

Genesco Inc. (GCO)

NYSE; shops; SIC 5661, Retail-Shoe Stores; CIK 0000018498

Genesco Inc. GCO; shops	
Grade	B A B C D E second fifth of 258 graded peers percentile 26.5; sampling error 2.9 points; lower is stronger
Rank	69 of 258
Profitability	B percentile 23.2
Solvency	B percentile 36.9
Growth and financing	C/D percentile 60.6
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 \$1.4B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active; fortress balance sheet not computable: dilution, distress
Inputs computable	7 of 14
Graded from	filings received through Jun 1, 2026 130 days before the rescan; latest periodic filing 10-Q received Sep 10, 2026
Last close	\$36.81 2026-10-08; market equity \$398.3M
Price used in grade	None

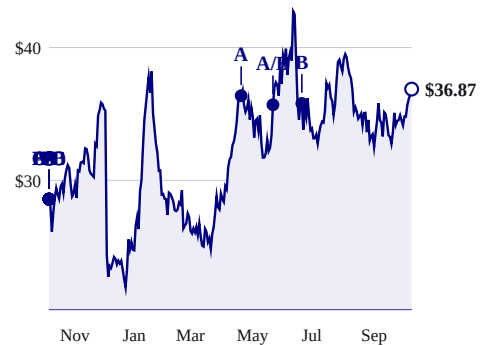


B, the elk

second fifth of its sector; letters are fifths of the 258 graded peers

Share price, twelve months to the rescan

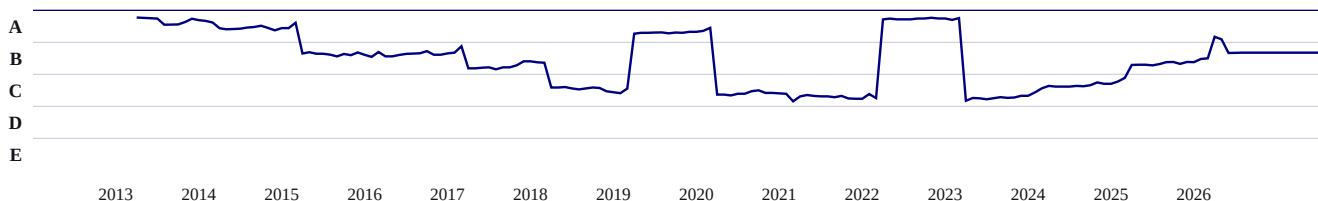
split-adjusted close; the letter is fixed at the rescan that set it



Rescans on file: B from Apr 21, 2025, A from Apr 21, 2026, A/B from May 21, 2026, 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 Mar 25, 2026

Genesco Inc., incorporated in 1934 in the State of Tennessee, is a leading retailer and wholesaler of branded footwear, apparel and accessories with net sales for Fiscal 2026 of \$2.4 billion. During Fiscal 2026, we operated four reportable business segments (not including corporate): (i) Journeys Group, comprised of the Journeys®, Journeys Kidz® and Little Burgundy® retail footwear chains and e-commerce operations; (ii) Schuh Group, comprised of the Schuh retail footwear chain and e-commerce operations; (iii)

Johnston & Murphy Group, comprised of Johnston & Murphy® retail operations, e-commerce operations and wholesale distribution of products under the Johnston & Murphy® brand; and (iv)...

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 23.2						
Gross profitability		80.9%	42.6%	12.4	242	2026-01-31
Return on invested capital		not computable	10.9%			latest aligned inputs end 2022-01-29; latest annual assets end 2026-01-31
Accruals ratio		(9.7%)	(4.9%)	24.5	287	2026-01-31
Gross margin stability, five years		0.8 pts	1.2 pts	32.6	219	2026-01-31
Solvency, sleeve percentile 36.9						
Twelve-month failure probability		not computable	0.04%			latest liabilities, cash plus short-term investments, book equity, and shares are required
Altman Z double-prime		2.57	1.92	36.7	208	2026-01-31
Net debt to EBITDA		not computable	1.84x			latest aligned inputs end 2022-01-29; latest annual assets end 2026-01-31
Interest coverage		not computable	2.26x			latest aligned inputs end 2024-02-03; latest annual assets end 2026-01-31
Current ratio		1.64x	1.37x	37.1	295	2026-01-31
Growth and financing, sleeve percentile 60.6						
Revenue growth, three-year compound		0.7%	1.5%	53.7	269	2026-01-31
Free cash flow growth, three-year compound		not computable	5.6%			current FCF must be positive and base FCF must exceed \$100,000 pretax income must exceed the validity floor and imply a 0%-100% tax rate
Reinvestment rate		not computable	7.3%			
Asset growth, three years		(1.5%)	3.4%	67.5	272	2026-01-31

