

Stitch Fix, Inc. (SFIX)

Nasdaq; shops; SIC 5961, Retail-Catalog & Mail-Order Houses; CIK 0001576942

Stitch Fix, Inc.

SFIX; shops

Grade	C/D on the C/D boundary of 258 graded peers percentile 59.5; sampling error 2.9 points; lower is stronger
Rank	154 of 258
Profitability	A/B percentile 18.3
Solvency	C/D percentile 60.3
Growth and financing	E percentile 83.6
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 \$479.4M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: dilution, distress, fortress balance sheet
Inputs computable	8 of 14
Graded from	filings received through Sep 24, 2026 15 days before the rescan; latest periodic filing 10-K received Sep 24, 2026
Last close	\$2.73 2026-10-08; market equity \$0
Price used in grade	None



C/D, the tortoise
on the C/D boundary 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/C from Sep 21, 2023, B from Mar 21, 2024, D from Oct 21, 2024, C/D from Apr 21, 2025

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 Sep 24, 2026

Stitch Fix is the leading online personal styling service that helps people discover the styles they will love that fit perfectly so they always look - and feel - their best. In 2011, Stitch Fix, Inc. ("we," "our," "us," "the Company," or "Stitch Fix") introduced an innovative approach to shopping for clothing and accessories. We were inspired by the opportunity to create a client-first styling experience, offering an alternative to impersonal, time-consuming and inconvenient traditional shopping. Since inception, our

business has been grounded in our commitment to developing and fostering client relationships and making people happier and more confident in what they wear.

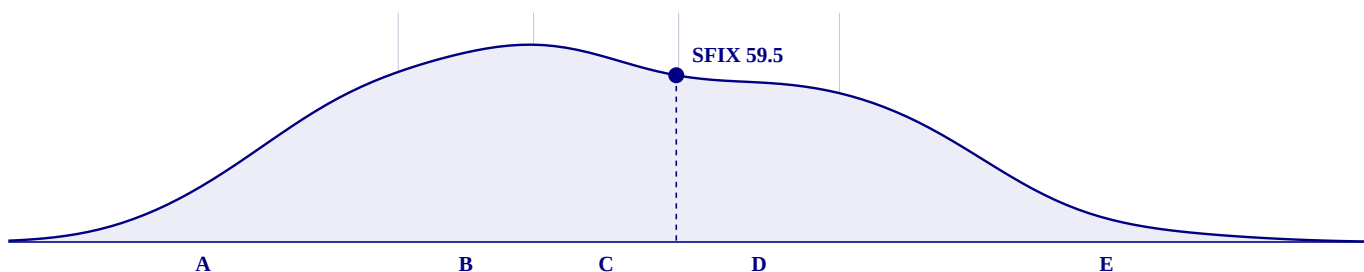
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 18.3						
Gross profitability		122.8%	42.6%	4.1	242	2026-08-01
Return on invested capital		not computable	10.9%			one or more required annual facts are missing
Accruals ratio		(10.8%)	(4.9%)	22.7	287	2026-08-01
Gross margin stability, five years		0.7 pts	1.2 pts	28.0	219	2026-08-01
Solvency, sleeve percentile 60.3						
Twelve-month failure probability		not computable	0.04%			liabilities and a nearby cover-page share count are required at 2026-08-01
Altman Z double-prime		(1.49)	1.92	75.4	208	2026-08-01
Net debt to EBITDA		not computable	1.84x			one or more required annual facts are missing
Interest coverage		not computable	2.26x			one or more required annual facts are missing
Current ratio		1.48x	1.37x	45.2	295	2026-08-01
Growth and financing, sleeve percentile 83.6						
Revenue growth, three-year compound		(5.4%)	1.5%	76.9	269	2026-08-01
Free cash flow growth, three-year compound		(28.5%)	5.6%	92.5	147	2026-08-01
Reinvestment rate		not computable	7.3%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Asset growth, three years		(7.9%)	3.4%	81.5	272	2026-08-01
Net share issuance, one year		not computable	(0.6%)			two annual share counts are required; found 0

