



# FY26 Q4 GENESCO

Summary Results • March 6, 2026



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# Safe Harbor Statement

**This presentation contains forward-looking statements**, including those regarding future sales, earnings, operating income, gross margins, expenses, capital expenditures, depreciation and amortization, tax rates, store openings and closures, cost reductions, and all other statements not addressing solely historical facts or present conditions. Forward-looking statements are usually identified by or are associated with such words as “intend,” “expect,” “feel,” “should,” “believe,” “anticipate,” “optimistic,” “confident” and similar terminology. Actual results could vary materially from the expectations reflected in these statements. A number of factors could cause differences. These include adjustments to projections reflected in forward-looking statements, including those resulting from weakness in store, e-commerce and shopping mall traffic, the imposition of tariffs (including the timing and amount thereof) on products imported by the Company or its vendors as well as the ability and costs to move production of products in response to tariffs; our ability to pass on price increases to our customers; restrictions on operations imposed by government entities and/or landlords, changes in public safety and health requirements, and limitations on the Company’s ability to adequately staff and operate stores. Differences from expectations could also result from store closures and effects on the business as a result of the level of consumer spending on our merchandise and interest in our brands and in general; the level and timing of promotional activity necessary to maintain inventories at appropriate levels; the Company’s ability to obtain from suppliers products that are in-demand on a timely basis and effectively manage disruptions in product supply or distribution, including disruptions as a result of pandemics or geopolitical events, including shipping disruptions near crucial trade routes; unfavorable trends in fuel costs, foreign exchange rates, foreign labor and material costs, and other factors affecting the cost of products; a disruption in shipping or increase in cost of our imported products, and other factors affecting the cost of products; our dependence on third-party vendors and licensors for the products we sell; store closures and effects on the business as a result of civil disturbances; our ability to renew our license agreements; impacts of the Russia-Ukraine war, the conflict in Israel and the surrounding areas; and other sources of market weakness in the locations in which we operate; the effectiveness of the Company’s omnichannel initiatives; costs associated with changes in minimum wage and overtime requirements; wage pressures; labor shortages; the effects of inflation; the evolving regulatory landscape related to our use of social media; weakness in the consumer economy and retail industry; competition and fashion trends in the Company’s markets, including trends with respect to the popularity of casual and dress footwear; any failure to increase sales at our existing stores, given our high fixed expense cost structure, and in our e-commerce businesses; risks related to the potential for terrorist events; risks related to public health and safety events; changes in buying patterns by significant wholesale customers; changes in consumer preferences; our ability to continue to complete and integrate acquisitions; our ability to expand our business and diversify our product base; impairment of goodwill in connection with acquisitions; payment related risks that could increase our operating cost, expose us to fraud or theft, subject us to potential liability and disrupt our business; retained liabilities associated with divestitures of businesses including potential liabilities under leases as the prior tenant or as a guarantor of certain leases; and changes in the timing of holidays or in the onset of seasonal weather affecting period-to-period sales comparisons. Additional factors that could cause differences from expectations include the ability to secure allocations to refine product assortments to address consumer demand; the ability to renew leases in existing stores and control or lower occupancy costs, to open or close stores in the number and on the planned schedule, and to conduct required remodeling or refurbishment on schedule and at expected expense levels; the Company’s ability to realize anticipated cost savings, including rent savings and savings in connection with the restructuring of the Company’s information technology functions; the amount and timing of share repurchases; our ability to make our occupancy costs more variable; the Company’s ability to achieve expected digital gains and gain market share; deterioration in the performance of individual businesses or of the Company’s market value relative to its book value, resulting in impairments of fixed assets, operating lease right of use assets or intangible assets or other adverse financial consequences and the timing and amount of such impairments or other consequences; unexpected changes to the market for the Company’s shares or for the retail sector in general; costs and reputational harm as a result of disruptions in the Company’s business or information technology systems, as a result of security breaches and incidents or by potential problems associated with the implementation of new or upgraded systems or as the result of the restructuring of the Company’s information technology functions; changes in tax laws and tax rates and the Company’s ability to realize any anticipated tax benefits in both the amount and timeframe anticipated; and the cost and outcome of litigation, investigations, environmental matters and other disputes involving the Company. Additional factors are cited in the “Risk Factors,” “Legal Proceedings” and “Management’s Discussion and Analysis of Financial Condition and Results of Operations” sections of, and elsewhere in, the Company’s SEC filings, copies of which may be obtained from the SEC website, [www.sec.gov](http://www.sec.gov), or by contacting the investor relations department of Genesco via the Company’s website, [www.genesco.com](http://www.genesco.com). Many of the factors that will determine the outcome of the subject matter of this release are beyond Genesco’s ability to control or predict. Genesco undertakes no obligation to release publicly the results of any revisions to these forward-looking statements that may be made to reflect events or circumstances after the date hereof or to reflect the occurrence of unanticipated events. Forward-looking statements reflect the expectations of the Company at the time they are made. The Company disclaims any obligation to update such statements.



