

## Hooker Furnishings Corp. (HOFT)

Nasdaq; consumer durables; SIC 2510, Household Furniture; CIK 0001077688

Hooker Furnishings Corp.

HOFI; consumer durables

Grade

C

A

B

C

D

E

middle fifth of 460 graded peers  
percentile 45.3; sampling error 2.3 points; lower is stronger

Rank

204 of 460

Profitability

C

percentile 47.7

Solvency

A

percentile 13.6

Growth and financing

D/E

percentile 82.2

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 \$225.9M

Standard universe

inside

revenue above \$1M and assets above \$10M

Warnings

none active

not computable: short runway, distress

Inputs computable

7 of 14

Graded from

filings received through Apr 17, 2026

175 days before the rescans; latest periodic filing 10-Q received Sep 11, 2026

Last close

\$12.72

2026-10-08; market equity \$136.0M

Price used in grade

None

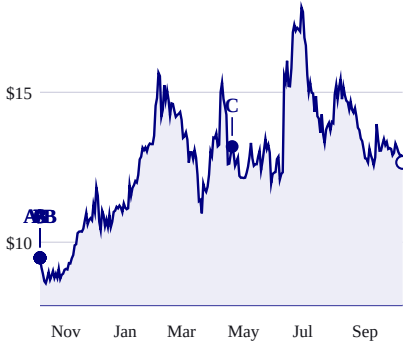


C, the tortoise

middle fifth of its sector; letters are fifths of the 460 graded peers

Share price, twelve months to the rescans

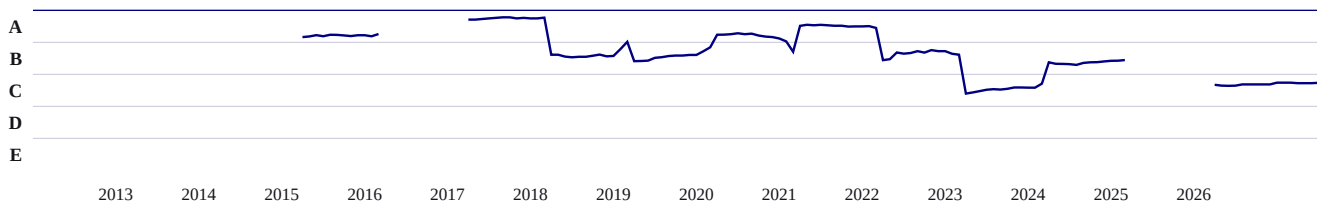
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: B from Apr 21, 2022, C from Apr 21, 2023, B from Apr 21, 2024

## 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 Apr 17, 2026

Virginia in 1924, is a designer, marketer and importer of casegoods (wooden and metal furniture), leather furniture, fabric-upholstered furniture, lighting, accessories, and home decor for the residential, hospitality and contract markets. We also domestically manufacture premium residential custom leather, custom fabric-upholstered furniture and outdoor furniture. the Pulaski Furniture ("PFC") and Samuel Lawrence Furniture ("SLF") brands within the Home Meridian segment no longer aligned with the Company's

long-term strategic direction.

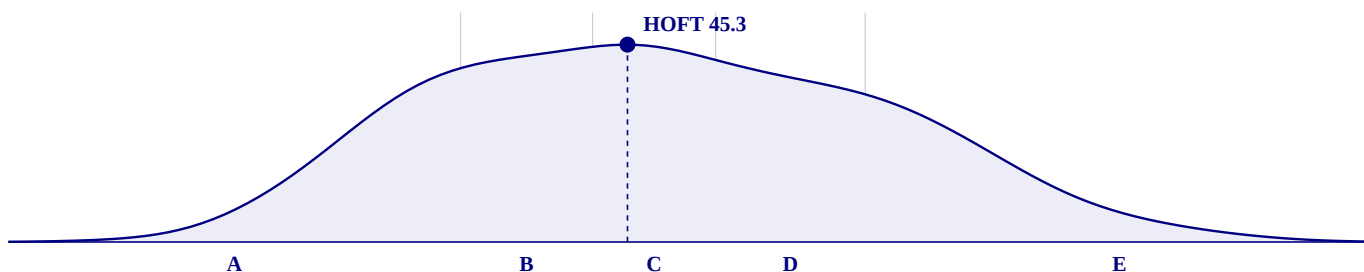
## The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