Net share issuance, one year	not computable	(0.6%)	prior share count is 66 days earlier
------------------------------	----------------	--------	--

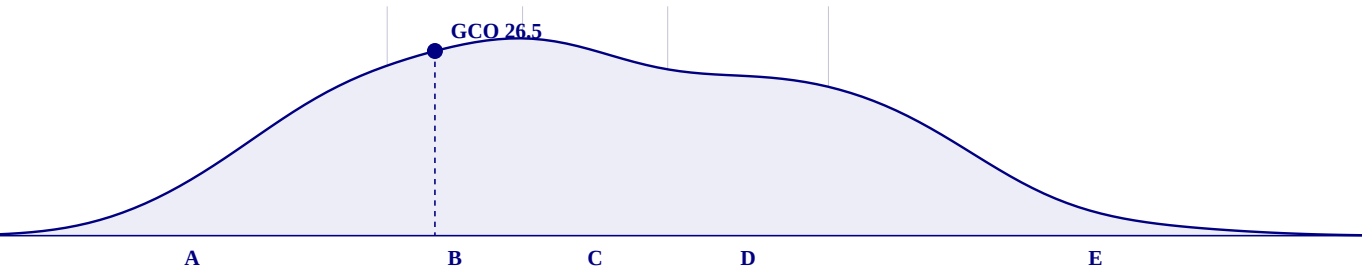
Warnings

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

Check	Measured
Fortress balance sheet	cash minus debt is 304,846,000 USD; Altman Z is not used

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
64	Dillard'S, Inc. (DDS)	24.7	B	
65	Dillard'S, Inc. (DDT)	24.7	B	
66	GameStop Corp. (GME)	25.5	B	fortress
				balance sheet
67	GameStop Corp. (GME-WT)	25.5	B	fortress
				balance sheet
68	ONE Group Hospitality, Inc. (STKS)	26.1	B	late filer
69	Genesco Inc. (GCO) <	26.5	B	fortress
				balance sheet
70	BJs Restaurants Inc. (BJRI)	26.8	B	
71	EVI Industries, Inc. (EVI)	27.2	B	
72	Hawkins Inc. (HWKN)	27.6	B	
73	Texas Roadhouse, Inc. (TXRH)	28.0	B	fortress
				balance sheet
74	Nathans Famous, Inc. (NATH)	28.4	B	

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	15.5%	(0.1%)	65
Distance from 52-week high	(13.7%)	(24.1%)	70
EBIT to enterprise value	4.8%	5.3%	44
Free cash flow yield	21.0%	4.2%	96
Book value to price	1.40	0.36	90
Sales to price	6.11	1.75	87
Composite equity issuance, five years	(32.4%)	(16.7%)	21
Relative strength against the sector, log excess return	0.17	0.02	65

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-01-31	
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	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass

Cash, filings, liquidity

Cash and equivalents	\$57.1M
Operating cash flow, four quarters	\$134.1M
Months of runway	not finite
Days since last periodic filing	29 (10-Q received Sep 10, 2026)
Median daily dollar volume, 63 sessions	\$6.1M

