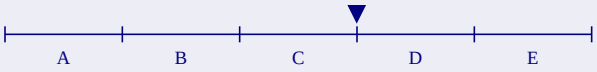
Bassett Furniture Industries Inc. BSET

Nasdaq; consumer durables; SIC 2511, Wood Household Furniture, (No Upholstered); CIK 0000010329

C/D

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

rank 256 of 428; percentile 60.0; sampling error 2.4 points; lower is stronger

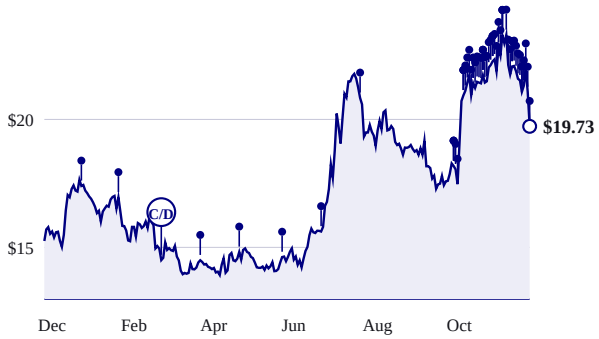


C/D, the tortoise



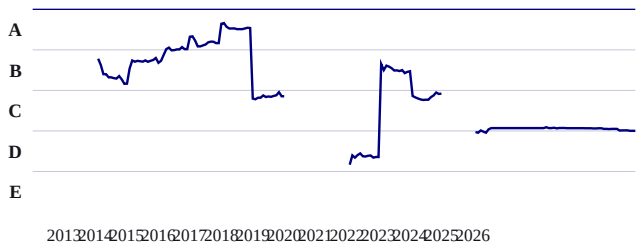
Scoreboard	
Profitability	C percentile 48.6
Solvency	B percentile 37.1
Growth and financing	D percentile 72.2
Reliability	0.87 AUC filers with $120M to $591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$120M to $591M assets total assets $323.8M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered; fortress balance sheet not computable: distress
Inputs computable	7 of 13
Graded from	filings received through Feb 5, 2026 291 days before the rescan; latest periodic filing 10-Q received Sep 30, 2026
Last close	$19.66 2026-11-20; market equity $170.1M; 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 5, 2026

Bassett is a leading retailer, manufacturer and marketer of branded home furnishings. We were founded in 1902 and incorporated under the laws of Virginia in 1930. Our rich 123-year history has instilled the principles of quality, value, and integrity in everything we do, while simultaneously providing us with the expertise to respond to ever-changing consumer tastes and meet the demands of a global economy. Approximately 60% of our wholesale sales arise from our network of 86 Company-owned and licensee-owned Bassett Home Furnishings ("BHF") stores.

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 48.6						
Gross profitability	58.3%	34.9%		19.7	438	2025-11-29
Return on invested capital	not computable	9.2%				

latest aligned inputs end 2018-11-24; latest annual assets end 2025-11-29

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Accruals ratio	(2.2%)	(5.1%)		77.5	485	2025-11-29
Gross margin stability, five years	not computable	1.7 pts				
five consecutive annual gross margins are required						
Solvency, sleeve percentile 37.1						
Altman Z double-prime	not computable	2.14				
one or more required annual facts are missing						
Net debt to EBITDA	not computable	2.11x				
latest aligned inputs end 2018-11-24; latest annual assets end 2025-11-29						
Interest coverage	not computable	3.21x				
interest expense must exceed $100,000						
Current ratio	1.89x	1.56x		37.1	499	2025-11-29
Growth and financing, sleeve percentile 72.2						
Revenue growth, three-year compound	(11.6%)	1.4%		90.1	446	2025-11-29
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	(70.6%)	18.0%		87.6	250	2025-11-29
Asset growth, three years	(7.3%)	2.0%		78.7	448	2025-11-29
Net share issuance, one year	(1.5%)	(0.2%)		32.4	377	2026-01-28

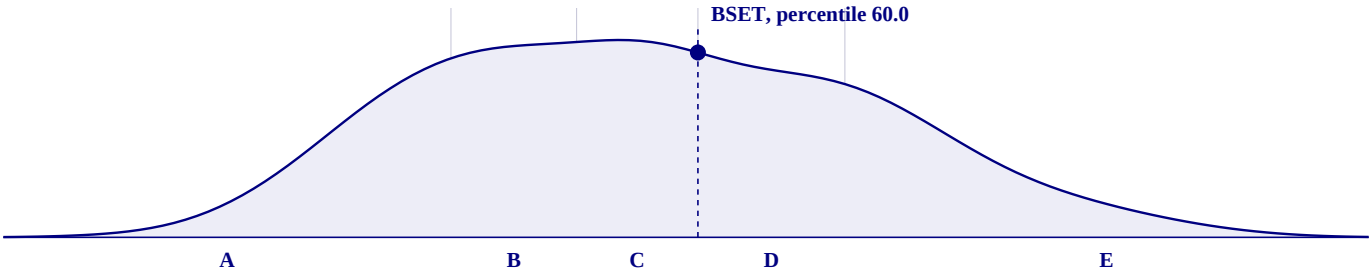
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 33,176,000 USD; Altman Z is not used