| Input                                               | Percentile, 0 to 100 | Value          | Peer median | Percentile | Peers | Period end                                                                                 |
|-----------------------------------------------------|----------------------|----------------|-------------|------------|-------|--------------------------------------------------------------------------------------------|
| <b>Profitability, sleeve percentile 47.7</b>        |                      |                |             |            |       |                                                                                            |
| Gross profitability                                 |                      | 32.5%          | 34.4%       | 50.1       | 476   | 2026-02-01                                                                                 |
| Return on invested capital                          |                      | not computable | 8.9%        |            |       | latest aligned inputs end 2019-02-03; latest annual assets end 2026-02-01                  |
| Accruals ratio                                      |                      | (37.7%)        | (5.1%)      | 4.8        | 525   | 2026-02-01                                                                                 |
| Gross margin stability, five years                  |                      | 4.8 pts        | 1.7 pts     | 88.2       | 407   | 2026-02-01                                                                                 |
| <b>Solvency, sleeve percentile 13.6</b>             |                      |                |             |            |       |                                                                                            |
| 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                               |                      | 6.24           | 2.11        | 14.5       | 402   | 2026-02-01                                                                                 |
| Net debt to EBITDA                                  |                      | not computable | 2.11x       |            |       | latest aligned inputs end 2019-02-03; latest annual assets end 2026-02-01                  |
| Interest coverage                                   |                      | not computable | 2.57x       |            |       | one or more required annual facts are missing                                              |
| Current ratio                                       |                      | 3.37x          | 1.55x       | 12.8       | 541   | 2026-02-01                                                                                 |
| <b>Growth and financing, sleeve percentile 82.2</b> |                      |                |             |            |       |                                                                                            |
| Revenue growth, three-year compound                 |                      | (21.9%)        | 1.4%        | 96.5       | 482   | 2026-02-01                                                                                 |
| Free cash flow growth, three-year compound          |                      | not computable | 8.3%        |            |       | current FCF must be positive and base FCF must exceed \$100,000                            |
| Reinvestment rate                                   |                      | not computable | 12.0%       |            |       | NOPAT must exceed \$100,000                                                                |
| Asset growth, three years                           |                      | not computable | 2.0%        |            |       | four consecutive annual observations are required                                          |
| Net share issuance, one year                        |                      | 0.7%           | (0.3%)      | 68.0       | 382   | 2026-04-10                                                                                 |

## Among 460 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                  |
|------|-------------------------------------------|------------|--------|---------------------------|
| 199  | LKQ Corp. (LKQ)                           | 44.4       | C      |                           |
| 200  | Hershey Co. (HSY)                         | 44.7       | C      |                           |
| 201  | Cannae Holdings, Inc. (CNNE)              | 44.7       | C      | fortress<br>balance sheet |
| 202  | Adient plc (ADNT)                         | 45.1       | C      |                           |
| 203  | Herbalife Ltd. (HLF)                      | 45.1       | C      |                           |
| 204  | Hooker Furnishings Corp. (HOFT) <         | 45.3       | C      |                           |
| 205  | Sonic Automotive Inc. (SAH)               | 45.5       | C      |                           |
| 206  | Post Holdings, Inc. (POST)                | 45.5       | C      |                           |
| 207  | Honest Company, Inc. (HNST)               | 45.9       | C      |                           |
| 208  | Sonos Inc. (SONO)                         | 46.0       | C      | fortress<br>balance sheet |
| 209  | First Watch Restaurant Group, Inc. (FWRG) | 46.3       | C      |                           |

