



MISUMI Group Inc.

FY2025 (ending March 31, 2026)

Third Quarter Earnings Report

January 30, 2026

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FX rates (vs Yen)	FY24 3Q Cum. Actual	FY25 3Q Cum. Actual
USD	152.9 yen	149.3 yen
EUR	164.9 yen	171.9 yen
RMB	21.2 yen	20.9 yen

# Earnings Overview for the First Nine Months of FY2025

# FY2025 Cumulative 3Q Earnings Overview

Digital MODEL initiatives drove a 6.3% YoY sales increase, reaching a record high.

Sales volume growth absorbed the impacts of tariffs and Forex, but M&A costs reduced profits; performance is generally on track.

Category	Pre-Fictiv consolidation			Fictiv FY25 3Q Cum. Actual (Jul.-Dec.)	Post-Fictiv consolidation	
	FY24 3Q Cum. Actual	FY25 3Q Cum. Actual	YoY change		FY25 3Q Cum. Actual (Jul.-Dec.)	YoY change
			Yen basis (Local currency basis)			Yen basis (Local currency basis)
Net Sales	301,585	310,560	+3.0% (+3.6%)	10,100	320,661	+6.3% (+7.0%)
Before goodwill amort. Operating Income	36,150	35,311	-2.3% (-0.4%)	※1 -1,280	34,030	-5.9% (-4.0%)
Margin	12.0%	11.4%	-0.6pt (-0.5pt)	-	10.6%	-1.4pt (-1.2pt)
Operating Income	36,150	35,311	-2.3% (-0.4%)	※2 -3,046	32,264	-10.7% (-8.9%)
Margin	12.0%	11.4%	-0.6pt (-0.5pt)	-	10.1%	-1.9pt (-1.8pt)
Net Income	28,213	25,998	-7.9% (-)	-2,970	23,027	-18.4% (-)

※1: Details (Fictiv Standalone business performance -215 million yen, M&A intermediary fees -1,065 million yen)

※2: Amortization of goodwill, etc.: -1,766 million yen

# FY2025 Cumulative 3Q Sales and Op. Income by Business Segment

FA: Sales rose with Digital MODEL initiatives (meviy, Economy Series etc.) and steady Fictiv results.

Die Components: Growth was driven by China/ Asia, but overall profits declined predominantly due to weak automotive demand in the U.S./ Japan.

VONA: Sales and profits increased due to effectively capturing mass production demand notably in China and Asia.

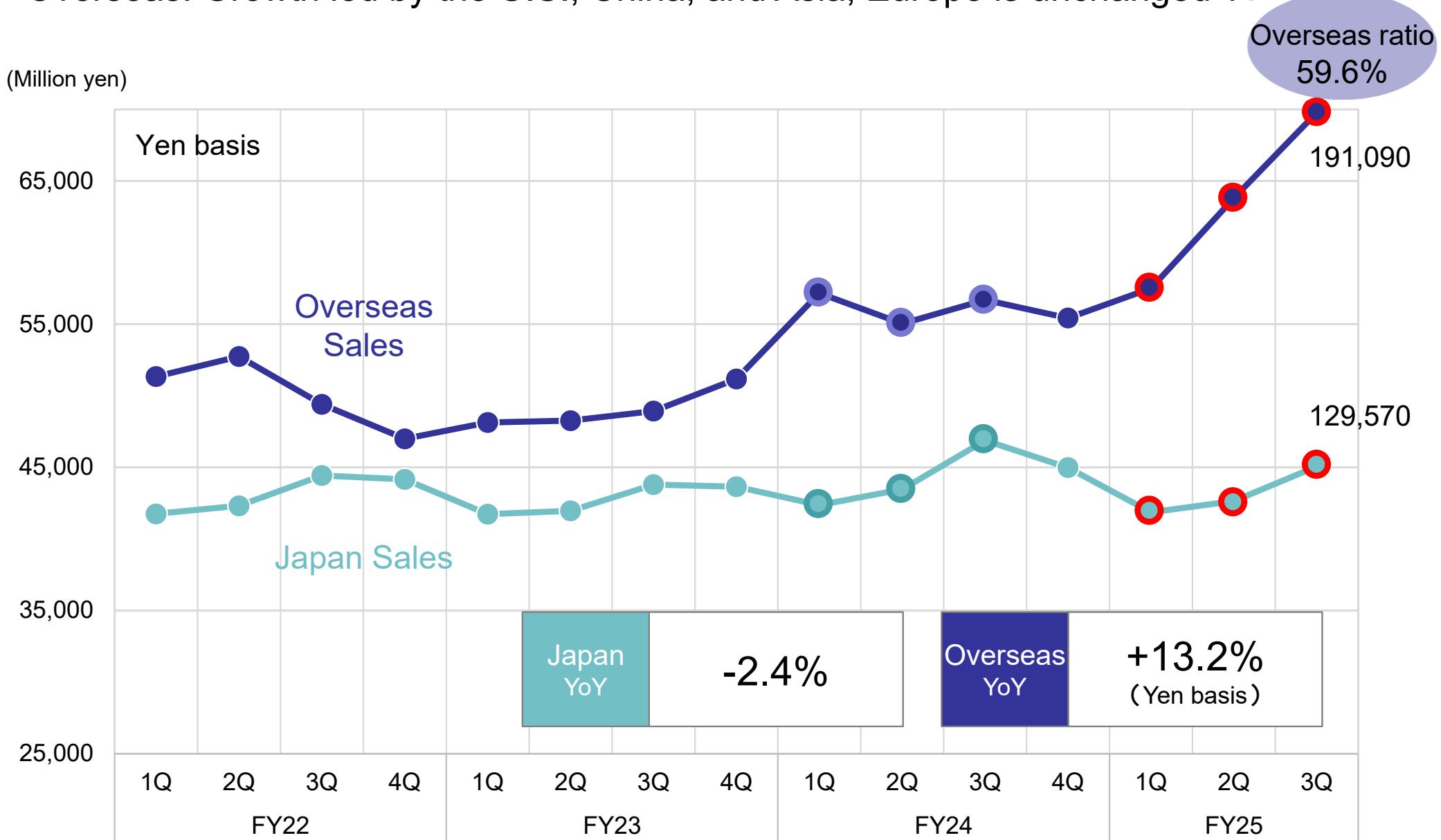
Million yen

Category	Net sales			Operating income				
	FY24 3Q Cum. Actual	FY25 3Q Cum. Actual	YoY change Yen basis (Local currency basis)	FY24 3Q Cum. Actual	FY25 3Q Cum. Actual	YoY change Yen basis (Local currency basis)		
Margin	Margin							
Total	301,585	320,661	+6.3% (+7.0%)	36,150	12.0%	32,264	10.1%	-10.7% (-8.9%)
FA business	102,158	115,919	+13.5% (+14.0%)	17,517	17.1%	14,045	12.1%	-19.8% (-18.4%)
	Pre-Fictiv Consolidation	105,819	+3.6% (+4.0%)			17,092	16.2%	-2.4% (-1.0%)
Die component business	64,721	65,203	+0.7% (+2.1%)	7,015	10.8%	6,285	9.6%	-10.4% (-7.6%)
VONA business	134,705	139,538	+3.6% (+4.0%)	11,616	8.6%	11,933	8.6%	+2.7% (+4.7%)

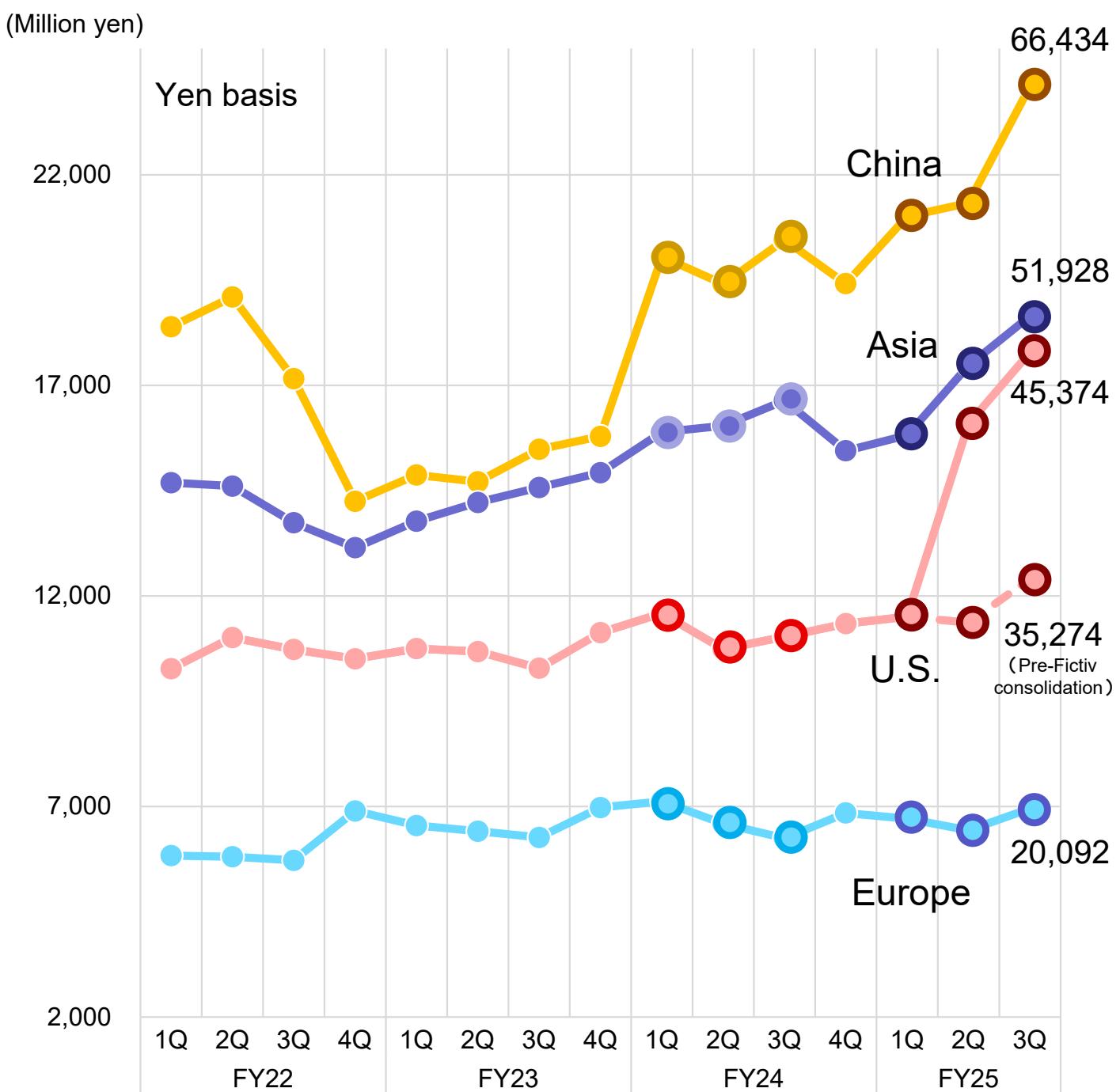
# FY2025 Cumulative 3Q Japan & Overseas Sales