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	\$1.1B	2026-01-31	2026-03-25	10-K	0001193125-26-123492
2	assets	us-gaap:Assets	\$1.4B	2026-01-31	2026-03-25	10-K	0001193125-26-123492
3	operating income	us-gaap:OperatingIncomeLoss	\$155.6M	2022-01-29	2024-03-27	10-K	0000950170-24-036902
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$153.0M	2022-01-29	2024-03-27	10-K	0000950170-24-036902
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$38.0M	2022-01-29	2024-03-27	10-K	0000950170-24-036902
6	total debt	us-gaap:LongTermDebt	\$15.7M	2022-01-29	2023-03-22	10-K	0000950170-23-009103
7	book equity	us-gaap:StockholdersEquity	\$602.5M	2022-01-29	2025-03-26	10-K	0000950170-25-044864
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$320.5M	2022-01-29	2022-03-23	10-K	0000950170-22-004397
9	total debt	us-gaap:LongTermDebt	\$33.0M	2021-01-30	2022-03-23	10-K	0000950170-22-004397
10	book equity	us-gaap:StockholdersEquity	\$566.8M	2021-01-30	2024-03-27	10-K	0000950170-24-036902
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$215.1M	2021-01-30	2022-03-23	10-K	0000950170-22-004397
12	net income	us-gaap:NetIncomeLoss	\$13.3M	2026-01-31	2026-03-25	10-K	0001193125-26-123492
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$145.8M	2026-01-31	2026-03-25	10-K	0001193125-26-123492
14	assets	us-gaap:Assets	\$1.3B	2025-02-01	2026-03-25	10-K	0001193125-26-123492
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.4B	2026-01-31	2026-03-25	10-K	0001193125-26-123492
16	gross profit	us-gaap:GrossProfit	\$1.1B	2025-02-01	2026-03-25	10-K	0001193125-26-123492
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.3B	2025-02-01	2026-03-25	10-K	0001193125-26-123492
18	gross profit	us-gaap:GrossProfit	\$1.1B	2024-02-03	2026-03-25	10-K	0001193125-26-123492
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.3B	2024-02-03	2026-03-25	10-K	0001193125-26-123492
20	gross profit	us-gaap:GrossProfit	\$1.1B	2023-01-28	2025-03-26	10-K	0000950170-25-044864
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.4B	2023-01-28	2025-03-26	10-K	0000950170-25-044864
22	gross profit	us-gaap:GrossProfit	\$1.2B	2022-01-29	2024-03-27	10-K	0000950170-24-036902
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.4B	2022-01-29	2024-03-27	10-K	0000950170-24-036902
24	current assets	us-gaap:AssetsCurrent	\$618.5M	2026-01-31	2026-03-25	10-K	0001193125-26-123492
25	current liabilities	us-gaap:LiabilitiesCurrent	\$376.3M	2026-01-31	2026-03-25	10-K	0001193125-26-123492
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$265.8M	2026-01-31	2026-03-25	10-K	0001193125-26-123492
27	operating income	us-gaap:OperatingIncomeLoss	\$17.3M	2026-01-31	2026-03-25	10-K	0001193125-26-123492
28	book equity	us-gaap:StockholdersEquity	\$567.0M	2026-01-31	2026-03-25	10-K	0001193125-26-123492
29	liabilities	us-gaap:Liabilities	\$825.9M	2026-01-31	2026-03-25	10-K	0001193125-26-123492
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$43.0M	2022-01-29	2024-03-27	10-K	0000950170-24-036902
31	operating income	us-gaap:OperatingIncomeLoss	-\$13.5M	2024-02-03	2026-03-25	10-K	0001193125-26-123492
32	interest expense	us-gaap:InterestExpense	\$7.8M	2024-02-03	2024-03-27	10-K	0000950170-24-036902
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$62.1M	2026-01-31	2026-03-25	10-K	0001193125-26-123492
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$87.9M	2025-02-01	2026-03-25	10-K	0001193125-26-123492
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$41.1M	2025-02-01	2026-03-25	10-K	0001193125-26-123492
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$94.8M	2024-02-03	2026-03-25	10-K	0001193125-26-123492
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$60.3M	2024-02-03	2026-03-25	10-K	0001193125-26-123492
38	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$164.9M	2023-01-28	2025-03-26	10-K	0000950170-25-044864
39	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$59.9M	2023-01-28	2025-03-26	10-K	0000950170-25-044864
40	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$53.3M	2026-01-31	2026-03-25	10-K	0001193125-26-123492
41	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$114.0M	2022-01-29	2024-03-25	10-K	0001193125-26-123492
42	income tax	us-gaap:IncomeTaxExpenseBenefit	-\$685,000	2026-01-31	2026-03-25	10-K	0001193125-26-123492
43	current assets	us-gaap:AssetsCurrent	\$608.8M	2025-02-01	2026-03-25	10-K	0001193125-26-123492

44	current liabilities	us-gaap:LiabilitiesCurrent	\$379.8M	2025-02-01	2026-03-25	10-K	0001193125-26-123492
45	assets	us-gaap:Assets	\$1.3B	2024-02-03	2026-03-25	10-K	0001193125-26-123492
46	assets	us-gaap:Assets	\$1.5B	2023-01-28	2025-03-26	10-K	0000950170-25-044864
47	shares outstanding	dei:EntityCommonStockSharesOutstanding	11,103,175	2026-05-18	2026-06-01	10-K/A	0001193125-26-251478
48	shares outstanding	dei:EntityCommonStockSharesOutstanding	10,858,224	2026-03-13	2026-03-25	10-K	0001193125-26-123492