# Non-GAAP • Financial Measures

We report consolidated financial results in accordance with generally accepted accounting principles (“GAAP”). However, to supplement these consolidated financial results our presentation includes certain non-GAAP financial measures such as earnings (loss) and earnings (loss) per share and operating income (loss). This supplemental information should not be considered in isolation as a substitute for related GAAP measures. We believe that disclosure of earnings (loss) and earnings (loss) per share from continuing operations and operating income (loss) adjusted for the items not reflected in the previously announced expectations will be meaningful to investors, especially in light of the impact of such items on the results. Reconciliations of the non-GAAP supplemental information to the comparable GAAP measures can be found in the Appendix.



# Q4 FY26 Financial Snapshot

## SALES

**\$800M**

Up 7% vs Q4 FY2025 with e-commerce 31% of retail sales

## COMPS

**+9%**

Stores	E-commerce	Journeys
<b>+9%</b>	<b>+8%</b>	<b>+12%</b>

## GAAP GROSS MARGIN

**45.9%**

Down 100 bps vs Q4 FY2025

## Non-GAAP GROSS MARGIN

**46.0%**

Down 90 bps vs Q4 FY2025

## SG&A

**\$312M**

39.1% of sales and 140 bps leverage vs Q4 FY2025

## GAAP OI

**\$51.3M**

## Non-GAAP OI

**\$55.9M**

## GAAP EPS

**\$4.43**

## Non-GAAP EPS

**\$3.74**

# 12mos FY26 Financial Snapshot

## SALES

**\$2.4B**

Up 5% vs FY2025 with e-commerce 25% of retail sales

## COMPS

**+6%**

Stores	E-commerce	Journeys
<b>+6%</b>	<b>+4%</b>	<b>+9%</b>

## GROSS MARGIN

**46.3%**

Down 90 bps vs FY2025

## SG&A

**\$1.1B**

45.2% of sales and 120 bps leverage vs FY2025

## GAAP OI

**\$17.3M**

## Non-GAAP OI

**\$26.6M**

## GAAP EPS

**\$1.25**

## Non-GAAP EPS

**\$1.45**

# Q4 & FY26 • Highlights

## Q4

- Strongest **quarterly comp performance** of the year
- The **sixth consecutive quarter of positive comps**, with overall comp growth of 9% and Journeys comps of 12% for the quarter on top of double-digit comps last year
- Stores continued **positive growth with comps up 9%** for the quarter and e-commerce comps up 8%
- Selling and administrative expenses **leveraged 140 basis points** for the quarter
- Journeys delivered **240 basis points of operating income** expansion in the fourth quarter
- Total **operating income increased 11% and adjusted operating income increased 17%** for the quarter
- Adjusted **EPS growth of 15% to \$3.74** for the quarter

## FY26

- We delivered **positive comps in every quarter of the year**
- Overall **comp growth of 6%** and Journeys comps of 9% for the year
- Stores had **positive growth with comps up 6%** for the year and e-commerce comps up 4%
- Selling and administrative expenses **leveraged 120 basis points** for the year
- Journeys delivered **210 basis points of operating income** expansion for the year
- Total **operating income increased 24% and adjusted operating income increased 41%** for the year
- Adjusted **EPS growth of 54% to \$1.45** for the year
- Ended the year in a **healthy inventory position**, only up 2% year over year