Japan: Capital investment demand remained weak, mainly among automotive customers.

Overseas: Growth led by the U.S., China, and Asia; Europe is unchanged YoY.



# FY2025 Cumulative 3Q Sales by Region



China

Investment remained strong, mainly in domestic demand. Economy Series and telecom etc. continued to grow.

Yen basis  
+10.9%

## Local currency

## Asia

Economy Series drove growth and maintained strong performance, successfully drawing in new customers. Local currency

YoY

Yen basis  
+6.9%

basis  
+8.4%

U.S.

Die & mold remained weak, while Fictiv expanded, FA and VONA maintained growth.

YoY

Yen basis  
+5.8%

Local currency  
basis  
+8.3%

Post-Fid  
Consolid

Europe

Local currency  
basis

## Europ

Yen figures held steady YoY due to  
Forex effect; recovery in demand will  
take time.

Yoy

Yen basis  
+0.7%

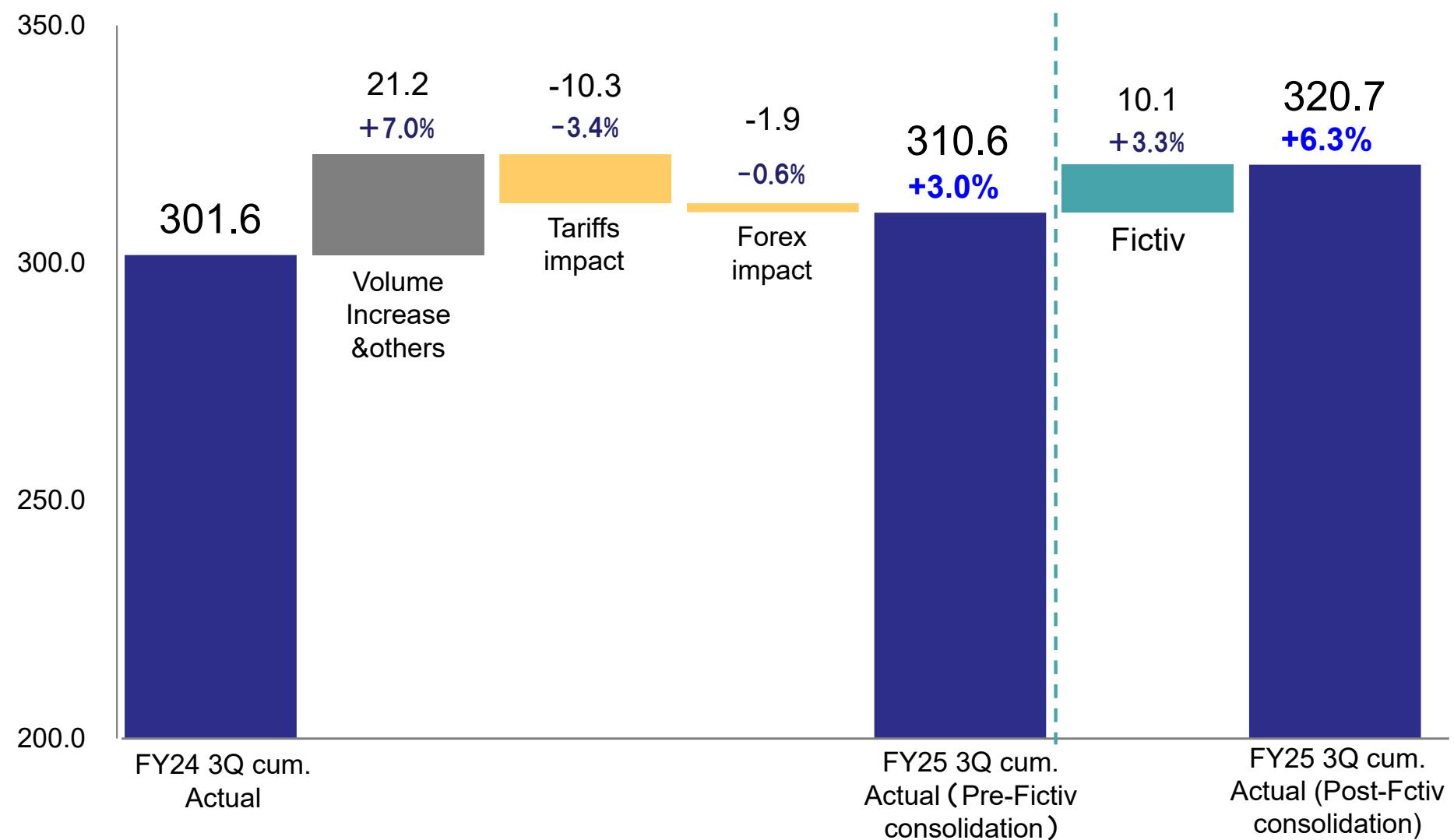
Local currency  
basis  
3.4%

# FY2025 Cumulative 3Q Sales Variance Analysis (YoY)

Digital MODEL initiatives increased sales volume which absorbed the impact of tariffs; Forex impact narrowed compared with the 1H.

Attributable to Fictiv's robust performance, sales increased by 6.3% YoY.

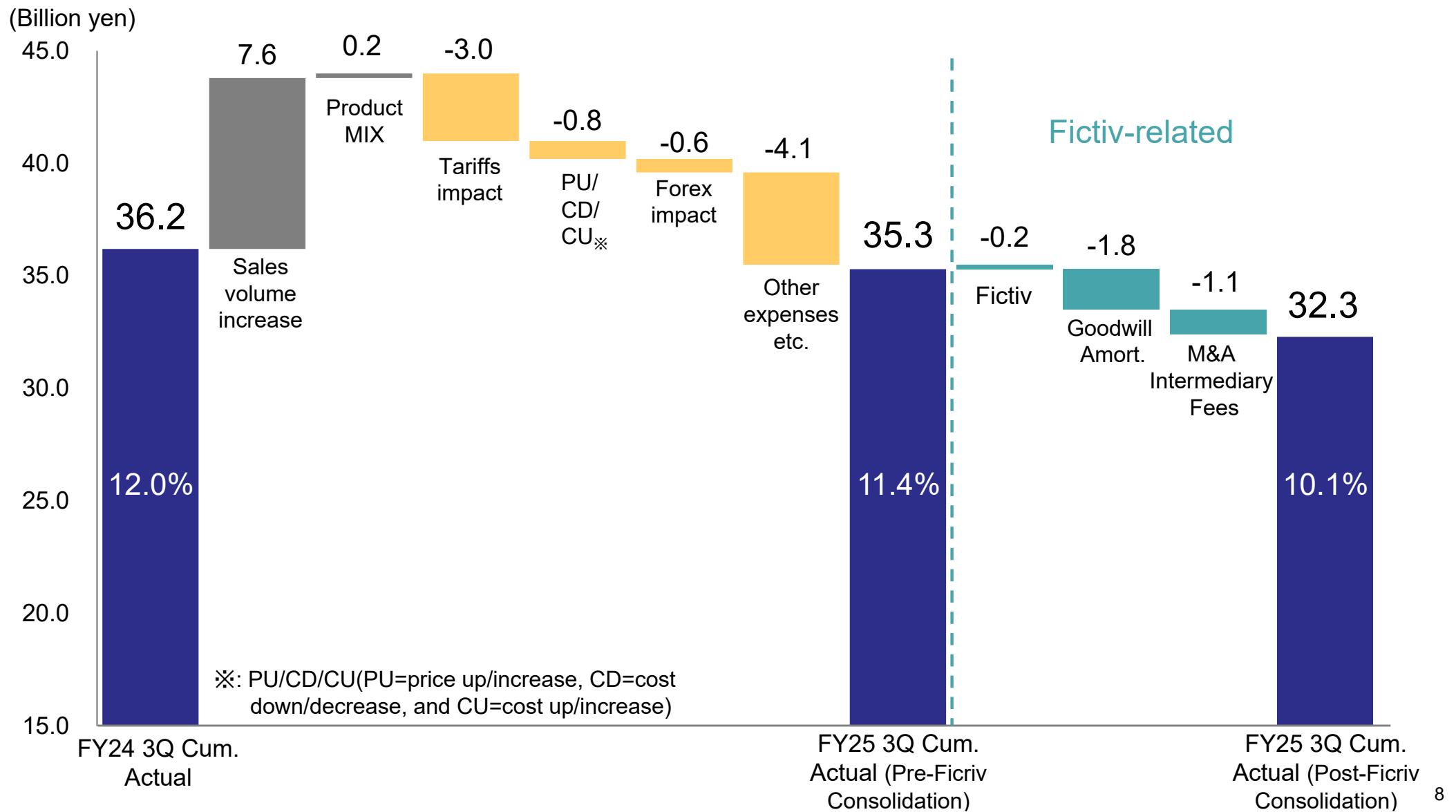
(Billion yen)



# FY2025 Cumulative 3Q Op. Income Variance Analysis (YoY)

Profits rose due to sales volume growth and product mix, which absorbed the impacts of tariffs, Cost Up and Forex; growth-related expenditures continued.

