

Regis Corp. (RGS)

Nasdaq; shops; SIC 7200, Services-Personal Services; CIK 0000716643

Regis Corp.

RGS; shops

Grade

E

A B C D E

weakest fifth of 258 graded peers
percentile 99.2; sampling error 2.9 points; lower is stronger

Rank

256 of 258

Profitability

E

percentile 83.9

Solvency

D

percentile 73.1

Growth and financing

D

percentile 74.2

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 \$547.2M

Standard universe

inside

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

Warnings

none active

not computable: distress

Inputs computable

7 of 14

Graded from

filings received through Sep 1, 2026

38 days before the rescan; latest periodic filing 10-K received Sep 1, 2026

Last close

\$29.51

2026-10-01; market equity \$73.7M

Price used in grade

None

E, the bear

weakest 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

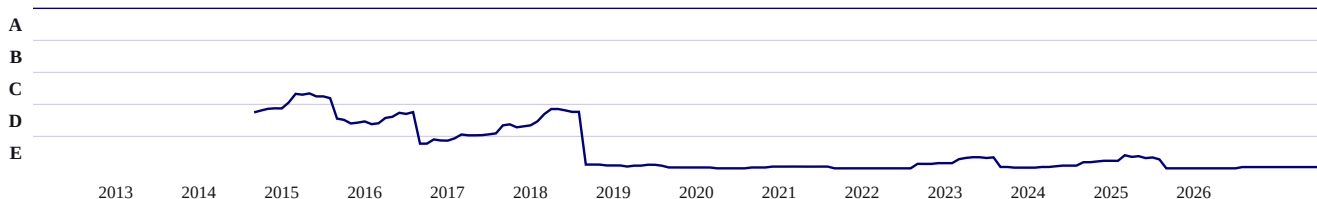
O/E

Nov Jan Mar May Jul Sep

Rescans on file: E from Sep 21, 2018, E from Sep 21, 2024, E from Sep 21, 2025

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 1, 2026

Regis Corporation franchises and owns hair care salons. The Company is listed on the Nasdaq Global Market under the ticker symbol "RGS." Unless the context otherwise provides, when we refer to the "Company," "we," "our," or "us," we are referring to Regis Corporation, the Registrant, together with its subsidiaries. As of June 30, 2026, the Company franchised or owned 3,712 locations, primarily in North America. The Company's locations consist of 3,448 franchised salons and 264 company-owned salons. Each of the

Company's salon concepts generally offers similar salon products and hair services.

The fourteen inputs

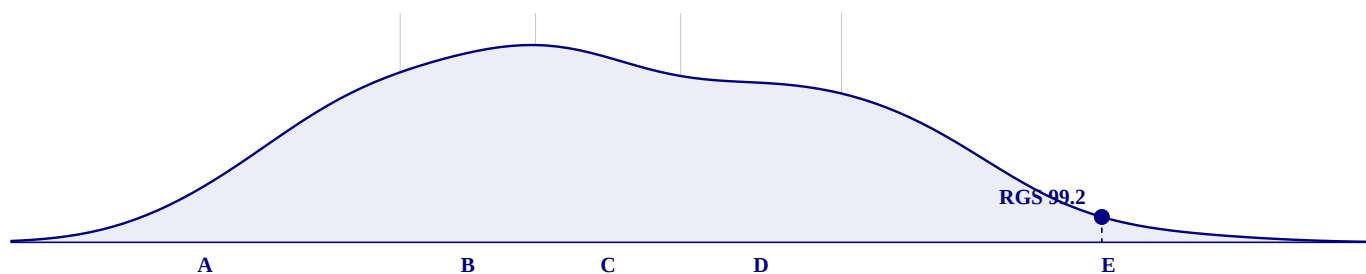
lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 83.9						
Gross profitability		not computable	42.6%			latest aligned inputs end 2012-06-30; latest annual assets end 2026-06-30
Return on invested capital		not computable	10.9%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Accruals ratio		(1.1%)	(4.9%)	83.9	287	2026-06-30
Gross margin stability, five years		not computable	1.2 pts			five annual gross margins are required; found 2
Solvency, sleeve percentile 73.1						
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		1.11	1.92	56.0	208	2026-06-30
Net debt to EBITDA		3.22x	1.84x	74.7	100	2026-06-30
Interest coverage		not computable	2.26x			latest aligned inputs end 2024-06-30; latest annual assets end 2026-06-30
Current ratio		0.62x	1.37x	88.4	295	2026-06-30
Growth and financing, sleeve percentile 74.2						
Revenue growth, three-year compound		(1.3%)	1.5%	63.4	269	2026-06-30
Free cash flow growth, three-year compound		not computable	5.6%			current FCF must be positive and base FCF must exceed \$100,000
Reinvestment rate		not computable	7.3%			pretax income must exceed the validity floor and imply a 0%-100% tax rate

Asset growth, three years		(3.4%)	3.4%	74.9	272	2026-06-30
Net share issuance, one year		2.6%	(0.6%)	84.3	211	2026-08-25