## 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    | 31.5%   | (0.2%)      | 80         |
| Distance from 52-week high                              | (29.0%) | (25.6%)     | 45         |
| EBIT to enterprise value                                | (10.8%) | 5.0%        | 18         |
| Free cash flow yield                                    | 11.2%   | 4.6%        | 79         |
| Book value to price                                     | 1.25    | 0.45        | 84         |
| Sales to price                                          | 2.05    | 1.49        | 62         |
| Composite equity issuance, five years                   | (36.4%) | (16.0%)     | 13         |
| Relative strength against the sector, log excess return | 0.30    | (0.01)      | 82         |

## Diagnostics

not in the grade

| Measure                                                   | Value                           |
|-----------------------------------------------------------|---------------------------------|
| <b>Piotroski F-score None of 9, period end 2026-02-01</b> |                                 |
| Return on assets above zero                               | fail                            |
| Operating cash flow above zero                            | pass                            |
| Return on assets improved                                 | fail                            |
| Operating cash flow exceeds net income                    | pass                            |
| Long-term leverage fell                                   | fail                            |
| Current ratio improved                                    | fail                            |
| No new shares issued                                      | fail                            |
| Gross margin improved                                     | fail                            |
| Asset turnover improved                                   | fail                            |
| <b>Cash, filings, liquidity</b>                           |                                 |
| Cash and equivalents                                      | n/a                             |
| Operating cash flow, four quarters                        | n/a                             |
| Months of runway                                          | not finite                      |
| Days since last periodic filing                           | 28 (10-Q received Sep 11, 2026) |

