Willamette Valley Vineyards Inc.

WVVI

Nasdaq; consumer nondurables; SIC 2080, Beverages; CIK 0000838875

D

fourth fifth of 118 graded peers in consumer nondurables

rank 78 of 118; percentile 65.8; sampling error 3.8 points; lower is stronger

A B C D E

D, the sloth



Scoreboard

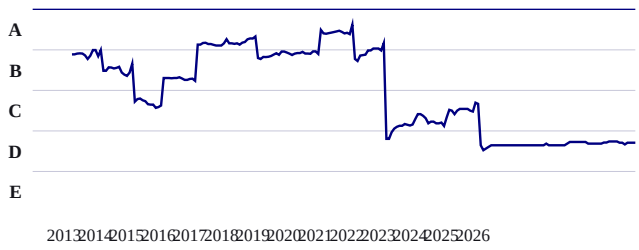
Profitability	D percentile 70.9
Solvency	C/D percentile 56.5
Growth and financing	B percentile 35.1
Reliability	0.83 AUC filers with $12.5M to $120M assets; 95% interval 0.79 to 0.86; 201 events, 2020 to 2025
Peer failure rate	1.07% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	$12.5M to $120M assets total assets $107.7M
Standard universe	inside revenue above $1M and assets above $10M
Warnings	none triggered not computable: dilution, distress
Inputs computable	10 of 13
Graded from	filings received through Mar 24, 2026 244 days before the rescan; latest periodic filing 10-Q received Nov 12, 2026
Last close	$1.74 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 Mar 24, 2026

- The Company was incorporated in May 1988 to produce and sell premium, super premium and ultra-premium varietals. The Company was originally established as a sole proprietorship by Oregon winegrower Jim Bernau in 1983. The Company is headquartered in Turner, Oregon, which is just south of the state capitol of Salem, Oregon. The Company's wines are made from grapes grown in vineyards owned, leased or contracted by the Company, and from grapes purchased from other vineyards.

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 70.9						
Gross profitability	20.9%	30.0%		63.4	135	2025-12-31
Return on invested capital	(1.3%)	6.0%		81.4	44	2025-12-31
Accruals ratio	0.8%	(5.2%)		87.0	139	2025-12-31
Gross margin stability, five years	2.0 pts	1.9 pts		51.8	111	2025-12-31

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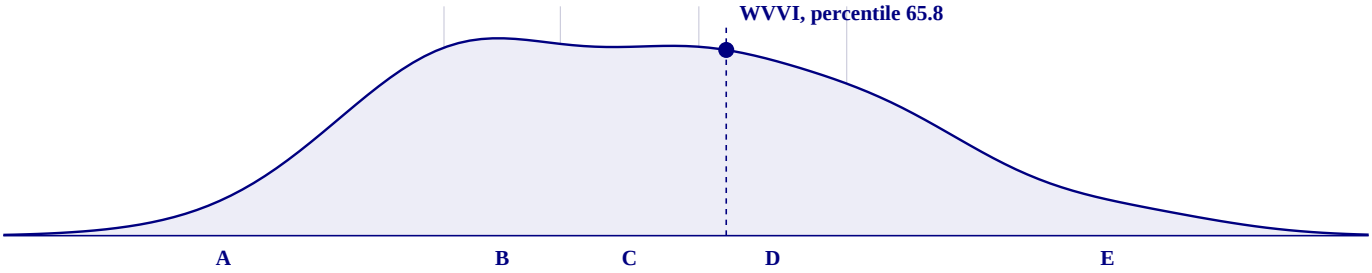
Solvency, sleeve percentile 56.5						
Altman Z double-prime	3.51	3.11	41.3	110	2025-12-31	
Net debt to EBITDA	7.50x	2.44x	94.0	51	2025-12-31	
Interest coverage	(1.23x)	2.36x	66.7	37	2025-12-31	
Current ratio	2.70x	1.82x	23.9	143	2025-12-31	
Growth and financing, sleeve percentile 35.1						
Revenue growth, three-year compound	3.1%	(0.1%)	33.9	125	2025-12-31	
Free cash flow growth, three-year compound	not computable	13.6%				
current FCF must be positive and base FCF must exceed $100,000						
Reinvestment rate	not computable	11.8%				
NOPAT must exceed $100,000						
Asset growth, three years	3.0%	0.2%	36.3	125	2025-12-31	
Net share issuance, one year	not computable	0.03%				
firm-wide XBRL shares cannot be assigned to one ticker class						

Among 118 peers

consumer nondurables; 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
73	Mccormick & Co. Inc. (MKC)	61.5	C/D	
74	Peloton Interactive, Inc. (PTON)	62.4	C/D	
75	V F Corp. (VFC)	63.2	C/D	
76	Edible Garden AG Inc. (EDBL)	64.1	D	late filer
77	Constellation Brands, Inc. (STZ)	65.0	D	
78	Willamette Valley Vineyards Inc. (WVVI)	65.8	D	
79	Post Holdings, Inc. (POST)	66.7	D	
80	Campbell'S Co. (CPB)	67.5	D	
81	Flowers Foods Inc. (FLO)	68.4	D	
82	Kraft Heinz Co. (KHC)	69.2	D	
83	Deluxe Corp. (DLX)	70.1	D	

