

Williams Sonoma Inc. (WSM)

NYSE; shops; SIC 5700, Retail-Home Furniture, Furnishings & Equipment Stores; CIK 0000719955

Williams Sonoma Inc. WSM; shops	
Grade	B A B C D E second fifth of 258 graded peers percentile 29.2; sampling error 2.9 points; lower is stronger
Rank	76 of 258
Profitability	C percentile 46.4
Solvency	B percentile 34.7
Growth and financing	C percentile 45.7
Reliability	0.94 AUC filers with over \$2.67B assets; 95% interval 0.88 to 0.97; 61 events, 2020 to 2025
Peer failure rate	0.52% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	over \$2.67B assets total assets \$5.4B
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active; fortress balance sheet not computable: distress
Inputs computable	10 of 14
Graded from	filings received through Mar 26, 2026 197 days before the rescans; latest periodic filing 10-Q received Aug 28, 2026
Last close	\$238.79 2026-10-08; market equity \$28.1B
Price used in grade	None



B, the elk
second fifth of its sector; letters are fifths of the 258 graded peers

Share price, twelve months to the rescans

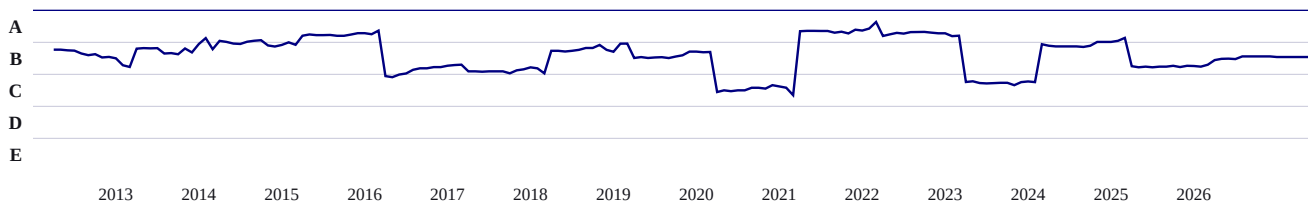
split-adjusted close; the letter is fixed at the rescans that set it



Rescans on file: A from Apr 21, 2021, C from Apr 21, 2023, A/B from Mar 21, 2024, B 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 Mar 26, 2026

Williams-Sonoma, Inc., (the "Company", "we", or "us") incorporated in 1973, is an omni-channel specialty retailer of high-quality products for the home. In 1956, our founder, Chuck Williams, turned a passion for cooking and eating with friends into a small business with a big idea. He opened a store in Sonoma, California to sell the French cookware that intrigued him while visiting Europe but that could not be found in America. Chuck's business, which set a standard for customer service, took off and helped fuel

a revolution in American cooking and entertaining that continues today.

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 46.4						
Gross profitability		66.6%	42.6%	19.5	242	2026-02-01
Return on invested capital		not computable	10.9%			latest aligned inputs end 2015-02-01; latest annual assets end 2026-02-01
Accruals ratio		(4.2%)	(4.9%)	60.1	287	2026-02-01
Gross margin stability, five years		1.7 pts	1.2 pts	59.6	219	2026-02-01
Solvency, sleeve percentile 34.7						
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		4.24	1.92	20.8	208	2026-02-01
Net debt to EBITDA		not computable	1.84x			latest aligned inputs end 2015-02-01; latest annual assets end 2026-02-01
Interest coverage		not computable	2.26x			one or more required annual facts are missing
Current ratio		1.39x	1.37x	48.6	295	2026-02-01
Growth and financing, sleeve percentile 45.7						
Revenue growth, three-year compound		(3.5%)	1.5%	70.1	269	2026-02-01
Free cash flow growth, three-year compound		14.7%	5.6%	30.8	147	2026-02-01
Reinvestment rate		(5.2%)	7.3%	67.5	152	2026-02-01
Asset growth, three years		5.1%	3.4%	38.7	272	2026-02-01
Net share issuance, one year		(3.6%)	(0.6%)	21.4	211	2026-03-22