# Footwear First Strategy

**We unite footwear-led  
brands that inspire  
consumers with  
elevated, on-trend style**



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# What We Do

**Footwear is what we know,  
and our brands are where we win.**

By combining winning assortments, distinctive brands, and exceptional customer experiences, **we attract more customers and create loyalty.**

**Our people** are our advantage. We have the teams, the skills, and the drive for success.



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# Growth Drivers Powered by Performance

1

## Curate & Create Winning Product

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*We focus on having the right footwear, in the right styles, all the time.*

2

## Elevate Distinct Brands

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*We activate brands with unique stories, product, and experiences to be top of mind for our customers.*

3

## Create Exceptional Experiences

---

*We offer compelling physical and digital environments that drive customers to choose us.*

4

## Build Amazing Teams

---

*We have the capabilities to perform, improve, and deliver results that move us forward.*



# What is Journeys' Strategic Growth Plan?



Multi-Brand, multi-category offering to inspire the journey from one you to the next

# Unique Consumer Positioning



There is white space in the market for Journeys to expand its reach amongst teens with a sharp focus on females



STYLE-LED  
FOOTWEAR  
DESTINATION

The **Premium Footwear** Experts Who Help You  
Create Your Identity

# Target Consumer Segments



Our **three consumer segments** reach a wider teen audience with a more intentional focus

@DYNAMICEXPLORER



Many different styles  
What's new & next  
Seeks latest trend

@STYLECHASER



What's cool & fashionable  
More mainstream  
Later trend adopters

@ANTI-HERO



Independent  
Heritage Journeys consumer  
Self-expression

# STRATEGIES



-  **DIVERSIFY OUR FOOTWEAR LEADERSHIP**
-  **BUILD OUR BRAND**
-  **RE-IMAGINE OUR STORE FLEET**
-  **DRIVE DIGITAL EVOLUTION**
-  **UNLOCK THE POWER OF OUR PEOPLE**



JOURNEYS



# DIVERSIFY OUR FOOTWEAR LEADERSHIP

## STRATEGIES

- 🎯 **Lead with Her**
- 🎯 **Elevate & Diversify the Assortment**
- 🎯 **Extend Key Franchise Leadership**
- 🎯 **Drive Newness and Trend Leadership**
- 🎯 **ASP Increases**



# BUILD OUR BRAND

## STRATEGIES

- 🎯 **Life on Loud and New Creative Concept for BTS and Holiday**
- 🎯 **Invest in Journeys Brand Presence for Greater Awareness**
- 🎯 **Elevate Editorial Content and Trend Positioning**
- 🎯 **Expand Brand Activation**
- 🎯 **Launch Community Platform**



# RE-IMAGINE OUR STORE FLEET

## STRATEGIES

- 🎯 **Double 4.0 Store Count**
- 🎯 **Pursue Targeted Expansions & Relocations**
- 🎯 **Strengthen Key Markets**
- 🎯 **Test Journeys Kidz 4.0 Concept**



# **DRIVE** **DIGITAL** **EVOLUTION**

## **STRATEGIES**

- 🎯 **Improve Online Discoverability within Agentic Search**
- 🎯 **Elevate the Site Experience**
- 🎯 **Increase Customer Acquisition & Retention Including All-Access**

# FINANCIALS



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Genesco BRANDS GROUP

# Q4 FY26 • Key Earnings Highlights

	Quarter 4 January 31, 2026	Quarter 4 February 1, 2025 <sup>(1)</sup>
Total Sales Change	7%	1%
Total Comparable Sales	9%	10%
Journeys Group	12%	14%
Schuh Group	3%	2%
Johnston & Murphy Group	2%	0%
Same Store Sales	9%	6%
Comparable E-commerce Sales	8%	18%
Gross Margin % <sup>(2)</sup>		
GAAP	45.9%	46.9%
Non-GAAP	46.0%	46.9%
Selling and Admin. Expenses %	39.1%	40.5%
Operating Income % <sup>(2)</sup>		
GAAP	6.4%	6.2%
Non-GAAP	7.0%	6.4%
Earnings per Diluted Share <sup>(2)</sup>		
GAAP	\$4.43	\$3.06
Non-GAAP	\$3.74	\$3.26

<sup>(1)</sup> Quarter 4 for the 13-week period ended February 1, 2025 and the 14-week period ended February 3, 2024.