Results, factoring in goodwill amortization, M&A expenses, and Fictiv's performance, were generally in line with the plan.



# FY2025 Consolidated Earnings Forecast

FX rates (vs Yen)	FY25 3Q Cum. Actual	FY25 4Q Forecast
USD	149.3 yen	155.0 yen
EUR	171.9 yen	182.0 yen
RMB	20.9 yen	22.0 yen

# FY2025 Full-Year Performance Outlook

Although the automotive sector stagnated, growth driven by Digital MODEL initiatives absorbed this; revisions were made to reflect current Forex rates.

Despite continued growth-related expenditures, profitability is likely to remain at the previously announced 10.5%.

Million yen

Category	Pre-Fictiv consolidation			Fictiv	Post-Fictiv consolidation			
	FY24 Actual	FY25 Forecast	YoY change		FY25 Announced Figures (10/31)	FY25 Forecast (1/30)	YoY Change	Change from Announced Figures
			Yen basis (local currency basis)	Nine months 25.Jul-26.Mar			Yen basis (local currency basis)	Yen basis (local currency basis)
Net sales	401,987	425,198	+5.8% (+5.5%)	14,802	432,000	440,000	+9.5% (+9.1%)	+1.9% (+0.1%)
Before goodwill amort. Operating Income	46,480	50,286	+8.2% (+7.7%)	※1 -1,263	48,200	49,022	+5.5% (+5.0%)	+1.7% (-2.6%)
Margin	11.6%	11.8%	+0.2pt (+0.2pt)	-	11.2%	11.1%	-0.4pt (-0.4pt)	-0.0pt (-0.3pt)
Operating Income	46,480	50,286	+8.2% (+7.7%)	-4,086	45,500	46,200	-0.6% (-1.1%)	+1.5% (-3.1%)
Margin	11.6%	11.8%	+0.2pt (+0.2pt)		10.5%	10.5%	-1.1pt (-1.1pt)	- (-0.3pt)
Net Income <sup>※2</sup>	36,549	37,803	+3.4% (-)	-3,903	33,900	33,900	-7.2% (-)	- (-)

※1: Details (Fictiv Standalone business performance -198M yen, M&A related costs -1,065M yen)

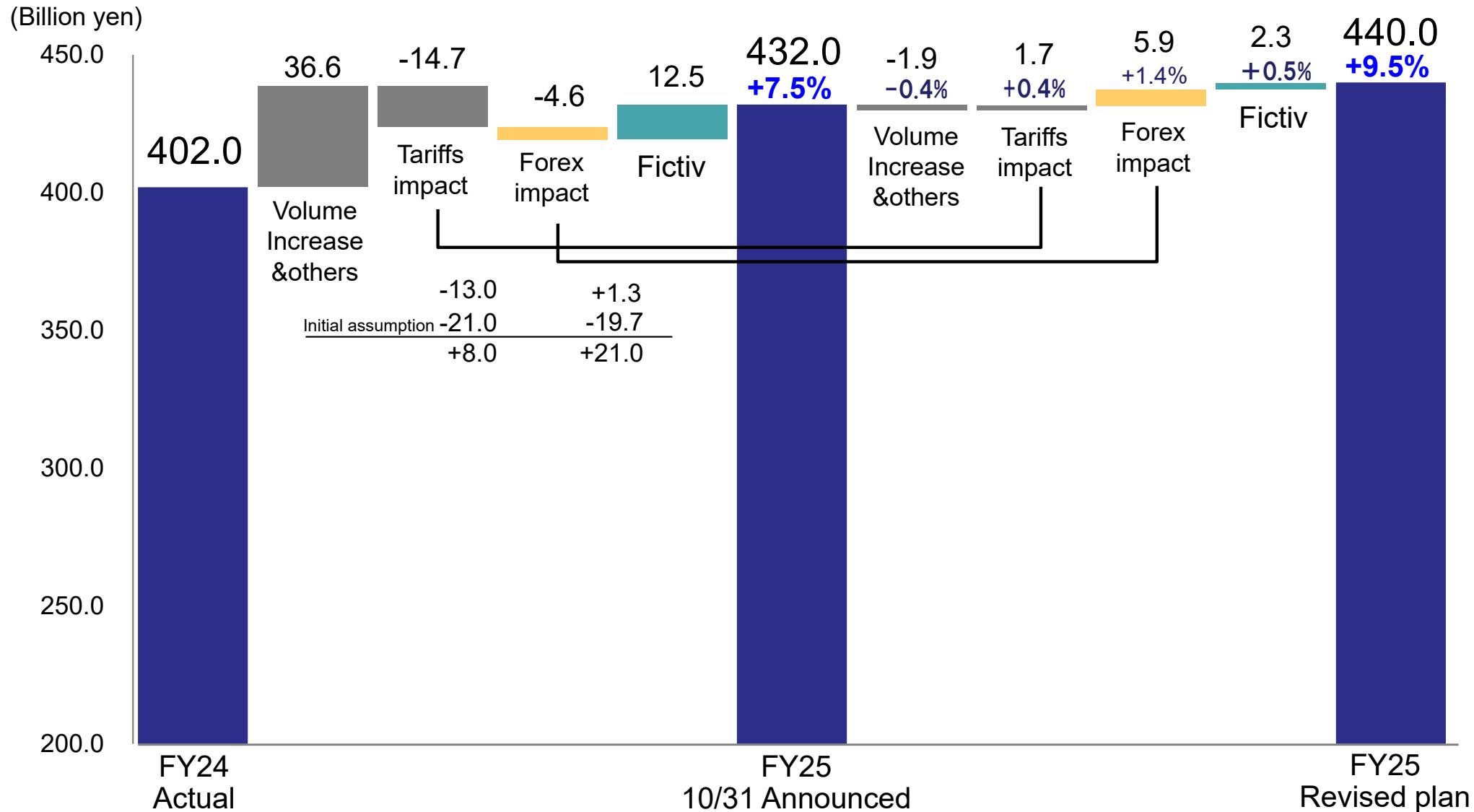
※2: Includes goodwill amortization -2,822M yen, and the consolidated tax impact from Fictiv acquisition

# FY2025 Full-year Sales Variance Analysis (YoY)

While lower sales expected amid weaker automotive demand, impacts of tariffs and Forex improved versus the previous outlook.

Changes since FY start: Tariffs  $-21.0 \rightarrow -13.0$ ; Forex  $-19.7 \rightarrow +1.3$ .

