

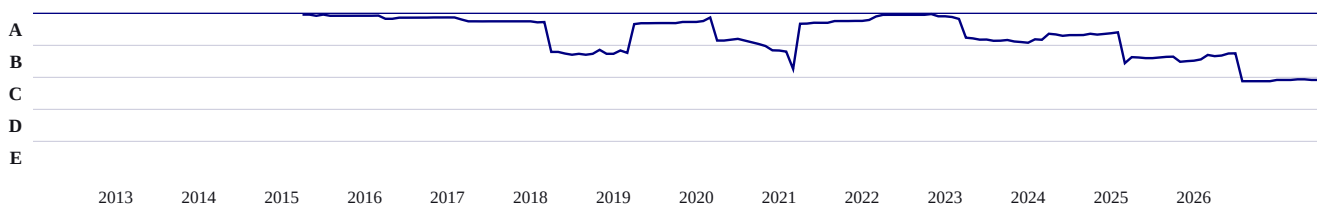
Shoe Station Group Inc. (SHOE)

Nasdaq; shops; SIC 5661, Retail-Shoe Stores; CIK 0000895447

[illegible]

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 Mar 26, 2026

Shoe Carnival, Inc. is one of the nation's largest omnichannel retailers of footwear and accessories for the family. Our goal is to be the leading family footwear retailer in the United States. We operate a retail-focused business model designed to deliver a differentiated footwear shopping experience featuring national name brands. Our omnichannel approach provides customers easy access to our broad assortment of branded footwear for athletics, daily activities, special events and work through the customer's

preferred delivery channel.

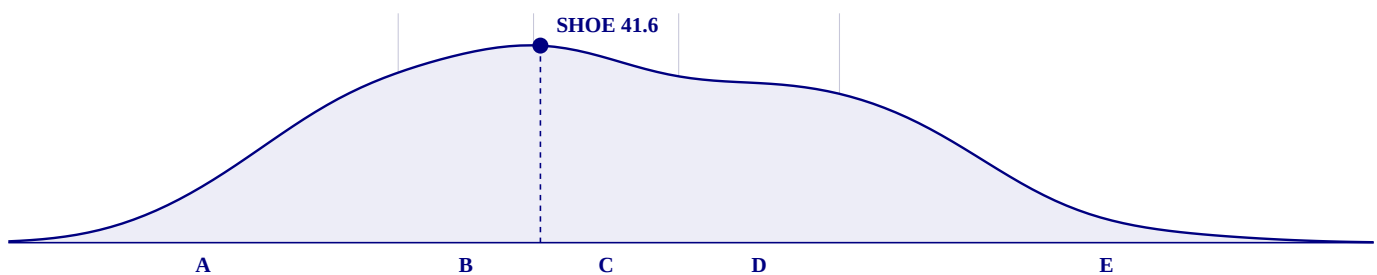
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 65.6						
Gross profitability		34.5%	42.6%	60.6	242	2026-01-31
Return on invested capital		not computable	10.9%			one or more required annual facts are missing
Accruals ratio		(1.6%)	(4.9%)	81.1	287	2026-01-31
Gross margin stability, five years		1.4 pts	1.2 pts	55.0	219	2026-01-31
Solvency, sleeve percentile 23.2						
Twelve-month failure probability		0.07%	0.04%	73.7	20	2026-08-01
Altman Z double-prime		6.37	1.92	10.1	208	2026-01-31
Net debt to EBITDA		not computable	1.84x			one or more required annual facts are missing
Interest coverage		178.98x	2.26x	0.0	64	2026-01-31
Current ratio		3.76x	1.37x	8.8	295	2026-01-31
Growth and financing, sleeve percentile 50.3						
Revenue growth, three-year compound		(3.5%)	1.5%	70.5	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
Reinvestment rate		85.4%	7.3%	17.9	152	2026-01-31
Asset growth, three years		6.7%	3.4%	33.9	272	2026-01-31
Net share issuance, one year		1.1%	(0.6%)	79.0	211	2026-03-20

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
103	YUM Brands Inc. (YUM)	39.7	B/C	
104	Dollar Tree, Inc. (DLTR)	40.1	B/C	
105	Floor & Decor Holdings, Inc. (FND)	40.5	B/C	
106	Sysco Corp. (SYY)	40.9	B/C	
107	Henry Schein Inc. (HSIC)	41.2	B/C	
108	Shoe Station Group Inc. (SHOE) <	41.6	B/C	
109	Wingstop Inc. (WING)	42.0	B/C	
110	Central Garden & PET Co. (CENT)	42.6	B/C	

