

Tilly'S, Inc. (TLYS)

NYSE; shops; SIC 5600, Retail-Apparel & Accessory Stores; CIK 0001524025

[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 Apr 9, 2026

Tillys is a leading destination specialty retailer of casual apparel, footwear, accessories, and hardgoods for young men, young women, boys and girls with an extensive assortment of iconic global, emerging, and proprietary brands rooted in an active, outdoor and social lifestyle. Tillys is headquartered in Irvine, California and operated 223 stores in 33 states as of January 31, 2026. Our stores are located in malls, lifestyle centers, "power" centers, community centers, outlet centers, and street-front locations.

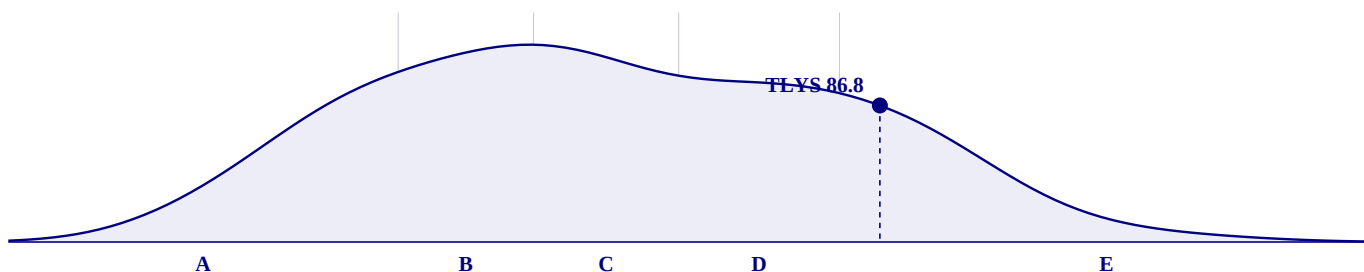
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 51.8						
Gross profitability		52.9%	42.6%	31.5	242	2026-01-31
Return on invested capital		not computable	10.9%			one or more required annual facts are missing
Accruals ratio		(6.6%)	(4.9%)	39.9	287	2026-01-31
Gross margin stability, five years		3.4 pts	1.2 pts	83.9	219	2026-01-31
Solvency, sleeve percentile 63.3						
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		(0.45)	1.92	70.5	208	2026-01-31
Net debt to EBITDA		not computable	1.84x			one or more required annual facts are missing
Interest coverage		not computable	2.26x			interest expense must exceed \$100,000
Current ratio		1.25x	1.37x	56.1	295	2026-01-31
Growth and financing, sleeve percentile 84.9						
Revenue growth, three-year compound		(6.3%)	1.5%	79.9	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		not computable	7.3%			NOPAT must exceed \$100,000
Asset growth, three years		(13.2%)	3.4%	90.0	272	2026-01-31
Net share issuance, one year		not computable	(0.6%)			raw and split-adjusted prices do not align at 2015-03-27

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
219	ThredUp Inc. (TDUP)	84.8	E	
220	Citi Trends Inc. (CTRN)	85.2	E	
221	Restaurant Brands International Inc. (QSR)	85.6	E	
222	Sportsman'S Warehouse Holdings, Inc. (SPWH)	86.0	E	
223	Petmed Express Inc. (PETS)	86.4	E	late filer
224	Tilly'S, Inc. (TLYS) <	86.8	E	
225	Bark, Inc. (BARK)	87.2	E	fortress
				balance sheet
226	Greenlane Holdings, Inc. (GNLN)	87.5	E	short runway
227	Greenwave Technology Solutions, Inc. (GWAV)	87.9	E	dilution, late
				filer
228	Dine Brands Global, Inc. (DIN)	88.3	E	
229	Suburban Propane Partners L.P. (SPH)	88.7	E	

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	90.3%	(0.1%)	96
Distance from 52-week high	(18.5%)	(24.1%)	57
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	0.67	0.02	96

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-01-31	
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	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$52.3M
Operating cash flow, four quarters	\$16.7M
Months of runway	not finite
Days since last periodic filing	36 (10-Q received Sep 3, 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	\$164.5M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
2	assets	us-gaap:Assets	\$310.8M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
3	net income	us-gaap:NetIncomeLoss	-\$17.5M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$4.1M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
5	assets	us-gaap:Assets	\$342.5M	2025-02-01	2026-04-09	10-K	0001628280-26-024440
6	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$553.6M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
7	gross profit	us-gaap:GrossProfit	\$149.7M	2025-02-01	2026-04-09	10-K	0001628280-26-024440
8	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$569.5M	2025-02-01	2026-04-09	10-K	0001628280-26-024440
9	gross profit	us-gaap:GrossProfit	\$165.7M	2024-02-03	2026-04-09	10-K	0001628280-26-024440
10	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$623.1M	2024-02-03	2026-04-09	10-K	0001628280-26-024440
11	gross profit	us-gaap:GrossProfit	\$202.7M	2023-01-28	2025-04-10	10-K	0001628280-25-017352
12	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$672.3M	2023-01-28	2025-04-10	10-K	0001628280-25-017352
13	gross profit	us-gaap:GrossProfit	\$276.7M	2022-01-29	2024-04-11	10-K	0001628280-24-015839
14	revenue	us-gaap:RevenueFromContractWithCustomerIncludingAssessedTax	\$775.7M	2022-01-29	2024-04-11	10-K	0001628280-24-015839
15	current assets	us-gaap:AssetsCurrent	\$125.2M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
16	current liabilities	us-gaap:LiabilitiesCurrent	\$100.1M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$91.6M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
18	operating income	us-gaap:OperatingIncomeLoss	-\$19.3M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
19	book equity	us-gaap:StockholdersEquity	\$85.1M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
20	liabilities	us-gaap:Liabilities	\$225.6M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
21	operating income	us-gaap:OperatingIncomeLoss	\$31.4M	2013-02-02	2015-04-01	10-K	0001193125-15-116304
22	interest expense	us-gaap:InterestExpense	\$91,000	2013-02-02	2013-04-03	10-K	0001193125-13-139904
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$4.7M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$42.0M	2025-02-01	2026-04-09	10-K	0001628280-26-024440
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$8.2M	2025-02-01	2026-04-09	10-K	0001628280-26-024440
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$6.7M	2024-02-03	2026-04-09	10-K	0001628280-26-024440
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$14.0M	2024-02-03	2026-04-09	10-K	0001628280-26-024440
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$1.4M	2023-01-28	2025-04-10	10-K	0001628280-25-017352
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$15.1M	2023-01-28	2025-04-10	10-K	0001628280-25-017352
30	depreciation amortization	us-gaap:Depreciation	\$10.6M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$17.6M	2026-01-31	2026-04-09	10-K	0001628280-26-024440
32	income tax	us-gaap:IncomeTaxExpenseBenefit	-\$137,000	2026-01-31	2026-04-09	10-K	0001628280-26-024440
33	current assets	us-gaap:AssetsCurrent	\$131.0M	2025-02-01	2026-04-09	10-K	0001628280-26-024440
34	current liabilities	us-gaap:LiabilitiesCurrent	\$99.4M	2025-02-01	2026-04-09	10-K	0001628280-26-024440
35	assets	us-gaap:Assets	\$429.5M	2024-02-03	2025-04-10	10-K	0001628280-25-017352
36	assets	us-gaap:Assets	\$475.8M	2023-01-28	2024-04-11	10-K	0001628280-24-015839
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	11,976,582	2015-03-27	2015-04-01	10-K	0001193125-15-116304
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	11,370,639	2014-03-22	2014-04-01	10-K	0001193125-14-126179