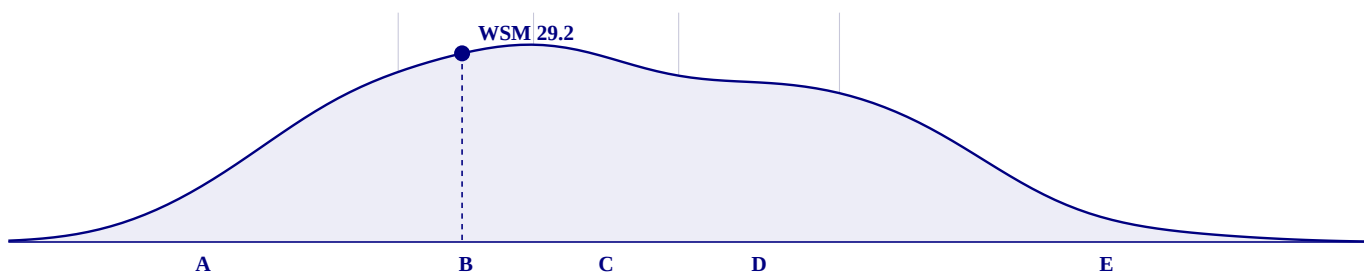
Warnings

1 of 7 checks triggered; none of them enters the letter

Check	Measured
Fortress balance sheet	cash minus debt is 222,927,000 USD; Altman Z is not used

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
71	EVI Industries, Inc. (EVI)	27.2	B	
72	Hawkins Inc. (HWKN)	27.6	B	
73	Texas Roadhouse, Inc. (TXRH)	28.0	B	fortress
				balance sheet
74	Nathans Famous, Inc. (NATH)	28.4	B	
75	Performance Food Group Co. (PFGC)	28.8	B	
76	Williams Sonoma Inc. (WSM) <	29.2	B	fortress
				balance sheet
77	Macy's, Inc. (M)	29.6	B	
78	Ingles Markets Inc. (IMKTA)	30.0	B	late filer
79	GAP Inc. (GAP)	30.4	B	fortress
				balance sheet
80	Chefs' Warehouse, Inc. (CHEF)	30.7	B	
81	Natural Grocers by Vitamin Cottage, Inc. (NGVC)	31.1	B	

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	18.4%	(0.1%)	67
Distance from 52-week high	(5.1%)	(24.1%)	92
EBIT to enterprise value	5.2%	5.3%	48
Free cash flow yield	3.7%	4.2%	45
Book value to price	0.08	0.36	21
Sales to price	0.28	1.75	5
Composite equity issuance, five years	(35.9%)	(16.7%)	15
Relative strength against the sector, log excess return	0.19	0.02	67

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-02-01	
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	pass
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$1.0B
Operating cash flow, four quarters	\$1.6B
Months of runway	not finite

Days since last periodic filing

42 (10-Q received Aug 28, 2026)