<sup>(2)</sup> See GAAP to Non-GAAP adjustments in appendix.

# 12mos FY26 • Key Earnings Highlights

	Fiscal Year Ended January 31, 2026	Fiscal Year Ended February 1, 2025 <sup>(1)</sup>
Total Sales Change	5%	0%
Total Comparable Sales	6%	3%
Journeys Group	9%	6%
Schuh Group	0%	-2%
Johnston & Murphy Group	0%	-2%
Same Store Sales	6%	0%
Comparable E-commerce Sales	4%	12%
Gross Margin % <sup>(2)</sup>		
GAAP	46.3%	47.2%
Non-GAAP	46.3%	47.2%
Selling and Admin. Expenses %	45.2%	46.4%
Operating Income % <sup>(2)</sup>		
GAAP	0.7%	0.6%
Non-GAAP	1.1%	0.8%
Earning (Loss) per Diluted Share <sup>(2)</sup>		
GAAP	\$1.25	(\$1.80)
Non-GAAP	\$1.45	\$0.94

<sup>(1)</sup> Fiscal 2025 for the 52-week period ended February 1, 2025 and Fiscal 2024 for the 53-week period ended February 3, 2024.

<sup>(2)</sup> See GAAP to Non-GAAP adjustments in appendix.

# Q4 FY26 Capital Allocation Snapshot

## TOTAL LIQUIDITY

**~\$437M**

Liquidity is comprised of cash and borrowing available under bank facilities

## INVENTORY

**\$434M**

+2% vs Q4 FY2025

## CAPITAL EXPENDITURES

**\$10M**

~60% allocated to stores  
~40% to other

## SHARE REPURCHASES

**\$0M**

\$30M remaining under current authorization

## STORE COUNT

**1,236**

6

Opened

15

Closed

## JOURNEYS 4.0

**8**

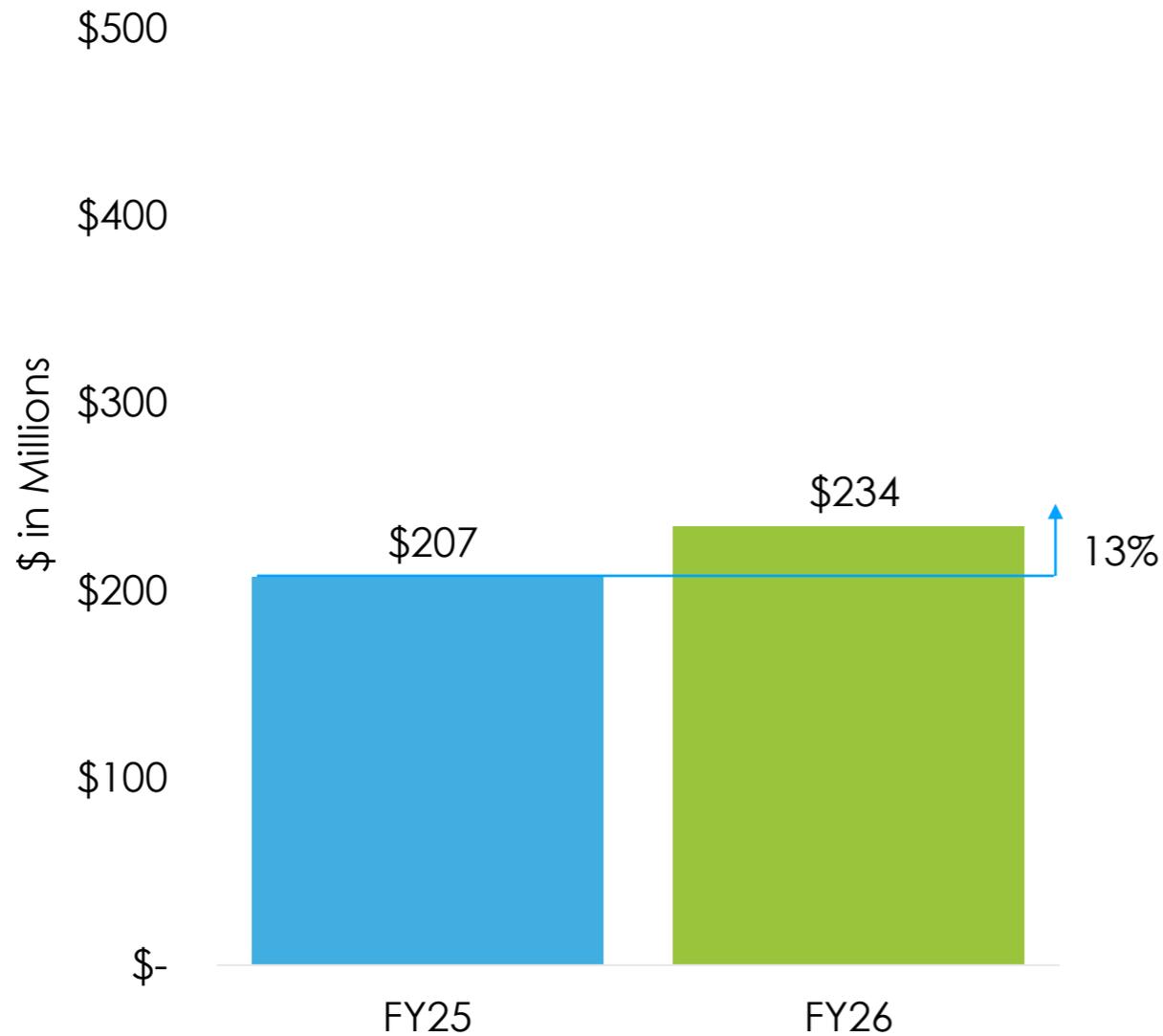
**remodels**

84 total remodels to date

# FY26 • Strong Digital Growth

## Quarter 4

## Trailing 12 months



% of Retail Sales <sup>(1)</sup>      30%      31%

FY25

FY26

25%

25%

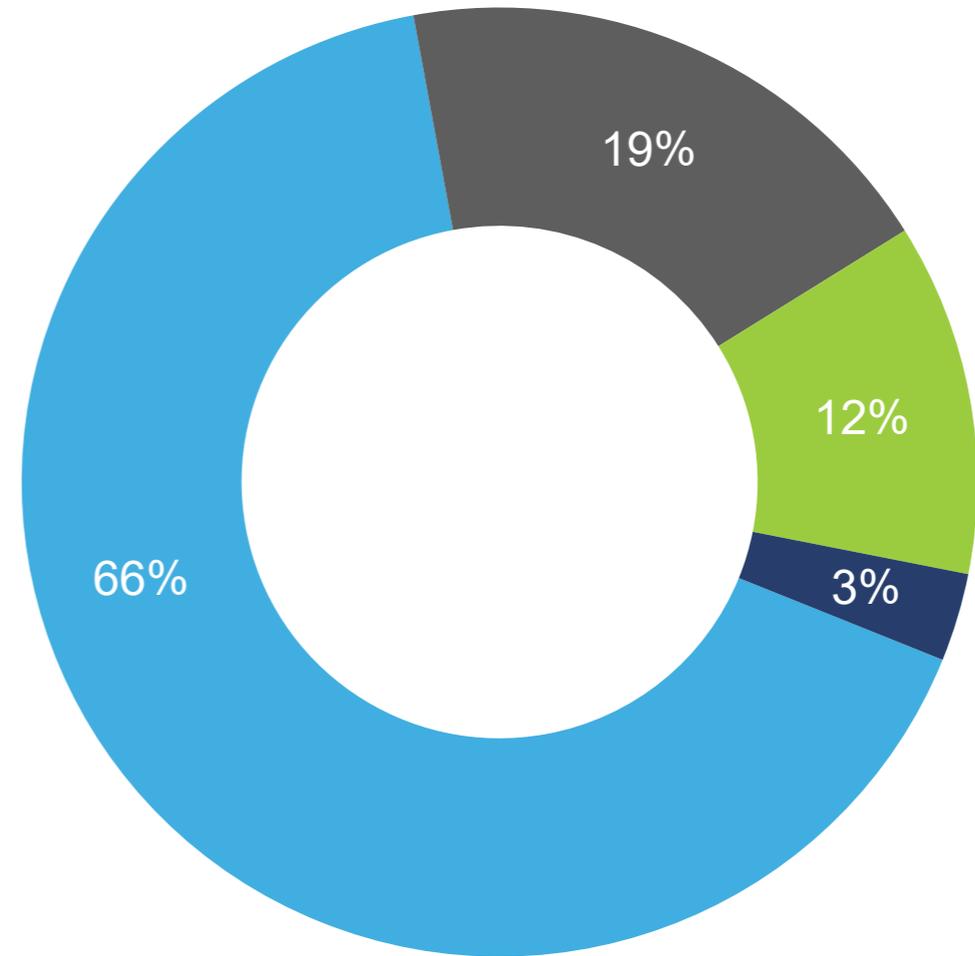
<sup>(1)</sup> Retail sales represent combined store sales and e-commerce sales

