

EVI Industries, Inc. (EVI)

NYSE; shops; SIC 7200, Services-Personal Services; CIK 0000065312

EVI Industries, Inc. EVI; shops	
Grade	B A B C D E second fifth of 258 graded peers percentile 27.2; sampling error 2.9 points; lower is stronger
Rank	71 of 258
Profitability	C percentile 51.7
Solvency	B percentile 35.1
Growth and financing	B/C percentile 37.6
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 \$304.5M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: short runway, distress
Inputs computable	9 of 14
Graded from	filings received through Sep 8, 2026 31 days before the rescans; latest periodic filing 10-K received Sep 8, 2026
Last close	\$19.25 2026-10-08; market equity \$247.9M
Price used in grade	None

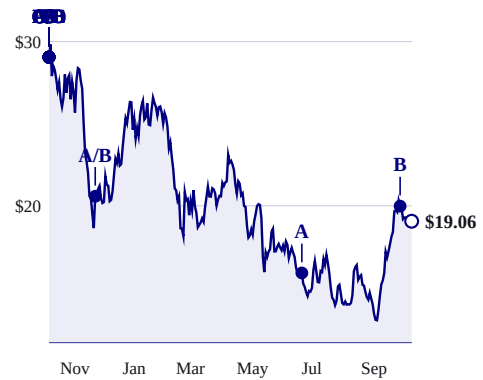


B, the elk

second fifth of its sector; letters are fifths of the 258 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: B from Sep 21, 2025, A/B from Nov 21, 2025, A from Jun 21, 2026, B from Sep 26, 2026

Letter at every rescans

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 Sep 8, 2026

The Company was incorporated under the laws of the State of Delaware on June 13, 1963. The Company, through its wholly-owned subsidiaries, is a value-added distributor, and provides advisory and technical services. Through its vast sales organization, the Company provides its customers with planning, designing, and consulting services related to their commercial laundry operations. The Company sells and/or leases its customers commercial laundry equipment, specializing in washing, drying, finishing, material

handling, water heating, power generation, and water reuse applications. In support of the suite of products it offers, the Company sells related parts and accessories.

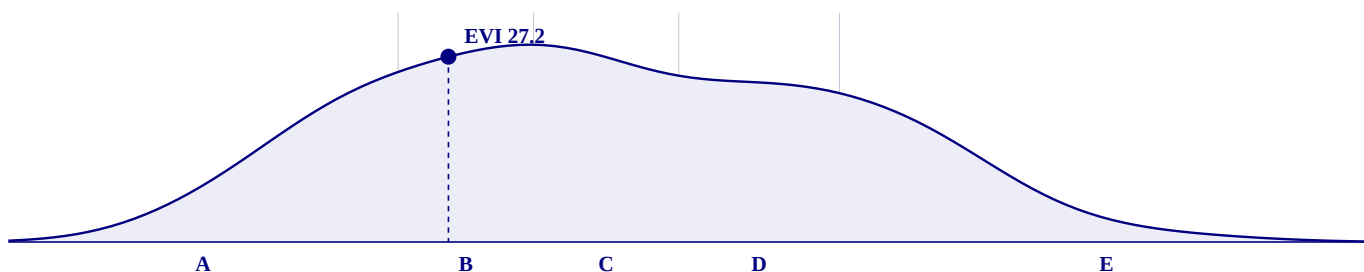
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 51.7						
Gross profitability		46.2%	42.6%	43.2	242	2026-06-30
Return on invested capital		not computable	10.9%			latest aligned inputs end 2019-06-30; latest annual assets end 2026-06-30
Accruals ratio		(4.2%)	(4.9%)	60.5	287	2026-06-30
Gross margin stability, five years		1.3 pts	1.2 pts	51.4	219	2026-06-30
Solvency, sleeve percentile 35.1						
Twelve-month failure probability		not computable	0.04%			liabilities and a nearby cover-page share count are required at 2026-06-30
Altman Z double-prime		2.98	1.92	32.9	208	2026-06-30
Net debt to EBITDA		not computable	1.84x			latest aligned inputs end 2019-06-30; latest annual assets end 2026-06-30
Interest coverage		not computable	2.26x			latest aligned inputs end 2025-06-30; latest annual assets end 2026-06-30
Current ratio		1.64x	1.37x	37.4	295	2026-06-30
Growth and financing, sleeve percentile 37.6						
Revenue growth, three-year compound		8.0%	1.5%	19.8	269	2026-06-30
Free cash flow growth, three-year compound		not computable	5.6%			four consecutive annual FCF observations are required; found 13
Reinvestment rate		32.9%	7.3%	34.4	152	2026-06-30
Asset growth, three years		6.3%	3.4%	35.1	272	2026-06-30
Net share issuance, one year		0.3%	(0.6%)	61.0	211	2026-09-03

Among 258 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
66	GameStop Corp. (GME)	25.5	B	fortress
67	GameStop Corp. (GME-WT)	25.5	B	balance sheet fortress
68	ONE Group Hospitality, Inc. (STKS)	26.1	B	balance sheet late filer
69	Genesco Inc. (GCO)	26.5	B	fortress
70	BJs Restaurants Inc. (BJRI)	26.8	B	balance sheet
71	EVI Industries, Inc. (EVI) <	27.2	B	
72	Hawkins Inc. (HWKN)	27.6	B	
73	Texas Roadhouse, Inc. (TXRH)	28.0	B	fortress
74	Nathans Famous, Inc. (NATH)	28.4	B	balance sheet
75	Performance Food Group Co. (PFGC)	28.8	B	
76	Williams Sonoma Inc. (WSM)	29.2	B	fortress
				balance sheet