Median daily dollar volume, 63 sessions

\$231.6M

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	\$3.6B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
2	assets	us-gaap:Assets	\$5.4B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
3	operating income	us-gaap:OperatingIncomeLoss	\$502.3M	2015-02-01	2017-03-30	10-K	0001193125-17-104341
4	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesMinorityInterestAndIncomeLossFromEquityMethodInvestments	\$502.3M	2015-02-01	2017-03-30	10-K	0001193125-16-525847
5	income tax	us-gaap:IncomeTaxExpenseBenefit	\$193.3M	2015-02-01	2017-03-30	10-K	0001193125-17-104341
6	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$0	2015-02-01	2015-04-02	10-K	0001193125-15-118009
7	book equity	us-gaap:StockholdersEquity	\$1.2B	2015-02-01	2018-03-29	10-K	0001193125-18-102232
8	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$222.9M	2015-02-01	2018-03-29	10-K	0001193125-18-102232
9	total debt	us-gaap:LongTermDebtAndCapitalLeaseObligations	\$2.0M	2014-02-02	2015-04-02	10-K	0001193125-15-118009
10	book equity	us-gaap:StockholdersEquity	\$1.3B	2014-02-02	2017-03-30	10-K	0001193125-17-104341
11	cash	us-gaap:CashAndCashEquivalentsAtCarryingValue	\$330.1M	2014-02-02	2017-03-30	10-K	0001193125-17-104341
12	net income	us-gaap:NetIncomeLoss	\$1.1B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
13	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.3B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
14	assets	us-gaap:Assets	\$5.3B	2025-02-02	2026-03-26	10-K	0000719955-26-000059
15	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$7.8B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
16	gross profit	us-gaap:GrossProfit	\$3.6B	2025-02-02	2026-03-26	10-K	0000719955-26-000059
17	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$7.7B	2025-02-02	2026-03-26	10-K	0000719955-26-000059
18	gross profit	us-gaap:GrossProfit	\$3.3B	2024-01-28	2026-03-26	10-K	0000719955-26-000059
19	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$7.8B	2024-01-28	2026-03-26	10-K	0000719955-26-000059
20	gross profit	us-gaap:GrossProfit	\$3.7B	2023-01-29	2025-03-27	10-K	0001628280-25-015037
21	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$8.7B	2023-01-29	2025-03-27	10-K	0001628280-25-015037
22	gross profit	us-gaap:GrossProfit	\$3.6B	2022-01-30	2024-03-20	10-K	0001628280-24-012221
23	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$8.2B	2022-01-30	2024-03-20	10-K	0001628280-24-012221
24	current assets	us-gaap:AssetsCurrent	\$2.7B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
25	current liabilities	us-gaap:LiabilitiesCurrent	\$2.0B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
26	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	\$1.5B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
27	operating income	us-gaap:OperatingIncomeLoss	\$1.4B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
28	book equity	us-gaap:StockholdersEquity	\$2.1B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
29	liabilities	us-gaap:Liabilities	\$3.3B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
30	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$162.3M	2015-02-01	2017-03-30	10-K	0001193125-17-104341
31	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$259.4M	2026-02-01	2026-03-26	10-K	0000719955-26-000059
32	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.4B	2025-02-02	2026-03-26	10-K	0000719955-26-000059
33	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$221.6M	2025-02-02	2026-03-26	10-K	0000719955-26-000059
34	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.7B	2024-01-28	2026-03-26	10-K	0000719955-26-000059
35	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$188.5M	2024-01-28	2026-03-26	10-K	0000719955-26-000059
36	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.1B	2023-01-29	2025-03-27	10-K	0001628280-25-015037
37	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$354.1M	2023-01-29	2025-03-27	10-K	0001628280-25-015037
38	depreciation amortization	us-gaap:DepreciationDepletionAndAmortization	\$231.4M	2026-02-01	2026-03-26	10-K	0000719955-26-000059
39	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItemsAndIncomeLossFromEquityMethodInvestments	\$1.5B	2026-02-01	2026-03-26	10-K	0000719955-26-000059
40	income tax	us-gaap:IncomeTaxExpenseBenefit	\$364.1M	2026-02-01	2026-03-26	10-K	0000719955-26-000059
41	current assets	us-gaap:AssetsCurrent	\$2.8B	2025-02-02	2026-03-26	10-K	0000719955-26-000059
42	current liabilities	us-gaap:LiabilitiesCurrent	\$1.9B	2025-02-02	2026-03-26	10-K	0000719955-26-000059
43	assets	us-gaap:Assets	\$5.3B	2024-01-28	2025-03-27	10-K	0001628280-25-015037
44	assets	us-gaap:Assets	\$4.7B	2023-01-29	2024-03-20	10-K	0001628280-24-012221
45	shares outstanding	dei:EntityCommonStockSharesOutstanding	119,016,049	2026-03-22	2026-03-26	10-K	0000719955-26-000059
46	shares outstanding	dei:EntityCommonStockSharesOutstanding	123,509,495	2025-03-23	2025-03-27	10-K	0001628280-25-015037