

FY2025(ended March 31,2026) Full-year Earnings Report



April 30, 2026

MISUMI Group Inc. (9962)

Representative Director and President Arata Shimizu



Key Points of This Earnings Release

FY25 Full-Year Actual

YoY growth in both revenue and profit

Net Sales: ¥441.3 Bn (+9.8% YoY) — Record high for both the full year and Q4

Operating Income: ¥47.6 Bn (+2.4% YoY) — Record high on a quarterly basis for Q4

FY26 Full-Year Outlook

Planning record-high net sales and operating income

Net Sales: ¥491.5 Bn (+11.4% YoY)

Operating Income: ¥55.0 Bn (+15.5% YoY), OI Margin: 11.2%

(Heightened Middle East tensions could lead to higher raw material and logistics costs, but the outlook remains uncertain and no quantitative impact has been factored into the consolidated earnings forecast)

Shareholder Returns

FY25

Full-year dividend: ¥52.98/share (Dividend payout ratio:35%), Share buyback: ¥25.0 Bn

FY26

Progressive dividend policy introduced (dividend payout ratio: 35%); full-year dividend planned at: ¥52.98/share, Share buyback: ¥30.0 Bn

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1. Earnings Overview for FY2025

FY25 Full-Year Results

< Market Outlook / Market Trends >

- An uncertain business environment is expected to persist, driven by factors such as U.S. tariff policies and rising geopolitical risks.
- Despite delays in certain automotive investment projects, demand related to telecommunications continued to remain robust.

< Sales Growth / Profitability >

- Sales Growth: Digital MODEL Shift initiatives drove growth, with full-year net sales reaching a record high.
- Profitability: Higher profitability driven by telecommunications-related demand and growth in China and other Asian markets.

< Strategy Execution / Infrastructure Enhancement >

- The combination of a “Digital MODEL Shift” and “region-specific growth strategies” is generating tangible results.
- Strengthened the Americas business and acquired AI-related capabilities through the acquisition of Fictiv.

1.Earnings Overview for FY2025

Consolidated Financial Results

Net sales amounted to ¥441.3 Bn (+9.8% YoY), and operating income totaled ¥47.6 Bn (+2.4% YoY), achieving record-high in net income.

	Pre-Fictiv consolidation			Fictiv 25.Jul ~ 26.Mar Nine months	Post-Fictiv consolidation			
	FY24 Actual	FY25 Actual	YoY change (Local currency basis)		FY25 Actual	YoY change (Local currency basis)	FY25 Announced figures (1/30)	FY25 vs. Announced figures (1/30)
Net Sales	401.9	427.0	+6.2% (+5.6%)	14.3	441.3	+9.8% (+9.2%)	440.0	+0.3%
Operating Income	46.4	52.6	+13.2% (+11.8%)	※2 -2.1	50.4	+8.6% (+7.3%)	49.0	+2.9%
Margin	11.6%	12.3%	+0.8pt (+0.7pt)	-	11.4%	-0.1pt (-0.2pt)	11.1%	+0.3pt
Operating Income	46.4	52.6	+13.2% (+11.8%)	※3 -4.9	47.6	+2.4% (+0.7%)	46.2	+3.1%
Margin	11.6%	12.3%	+0.8pt (+0.7pt)	-	10.8%	-0.8pt (-0.9pt)	10.5%	+0.3pt
Net income	36.5	45.1	+23.4% (-)	-4.6	40.4	+10.7% (-)	33.9	+19.3%

※1 Before goodwill amort.

※2

※3

※4

※1: Profit calculated by adding amortization of goodwill and amortization of intangible assets related to the acquisition of Fictiv Inc. to operating profit

※2: Breakdown: Fictiv standalone performance: -¥1.0 Bn ; M&A advisory fees: -¥1.1 Bn

※3: Included amortization of goodwill and related items: -¥2.8 Bn

※4: Includes the decrease in income tax adjustments attributable to, among others, the recognition of deferred tax assets for net operating loss carryforwards in connection with the introduction of the U.S. consolidated tax filing system

FY25 Exchange rate

USD: ¥151.0, EUR: ¥174.6, RMB: ¥21.3

1.Earnings Overview for FY2025

Sales and Operating Income by Business Segment

FA: Performance remained solid, driven mainly by telecommunications-related demand; however, operating income declined due to the consolidation of Fictiv.