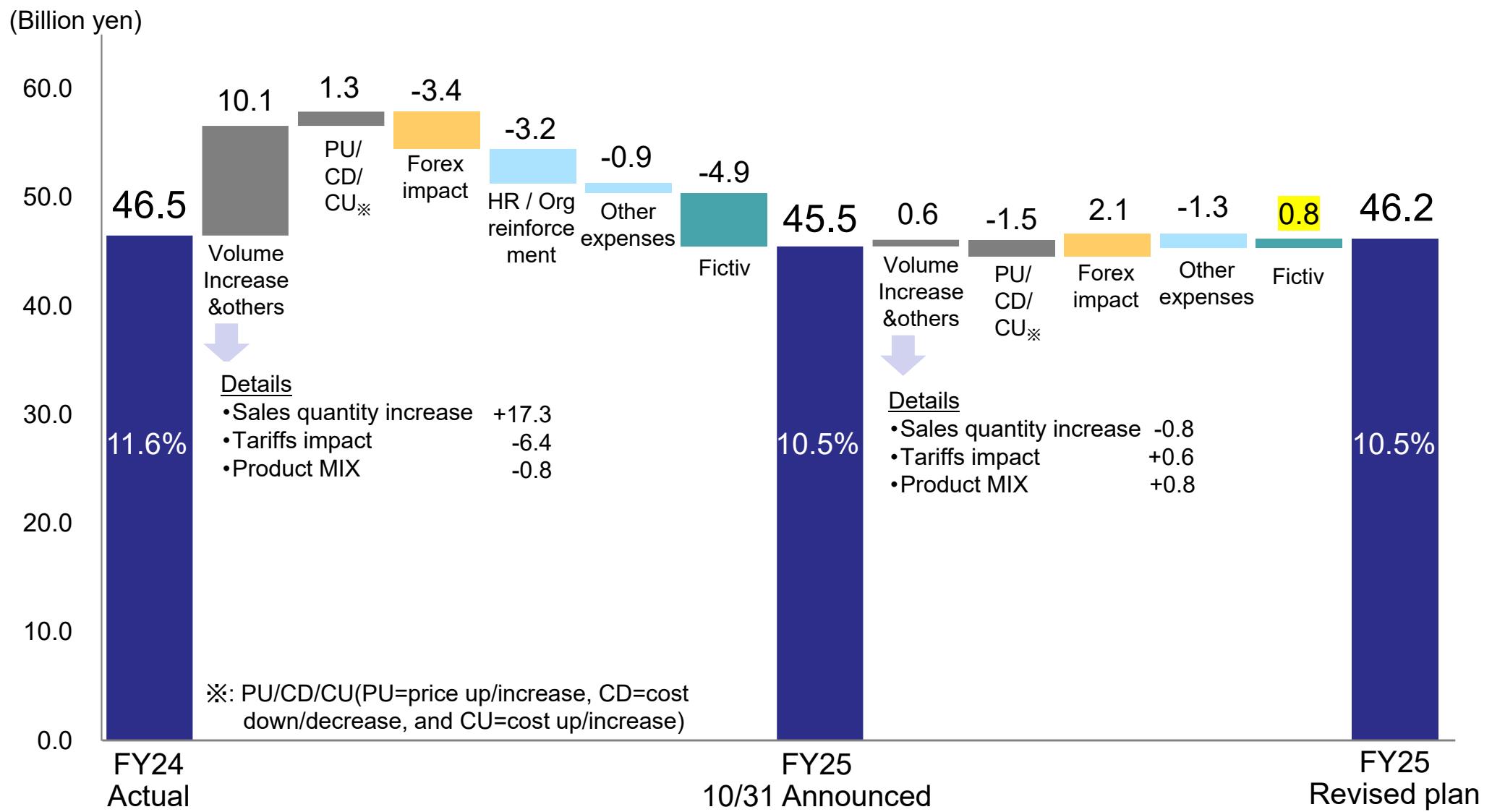
The forecast was revised upward, reflecting robust Fictiv; with YoY growth of +9.5%.



# FY2025 Full-year Op. Income Variance Analysis (YoY)

Since the previous announcement, there were impacts from sales volume decrease and Cost Up; notwithstanding product mix improved. Impacts from tariffs and Forex narrowed.

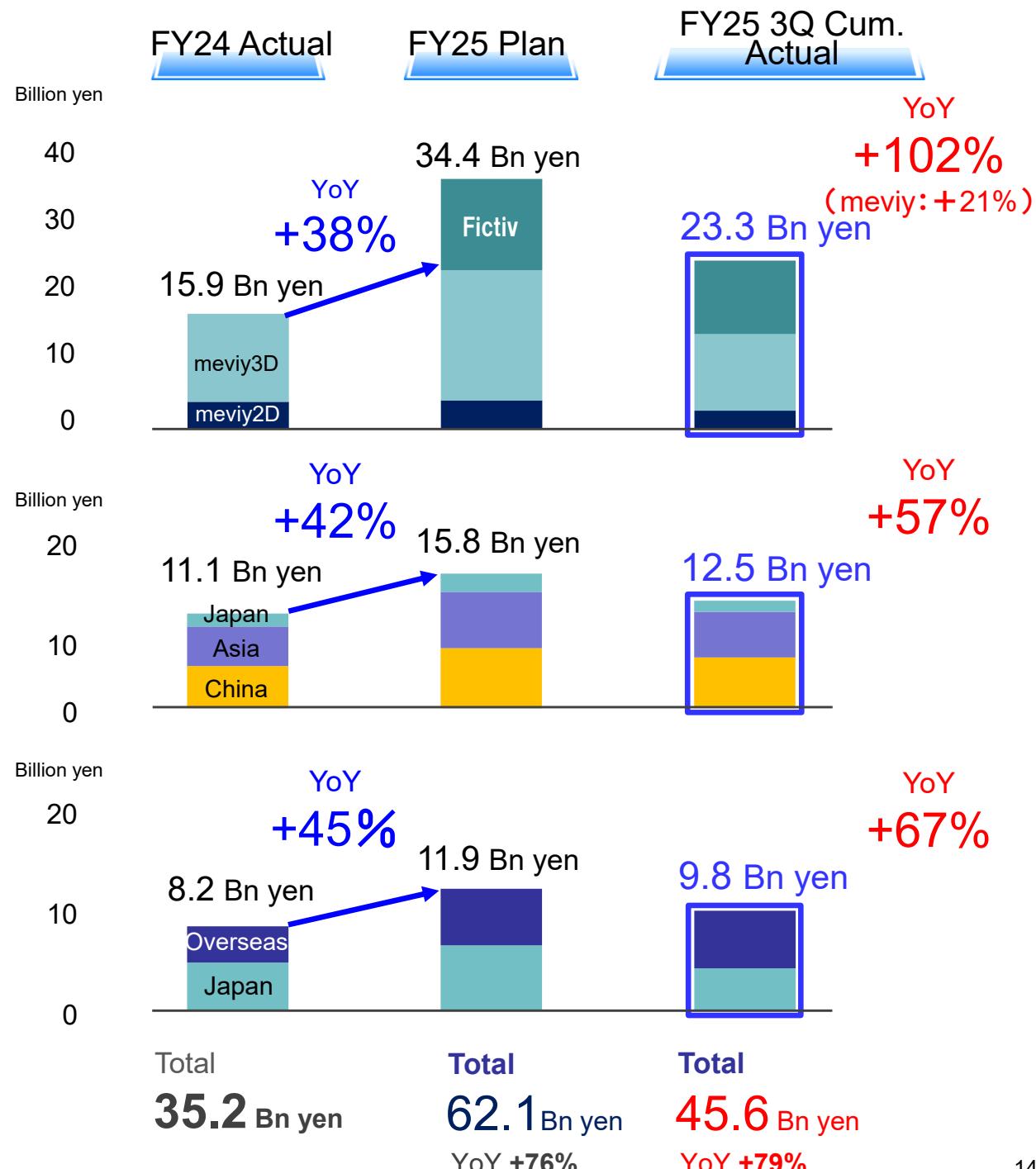
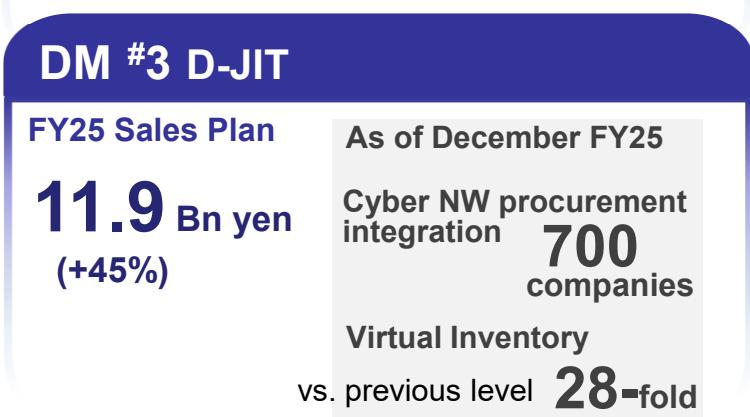
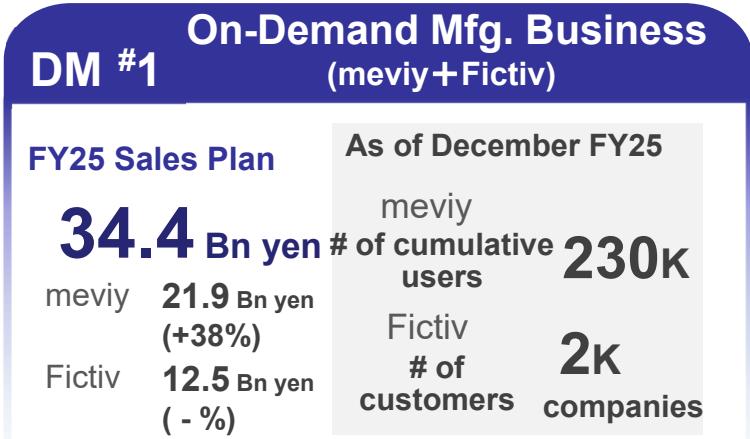
Despite continued growth-related expenditures, Fictiv's performance is likely to exceed the initial plan, accordingly full-year results are expected to be in line with the PY.



