

Agilysys Inc. (AGYS)

Nasdaq; business equipment; SIC 7373, Services-Computer Integrated Systems Design; CIK 0000078749

Agilysys Inc. AGYS; business equipment	
Grade	A A B C D E strongest fifth of 497 graded peers percentile 4.0; sampling error 2.2 points; lower is stronger
Rank	21 of 497
Profitability	B percentile 29.6
Solvency	B percentile 35.0
Growth and financing	B percentile 25.0
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 \$481.5M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress, fortress balance sheet
Inputs computable	10 of 14
Graded from	filings received through May 21, 2026 141 days before the rescans; latest periodic filing 10-Q received Jul 27, 2026
Last close	\$102.53 2026-10-08; market equity \$2.9B
Price used in grade	None



A, the bull
strongest fifth of its sector;
letters are fifths of the 497
graded peers

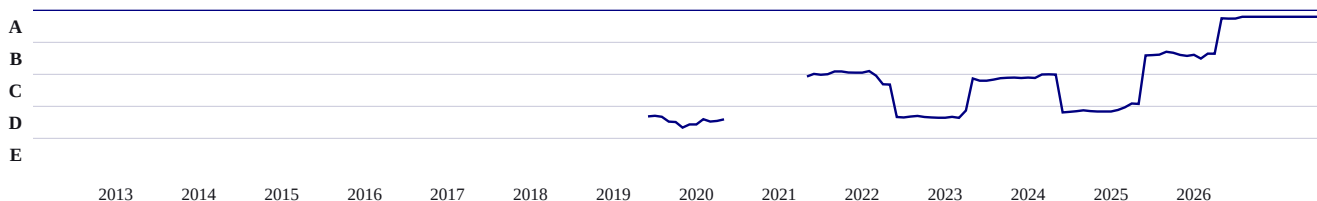
Share price, twelve months to the rescans
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: D from Jun 21, 2024, C/D from Feb 21, 2025, B from Jun 21, 2026

Letter at every rescan

Jan 21, 2012 to Oct 9, 2026; sector percentile, 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 May 21, 2026

Agilysys has been a leader in hospitality software for more than 45 years, delivering innovative cloud-native SaaS and on-premise solutions for hotels, multi-amenity resorts, cruise lines, casinos, corporate foodservice management, restaurants, universities, stadiums, and healthcare facilities. The Company's software solutions include point-of-sale (POS), property management (PMS), inventory and procurement, payments, and related applications that manage and enhance the entire guest journey. Agilysys is also

known for its world-class customer-centric service.

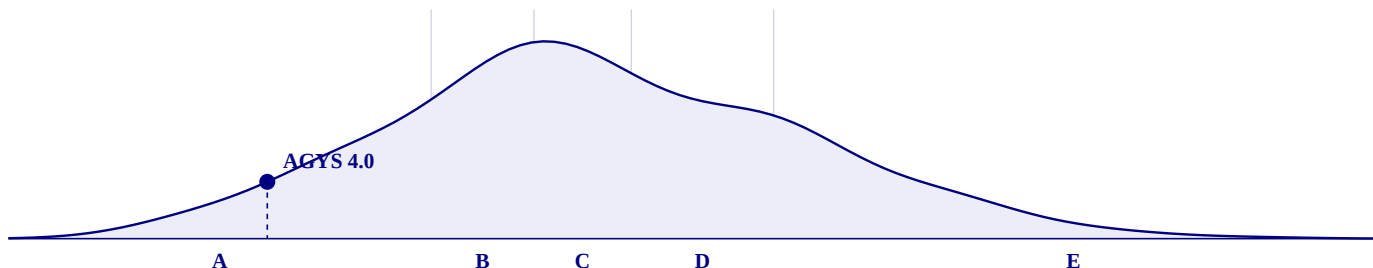
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 29.6						
Gross profitability		41.5%	28.5%	24.8	558	2026-03-31
Return on invested capital		not computable	10.9%			one or more required annual facts are missing
Accruals ratio		(6.8%)	(7.4%)	55.0	621	2026-03-31
Gross margin stability, five years		0.8 pts	2.4 pts	8.9	429	2026-03-31
Solvency, sleeve percentile 35.0						
Twelve-month failure probability		not computable	0.05%			four consecutive discrete net-income quarters are required; found 4
Altman Z double-prime		not computable	2.18			one or more required annual facts are missing
Net debt to EBITDA		not computable	1.11x			one or more required annual facts are missing
Interest coverage		87.25x	3.77x	5.6	90	2026-03-31
Current ratio		1.47x	2.02x	64.4	666	2026-03-31
Growth and financing, sleeve percentile 25.0						
Revenue growth, three-year compound		17.3%	6.4%	22.5	538	2026-03-31
Free cash flow growth, three-year compound		35.8%	17.2%	25.8	268	2026-03-31
Reinvestment rate		129.2%	14.3%	16.0	226	2026-03-31
Asset growth, three years		25.6%	5.0%	12.1	563	2026-03-31
Net share issuance, one year		0.5%	0.5%	48.5	407	2026-05-08