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
149	Kroger Co. (KR)	57.6	C/D	
150	United Natural Foods Inc. (UNFI)	58.0	C/D	
151	Autonation, Inc. (AN)	58.4	C/D	
152	Papa Johns International Inc. (PZZA)	58.8	C/D	
153	Autozone Inc. (AZO)	59.1	C/D	
154	Stitch Fix, Inc. (SFIX) <	59.5	C/D	
155	Resideo Technologies, Inc. (REZI)	59.9	C/D	short runway
156	Albertsons Companies, Inc. (ACI)	60.3	C/D	
157	Genuine Parts Co. (GPC)	60.7	C/D	
158	Wayfair Inc. (W)	61.1	C/D	
159	Kohls Corp. (KSS)	61.5	C/D	

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	(27.1%)	(0.1%)	22
Distance from 52-week high	(51.6%)	(24.1%)	16
EBIT to enterprise value	not computable	5.3%	
Free cash flow yield	not computable	4.2%	
Book value to price	not computable	0.36	
Sales to price	not computable	1.75	
Composite equity issuance, five years	not computable	(16.7%)	
Relative strength against the sector, log excess return	(0.29)	0.02	22

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-08-01	
Return on assets above zero	fail
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	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$95.3M
Operating cash flow, four quarters	\$39.1M
Months of runway	not finite
Days since last periodic filing	15 (10-K received Sep 24, 2026)
Median daily dollar volume, 63 sessions	\$5.1M

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	\$588.5M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
2	assets	us-gaap:Assets	\$479.4M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
3	net income	us-gaap:NetIncomeLoss	-\$12.6M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperations	\$39.1M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
5	assets	us-gaap:Assets	\$480.6M	2025-08-02	2026-09-24	10-K	0001628280-26-063365
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.3B	2026-08-01	2026-09-24	10-K	0001628280-26-063365
7	gross profit	us-gaap:GrossProfit	\$562.9M	2025-08-02	2026-09-24	10-K	0001628280-26-063365
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.3B	2025-08-02	2026-09-24	10-K	0001628280-26-063365
9	gross profit	us-gaap:GrossProfit	\$592.0M	2024-08-03	2026-09-24	10-K	0001628280-26-063365
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.3B	2024-08-03	2026-09-24	10-K	0001628280-26-063365
11	gross profit	us-gaap:GrossProfit	\$675.6M	2023-07-29	2025-09-25	10-K	0001628280-25-042782
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.6B	2023-07-29	2025-09-25	10-K	0001628280-25-042782
13	gross profit	us-gaap:GrossProfit	\$886.7M	2022-07-30	2024-09-25	10-K	0001576942-24-000099
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$2.0B	2022-07-30	2024-09-25	10-K	0001576942-24-000099
15	current assets	us-gaap:AssetsCurrent	\$348.3M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
16	current liabilities	us-gaap:LiabilitiesCurrent	\$235.7M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$508.6M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
18	operating income	us-gaap:OperatingIncomeLoss	-\$21.7M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
19	book equity	us-gaap:StockholdersEquity	\$196.1M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
20	liabilities	us-gaap:Liabilities	\$283.3M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
21	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$19.2M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivitiesContinuingOperations	\$35.6M	2025-08-02	2026-09-24	10-K	0001628280-26-063365
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$16.3M	2025-08-02	2026-09-24	10-K	0001628280-26-063365
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$28.2M	2024-08-03	2024-09-25	10-K	0001576942-24-000099
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$14.0M	2024-08-03	2026-09-24	10-K	0001628280-26-063365
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$73.2M	2023-07-29	2024-09-25	10-K	0001576942-24-000099
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$18.9M	2023-07-29	2025-09-25	10-K	0001628280-25-042782
28	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$22.6M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
29	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$11.5M	2026-08-01	2026-09-24	10-K	0001628280-26-063365
30	income tax	us-gaap:IncomeTaxExpenseBenefit	\$338,000	2026-08-01	2026-09-24	10-K	0001628280-26-063365
31	current assets	us-gaap:AssetsCurrent	\$373.9M	2025-08-02	2026-09-24	10-K	0001628280-26-063365
32	current liabilities	us-gaap:LiabilitiesCurrent	\$206.2M	2025-08-02	2026-09-24	10-K	0001628280-26-063365
33	assets	us-gaap:Assets	\$486.9M	2024-08-03	2025-09-25	10-K	0001628280-25-042782
34	assets	us-gaap:Assets	\$614.5M	2023-07-29	2024-09-25	10-K	0001576942-24-000099