# Advancement of the Digital MODEL

# Digital MODEL: FY2025 Sales Outlook

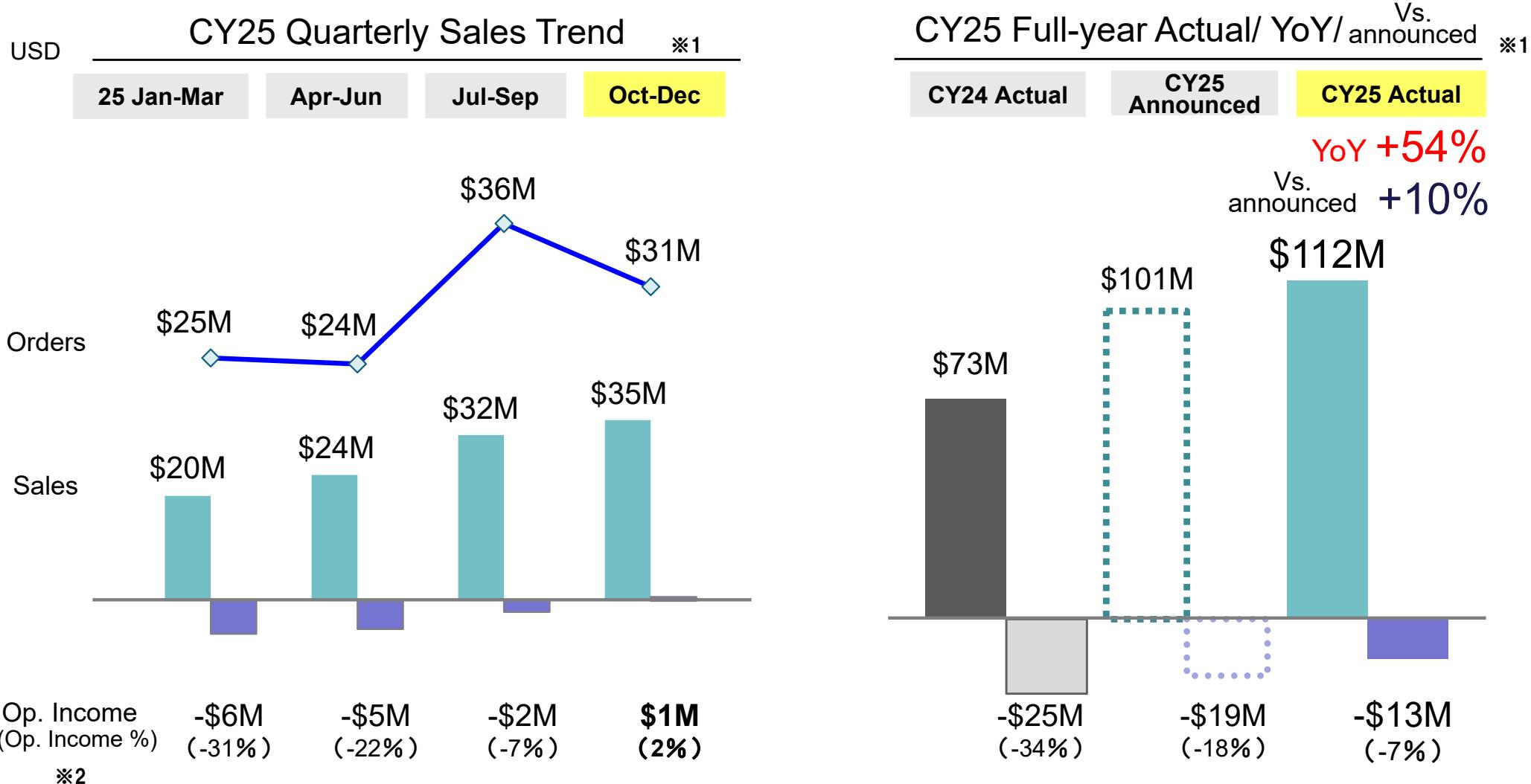
( ) indicates YoY growth rate



# Fictiv's Business Performance (Standalone Basis)

Sales growth and improved profitability were driven by synergies with MISUMI.

Customer demand acquisition is advancing well in growth sectors (robotics and aerospace etc.).



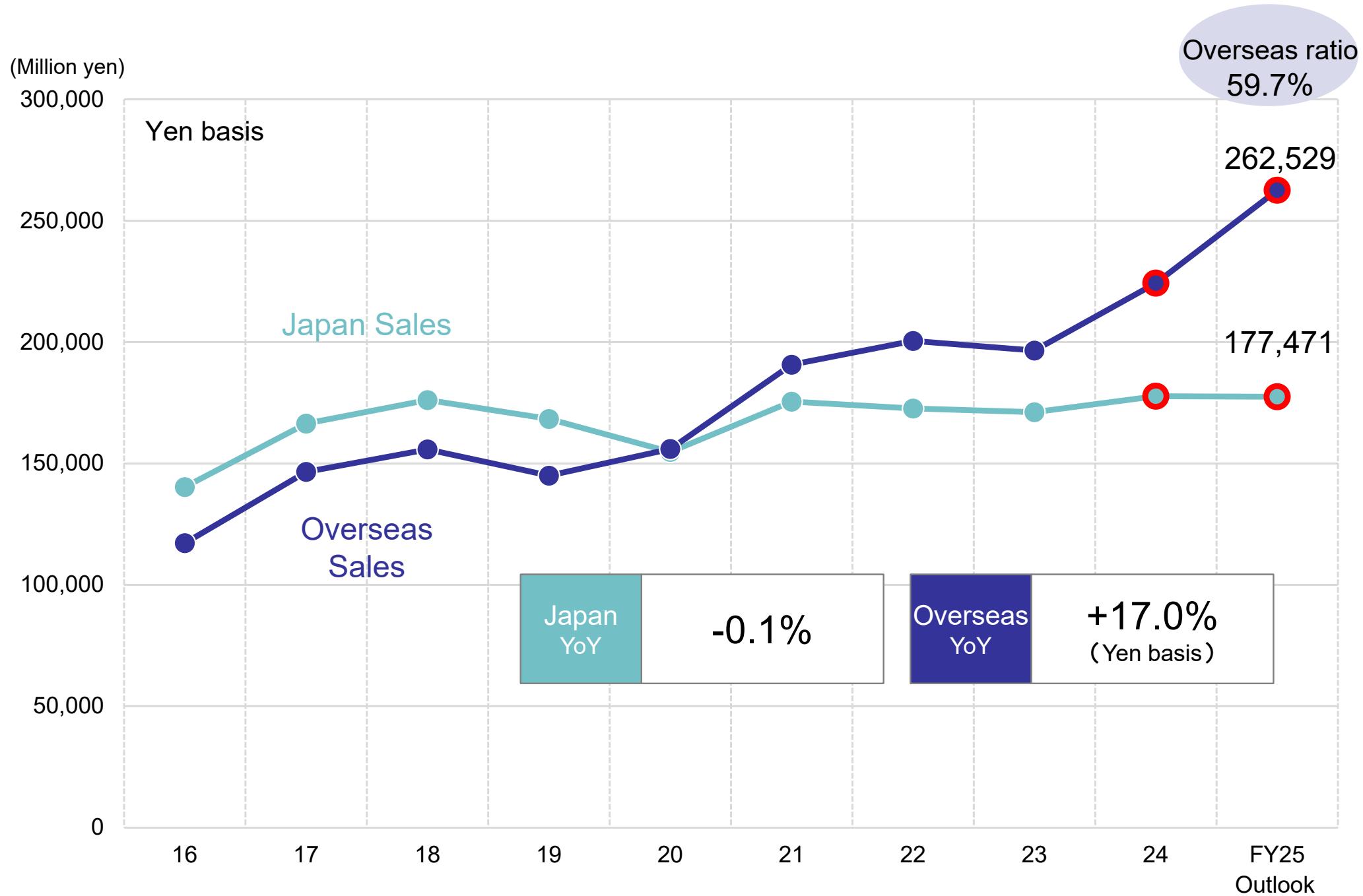
\*1: Business performance from July onward will be included in the consolidated financial report