# Q4 FY26

## Sales by Segment



-  Journeys
-  Schuh
-  Johnston & Murphy Group
-  Genesco Brands Group



Q4 FY26  
Net Sales  
\$799.9 Million

# Q4 FY26 & Proj 12 mos FY27 • Retail Store Summary

Q4 FY26	Nov. 1, 2025	Open	Close	Jan. 31, 2026
Journeys Group	974	2	11	<b>965</b>
Schuh Group	119	0	1	<b>118</b>
Johnston & Murphy Group	152	4	3	<b>153</b>
<b>Total Stores</b>	<b>1,245</b>	<b>6</b>	<b>15</b>	<b>1,236</b>

Projected 12 mos FY27	Jan. 31, 2026	Open	Close	Jan. 30, 2027
Journeys Group	965	6	56	<b>915</b>
Schuh Group	118	2	13	<b>107</b>
Johnston & Murphy Group	153	15	6	<b>162</b>
<b>Total Stores</b>	<b>1,236</b>	<b>23</b>	<b>75</b>	<b>1,184</b>



# FY27 • Outlook <sup>(1)</sup>

Note: See earnings call transcript for important details regarding guidance assumptions

Non-GAAP EPS	\$1.90 to \$2.30 per share
Total Sales vs. FY2026	down 1% to flat
Comparable Sales	up 1% to 2%
Gross Margin vs. FY2026	up 50 to 60 basis points
SG&A Expenses vs. FY2026	10 to 30 basis points deleverage
Operating Income	~ \$32 - \$38 million
Tax Rate <sup>(2)</sup>	~ 30% (~7% to 8% for Q1 - Q3)
CapEx	~ \$65 - \$70 million (90% allocated to stores; 10% to other)
Depreciation & Amortization	~ \$50 - \$55 million
Avg Shares Outstanding	10.9 million (assumes no further repurchases)

Additional color on anticipated sales growth by business which includes a reduction in sales of approx. \$30 million due to net store closures:

- Journeys: Low-single digit percentage increase
- schuh: Mid-single digit percentage decrease with promotional reset
- Johnston & Murphy: Mid-single digit percentage increase
- Genesco Brands Group: A reduction in sales of approx. \$30 million net due to exit of licenses

<sup>(1)</sup> On a Non-GAAP basis

<sup>(2)</sup> Due to the valuation allowance, the tax rate for the first three quarters of the year will be in the range of 7% to 8%

# APPENDIX



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# Q4 FY26 • Adjusted Operating Income Statement

(1)