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
251	BrightView Holdings, Inc. (BV)	59.0	C/D	
252	Starbucks Corp. (SBUX)	59.2	C/D	
253	Motorcar Parts OF America Inc. (MPAA)	59.5	C/D	
254	United Natural Foods Inc. (UNFI)	59.7	C/D	
255	Clarus Corp. (CLAR)	59.8	C/D	fortress balance sheet
256	Bassett Furniture Industries Inc. (BSET)	60.0	C/D	fortress balance sheet
257	Papa Johns International Inc. (PZZA)	60.1	C/D	
258	Autonation, Inc. (AN)	60.5	C/D	
259	Zevia PBC (ZVIA)	60.7	C/D	
260	Genuine Parts Co. (GPC)	60.9	C/D	
261	Kohls Corp. (KSS)	61.3	C/D	

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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	24.5%	(1.3%)	74
Distance from 52-week high	(15.3%)	(26.2%)	73
EBIT to enterprise value	5.8%	5.1%	58
Free cash flow yield	5.2%	4.6%	55
Book value to price	0.97	0.49	74
Sales to price	1.96	1.48	60
Composite equity issuance, five years	(46.4%)	(16.9%)	7
Relative strength against the sector, log excess return	0.31	0.03	78
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 2025-11-29	
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	fail
Current ratio improved	fail
No new shares issued	pass
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	$35.4M
Operating cash flow, four quarters	$15.8M
Months of runway	not finite
Days since last periodic filing	54 (10-Q received Sep 30, 2026)
Median daily dollar volume, 63 sessions	$580,334

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	$188.7M	2025-11-29	2026-02-05	10-K	26-003189
2	assets	us-gaap:Assets	$323.8M	2025-11-29	2026-02-05	10-K	26-003189
3	operating income	us-gaap:OperatingIncomeLoss	$14.1M	2018-11-24	2021-01-21	10-K	21-000971
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$12.2M	2018-11-24	2021-01-21	10-K	21-000971
5	income tax	us-gaap:IncomeTaxExpenseBenefit	$4.0M	2018-11-24	2021-01-21	10-K	21-000971
6	total debt	us-gaap:LongTermDebt	$292,000	2018-11-24	2019-01-17	10-K	19-000960
7	book equity	us-gaap:StockholdersEquity	$190.3M	2018-11-24	2022-01-31	10-K	22-001938
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$33.5M	2018-11-24	2020-01-23	10-K	20-001052
9	total debt	us-gaap:LongTermDebt	$3.7M	2017-11-25	2019-01-17	10-K	19-000960
10	book equity	us-gaap:StockholdersEquity	$191.5M	2017-11-25	2021-01-21	10-K	21-000971
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$53.9M	2017-11-25	2019-01-17	10-K	19-000960
12	net income	us-gaap:NetIncomeLoss	$6.1M	2025-11-29	2026-02-05	10-K	26-003189
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$13.5M	2025-11-29	2026-02-05	10-K	26-003189
14	assets	us-gaap:Assets	$341.2M	2024-11-30	2026-02-05	10-K	26-003189
15	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$13.2M	2018-11-24	2021-01-21	10-K	21-000971
16	operating income	us-gaap:OperatingIncomeLoss	-$16.3M	2024-11-30	2026-02-05	10-K	26-003189
17	interest expense	us-gaap:InterestExpense	$30,000	2024-11-30	2025-02-10	10-K	25-003216

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18	current assets	us-gaap:AssetsCurrent	$145.5M	2025-11-29	2026-02-05	10-K	26-003189
19	current liabilities	us-gaap:LiabilitiesCurrent	$77.0M	2025-11-29	2026-02-05	10-K	26-003189
20	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$335.3M	2025-11-29	2026-02-05	10-K	26-003189
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$329.9M	2024-11-30	2026-02-05	10-K	26-003189
22	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$390.1M	2023-11-25	2026-02-05	10-K	26-003189
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingA...	$485.6M	2022-11-26	2025-02-10	10-K	25-003216
24	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.5M	2025-11-29	2026-02-05	10-K	26-003189
25	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$4.0M	2024-11-30	2026-02-05	10-K	26-003189
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$5.2M	2024-11-30	2026-02-05	10-K	26-003189
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	$18.7M	2023-11-25	2026-02-05	10-K	26-003189
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$17.5M	2023-11-25	2026-02-05	10-K	26-003189
29	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$3.0M	2022-11-26	2025-02-10	10-K	25-003216
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$21.3M	2022-11-26	2025-02-10	10-K	25-003216
31	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$8.8M	2025-11-29	2026-02-05	10-K	26-003189
32	operating income	us-gaap:OperatingIncomeLoss	$7.8M	2025-11-29	2026-02-05	10-K	26-003189
33	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	$8.8M	2025-11-29	2026-02-05	10-K	26-003189
34	income tax	us-gaap:IncomeTaxExpenseBenefit	$2.7M	2025-11-29	2026-02-05	10-K	26-003189
35	current assets	us-gaap:AssetsCurrent	$141.5M	2024-11-30	2026-02-05	10-K	26-003189
36	current liabilities	us-gaap:LiabilitiesCurrent	$73.4M	2024-11-30	2026-02-05	10-K	26-003189
37	assets	us-gaap:Assets	$370.4M	2023-11-25	2025-02-10	10-K	25-003216
38	assets	us-gaap:Assets	$406.3M	2022-11-26	2024-01-25	10-K	24-002203
39	shares outstanding	dei:EntityCommonStockSharesOutstanding	8,654,370	2026-01-28	2026-02-05	10-K	26-003189
40	shares outstanding	dei:EntityCommonStockSharesOutstanding	8,788,356	2025-01-23	2025-02-10	10-K	25-003216

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