111	Central Garden & PET Co. (CENTA)	42.6	B/C
112	H&R Block Inc. (HRB)	43.2	C
113	TJX Companies Inc. (TJX)	43.6	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	(31.6%)	(0.1%)	17
Distance from 52-week high	(38.6%)	(24.1%)	29
EBIT to enterprise value	not computable	5.3%	
Free cash flow yield	7.5%	4.2%	74
Book value to price	1.91	0.36	93
Sales to price	3.20	1.75	71
Composite equity issuance, five years	(14.5%)	(16.7%)	54
Relative strength against the sector, log excess return	(0.36)	0.02	17

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	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	pass
Asset turnover improved	fail
Cash, filings, liquidity	
Cash and equivalents	\$118.0M
Operating cash flow, four quarters	\$101.8M
Months of runway	not finite
Days since last periodic filing	29 (10-Q received Sep 10, 2026)
Median daily dollar volume, 63 sessions	\$12.9M

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	\$415.1M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
2	assets	us-gaap:Assets	\$1.2B	2026-01-31	2026-03-26	10-K	0001193125-26-126279
3	net income	us-gaap:NetIncomeLoss	\$52.3M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$71.3M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
5	assets	us-gaap:Assets	\$1.1B	2025-02-01	2026-03-26	10-K	0001193125-26-126279
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.1B	2026-01-31	2026-03-26	10-K	0001193125-26-126279
7	gross profit	us-gaap:GrossProfit	\$428.8M	2025-02-01	2026-03-26	10-K	0001193125-26-126279
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$1.2B	2025-02-01	2026-03-26	10-K	0001193125-26-126279
9	gross profit	us-gaap:GrossProfit	\$421.4M	2024-02-03	2026-03-26	10-K	0001193125-26-126279
10	revenue	us-gaap:Revenues	\$1.2B	2024-02-03	2026-03-26	10-K	0001193125-26-126279
11	gross profit	us-gaap:GrossProfit	\$468.2M	2023-01-28	2025-03-21	10-K	0000950170-25-043195
12	revenue	us-gaap:Revenues	\$1.3B	2023-01-28	2025-03-21	10-K	0000950170-25-043195
13	gross profit	us-gaap:GrossProfit	\$526.8M	2022-01-29	2024-03-22	10-K	0000950170-24-035337
14	revenue	us-gaap:Revenues	\$1.3B	2022-01-29	2024-03-22	10-K	0000950170-24-035337
15	current assets	us-gaap:AssetsCurrent	\$596.1M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
16	current liabilities	us-gaap:LiabilitiesCurrent	\$158.4M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$808.8M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
18	operating income	us-gaap:OperatingIncomeLoss	\$66.8M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
19	book equity	us-gaap:StockholdersEquity	\$689.7M	2026-01-31	2026-03-26	10-K	0001193125-26-126279

20	liabilities	us-gaap:Liabilities	\$512.1M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
21	interest expense	us-gaap:InterestExpense	\$373,000	2026-01-31	2026-03-26	10-K	0001193125-26-126279
22	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$44.7M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
23	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$102.6M	2025-02-01	2026-03-26	10-K	0001193125-26-126279
24	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$33.2M	2025-02-01	2026-03-26	10-K	0001193125-26-126279
25	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$122.8M	2024-02-03	2026-03-26	10-K	0001193125-26-126279
26	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$56.3M	2024-02-03	2026-03-26	10-K	0001193125-26-126279
27	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$50.4M	2023-01-28	2025-03-21	10-K	0000950170-25-043195
28	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$77.3M	2023-01-28	2025-03-21	10-K	0000950170-25-043195
29	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$34.3M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
30	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$76.4M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
31	income tax	us-gaap:IncomeTaxExpenseBenefit	\$18.1M	2026-01-31	2026-03-26	10-K	0001193125-26-126279
32	current assets	us-gaap:AssetsCurrent	\$536.1M	2025-02-01	2026-03-26	10-K	0001193125-26-126279
33	current liabilities	us-gaap:LiabilitiesCurrent	\$130.4M	2025-02-01	2026-03-26	10-K	0001193125-26-126279
34	assets	us-gaap:Assets	\$1.0B	2024-02-03	2025-03-21	10-K	0000950170-25-043195
35	assets	us-gaap:Assets	\$989.8M	2023-01-28	2024-03-22	10-K	0000950170-24-035337
36	shares outstanding	dei:EntityCommonStockSharesOutstanding	27,469,571	2026-03-20	2026-03-26	10-K	0001193125-26-126279
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	27,174,403	2025-03-17	2025-03-21	10-K	0000950170-25-043195