

Vince Holding Corp. (VNCE)

Nasdaq; shops; SIC 5600, Retail-Apparel & Accessory Stores; CIK 0001579157

Vince Holding Corp. VNCE; shops	
Grade	D A B C D E fourth fifth of 258 graded peers percentile 66.5; sampling error 2.9 points; lower is stronger
Rank	172 of 258
Profitability	D percentile 67.2
Solvency	C percentile 45.9
Growth and financing	C percentile 55.2
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 \$225.0M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress, fortress balance sheet
Inputs computable	9 of 14
Graded from	filings received through Apr 16, 2026 176 days before the rescans; latest periodic filing 10-Q received Sep 11, 2026
Last close	\$11.47 2026-10-08; market equity \$148.5M
Price used in grade	None

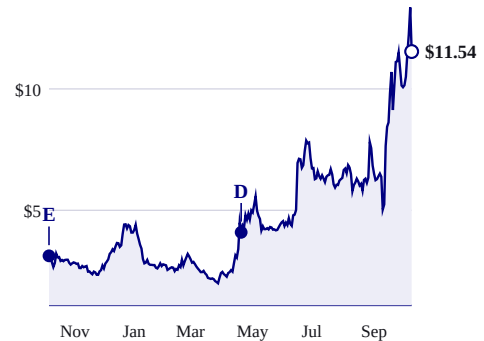


D, the sloth

fourth fifth of its sector; letters are fifths of the 258 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: E from May 21, 2022, D from Apr 21, 2026

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 16, 2026

We are a global retail company that operates the Vince brand women's and men's ready to wear business. Previously, the Company also owned and operated the Rebecca Taylor and Parker brands until the sale of the respective intellectual property was completed, as discussed below under "Recent Developments". We serve our customers through a variety of channels that reinforce the brand images. We have a select number of wholesale partners who account for a significant portion of our net sales. In fiscal 2025 and fiscal

2024, sales to one wholesale partner, Nordstrom Inc., accounted for more than ten percent of the Company's net sales.

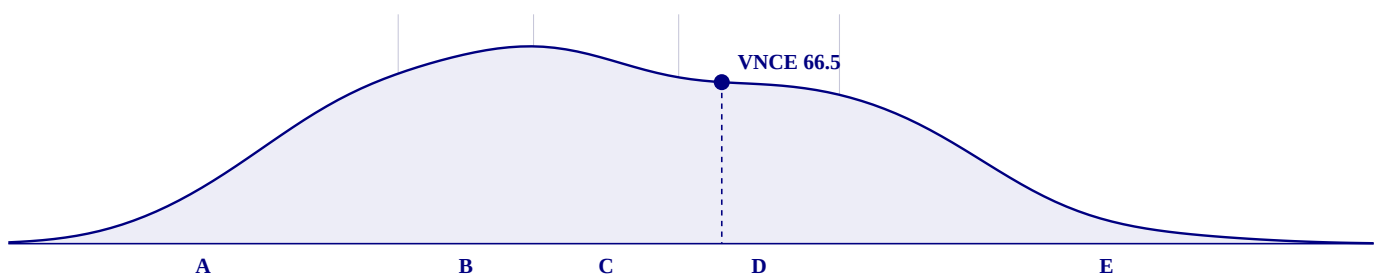
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 67.2						
Gross profitability		66.3%	42.6%	20.3	242	2026-01-31
Return on invested capital		not computable	10.9%			one or more required annual facts are missing
Accruals ratio		1.5%	(4.9%)	92.7	287	2026-01-31
Gross margin stability, five years		4.0 pts	1.2 pts	88.5	219	2026-01-31
Solvency, sleeve percentile 45.9						
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		not computable	1.92			one or more required annual facts are missing
Net debt to EBITDA		not computable	1.84x			one or more required annual facts are missing
Interest coverage		2.70x	2.26x	47.6	64	2026-01-31
Current ratio		1.49x	1.37x	44.2	295	2026-01-31
Growth and financing, sleeve percentile 55.2						
Revenue growth, three-year compound		(5.7%)	1.5%	77.6	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		190.3%	7.3%	2.6	152	2026-01-31
Asset growth, three years		(9.5%)	3.4%	85.6	272	2026-01-31
Net share issuance, one year		0.03%	(0.6%)	54.8	211	2026-03-31

Among 258 peers

shops; letters are fifths of this list



Rank	Company	Percentile	Letter	Warnings
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167	NU Skin Enterprises, Inc. (NUS)	64.6	D	distress, fortress balance sheet
168	A.K.A. Brands Holding Corp. (AKA)	65.0	D	
169	O Reilly Automotive Inc. (ORLY)	65.4	D	
170	AerSale Corp. (ASLE)	65.8	D	short runway, fortress balance sheet
171	World Kinect Corp. (WKC)	66.1	D	
172	Vince Holding Corp. (VNCE) <	66.5	D	
173	Seaboard Corp. (SEB)	66.9	D	
174	Aspen Aerogels Inc. (ASPN)	67.3	D	fortress balance sheet
175	Star Group, L.P. (SGU)	67.7	D	
176	Arko Corp. (ARKO)	68.1	D	
177	Bloomin' Brands, Inc. (BLMN)	68.5	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	104.8%	(0.1%)	97
Distance from 52-week high	(13.6%)	(24.1%)	70
EBIT to enterprise value	1.7%	5.3%	21
Free cash flow yield	(0.9%)	4.2%	19
Book value to price	0.39	0.36	52
Sales to price	2.01	1.75	57
Composite equity issuance, five years	9.2%	(16.7%)	88
Relative strength against the sector, log excess return	0.74	0.02	97

