points; lower is stronger

A B C D E

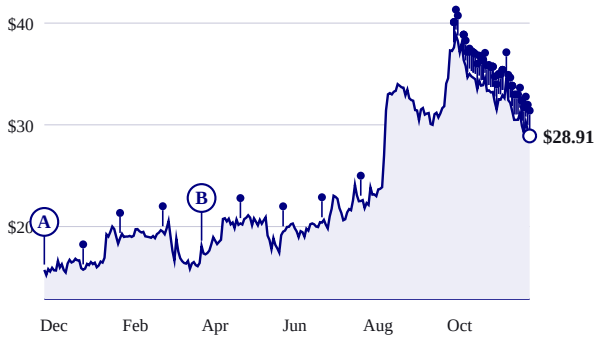
**B, the elk**



## Scoreboard

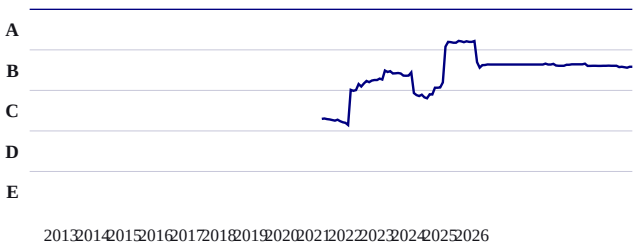
| | |
|---|---|
| **Profitability** | C/D<br>percentile 58.3 |
| **Solvency** | A/B<br>percentile 19.2 |
| **Growth and financing** | C<br>percentile 43.5 |
| **Reliability** | 0.87 AUC<br>filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025 |
| **Peer failure rate** | 1.03% a year<br>Item 1.03 bankruptcies, same asset band, 2012 to 2025 |
| **Size band** | $120M to $591M assets<br>total assets $397.6M |
| **Standard universe** | inside<br>revenue above $1M and assets above $10M |
| **Warnings** | none triggered<br>not computable: dilution, distress |
| **Inputs computable** | 10 of 13 |
| **Graded from** | filings received through Feb 25, 2026<br>270 days before the rescan; latest periodic filing 10-Q received Nov 4, 2026 |
| **Last close** | $28.69<br>2026-11-20; market equity $0; 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 25, 2026*

Throughout this Annual Report on Form 10-K and the notes to consolidated financial statements, references to "Hamilton Beach Holding", "the Company", "we", "us" and "our" and similar references are to Hamilton Beach Brands Holding Company and its subsidiaries on a consolidated basis unless otherwise noted or as the context otherwise requires. Hamilton Beach Brands Holding Company is a holding company and operates through its indirect, wholly owned subsidiary, Hamilton Beach Brands, Inc., a Delaware corporation ("HBB").

## The thirteen inputs

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

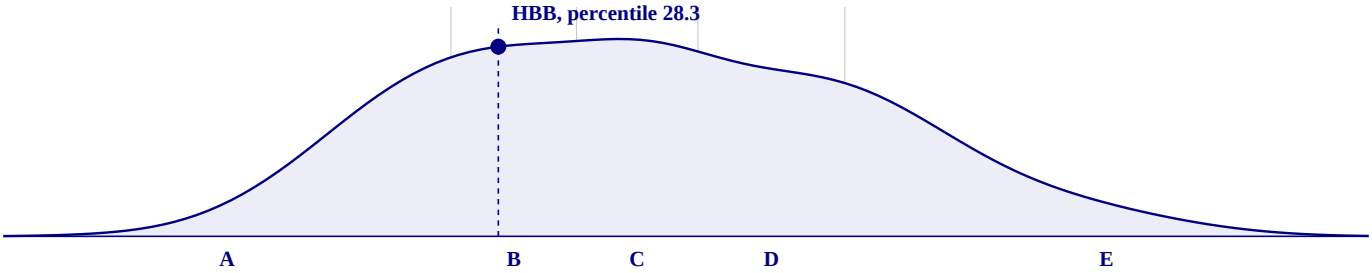
| Input | Value | Peer median | Percentile, 0 to 100 | Pct | Peers | Period end |
|---|---|---|---|---|---|---|
| **Profitability, sleeve percentile 58.3** | | | | | | |
| Gross profitability | 39.3% | 34.9% | | 43.0 | 438 | 2025-12-31 |
| Return on invested capital | 15.3% | 9.2% | | 30.3 | 146 | 2025-12-31 |
| Accruals ratio | 3.1% | (5.1%) | | 93.8 | 485 | 2025-12-31 |