In Thousands	Quarter 4					
	January 31, 2026			February 1, 2025		
	Operating Income (Loss)	Asset Impair & Other Adj	Adj Operating Income (Loss)	Operating Income (Loss)	Asset Impair & Other Adj	Adj Operating Income (Loss)
Journeys Group	\$ 60,206	\$ -	\$ 60,206	\$ 43,152	\$ -	\$ 43,152
Schuh Group	928	-	928	5,637	-	5,637
Johnston & Murphy Group	6,465	-	6,465	6,555	-	6,555
Genesco Brands Group	(1,958)	1,253	(705)	1,391	-	1,391
Corporate and Other	(14,318)	3,321	(10,997)	(10,618)	1,745	(8,873)
<b>Total Operating Income</b>	<b>\$ 51,323</b>	<b>\$ 4,574</b>	<b>\$ 55,897</b>	<b>\$ 46,117</b>	<b>\$ 1,745</b>	<b>\$ 47,862</b>
% of sales	6.4%		7.0%	6.2%		6.4%
Depreciation and amortization			13,097			13,004
Adjusted earnings before interest, taxes, depreciation and amortization ("EBITDA") <sup>(2)</sup>			\$ 68,994			\$ 60,866
% of sales			8.6%			8.2%

(1) See GAAP to Non-GAAP adjustments in appendix.

(2) Excludes "Other components of net periodic benefit cost" line item on the Consolidated Statements of Operations.



# 12mos FY26 • Adjusted Operating Income Statement

(1)

In Thousands	Fiscal Year Ended					
	January 31, 2026			February 1, 2025		
	Operating Income (Loss)	Asset Impair & Other Adj	Adj Operating Income (Loss)	Operating Income (Loss)	Asset Impair & Other Adj	Adj Operating Income (Loss)
Journeys Group	\$ 60,490	\$ -	\$ 60,490	\$ 26,345	\$ -	\$ 26,345
Schuh Group	(4,545)	-	(4,545)	10,199	-	10,199
Johnston & Murphy Group	4,588	-	4,588	8,416	-	8,416
Genesco Brands Group	(66)	1,253	1,187	6,806	1,750	8,556
Corporate and Other	(43,153)	8,068	(35,085)	(37,841)	3,235	(34,606)
<b>Total Operating Income</b>	<b>\$ 17,314</b>	<b>\$ 9,321</b>	<b>\$ 26,635</b>	<b>\$ 13,925</b>	<b>\$ 4,985</b>	<b>\$ 18,910</b>
% of sales	0.7%		1.1%	0.6%		0.8%
Depreciation and amortization			53,325			52,464
Adjusted earnings before interest, taxes, depreciation and amortization ("EBITDA") <sup>(2)</sup>			\$ 79,960			\$ 71,374
% of sales			3.3%			3.1%

<sup>(1)</sup> See GAAP to Non-GAAP adjustments in appendix.

<sup>(2)</sup> Excludes "Other components of net periodic benefit cost" line item on the Consolidated Statements of Operations.



# Q4 FY26 • Non-GAAP Reconciliation

In Thousands (except per share amounts)	Quarter 4 January 31, 2026			Quarter 4 February 1, 2025		
	Pretax	Net of Tax	Per Share Amounts	Pretax	Net of Tax	Per Share Amounts
Earnings from continuing operations, as reported		\$ 47,522	\$ 4.43		\$ 33,553	\$ 3.06
Gross margin adjustment:						
Charges related to distribution model transition	\$ -	-	0.00	\$ -	12	0.00
Inventory write-down related to exit of licenses	1,253	913	0.09	-	-	0.00
Total gross margin adjustment	\$ 1,253	913	0.09	\$ -	12	0.00
Asset impairments and other adjustments:						
Asset impairment charges	\$ 478	365	0.03	\$ 890	678	0.06
Store restructuring charges	-	34	0.00	-	-	0.00
Costs associated with information technology transformation	2,843	2,086	0.19	-	-	0.00
Severance	-	6	0.00	855	668	0.06
Total asset impairments and other adjustments	\$ 3,321	2,491	0.22	\$ 1,745	1,346	0.12
Income tax expense adjustments:						
One big beautiful bill impact		(11,899)	(1.11)		-	0.00
U.S. valuation allowance		-	0.00		(7)	0.00
Tax impact share based awards		743	0.07		(134)	(0.01)
Other tax items		399	0.04		1,038	0.09
Total income tax expense adjustments		(10,757)	(1.00)		897	0.08
Adjusted earnings from continuing operations <sup>(1) and (2)</sup>		\$ 40,169	\$ 3.74		\$ 35,808	\$ 3.26