## 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                                                                                                            | \$73.5M    | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 2  | assets                    | us-gaap:Assets                                                                                                                 | \$225.9M   | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 3  | operating income          | us-gaap:OperatingIncomeLoss                                                                                                    | \$52.7M    | 2019-02-03 | 2021-04-16 | 10-K | 0001185185-21-000547 |
| 4  | pretax income             | us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesMinorityInterestAndIncomeLossFromEquityMethodInvestments            | \$116M     | 2019-02-03 | 2021-04-16 | 10-K | 0001185185-21-000547 |
| 5  | income tax                | us-gaap:IncomeTaxExpenseBenefit                                                                                                | \$11.7M    | 2019-02-03 | 2021-04-16 | 10-K | 0001185185-21-000547 |
| 6  | total debt                | us-gaap:LongTermDebt                                                                                                           | \$35.5M    | 2019-02-03 | 2019-04-19 | 10-K | 0001185185-19-000568 |
| 7  | book equity               | us-gaap:StockholdersEquity                                                                                                     | \$263.2M   | 2019-02-03 | 2022-04-15 | 10-K | 0001185185-22-000451 |
| 8  | cash                      | us-gaap:CashAndCashEquivalentsAtCarryingValue                                                                                  | \$11.4M    | 2019-02-03 | 2021-04-16 | 10-K | 0001185185-21-000547 |
| 9  | total debt                | us-gaap:LongTermDebt                                                                                                           | \$53.4M    | 2018-01-28 | 2018-04-13 | 10-K | 0001185185-18-000692 |
| 10 | book equity               | us-gaap:StockholdersEquity                                                                                                     | \$229.5M   | 2018-01-28 | 2021-04-16 | 10-K | 0001185185-21-000547 |
| 11 | cash                      | us-gaap:CashAndCashEquivalentsAtCarryingValue                                                                                  | \$30.9M    | 2018-01-28 | 2021-04-16 | 10-K | 0001185185-21-000547 |
| 12 | net income                | us-gaap:NetIncomeLoss                                                                                                          | -\$27.0M   | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 13 | operating cash flow       | us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperations                                                         | \$8.3M     | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 14 | assets                    | us-gaap:Assets                                                                                                                 | \$14.5M    | 2025-03-31 | 2025-04-18 | 10-K | 0001185185-25-000321 |
| 15 | revenue                   | us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax                                                                    | \$278.1M   | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 16 | gross profit              | us-gaap:GrossProfit                                                                                                            | \$78.1M    | 2025-02-02 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 17 | revenue                   | us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax                                                                    | \$317.4M   | 2025-02-02 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 18 | gross profit              | us-gaap:GrossProfit                                                                                                            | \$94.0M    | 2024-01-28 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 19 | revenue                   | us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax                                                                    | \$344.6M   | 2024-01-28 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 20 | gross profit              | us-gaap:GrossProfit                                                                                                            | \$93.3M    | 2023-01-29 | 2025-04-18 | 10-K | 0001185185-25-000321 |
| 21 | revenue                   | us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax                                                                    | \$583.1M   | 2023-01-29 | 2025-04-18 | 10-K | 0001185185-25-000321 |
| 22 | gross profit              | us-gaap:GrossProfit                                                                                                            | \$101.7M   | 2022-01-30 | 2024-04-12 | 10-K | 0001185185-24-000378 |
| 23 | revenue                   | us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax                                                                    | \$593.6M   | 2022-01-30 | 2024-04-12 | 10-K | 0001185185-24-000378 |
| 24 | current assets            | us-gaap:AssetsCurrent                                                                                                          | \$92.9M    | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 25 | current liabilities       | us-gaap:LiabilitiesCurrent                                                                                                     | \$27.6M    | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 26 | retained earnings         | us-gaap:RetainedEarningsAccumulatedDeficit                                                                                     | \$117.6M   | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 27 | operating income          | us-gaap:OperatingIncomeLoss                                                                                                    | -\$16.5M   | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 28 | book equity               | us-gaap:StockholdersEquity                                                                                                     | \$169.2M   | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 29 | liabilities               | us-gaap:Liabilities                                                                                                            | \$56.6M    | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 30 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization                                                                                   | \$7.4M     | 2019-02-03 | 2021-04-16 | 10-K | 0001185185-21-000547 |
| 31 | capital expenditure       | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment                                                                             | \$3.2M     | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 32 | operating cash flow       | us-gaap:NetCashProvidedByUsedInOperatingActivities                                                                             | -\$23.0M   | 2025-02-02 | 2025-04-18 | 10-K | 0001185185-25-000321 |
| 33 | capital expenditure       | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment                                                                             | \$3.1M     | 2025-02-02 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 34 | operating cash flow       | us-gaap:NetCashProvidedByUsedInOperatingActivities                                                                             | \$55.5M    | 2024-01-28 | 2025-04-18 | 10-K | 0001185185-25-000321 |
| 35 | capital expenditure       | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment                                                                             | \$5.2M     | 2024-01-28 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 36 | operating cash flow       | us-gaap:NetCashProvidedByUsedInOperatingActivities                                                                             | -\$21.7M   | 2023-01-29 | 2025-04-18 | 10-K | 0001185185-25-000321 |
| 37 | capital expenditure       | us-gaap:PaymentsToAcquirePropertyPlantAndEquipment                                                                             | \$4.2M     | 2023-01-29 | 2025-04-18 | 10-K | 0001185185-25-000321 |
| 38 | depreciation amortization | us-gaap:DepreciationDepletionAndAmortization                                                                                   | \$7.1M     | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 39 | pretax income             | us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItemsAndLossFromEquityMethodInvestments | \$17.0M    | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 40 | income tax                | us-gaap:IncomeTaxExpenseBenefit                                                                                                | -\$4.3M    | 2026-02-01 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 41 | current assets            | us-gaap:AssetsCurrent                                                                                                          | \$141.1M   | 2025-02-02 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 42 | current liabilities       | us-gaap:LiabilitiesCurrent                                                                                                     | \$40.0M    | 2025-02-02 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 43 | assets                    | us-gaap:Assets                                                                                                                 | \$313.9M   | 2025-02-02 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 44 | assets                    | us-gaap:Assets                                                                                                                 | \$343.6M   | 2024-01-28 | 2025-04-18 | 10-K | 0001185185-25-000321 |
| 45 | shares outstanding        | dei:EntityCommonStockSharesOutstanding                                                                                         | 10,779,729 | 2026-04-10 | 2026-04-17 | 10-K | 0001185185-26-001420 |
| 46 | shares outstanding        | dei:EntityCommonStockSharesOutstanding                                                                                         | 10,702,685 | 2025-04-07 | 2025-04-18 | 10-K | 0001185185-25-000321 |