Die Components: Profit declined, impacted by sluggish automotive demand in the Americas and Europe.

	Net Sales			Operating Income				Billion yen
	FY24 Actual	FY25 Actual	YoY change (Local currency basis)	FY24 Actual	Margin	FY25 Actual	Margin	YoY change (Local currency basis)
Total	401.9	441.3	+9.8% (+9.2%)	46.4	11.6%	47.6	10.8%	+2.4% (+0.7%)
FA business	135.8	160.4	+18.2% (+17.3%)	22.5	16.6%	20.2	12.6%	-9.9% (-11.6%)
Pre-Fictiv consolidation	135.8	146.1	+7.6% (+6.8%)	22.5	16.6%	25.2	17.3%	+12.3% (+11.4%)
Die Components business	86.4	88.3	+2.2% (+2.0%)	9.5	11.0%	8.6	9.8%	-8.5% (-9.1%)
VONA business	179.7	192.5	+7.1% (+6.5%)	14.4	8.0%	18.6	9.7%	+28.8% (+26.4%)

1.Earnings Overview for FY2025

Digital MODEL Shift: Performance

Net Sales

Billion yen

※1

FY24 Actual	FY25 (Announced figures 7/25)	FY25 Actual	YoY change	Vs. Announced figures 7/25
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Total	35.2	61.6	64.2	+81.5%	+4.3%
Online Processing Business	15.9	33.9	32.1	+101.1%	-5.3%
meviy	15.9	21.9	17.7	+11.2%	-18.9%
Fictiv	—	12.0	14.3	—	+19.6%
Economy Series	11.1	15.8	18.3	+63.7%	+15.9%
D-JIT	8.2	11.9	13.8	+68.0%	+16.3%

<u>KPI</u>	<u>Progress</u>
Cumulative users 240,000 (+26.3% YoY)	Plans fell short due to sluggish conditions in the domestic EV market.
# of customers approximately 2,000 companies	The integration process with MISUMI continues to progress smoothly
# of customers 95,000 companies (+5.6% YoY)	Continued growth led by China and Asia
Cyber NW procurement integration: over 700 companies	Enhanced global volume responsiveness

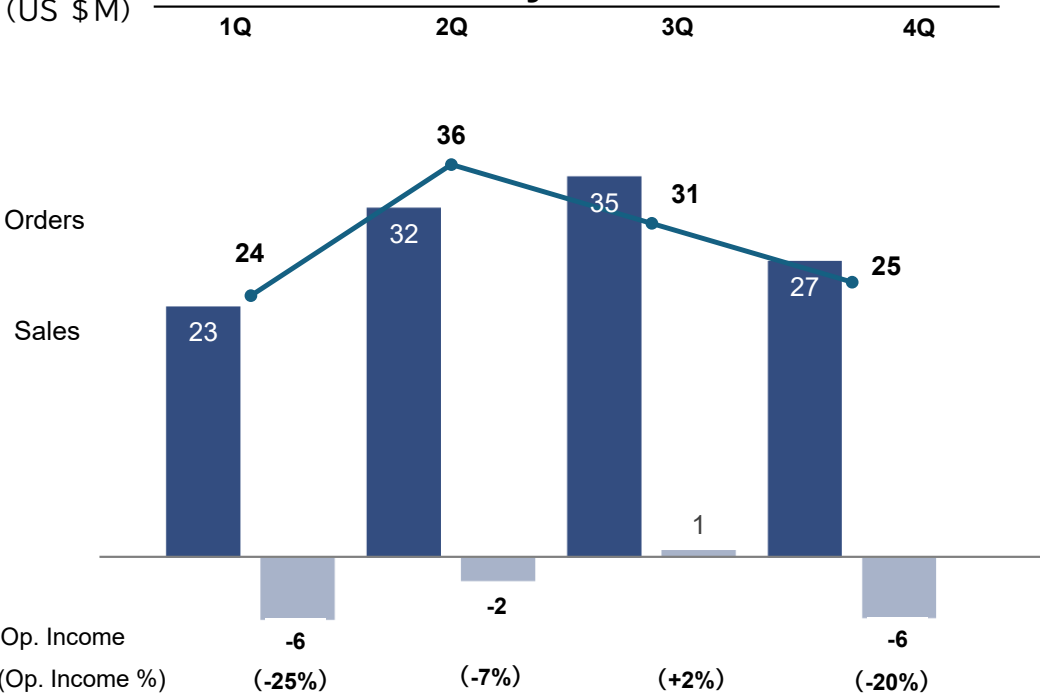
※1: Digital MODEL Shift FY25 initial plan

1.Earnings Overview for FY2025

Fictiv's Business Performance (Standalone Basis)

Growth accompanied by improved profitability, with net sales of \$117 Mn (+50.3% YoY) and a 21-percentage-point improvement in operating income margin.