\*2: Excludes M&A intermediary fees and goodwill amortization

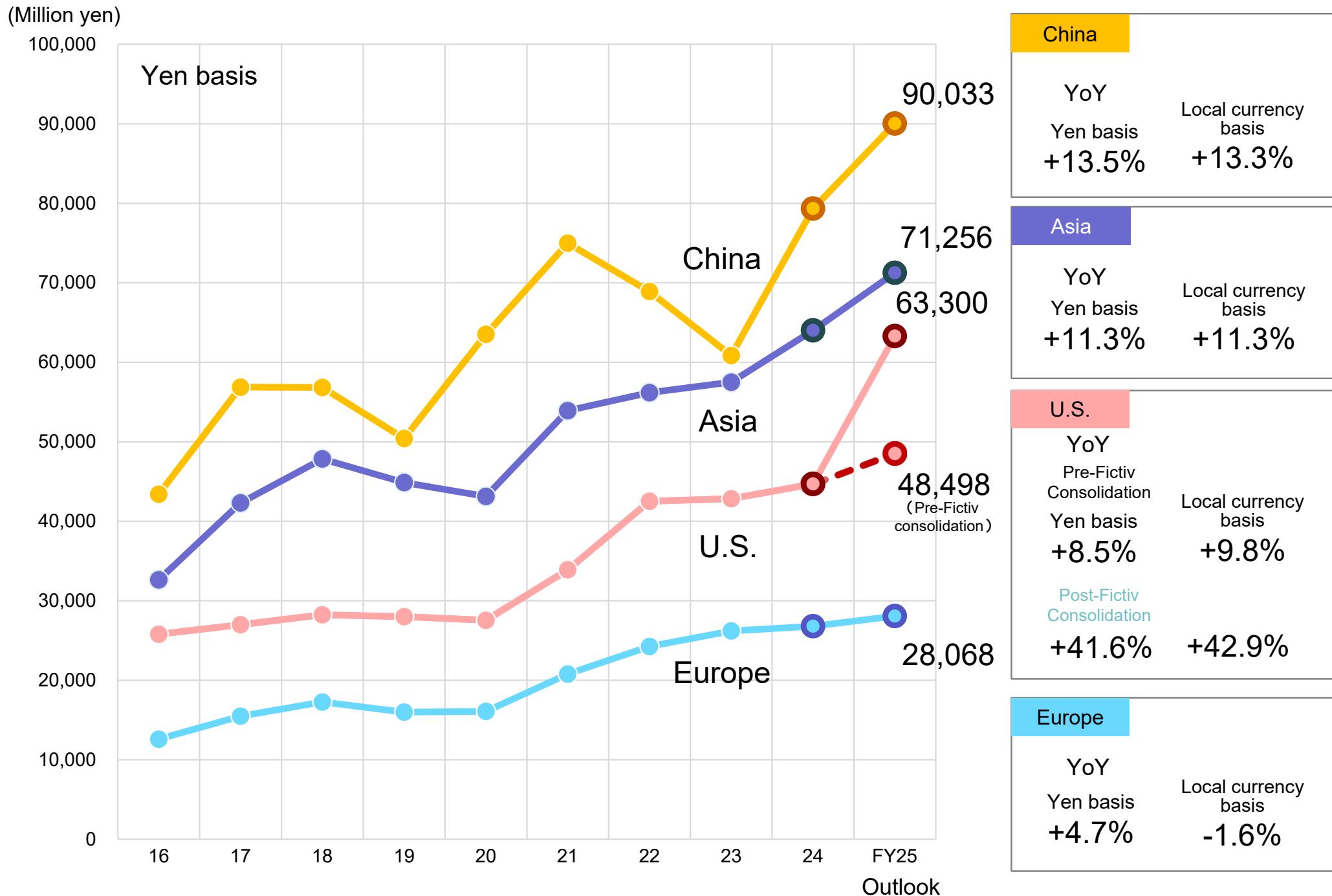
YoY +27pt  
Vs. announced +11pt

# Reference Materials

# FY2025 Full-Year Japan & Overseas Sales Outlook (1/30 Announcement)



# FY2025 Full-Year Sales Outlook by Region (1/30 Announcement)



# 1. Consolidated Balance Sheet

(million yen)

	As of March 31, 2023		As of March 31, 2024		As of Dec. 31, 2024		As of March 31, 2025		As of Dec. 31, 2025	
	Amount	vs previous FY end %	Amount	vs previous FY end %	Amount	vs previous FY end %	Amount	vs previous FY end %	Amount	vs previous FY end %
Current assets	282,623	11.7%	313,381	10.9%	318,220	1.5%	317,805	1.4%	281,293	-11.5%
Cash and Deposits	119,558	9.8%	148,848	24.5%	153,364	3.0%	159,296	7.0%	108,121	-32.1%
Notes receivable and accounts receivable	76,359	-0.6%	75,869	-0.6%	80,022	5.5%	78,390	3.3%	90,785	15.8%
Inventories	77,391	25.3%	78,378	1.3%	74,315	-5.2%	69,652	-11.1%	71,581	2.8%
Other current assets	9,313	64.3%	10,285	10.4%	10,517	2.3%	10,466	1.8%	10,805	3.2%
Fixed assets	95,835	1.7%	100,136	4.5%	103,379	3.2%	101,769	1.6%	156,806	54.1%
Property, Plant and Equipment	48,405	4.1%	51,042	5.4%	54,472	6.7%	52,522	2.9%	55,006	4.7%
Buildings and structures	14,604	5.7%	14,252	-2.4%	22,551	58.2%	21,536	51.1%	22,845	6.1%
Machinery, equipment and vehicles	15,666	-3.7%	16,084	2.7%	15,827	-1.6%	15,626	-2.8%	15,294	-2.1%
Land	3,898	0.6%	3,880	-0.5%	3,901	0.5%	4,259	9.8%	4,322	1.5%
Other tangible fixed assets	14,235	13.4%	16,824	18.2%	12,192	-27.5%	11,099	-34.0%	12,544	13.0%
Intangible fixed assets	35,021	-2.0%	36,109	3.1%	34,085	-5.6%	33,283	-7.8%	86,159	158.9%
Goodwill	-	-	-	-	-	-	-	-	53,087	-
Intangible fixed assets	35,021	-2.0%	36,109	3.1%	34,085	-5.6%	33,283	-7.8%	33,072	-0.6%
Investments and Other assets	12,408	3.2%	12,984	4.6%	14,821	14.1%	15,963	22.9%	15,640	-2.0%
Investment securities	6	0.0%	6	0.0%	1,206	-	1,224	-	1,476	20.6%
Deferred tax assets	6,891	5.2%	7,679	11.4%	8,405	9.4%	9,052	17.9%	8,478	-6.3%
Other investments	5,510	0.8%	5,298	-3.9%	5,210	-1.7%	5,686	7.3%	5,685	0.0%
Total assets	378,458	8.9%	413,517	9.3%	421,599	2.0%	419,574	1.5%	438,099	4.4%
Current liabilities	48,942	-6.6%	49,929	2.0%	49,519	-0.8%	51,876	3.9%	55,690	7.4%
Notes payable and Accounts payable	22,434	3.8%	20,984	-6.5%	20,338	-3.1%	21,189	1.0%	24,875	17.4%
Other current liabilities	26,507	-13.9%	28,944	9.2%	29,181	0.8%	30,686	6.0%	30,814	0.4%
Long-Term liabilities	15,291	1.8%	15,908	4.0%	16,094	1.2%	15,634	-1.7%	15,899	1.7%
Deferred tax liabilities	798	-14.9%	648	-18.8%	978	50.8%	1,043	60.8%	515	-50.6%
Liability for Retirement Benefits	7,025	2.2%	7,436	5.9%	7,736	4.0%	7,337	-1.3%	7,869	7.2%
Other long-term liabilities	7,467	3.6%	7,823	4.8%	7,378	-5.7%	7,253	-7.3%	7,514	3.6%
Total liabilities	64,234	-4.7%	65,837	2.5%	65,613	-0.3%	67,510	2.5%	71,589	6.0%
Common stock	13,936	2.0%	14,140	1.5%	14,379	1.7%	14,483	2.4%	14,612	0.9%
Capital surplus	24,292	1.1%	24,303	0.0%	24,517	0.9%	24,585	1.2%	24,533	-0.2%
Retained earnings	245,557	11.4%	266,651	8.6%	285,210	7.0%	293,546	10.1%	305,251	4.0%
Treasury stock	△ 80	-	△ 9,159	-	△ 28,779	214.2%	△ 28,352	209.6%	△ 44,827	58.1%
Total accumulated other comprehensive income	27,580	44.4%	48,573	76.1%	57,640	18.7%	45,020	-7.3%	64,134	42.5%
Stock acquisition rights	1,989	2.7%	2,087	4.9%	1,867	-10.5%	1,663	-20.3%	1,503	-9.6%
Non-controlling interests	948	18.9%	1,076	13.5%	1,149	6.7%	1,116	3.8%	1,302	16.6%
Total net assets	314,224	12.2%	347,679	10.6%	355,985	2.4%	352,064	1.3%	366,510	4.1%
Total liabilities and net assets	378,458	8.9%	413,517	9.3%	421,599	2.0%	419,574	1.5%	438,099	4.4%

(Note1) MISUMI Group has applied IFRS 16 "Leases" from FY2020/3 to certain overseas consolidated subsidiaries. The right-to-use assets are booked in "Other tangible fixed assets", and Lease obligations are booked in Other current liabilities and "Other long-term liabilities".

(Note2) Items where the increase/decrease rate exceeds 1,000% are indicated as "-".

## 2. Consolidated Statement of Income

		Fiscal year ended March 2023		Fiscal year ended March 2024		3rd quarter ended December 2024		Fiscal year ended March 2025		3rd quarter ended December 2025		Fiscal year ended March 2026 Forecast	
		Amount	Sales ratio YoY%	Amount	Sales ratio YoY%	Amount	Sales ratio 3Qo3Q%	Amount	Sales ratio YoY%	Amount	Sales ratio 3Qo3Q%	Amount	Sales ratio YoY%
Factory Automation		121,932	32.7%	118,219	32.2%	102,158	33.9%	135,803	33.8%	115,919	36.2%	162,084	36.8%
			2.2%		-3.0%		16.5%				13.5%		19.4%
Die Components		79,125	21.2%	79,932	21.7%	64,721	21.5%	86,451	21.5%	65,203	20.3%	88,266	20.1%
			5.3%		1.0%		9.1%				0.7%		2.1%
VONA		172,093	46.1%	169,497	46.1%	134,705	44.7%	179,732	44.7%	139,538	43.5%	189,650	43.1%
			0.2%		-1.5%		7.1%				3.6%		5.5%
Net sales		373,151	100.0%	367,649	100.0%	301,585	100.0%	401,987	100.0%	320,661	100.0%	440,000	100.0%
			1.9%		-1.5%		10.5%				6.3%		9.5%
Cost of sales		202,073	54.2%	200,272	54.5%	160,759	53.3%	214,997	53.5%	171,756	53.6%		
			1.4%		-0.9%		7.8%				6.8%		
Gross profit		171,078	45.8%	167,377	45.5%	140,825	46.7%	186,990	46.5%	148,904	46.4%		
			2.5%		-2.2%		13.8%				5.7%		
S G & A expenses		124,463	33.4%	129,011	35.1%	104,675	34.7%	140,509	35.0%	116,640	36.4%		
			8.6%		3.7%		10.3%				11.4%		
Operating income		46,615	12.5%	38,365	10.4%	36,150	12.0%	46,480	11.6%	32,264	10.1%	46,200	10.5%
			-10.7%		-17.7%		25.1%				-10.7%		-0.6%
Non-operating income		2,283	0.6%	4,199	1.1%	3,643	1.2%	4,701	1.2%	2,000	0.6%		
			118.9%		84.0%		20.4%				-45.1%		
Non-operating expenses		1,059	0.3%	1,299	0.4%	888	0.3%	1,279	0.3%	850	0.3%		
			40.6%		22.7%		15.1%				-4.4%		
Ordinary income		47,838	12.8%	41,265	11.2%	38,904	12.9%	49,901	12.4%	33,414	10.4%	47,300	10.8%
			-8.9%		-13.7%		24.9%				-14.1%		-5.2%
Extraordinary income/losses(Δ)		△ 1,305	-0.3%	△ 2,045	-0.6%	38	0.0%	38	0.0%	△ 504	-0.2%		
			-4.6%		56.6%		-				-		
Income taxes		12,126	3.2%	10,964	3.0%	10,647	3.5%	13,285	3.3%	9,754	3.0%		
			-10.2%		-9.6%		25.7%				-8.4%		
Net income attributable to non-controlling interests		124	0.0%	102	0.0%	81	0.0%	105	0.0%	128	0.0%		
			92.5%		-17.3%		-3.0%				57.9%		
Net income attributable to owners of parent		34,282	9.2%	28,152	7.7%	28,213	9.4%	36,549	9.1%	23,027	7.2%	33,900	7.7%
			-8.7%		-17.9%		25.6%				-18.4%		-7.2%