<sup>(1)</sup> The adjusted tax rate for the fourth quarter of Fiscal 2026 and 2025 is 27.4% and 23.8%, respectively.

<sup>(2)</sup> EPS reflects 10.7 million and 11.0 million share count for the fourth quarter of Fiscal 2026 and 2025, respectively, which includes common stock equivalents in both periods.



# 12mos FY26 • Non-GAAP Reconciliation

In Thousands (except per share amounts)	Fiscal Year Ended January 31, 2026			Fiscal Year Ended February 1, 2025		
	Pretax	Net of Tax	Per Share Amounts	Pretax	Net of Tax	Per Share Amounts
Earnings (Loss) from continuing operations, as reported		\$ 13,276	\$ 1.25		\$ (19,512)	\$ (1.80)
Gross margin adjustment:						
Charges related to distribution model transition	\$ -	-	0.00	\$ 1,750	1,345	0.12
Inventory write-down related to exit of licenses	1,253	913	0.09	-	-	0.00
Total gross margin adjustment	\$ 1,253	913	0.09	\$ 1,750	1,345	0.12
Asset impairments and other adjustments:						
Asset impairment charges	\$ 737	552	0.05	\$ 1,384	1,054	0.09
Store restructuring charges	3,891	2,904	0.27	-	-	0.00
Costs associated with information technology transformation	2,843	2,086	0.20	-	-	0.00
Severance	597	435	0.04	1,851	1,426	0.13
Impact of additional dilutive shares	-	-	0.00	-	-	0.03
Total asset impairments and other adjustments	\$ 8,068	5,977	0.56	\$ 3,235	2,480	0.25
Income tax expense adjustments:						
Tax impact share based awards		743	0.07		588	0.05
One big beautiful bill impact		(5,216)	(0.49)		-	0.00
U.S. valuation allowance		-	0.00		26,243	2.39
Other tax items		(322)	(0.03)		(804)	(0.07)
Total income tax expense adjustments		(4,795)	(0.45)		26,027	2.37
Adjusted earnings from continuing operations <sup>(1) and (2)</sup>		\$ 15,371	\$ 1.45		\$ 10,340	\$ 0.94

<sup>(1)</sup> The adjusted tax rate for Fiscal 2026 and 2025 is 29.9% and 27.7%, respectively.

<sup>(2)</sup> EPS reflects 10.6 million and 11.0 million share count for Fiscal 2026 and 2025, respectively, which includes common stock equivalents in both periods for adjusted earnings from continuing operations. The loss from continuing operations for Fiscal 2025, as reported, excludes common stock equivalents.



# Q4 FY26 • Adjusted Gross Margin

In Thousands	Quarter 4	
	January 31, 2026	February 1, 2025
Gross margin, as reported	\$ 367,092	\$ 349,637
% of sales	45.9%	46.9%
Inventory write-down related to exit of licenses	1,253	-
Total gross margin adjustments	1,253	-
Adjusted gross margin	\$ 368,345	\$ 349,637
% of sales	46.0%	46.9%

# 12mos FY26 • Adjusted Gross Margin

In Thousands	Fiscal Year Ended	
	January 31, 2026	February 1, 2025
Gross margin, as reported	\$ 1,126,850	\$ 1,096,813
% of sales	46.3%	47.2%
Inventory write-down related to exit of licenses	1,253	-
Charges related to distribution model transition	-	1,750
Total gross margin adjustments	1,253	1,750
Adjusted gross margin	\$ 1,128,103	\$ 1,098,563
% of sales	46.3%	47.2%



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