FY25 Quarterly Sales Trend ※1



CY
25. Jan~25.Dec

Orders Full-year \$ 115 Mn
YoY **+49.9%**

FY
25.Apr~26.Mar

Orders Full-year \$ 116 Mn
YoY **+43.0%**

Sales Full-year \$ 112 Mn
YoY **+54.0%**

Sales Full-year \$ 117 Mn
YoY **+50.3%**

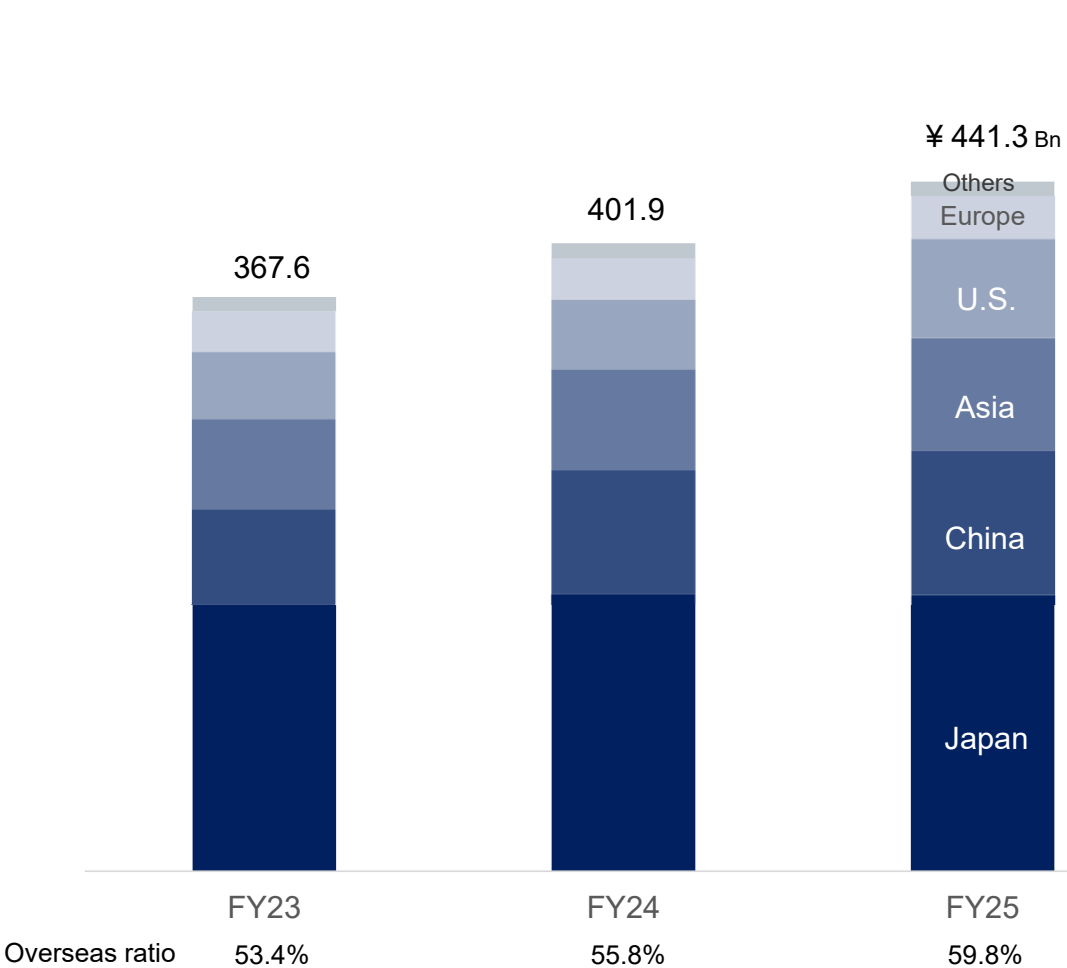
Op. Income Full-year -7%
YoY **+27pt**

Op. Income Full-year -11%
YoY **+21pt**

※1: Business performance from July 2025 (Q2) onwards included in consolidated results
 ※2: Excl. M&A intermediary fees and goodwill amortization
 ※3: Q1 figures exclude one-time stock-based compensation expenses