### 3. Consolidated Statement of Cash Flows

(million yen)

	Fiscal year ended March 2023		Fiscal year ended March 2024		3rd quarter ended December 2024		Fiscal year ended March 2025		3rd quarter ended December 2025	
	Amount	YoY	Amount	YoY	Amount	3Qo3Q	Amount	YoY	Amount	3Qo3Q
Operating activities	31,447	△ 23,943	54,567	23,120	42,917	4,758	60,461	5,893	33,588	△ 9,328
Income before income taxes	46,533	△ 4,598	39,219	△ 7,313	38,942	7,932	49,940	10,720	32,910	△ 6,032
Depreciation, Amortization	16,587	1,245	17,564	977	13,351	212	17,718	153	12,764	△ 587
Amortization of goodwill	-	-	-	-	-	-	-	-	1,766	1,766
Decrease (Increase) in working capital	△ 11,766	△ 9,426	6,059	17,826	791	△ 4,115	4,228	△ 1,831	△ 3,369	△ 4,161
Other	△ 19,906	△ 11,164	△ 8,276	11,629	△ 10,168	729	△ 11,425	△ 3,148	△ 10,482	△ 314
Investing activities	△ 19,033	3,728	△ 18,995	38	△ 26,092	△ 15,819	△ 32,452	△ 13,457	△ 36,281	△ 10,189
Purchase of fixed assets	△ 13,625	2,882	△ 17,976	△ 4,350	△ 11,566	1,037	△ 15,434	2,541	△ 10,915	651
Deposits and withdrawals of time deposits	△ 5,416	943	△ 1,483	3,933	△ 13,456	△ 15,482	△ 16,100	△ 14,617	23,281	36,738
Purchase of shares of subsidiaries resulting in change	-	-	-	-	-	-	-	-	△ 48,483	△ 48,483
Other	9	△ 97	464	455	△ 1,068	59	△ 916	△ 1,381	△ 163	904
Financing activities	△ 11,169	△ 1,560	△ 18,968	△ 7,799	△ 31,345	△ 12,757	△ 31,759	△ 12,790	△ 33,237	△ 1,891
Dividends paid	△ 9,244	△ 1,427	△ 7,058	2,185	△ 9,653	△ 2,595	△ 9,653	△ 2,595	△ 11,322	△ 1,668
Purchase of treasury stock	△ 0	0	△ 10,095	△ 10,094	△ 20,164	△ 10,069	△ 20,164	△ 10,068	△ 17,069	3,094
Other	△ 1,924	△ 132	△ 1,814	109	△ 1,527	△ 1,527	△ 1,940	△ 126	△ 4,845	△ 3,317
Effect of exchange rate change on cash and cash equivalents	3,952	△ 2,506	10,132	6,179	4,656	151	△ 1,367	△ 11,500	7,186	2,529
Net increase (decrease) in cash and cash equivalents	5,197	△ 24,281	26,736	21,538	△ 9,864	△ 23,666	△ 5,117	△ 31,853	△ 28,743	△ 18,879
Cash and cash equivalents at beginning of year	101,443	29,479	106,640	5,197	133,376	26,736	133,376	26,736	128,259	△ 5,117
Cash and cash equivalents at end of year	106,640	5,197	133,376	26,736	123,512	3,069	128,259	△ 5,117	99,515	△ 23,997

(Note1)The "Other" category under cash flows from financing activities for the half year ended September 2025 includes an outflow of ¥3,356 million for the repayment of borrowings by acquired subsidiaries.

## 4. Key Financial Indicator

	Fiscal year ended March 2023	Fiscal year ended March 2024	3rd quauter ended December 2024	Fiscal year ended March 2025	3rd quauter ended December 2025
EBITDA (million yen)	63,202	55,930	49,501	64,199	46,794
Net income per share(yen)	120.53	99.75	101.59	131.95	84.48
Operating Income Margin (%)	12.5	10.4	12.0	11.6	10.1
Return on Assets (%)	9.4	7.1	5.6	8.8	5.4
Return on Equity (%)	11.7	8.6	6.6	10.5	6.4
Current Ratio (%)	577.5	627.7	642.6	612.6	505.1
Equity Ratio (%)	82.3	83.3	83.7	83.2	83.0
Receivables Turnover (Days)	74.9	75.6	69.2	70.0	73.2
Inventory Turnover (Months)	4.1	4.7	4.2	4.1	3.8

- Formula -

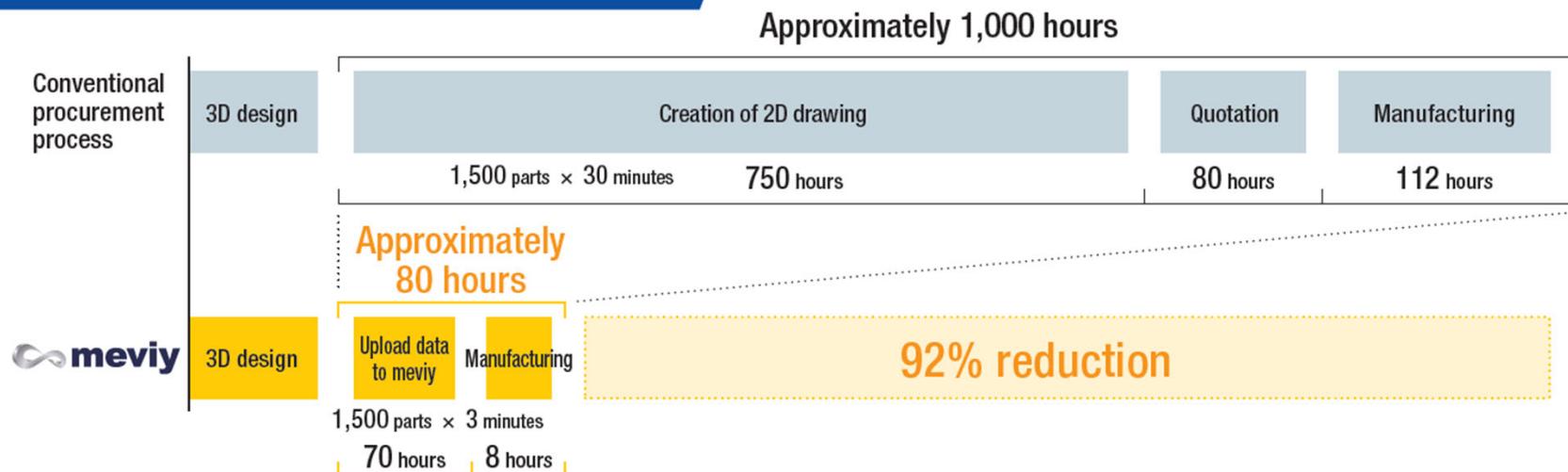
- EBITDA: Operating income + Depreciation, Amortization + Amortization of goodwill
- Net income per share: Net Income/Weighted average number of shares outstanding during the fiscal year(excluding treasury stock)
- Operating Income Margin: Operating Income/Sales
- Return on Assets: Net Income/((Last Ending Assets+Ending Assets)/2)
- Return on Equity: Net Income/((Last Ending Equity+Ending Equity)/2)
- Current Ratio: Current Assets/Current Liabilities
- Equity Ratio: Ending Equity/Ending Assets
- Receivables Turnover (Days):(Last Ending Trade Notes & Receivable+Ending Trade Notes & Receivable)/2/Sales × 365Days(275 Days)
- Inventory Turnover (Months) :(Last Ending Inventory +Ending Inventory )/2/COGS × 12Months(9 Months)

# A Revolution in Parts Procurement: mevyi

- Simply upload 3D data of machine parts and the AI will automatically and instantly provide a quote, and our unique platform enables shipping in as little as one day using a digital manufacturing system (available for free)

