Revolve Group, Inc.

RVLV

NYSE; shops; SIC 5961, Retail-Catalog & Mail-Order Houses; CIK 0001746618

A

strongest fifth of 239 graded peers in shops

rank 3 of 239; percentile 0.8; sampling error 3.0 points; lower is stronger

A B C D E

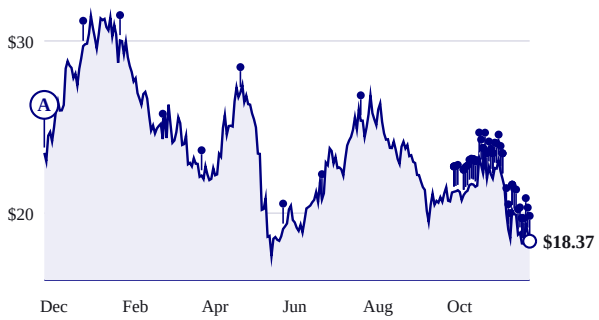
A, the bull



Scoreboard

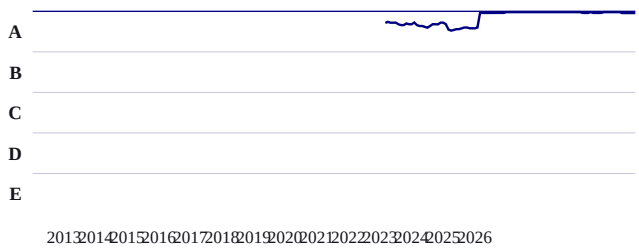
Profitability	C percentile 47.7
Solvency	A percentile 10.8
Growth and financing	A/B percentile 21.0
Reliability	0.91 AUC filers with $591M to $2.67B assets; 95% interval 0.88 to 0.94; 160 events, 2020 to 2025
Peer failure rate	1.01% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$591M to $2.67B assets total assets $765.0M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, distress, fortress balance sheet
Inputs computable	9 of 13
Graded from	filings received through Feb 25, 2026 270 days before the rescan; latest periodic filing 10-Q received Nov 3, 2026
Last close	$18.37 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

REVOLVE is the next-generation fashion retailer for Millennial and Generation Z consumers. As a trusted premium lifestyle brand and a go-to online source for discovery and inspiration, we deliver exceptional service and an engaging customer experience with a vast yet curated offering totaling over 140,000 apparel and footwear styles, as well as beauty and accessories. Our dynamic platform connects a deeply engaged community of millions of consumers, thousands of global fashion influencers and over 1,600 emerging, established and owned brands.

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 47.7						
Gross profitability	85.7%	43.5%		10.8	223	2025-12-31
Return on invested capital	not computable	11.5%				

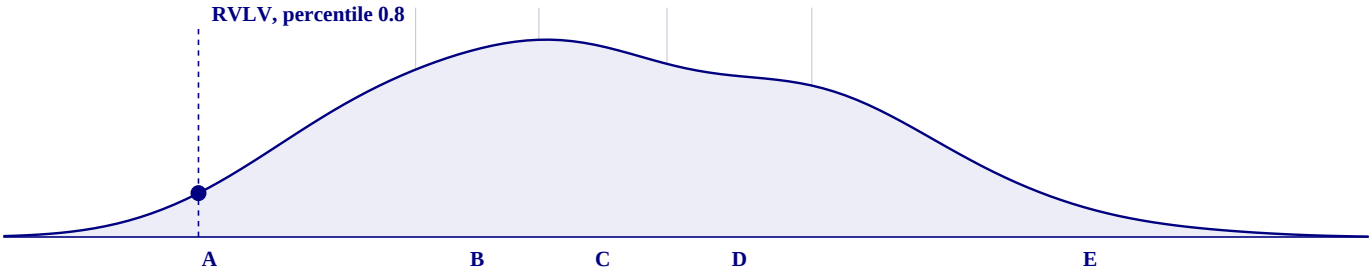
one or more required annual facts are missing

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Accruals ratio	0.3%	(4.9%)	89.9	268	2025-12-31
Gross margin stability, five years	1.1 pts	1.2 pts	42.3	202	2025-12-31
Solvency, sleeve percentile 10.8					
Altman Z double-prime	7.92	1.93	6.1	197	2025-12-31
Net debt to EBITDA	not computable	1.65x			
one or more required annual facts are missing					
Interest coverage	not computable	3.83x			
one or more required annual facts are missing					
Current ratio	2.81x	1.34x	15.4	274	2025-12-31
Growth and financing, sleeve percentile 21.0					
Revenue growth, three-year compound	3.6%	1.8%	39.0	250	2025-12-31
Free cash flow growth, three-year compound	38.0%	5.2%	12.3	139	2025-12-31
Reinvestment rate	106.0%	13.1%	12.0	143	2025-12-31
Asset growth, three years	9.7%	3.3%	20.8	251	2025-12-31
Net share issuance, one year	not computable	(0.6%)			
two annual share counts are required; found 0					