Diagnostics

not in the grade

Measure	Value
Piotroski F-score 6 of 9, period end 2026-01-31	
Return on assets above zero	pass
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	fail
Long-term leverage fell	fail
Current ratio improved	pass
No new shares issued	fail
Gross margin improved	pass
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$1.0M
Operating cash flow, four quarters	\$19.8M
Months of runway	not finite
Days since last periodic filing	28 (10-Q received Sep 11, 2026)
Median daily dollar volume, 63 sessions	\$633,195

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	\$149.1M	2026-01-31	2026-04-16	10-K	0001193125-26-158986
2	assets	us-gaap:Assets	\$225.0M	2026-01-31	2026-04-16	10-K	0001193125-26-158986
3	net income	us-gaap:NetIncomeLoss	\$6.4M	2026-01-31	2026-04-16	10-K	0001193125-26-158986
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$3.0M	2026-01-31	2026-04-16	10-K	0001193125-26-158986

5	assets	us-gaap:Assets	\$222.7M	2025-02-01	2026-04-16	10-K	0001193125-26-158986
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$300.0M	2026-01-31	2026-04-16	10-K	0001193125-26-158986
7	gross profit	us-gaap:GrossProfit	\$145.2M	2025-02-01	2026-04-16	10-K	0001193125-26-158986
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$293.5M	2025-02-01	2026-04-16	10-K	0001193125-26-158986
9	gross profit	us-gaap:GrossProfit	\$133.3M	2024-02-03	2025-05-02	10-K	0000950170-25-062847
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$292.9M	2024-02-03	2025-05-02	10-K	0000950170-25-062847
11	gross profit	us-gaap:GrossProfit	\$138.0M	2023-01-28	2024-05-02	10-K	0000950170-24-052254
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$357.4M	2023-01-28	2024-05-02	10-K	0000950170-24-052254
13	gross profit	us-gaap:GrossProfit	\$146.6M	2022-01-29	2023-04-28	10-K	0000950170-23-015755
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$322.7M	2022-01-29	2023-04-28	10-K	0000950170-23-015755
15	operating income	us-gaap:OperatingIncomeLoss	\$9.2M	2026-01-31	2026-04-16	10-K	0001193125-26-158986
16	interest expense	us-gaap:InterestExpense	\$3.4M	2026-01-31	2026-04-16	10-K	0001193125-26-158986
17	current assets	us-gaap:AssetsCurrent	\$101.0M	2026-01-31	2026-04-16	10-K	0001193125-26-158986
18	current liabilities	us-gaap:LiabilitiesCurrent	\$67.9M	2026-01-31	2026-04-16	10-K	0001193125-26-158986
19	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$4.3M	2026-01-31	2026-04-16	10-K	0001193125-26-158986
20	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$22.1M	2025-02-01	2026-04-16	10-K	0001193125-26-158986
21	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$4.2M	2025-02-01	2026-04-16	10-K	0001193125-26-158986
22	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.6M	2024-02-03	2025-05-02	10-K	0000950170-25-062847
23	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$1.5M	2024-02-03	2025-05-02	10-K	0000950170-25-062847
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	-\$19.3M	2023-01-28	2024-05-02	10-K	0000950170-24-052254
25	capital expenditure	us-gaap:PaymentsToAcquireProductiveAssets	\$2.8M	2023-01-28	2024-05-02	10-K	0000950170-24-052254
26	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$2.9M	2026-01-31	2026-04-16	10-K	0001193125-26-158986
27	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesMinorityInterestAndIncomeLossFromEquityMethodInvestments	\$7.4M	2025-02-01	2026-04-16	10-K	0001193125-26-158986
28	income tax	us-gaap:IncomeTaxExpenseBenefit	\$2.6M	2026-01-31	2026-04-16	10-K	0001193125-26-158986
29	current assets	us-gaap:AssetsCurrent	\$96.6M	2025-02-01	2026-04-16	10-K	0001193125-26-158986
30	current liabilities	us-gaap:LiabilitiesCurrent	\$73.5M	2025-02-01	2026-04-16	10-K	0001193125-26-158986
31	assets	us-gaap:Assets	\$225.1M	2024-02-03	2025-05-02	10-K	0000950170-25-062847
32	assets	us-gaap:Assets	\$303.3M	2023-01-28	2024-05-02	10-K	0000950170-24-052254
33	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,847,294	2026-03-31	2026-04-16	10-K	0001193125-26-158986
34	shares outstanding	dei:EntityCommonStockSharesOutstanding	12,843,067	2025-04-21	2025-05-02	10-K	0000950170-25-062847