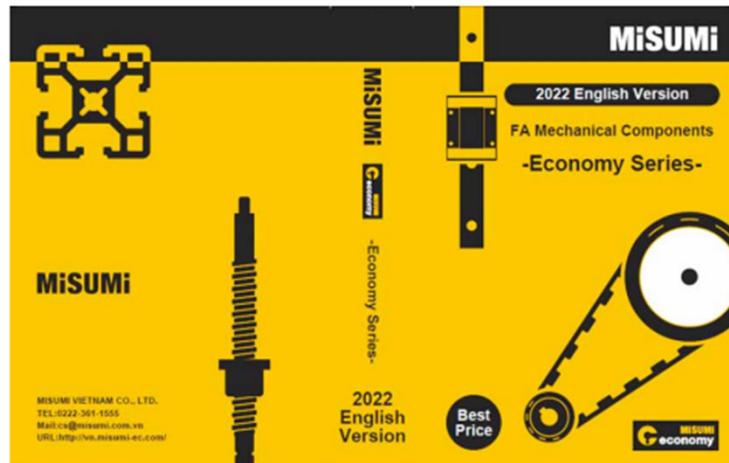


Example: Parts procurement for equipment with 1,500 components



# Product Range Reform: Economy Products

- Newly introduced, competitively priced mid-range product line from China



MISUMI **MISUMI**  
economy

Miniature Linear Guides  
Standard

Volume Discount

CAD : 3D

MISUMI **MISUMI**  
economy **SAVE** Up to **55%**

Small Ball Bearings

Recommendation

Volume Discount

## Comparison with existing products

Existing product



Accuracy -0.009 to 0  
(I.D. Intersection)

Economy product



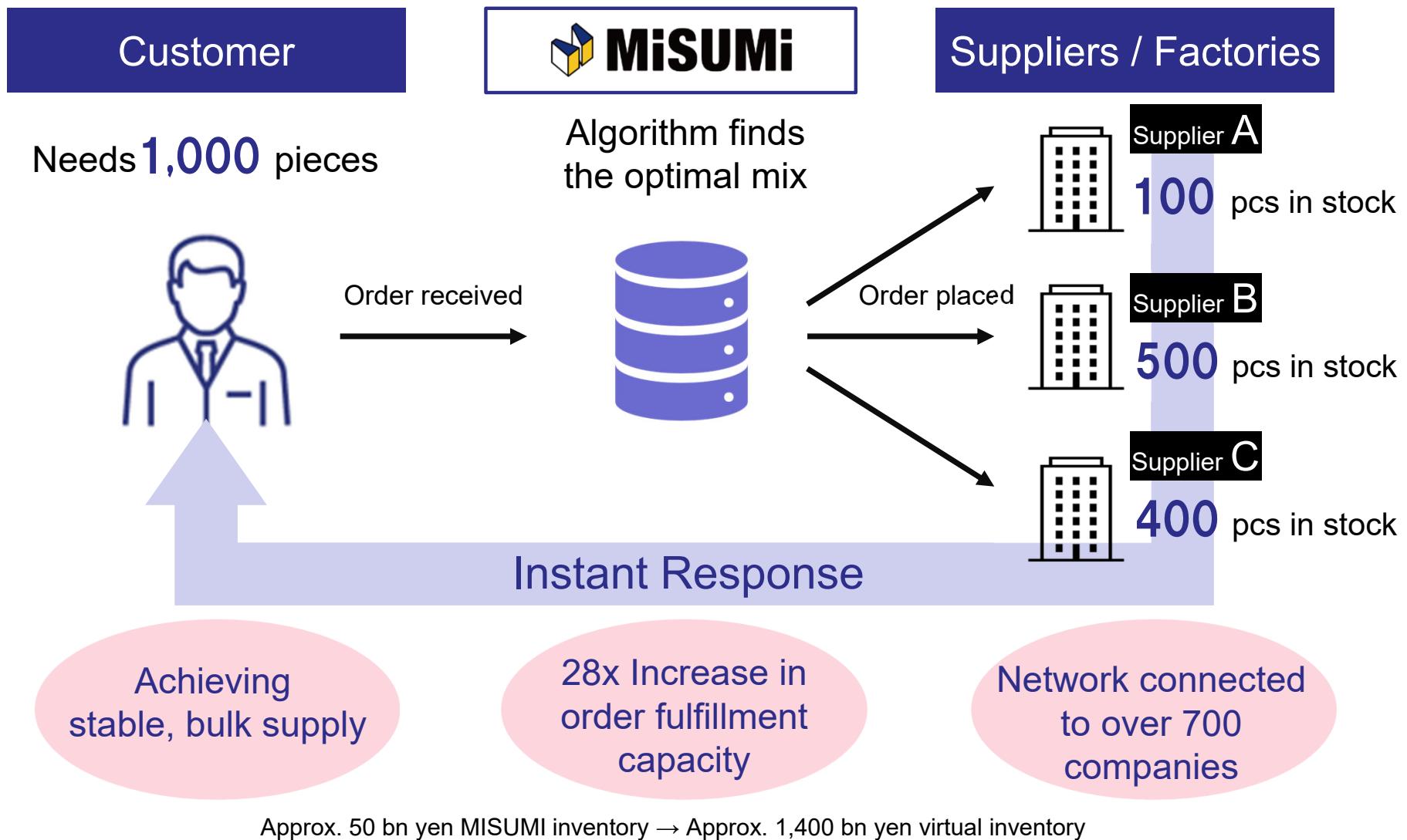
-0.012 to +0.003  
(Middle range accuracy)

Price index 100

30-50

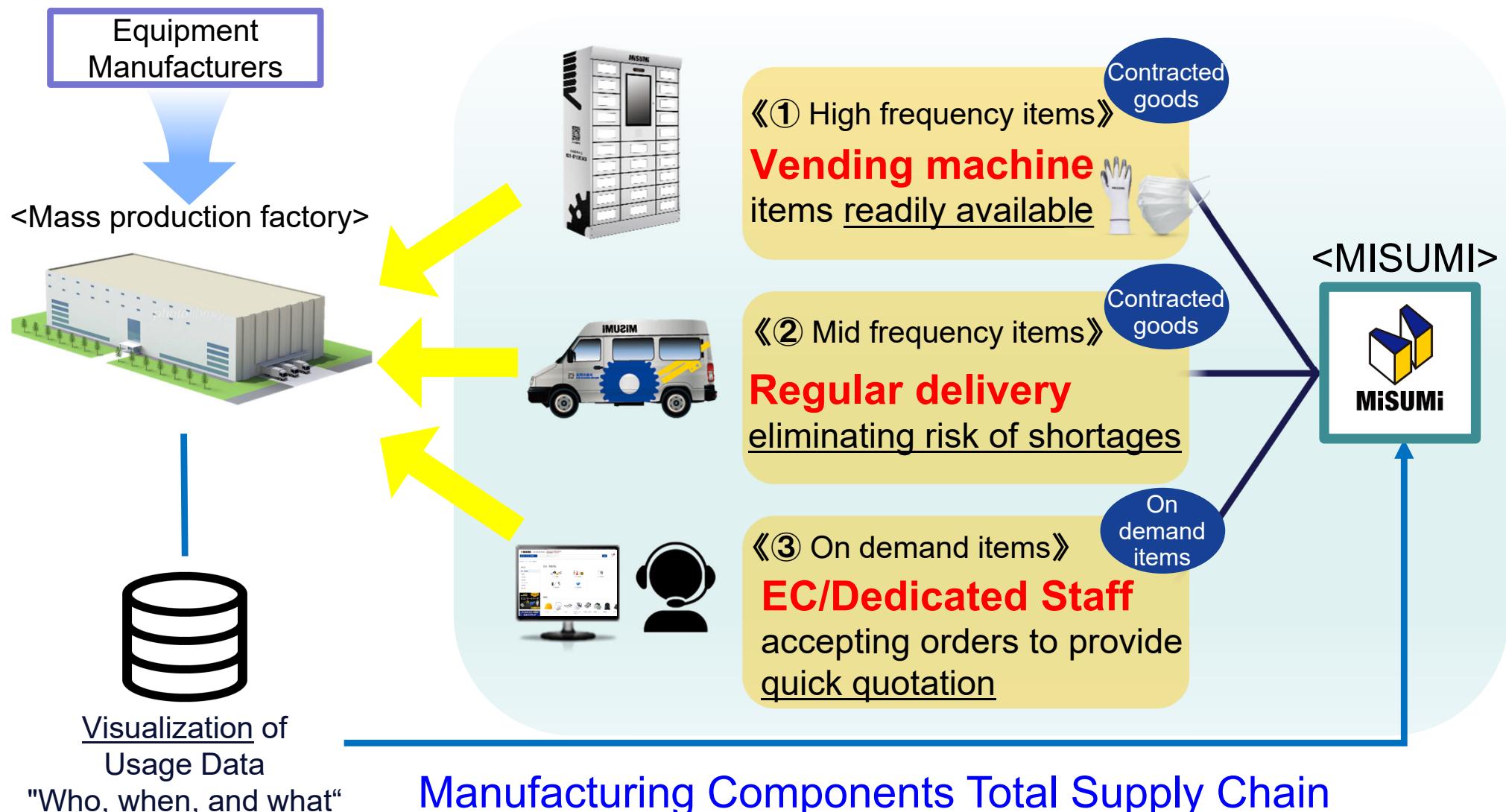
# Improving Response to Quantity: D-JIT

- A unique system is now in place that allows us to respond to our customers' needs, even for high-volume orders with short lead times
- From “**MISUMI for small quantities, quick delivery**” to “**MISUMI even for larger quantities**”, which will be rolled out globally from Japan



# The 4th Digital MODEL: floow

- Total cost reduction for manufacturing components that tailors the purchasing of manufacturing components according to a customer's purchasing pattern
- To expand from existing equipment manufacturing customers to new mass production factory customers across different industries



"Who, when, and what"

# Business Foundation

## IT

- Our Company has made a proactive investment in IT to promote sustainable growth
- Starting in fiscal year 2021, we began a comprehensive overhaul of the core systems
- We aim to triple the rate of new feature development while reducing development costs by two-thirds

## Production/ Logistics

- Aiming for a more stable supply of products by strengthening the globally reliable, quick delivery system