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
1	Yelp Inc. (YELP)	0.0	A	
2	Shake Shack Inc. (SHAK)	0.4	A	fortress balance sheet
3	Revolve Group, Inc. (RVLV)	0.8	A	
4	Five Below, Inc. (FIVE)	1.3	A	
5	Boot Barn Holdings, Inc. (BOOT)	1.7	A	
6	Brinker International, Inc. (EAT)	2.1	A	
7	DXP Enterprises Inc. (DXPE)	2.5	A	
8	Fastenal Co. (FAST)	2.9	A	fortress balance sheet

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	(3.6%)	(0.5%)	44
Distance from 52-week high	(41.6%)	(25.1%)	29
EBIT to enterprise value	not computable	5.5%	
Free cash flow yield	not computable	4.2%	
Book value to price	not computable	0.40	
Sales to price	not computable	1.70	
Composite equity issuance, five years	not computable	(17.2%)	
Relative strength against the sector, log excess return	0.05	0.08	44
Twelve-month failure probability, CHS model	not computable	0.04%	

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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	pass
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$284.6M
Operating cash flow, four quarters	$6.7M
Months of runway	not finite
Days since last periodic filing	19 (10-Q received Nov 3, 2026)
Median daily dollar volume, 63 sessions	$17.3M

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	$655.8M	2025-12-31	2026-02-25	10-K	26-071307
2	assets	us-gaap:Assets	$765.0M	2025-12-31	2026-02-25	10-K	26-071307
3	net income	us-gaap:NetIncomeLoss	$61.7M	2025-12-31	2026-02-25	10-K	26-071307
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$59.4M	2025-12-31	2026-02-25	10-K	26-071307
5	assets	us-gaap:Assets	$665.5M	2024-12-31	2026-02-25	10-K	26-071307
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.2B	2025-12-31	2026-02-25	10-K	26-071307
7	gross profit	us-gaap:GrossProfit	$593.3M	2024-12-31	2026-02-25	10-K	26-071307
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2024-12-31	2026-02-25	10-K	26-071307
9	gross profit	us-gaap:GrossProfit	$554.2M	2023-12-31	2026-02-25	10-K	26-071307
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2023-12-31	2026-02-25	10-K	26-071307
11	gross profit	us-gaap:GrossProfit	$592.3M	2022-12-31	2025-02-25	10-K	25-026748
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$1.1B	2022-12-31	2025-02-25	10-K	25-026748
13	gross profit	us-gaap:GrossProfit	$489.8M	2021-12-31	2024-02-27	10-K	24-021244
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$891.4M	2021-12-31	2024-02-27	10-K	24-021244
15	current assets	us-gaap:AssetsCurrent	$647.0M	2025-12-31	2026-02-25	10-K	26-071307
16	current liabilities	us-gaap:LiabilitiesCurrent	$230.5M	2025-12-31	2026-02-25	10-K	26-071307
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$368.2M	2025-12-31	2026-02-25	10-K	26-071307
18	operating income	us-gaap:OperatingIncomeLoss	$74.3M	2025-12-31	2026-02-25	10-K	26-071307
19	book equity	us-gaap:StockholdersEquityIncludingPortionAttributableT...	$512.5M	2025-12-31	2026-02-25	10-K	26-071307
20	liabilities	us-gaap:Liabilities	$252.5M	2025-12-31	2026-02-25	10-K	26-071307
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$11.4M	2025-12-31	2026-02-25	10-K	26-071307
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$26.7M	2024-12-31	2026-02-25	10-K	26-071307
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$5.6M	2024-12-31	2026-02-25	10-K	26-071307
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$43.3M	2023-12-31	2026-02-25	10-K	26-071307
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.2M	2023-12-31	2026-02-25	10-K	26-071307
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$23.4M	2022-12-31	2025-02-25	10-K	25-026748
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$5.2M	2022-12-31	2025-02-25	10-K	25-026748
28	depreciation amortization	us-gaap:Depreciation	$4.4M	2025-12-31	2026-02-25	10-K	26-071307
29	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$82.3M	2025-12-31	2026-02-25	10-K	26-071307
30	income tax	us-gaap:IncomeTaxExpenseBenefit	$21.2M	2025-12-31	2026-02-25	10-K	26-071307
31	current assets	us-gaap:AssetsCurrent	$561.1M	2024-12-31	2026-02-25	10-K	26-071307

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32	current liabilities	us-gaap:LiabilitiesCurrent	$196.1M	2024-12-31	2026-02-25	10-K	26-071307
33	assets	us-gaap:Assets	$608.9M	2023-12-31	2025-02-25	10-K	25-026748
34	assets	us-gaap:Assets	$579.3M	2022-12-31	2024-02-27	10-K	24-021244