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	(55.7%)	(0.1%)	6
Distance from 52-week high	(36.1%)	(24.1%)	32
EBIT to enterprise value	5.4%	5.3%	51
Free cash flow yield	5.5%	4.2%	61
Book value to price	0.61	0.36	67
Sales to price	1.82	1.75	51
Composite equity issuance, five years	1.1%	(16.7%)	80
Relative strength against the sector, log excess return	(0.79)	0.02	6

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2026-06-30	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	fail
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	n/a

Operating cash flow, four quarters	n/a
Months of runway	not finite
Days since last periodic filing	31 (10-K received Sep 8, 2026)
Median daily dollar volume, 63 sessions	\$1.1M

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	\$140.7M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
2	assets	us-gaap:Assets	\$304.5M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
3	operating income	us-gaap:OperatingIncomeLoss	\$7.0M	2019-06-30	2020-09-14	10-K	0001174947-20-000945
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$5.4M	2026-06-30	2026-09-08	10-K	0001174947-20-000945
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$1.9M	2019-06-30	2020-09-14	10-K	0001174947-20-000945
6	total debt	us-gaap:LongTermDebt	\$40.6M	2019-06-30	2020-09-14	10-K	0001174947-20-000945
7	book equity	us-gaap:StockholdersEquity	\$77.3M	2019-06-30	2021-09-13	10-K	0001174947-21-000839
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$5.0M	2019-06-30	2019-09-13	10-K	0001174947-19-001060
9	total debt	us-gaap:LongTermDebt	\$10.0M	2018-06-30	2019-09-13	10-K	0001174947-19-001060
10	book equity	us-gaap:StockholdersEquity	\$57.0M	2018-06-30	2020-09-14	10-K	0001174947-20-000945
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$1.3M	2018-06-30	2019-09-13	10-K	0001174947-19-001060
12	net income	us-gaap:NetIncomeLoss	\$7.7M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$20.6M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
14	assets	us-gaap:Assets	\$307.0M	2025-06-30	2026-09-08	10-K	0001437749-26-029759
15	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$446.6M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
16	gross profit	us-gaap:GrossProfit	\$118.3M	2025-06-30	2026-09-08	10-K	0001437749-26-029759
17	revenue	us-gaap:Revenues	\$389.8M	2025-06-30	2025-09-11	10-K	0002077096-25-000107
18	gross profit	us-gaap:GrossProfit	\$105.3M	2024-06-30	2025-09-11	10-K	0002077096-25-000107
19	revenue	us-gaap:Revenues	\$353.6M	2024-06-30	2025-09-11	10-K	0002077096-25-000107
20	gross profit	us-gaap:GrossProfit	\$103.7M	2023-06-30	2024-09-13	10-K/A	0001174947-24-001066
21	revenue	us-gaap:Revenues	\$354.2M	2023-06-30	2024-09-13	10-K/A	0001174947-24-001066
22	gross profit	us-gaap:GrossProfit	\$73.7M	2022-06-30	2023-10-05	10-K	0001174947-23-001191
23	revenue	us-gaap:Revenues	\$267.3M	2022-06-30	2023-10-05	10-K	0001174947-23-001191
24	current assets	us-gaap:AssetsCurrent	\$141.0M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
25	current liabilities	us-gaap:LiabilitiesCurrent	\$86.1M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$39.8M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
27	operating income	us-gaap:OperatingIncomeLoss	\$15.7M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
28	book equity	us-gaap:StockholdersEquity	\$150.1M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
29	liabilities	us-gaap:Liabilities	\$154.4M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$2.7M	2019-06-30	2020-09-14	10-K	0001174947-20-000945
31	operating income	us-gaap:OperatingIncomeLoss	\$13.8M	2025-06-30	2026-09-08	10-K	0001437749-26-029759
32	interest expense	us-gaap:InterestExpense	\$2.7M	2025-06-30	2025-09-11	10-K	0002077096-25-000107
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$7.2M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
34	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$8.1M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
35	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$11.8M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
36	income tax	us-gaap:IncomeTaxExpenseBenefit	\$4.1M	2026-06-30	2026-09-08	10-K	0001437749-26-029759
37	current assets	us-gaap:AssetsCurrent	\$145.4M	2025-06-30	2026-09-08	10-K	0001437749-26-029759
38	current liabilities	us-gaap:LiabilitiesCurrent	\$94.9M	2025-06-30	2026-09-08	10-K	0001437749-26-029759
39	assets	us-gaap:Assets	\$230.7M	2024-06-30	2025-09-11	10-K	0002077096-25-000107
40	assets	us-gaap:Assets	\$253.8M	2023-06-30	2024-09-13	10-K/A	0001174947-24-001066
41	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,878,532	2026-09-03	2026-09-08	10-K	0001437749-26-029759
42	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,840,637	2025-10-17	2025-10-24	10-K/A	0001174947-25-001294