Not investment advice. Informational and educational only. Data from SEC EDGAR, may contain errors, is not warranted. The grade ranks reported financial condition and is not a return forecast.

| | | | | | |
|---|---|---|---|---|---|
| Gross margin stability, five years | 2.4 pts | 1.7 pts | 66.2 | 377 | 2025-12-31 |
| **Solvency, sleeve percentile 19.2** | | | | | |
| Altman Z double-prime | 5.69 | 2.14 | 16.7 | 373 | 2025-12-31 |
| Net debt to EBITDA | 0.06x | 2.11x | 17.3 | 169 | 2025-12-31 |
| Interest coverage | not computable | 3.21x | | | |
| *latest aligned inputs end 2023-12-31; latest annual assets end 2025-12-31* | | | | | |
| Current ratio | 2.47x | 1.56x | 23.7 | 499 | 2025-12-31 |
| **Growth and financing, sleeve percentile 43.5** | | | | | |
| Revenue growth, three-year compound | (1.8%) | 1.4% | 63.8 | 446 | 2025-12-31 |
| Free cash flow growth, three-year compound | not computable | 7.3% | | | |
| *current FCF must be positive and base FCF must exceed $100,000* | | | | | |
| Reinvestment rate | 106.0% | 18.0% | 14.9 | 250 | 2025-12-31 |
| Asset growth, three years | 0.7% | 2.0% | 51.7 | 448 | 2025-12-31 |
| Net share issuance, one year | not computable | (0.2%) | | | |
| *two annual share counts are required; found 0* | | | | | |

## 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 |
|---|---|---|---|---|
| 114 | Hawkins Inc. (HWKN) | 27.3 | B | |
| 115 | Vital Farms, Inc. (VITL) | 27.4 | B | |
| 116 | Genesco Inc. (GCO) | 27.7 | B | fortress balance sheet |
| 117 | Texas Roadhouse, Inc. (TXRH) | 28.2 | B | fortress balance sheet |
| 118 | Mission Produce, Inc. (AVO) | 28.2 | B | |
| 119 | Hamilton Beach Brands Holding Co. (HBB) | 28.3 | B | |
| 120 | Williams Sonoma Inc. (WSM) | 28.6 | B | fortress balance sheet |
| 121 | Autoliv Inc. (ALV) | 28.8 | B | |
| 122 | Chefs' Warehouse, Inc. (CHEF) | 29.0 | B | |
| 123 | Marzetti Co. (MZTI) | 29.1 | B | |
| 124 | Burlington Stores, Inc. (BURL) | 29.4 | B | |

## What the price implies

*at the 2026-11-20 close; none of these enters the grade*

| Measure | Value | Peer median | Percentile |
|---|---|---|---|
| Twelve-month price change, skipping the latest month | 178.4% | (1.3%) | 99 |
| Distance from 52-week high | (25.5%) | (26.2%) | 52 |
| EBIT to enterprise value | not computable | 5.1% | |
| Free cash flow yield | not computable | 4.6% | |
| Book value to price | not computable | 0.49 | |
| Sales to price | not computable | 1.48 | |
| Composite equity issuance, five years | not computable | (16.9%) | |
| Relative strength against the sector, log excess return | 1.11 | 0.03 | 99 |