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
251	Cato Corp. (CATO)	97.3	E	
252	Rent the Runway, Inc. (RENT)	97.7	E	
253	Digital Brands Group, Inc. (DBGI)	98.1	E	dilution, short runway, late filer
254	LiveOne, Inc. (LVO)	98.4	E	dilution, late filer
255	iPower Inc. (IPW)	98.8	E	dilution, late filer, fortress balance sheet
256	Regis Corp. (RGS) <	99.2	E	
257	Playboy, Inc. (PLBY)	99.6	E	
258	Hydrofarm Holdings Group, Inc. (HYFM)	100.0	E	fortress balance sheet

What the price implies

at the 2026-10-01 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(6.3%)	(0.1%)	42
Distance from 52-week high	(4.5%)	(24.1%)	93
EBIT to enterprise value	14.9%	5.3%	95
Free cash flow yield	15.2%	4.2%	90
Book value to price	2.64	0.36	96
Sales to price	3.06	1.75	70
Composite equity issuance, five years	33.3%	(16.7%)	92
Relative strength against the sector, log excess return	(0.04)	0.02	42

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None 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	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	fail

Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$26.0M
Operating cash flow, four quarters	\$13.1M
Months of runway	not finite
Days since last periodic filing	38 (10-K received Sep 1, 2026)
Median daily dollar volume, 63 sessions	\$156,365

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	\$998.4M	2012-06-30	2012-08-29	10-K	0001047469-12-008600
2	assets	us-gaap:Assets	\$1.6B	2012-06-30	2013-08-27	10-K	0001047469-13-008674
3	operating income	us-gaap:OperatingIncomeLoss	\$24.4M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraord	\$54.9M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
5	income tax	us-gaap:IncomeTaxExpenseBenefit	-\$1.1M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
6	total debt	us-gaap:LongTermDebt	\$117.1M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
7	book equity	us-gaap:StockholdersEquity	\$193.8M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$26.0M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
9	total debt	us-gaap:LongTermDebt	\$110.8M	2025-06-30	2026-09-01	10-K	0000716643-26-000031
10	book equity	us-gaap:StockholdersEquity	\$185.6M	2025-06-30	2026-09-01	10-K	0000716643-26-000031
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$17.0M	2025-06-30	2026-09-01	10-K	0000716643-26-000031
12	net income	us-gaap:NetIncomeLoss	\$6.9M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$13.1M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
14	assets	us-gaap:Assets	\$547.2M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
15	assets	us-gaap:Assets	\$599.0M	2025-06-30	2026-09-01	10-K	0000716643-26-000031
16	current assets	us-gaap:AssetsCurrent	\$57.4M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
17	current liabilities	us-gaap:LiabilitiesCurrent	\$91.9M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
18	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$108.9M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
19	liabilities	us-gaap:Liabilities	\$353.4M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
20	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$3.9M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
21	operating income	us-gaap:OperatingIncomeLoss	\$20.9M	2024-06-30	2026-09-01	10-K	0000716643-26-000031
22	interest expense	us-gaap:InterestAndDebtExpense	\$25.4M	2024-06-30	2024-08-28	10-K	0000716643-24-000031
23	revenue	us-gaap:Revenues	\$224.5M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
24	revenue	us-gaap:Revenues	\$210.1M	2025-06-30	2026-09-01	10-K	0000716643-26-000031
25	revenue	us-gaap:Revenues	\$203.0M	2024-06-30	2026-09-01	10-K	0000716643-26-000031
26	revenue	us-gaap:Revenues	\$233.3M	2023-06-30	2025-09-03	10-K	0000716643-25-000031
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$2.0M	2026-06-30	2026-09-01	10-K	0000716643-26-000031
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$13.7M	2025-06-30	2026-09-01	10-K	0000716643-26-000031
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$1.3M	2025-06-30	2026-09-01	10-K	0000716643-26-000031
30	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$2.0M	2024-06-30	2026-09-01	10-K	0000716643-26-000031
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$376,000	2024-06-30	2026-09-01	10-K	0000716643-26-000031
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$7.9M	2023-06-30	2025-09-03	10-K	0000716643-25-000031
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$481,000	2023-06-30	2025-09-03	10-K	0000716643-25-000031
34	current assets	us-gaap:AssetsCurrent	\$50.5M	2025-06-30	2026-09-01	10-K	0000716643-26-000031
35	current liabilities	us-gaap:LiabilitiesCurrent	\$101.7M	2025-06-30	2026-09-01	10-K	0000716643-26-000031
36	assets	us-gaap:Assets	\$530.5M	2024-06-30	2025-09-03	10-K	0000716643-25-000031
37	assets	us-gaap:Assets	\$607.4M	2023-06-30	2024-08-28	10-K	0000716643-24-000031
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	2,498,778	2026-08-25	2026-09-01	10-K	0000716643-26-000031
39	shares outstanding	dei:EntityCommonStockSharesOutstanding	2,435,981	2025-08-29	2025-09-03	10-K	0000716643-25-000031