Among 497 peers

business equipment; 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
16	Nvidia Corp. (NVDA)	3.0	A	fortress balance sheet
17	Gitlab Inc. (GTLB)	3.2	A	late filer
18	Arista Networks, Inc. (ANET)	3.4	A	

19	Five9, Inc. (FIVN)	3.6	A
20	Optex Systems Holdings Inc. (OPXS)	3.8	A
21	Agilysys Inc. (AGYS) <	4.0	A
22	EverQuote, Inc. (EVER)	4.2	A
23	A10 Networks, Inc. (ATEN)	4.4	A
24	Aeluma, Inc. (ALMU)	4.6	A fortress balance sheet
25	Veeva Systems Inc. (VEEV)	4.8	A
26	Monolithic Power Systems, Inc. (MPWR)	5.0	A

What the price implies

at the 2026-10-08 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	10.6%	2.2%	57
Distance from 52-week high	(27.3%)	(30.0%)	54
EBIT to enterprise value	not computable	1.5%	
Free cash flow yield	2.4%	2.7%	46
Book value to price	0.12	0.23	27
Sales to price	0.11	0.30	22
Composite equity issuance, five years	16.6%	3.9%	68
Relative strength against the sector, log excess return	(0.18)	(0.26)	57

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 7 of 9, period end 2026-03-31	
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	pass
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$123.7M
Operating cash flow, four quarters	\$82.2M
Months of runway	not finite
Days since last periodic filing	74 (10-Q received Jul 27, 2026)
Median daily dollar volume, 63 sessions	\$25.5M

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	\$199.9M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
2	assets	us-gaap:Assets	\$481.5M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
3	net income	us-gaap:NetIncomeLoss	\$38.8M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$70.0M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
5	assets	us-gaap:Assets	\$434.4M	2025-03-31	2026-05-21	10-K	0001193125-26-234423
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$319.3M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
7	gross profit	us-gaap:GrossProfit	\$172.0M	2025-03-31	2026-05-21	10-K	0001193125-26-234423
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$275.6M	2025-03-31	2026-05-21	10-K	0001193125-26-234423
9	gross profit	us-gaap:GrossProfit	\$144.3M	2024-03-31	2026-05-21	10-K	0001193125-26-234423
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$237.5M	2024-03-31	2026-05-21	10-K	0001193125-26-234423
11	gross profit	us-gaap:GrossProfit	\$120.8M	2023-03-31	2025-05-23	10-K	0000950170-25-076527
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$198.1M	2023-03-31	2025-05-23	10-K	0000950170-25-076527

13	gross profit	us-gaap:GrossProfit	\$101.5M	2022-03-31	2024-05-22	10-K	0000950170-24-063222
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$162.6M	2022-03-31	2024-05-22	10-K	0000950170-24-063222
15	operating income	us-gaap:OperatingIncomeLoss	\$43.0M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
16	interest expense	us-gaap:InterestExpense	\$493,000	2026-03-31	2026-05-21	10-K	0001193125-26-234423
17	current assets	us-gaap:AssetsCurrent	\$184.1M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
18	current liabilities	us-gaap:LiabilitiesCurrent	\$125.1M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
19	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$1.8M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$55.1M	2025-03-31	2026-05-21	10-K	0001193125-26-234423
21	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$2.8M	2025-03-31	2026-05-21	10-K	0001193125-26-234423
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$48.2M	2024-03-31	2026-05-21	10-K	0001193125-26-234423
23	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$8.1M	2024-03-31	2026-05-21	10-K	0001193125-26-234423
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$34.5M	2023-03-31	2025-05-23	10-K	0000950170-25-076527
25	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$7.2M	2023-03-31	2025-05-23	10-K	0000950170-25-076527
26	depreciation amortization	us-gaap:Depreciation	\$3.8M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
27	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$18.4M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
28	income tax	us-gaap:IncomeTaxExpenseBenefit	\$9.6M	2026-03-31	2026-05-21	10-K	0001193125-26-234423
29	current assets	us-gaap:AssetsCurrent	\$123.5M	2025-03-31	2026-05-21	10-K	0001193125-26-234423
30	current liabilities	us-gaap:LiabilitiesCurrent	\$111.0M	2025-03-31	2026-05-21	10-K	0001193125-26-234423
31	assets	us-gaap:Assets	\$350.4M	2024-03-31	2025-05-23	10-K	0000950170-25-076527
32	assets	us-gaap:Assets	\$243.0M	2023-03-31	2024-05-22	10-K	0000950170-24-063222
33	shares outstanding	dei:EntityCommonStockSharesOutstanding	28,166,629	2026-05-08	2026-05-21	10-K	0001193125-26-234423
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	28,017,312	2025-05-16	2025-05-23	10-K	0000950170-25-076527