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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 None of 9, period end 2025-12-31** | |
| Return on assets above zero | pass |
| Operating cash flow above zero | pass |
| Return on assets improved | fail |
| Operating cash flow exceeds net income | fail |
| Long-term leverage fell | pass |
| Current ratio improved | pass |
| No new shares issued | fail |
| Gross margin improved | fail |
| Asset turnover improved | fail |
| **Cash, filings, liquidity** | |
| Cash and equivalents | $92.5M |
| Operating cash flow, four quarters | $108.9M |
| Months of runway | not finite |
| Days since last periodic filing | 18 (10-Q received Nov 4, 2026) |
| Median daily dollar volume, 63 sessions | $2.5M |

## 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 | $156.2M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 2 | assets | us-gaap:Assets | $397.6M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 3 | operating income | us-gaap:OperatingIncomeLoss | $36.6M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 4 | pretax income | us-gaap:IncomeLossFromContinuingOperationsBeforeInc... | $35.6M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 5 | income tax | us-gaap:IncomeTaxExpenseBenefit | $9.2M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 6 | total debt | us-gaap:LongTermDebt | $50.0M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 7 | book equity | us-gaap:StockholdersEquity | $182.8M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 8 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $47.3M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 9 | total debt | us-gaap:LongTermDebt | $50.0M | 2024-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 10 | book equity | us-gaap:StockholdersEquity | $165.9M | 2024-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 11 | cash | us-gaap:CashAndCashEquivalentsAtCarryingValue | $45.6M | 2024-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 12 | net income | us-gaap:NetIncomeLoss | $26.5M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 13 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $13.8M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 14 | assets | us-gaap:Assets | $415.1M | 2024-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 15 | revenue | us-gaap:Revenues | $606.9M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 16 | gross profit | us-gaap:GrossProfit | $170.2M | 2024-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 17 | revenue | us-gaap:Revenues | $654.7M | 2024-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 18 | gross profit | us-gaap:GrossProfit | $143.7M | 2023-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 19 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $625.6M | 2023-12-31 | 2024-03-06 | 10-K | 24-000011 |
| 20 | gross profit | us-gaap:GrossProfit | $129.1M | 2022-12-31 | 2025-02-26 | 10-K | 25-000008 |
| 21 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $640.9M | 2022-12-31 | 2024-03-06 | 10-K | 24-000011 |
| 22 | gross profit | us-gaap:GrossProfit | $136.5M | 2021-12-31 | 2024-03-06 | 10-K | 24-000011 |
| 23 | revenue | us-gaap:RevenueFromContractWithCustomerExcludingA... | $658.4M | 2021-12-31 | 2024-03-06 | 10-K | 24-000011 |
| 24 | current assets | us-gaap:AssetsCurrent | $304.7M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 25 | current liabilities | us-gaap:LiabilitiesCurrent | $123.2M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 26 | retained earnings | us-gaap:RetainedEarningsAccumulatedDeficit | $143.9M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 27 | liabilities | us-gaap:Liabilities | $214.8M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 28 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization | $5.9M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 29 | operating income | us-gaap:OperatingIncomeLoss | $35.1M | 2023-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 30 | interest expense | us-gaap:InterestExpense | $3.0M | 2023-12-31 | 2024-03-06 | 10-K | 24-000011 |

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| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 31 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $2.8M | 2025-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 32 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $65.4M | 2024-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 33 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $3.2M | 2024-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 34 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivities | $88.6M | 2023-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 35 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $3.4M | 2023-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 36 | operating cash flow | us-gaap:NetCashProvidedByUsedInOperatingActivitiesC... | -$3.4M | 2022-12-31 | 2023-03-09 | 10-K | 23-000015 |
| 37 | capital expenditure | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment | $2.3M | 2022-12-31 | 2025-02-26 | 10-K | 25-000008 |
| 38 | current assets | us-gaap:AssetsCurrent | $303.7M | 2024-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 39 | current liabilities | us-gaap:LiabilitiesCurrent | $154.1M | 2024-12-31 | 2026-02-25 | 10-K | 26-000037 |
| 40 | assets | us-gaap:Assets | $384.7M | 2023-12-31 | 2025-02-26 | 10-K | 25-000008 |
| 41 | assets | us-gaap:Assets | $388.9M | 2022-12-31 | 2024-03-06 | 10-K | 24-000011 |

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