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	(44.4%)	(1.0%)	15
Distance from 52-week high	(47.7%)	(24.5%)	19
EBIT to enterprise value	not computable	3.5%	
Free cash flow yield	not computable	4.5%	
Book value to price	not computable	0.60	
Sales to price	not computable	1.26	
Composite equity issuance, five years	not computable	(17.0%)	
Relative strength against the sector, log excess return	(0.67)	(0.09)	15
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	fail
Operating cash flow above zero	fail
Return on assets improved	fail
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	$609,194
Operating cash flow, four quarters	$1.8M
Months of runway	not finite
Days since last periodic filing	11 (10-Q received Nov 12, 2026)
Median daily dollar volume, 63 sessions	$16,095

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	$22.5M	2025-12-31	2026-03-24	10-K	26-000061
2	assets	us-gaap:Assets	$107.7M	2025-12-31	2026-03-24	10-K	26-000061
3	operating income	us-gaap:OperatingIncomeLoss	-$1.4M	2025-12-31	2026-03-24	10-K	26-000061
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeInc...	-$1.2M	2025-12-31	2026-03-24	10-K	26-000061
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-$291,581	2025-12-31	2026-03-24	10-K	26-000061
6	total debt	us-gaap:LongTermDebt	$14.0M	2025-12-31	2026-03-24	10-K	26-000061
7	book equity	us-gaap:StockholdersEquity	$66.2M	2025-12-31	2026-03-24	10-K	26-000061
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$410,886	2025-12-31	2026-03-24	10-K	26-000061
9	total debt	us-gaap:LongTermDebt	$12.9M	2024-12-31	2026-03-24	10-K	26-000061
10	book equity	us-gaap:StockholdersEquity	$69.2M	2024-12-31	2026-03-24	10-K	26-000061
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	$320,883	2024-12-31	2026-03-24	10-K	26-000061
12	net income	us-gaap:NetIncomeLoss	-$917,685	2025-12-31	2026-03-24	10-K	26-000061
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$1.8M	2025-12-31	2026-03-24	10-K	26-000061
14	assets	us-gaap:Assets	$109.0M	2024-12-31	2026-03-24	10-K	26-000061
15	revenue	us-gaap:Revenues	$37.2M	2025-12-31	2026-03-24	10-K	26-000061
16	gross profit	us-gaap:GrossProfit	$24.2M	2024-12-31	2026-03-24	10-K	26-000061
17	revenue	us-gaap:Revenues	$39.8M	2024-12-31	2026-03-24	10-K	26-000061
18	gross profit	us-gaap:GrossProfit	$22.6M	2023-12-31	2025-03-25	10-K	25-000089
19	revenue	us-gaap:Revenues	$39.1M	2023-12-31	2025-03-25	10-K	25-000089
20	gross profit	us-gaap:GrossProfit	$18.8M	2022-12-31	2024-03-26	10-K	24-000132
21	revenue	us-gaap:Revenues	$33.9M	2022-12-31	2024-03-26	10-K	24-000132
22	gross profit	us-gaap:GrossProfit	$18.7M	2021-12-31	2023-03-28	10-K	23-000177
23	revenue	us-gaap:Revenues	$31.8M	2021-12-31	2023-03-28	10-K	23-000177
24	current assets	us-gaap:AssetsCurrent	$39.0M	2025-12-31	2026-03-24	10-K	26-000061
25	current liabilities	us-gaap:LiabilitiesCurrent	$14.5M	2025-12-31	2026-03-24	10-K	26-000061
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	$14.2M	2025-12-31	2026-03-24	10-K	26-000061
27	liabilities	us-gaap:Liabilities	$41.5M	2025-12-31	2026-03-24	10-K	26-000061
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	$3.2M	2025-12-31	2026-03-24	10-K	26-000061
29	interest expense	us-gaap:InterestExpense	$1.2M	2025-12-31	2026-03-24	10-K	26-000061
30	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$444,167	2025-12-31	2026-03-24	10-K	26-000061
31	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$3.2M	2024-12-31	2026-03-24	10-K	26-000061

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32	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$1.9M	2024-12-31	2026-03-24	10-K	26-000061
33	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$2.0M	2023-12-31	2025-03-25	10-K	25-000089
34	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$4.3M	2023-12-31	2025-03-25	10-K	25-000089
35	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-$2.7M	2022-12-31	2024-03-26	10-K	24-000132
36	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	$14.8M	2022-12-31	2024-03-26	10-K	24-000132
37	current assets	us-gaap:AssetsCurrent	$36.9M	2024-12-31	2026-03-24	10-K	26-000061
38	current liabilities	us-gaap:LiabilitiesCurrent	$13.0M	2024-12-31	2026-03-24	10-K	26-000061
39	assets	us-gaap:Assets	$105.7M	2023-12-31	2025-03-25	10-K	25-000089
40	assets	us-gaap:Assets	$98.7M	2022-12-31	2024-03-26	10-K	24-000132

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