1.Earnings Overview for FY2025

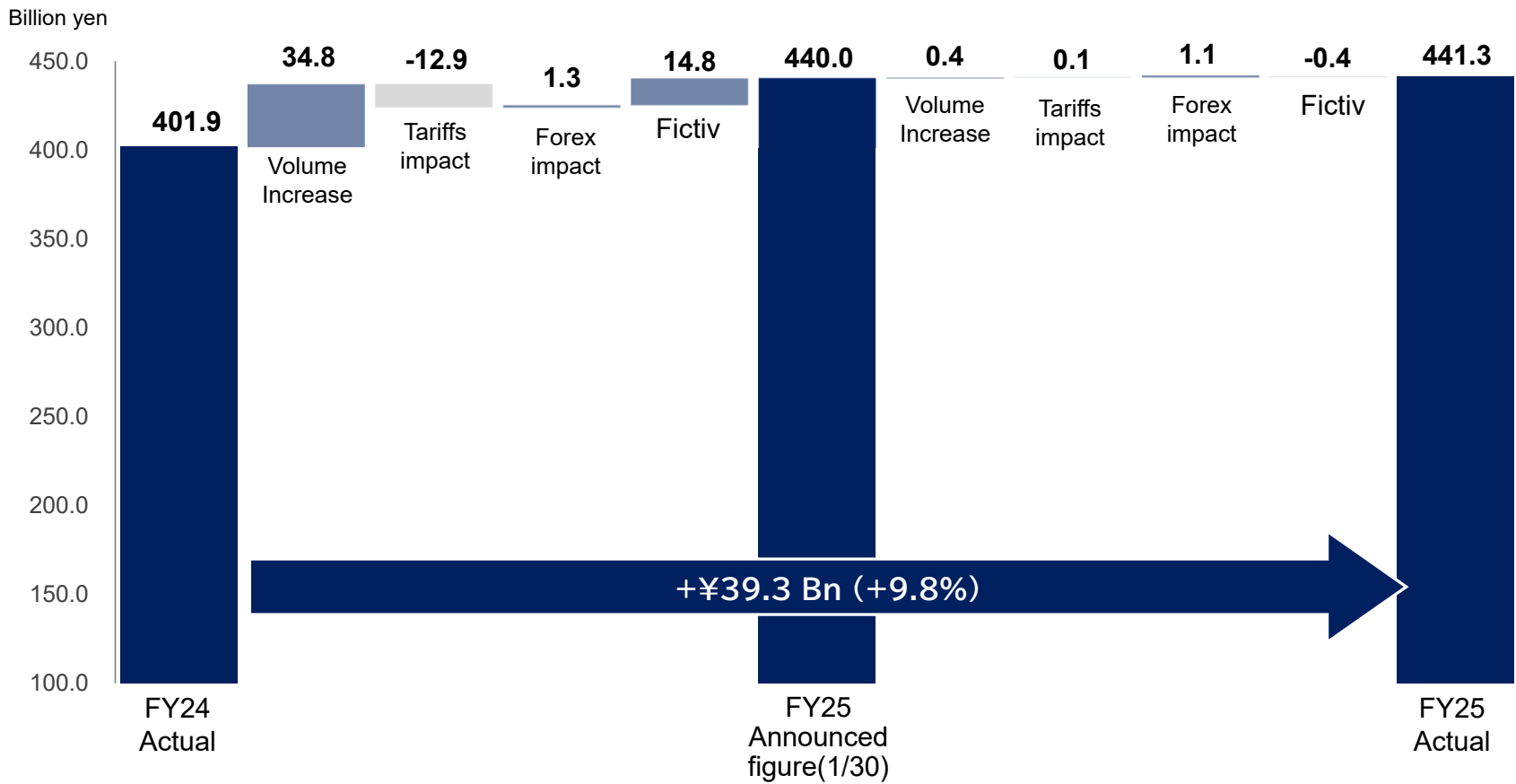
Sales by Region



	Sales	Yen basis	YoY Local currency basis
Europe	¥27.6 Bn	+3.3%	-3.2%
✓	Manufacturing PMI improved from Q4 onward; however, a full recovery has yet to materialize		
U.S.	¥63.3 Bn	+41.6%	+42.7%
Pre-Fictiv consolidation	¥48.9 Bn	+5.1%	+10.6%
✓	Significant YoY growth following Fictiv consolidation		
✓	Pre-consolidation, growth was maintained through proprietary initiatives despite ongoing uncertainty from tariffs and other factors		
Asia	¥72.0 Bn	+12.6%	+12.3%
✓	Semiconductor-related demand remained strong; E-products were also solid		
China	¥91.9 Bn	+15.9%	+14.9%
✓	E-products remained strong; telecommunications-related demand accelerated in 2H		
Japan	¥177.2 Bn	-0.3%	—
✓	Q4 showed signs of recovery, while automotive-led market softness persists		

Sales Variance Analysis

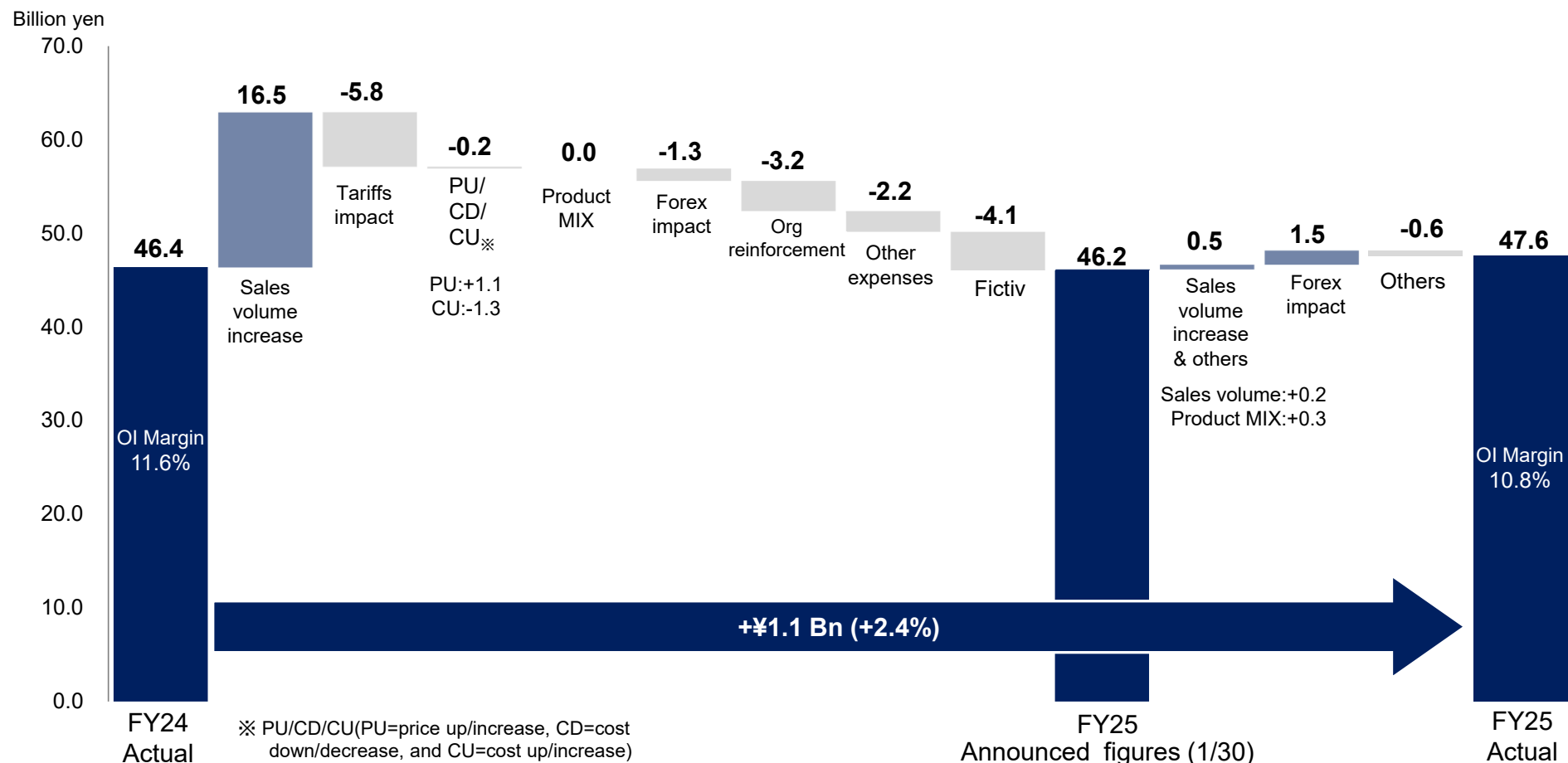
Growth was driven by Digital MODEL initiatives, achieving +9.8% YoY and broadly in line with the 3Q disclosure.



1.Earnings Overview for FY2025

Operating Income Variance Analysis

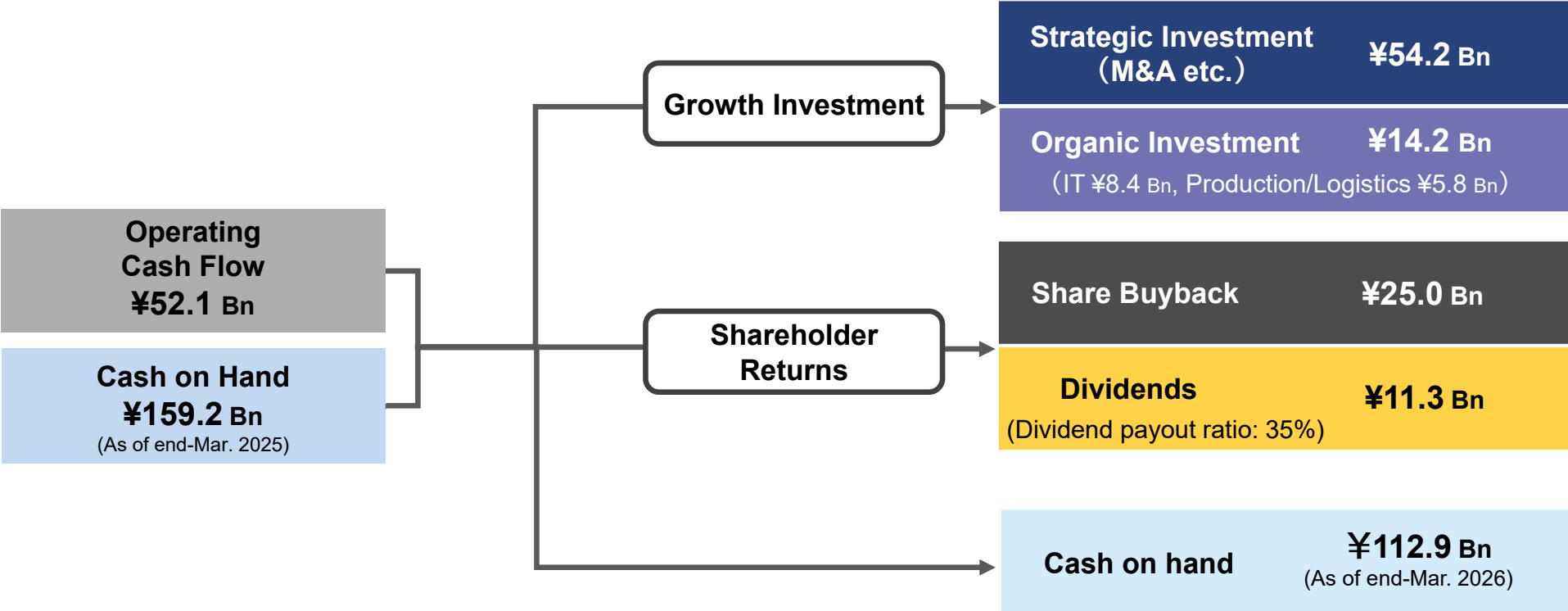
Higher sales volumes offset the impacts of tariffs and the Fictiv acquisition, among other factors, delivering a ¥1.1 Bn YoY increase in profit and outperforming the 3Q disclosure.



Cash Allocation

Completed the acquisition of Fictiv and entered into a capital and business alliance with Oishii Farm.

■ FY25



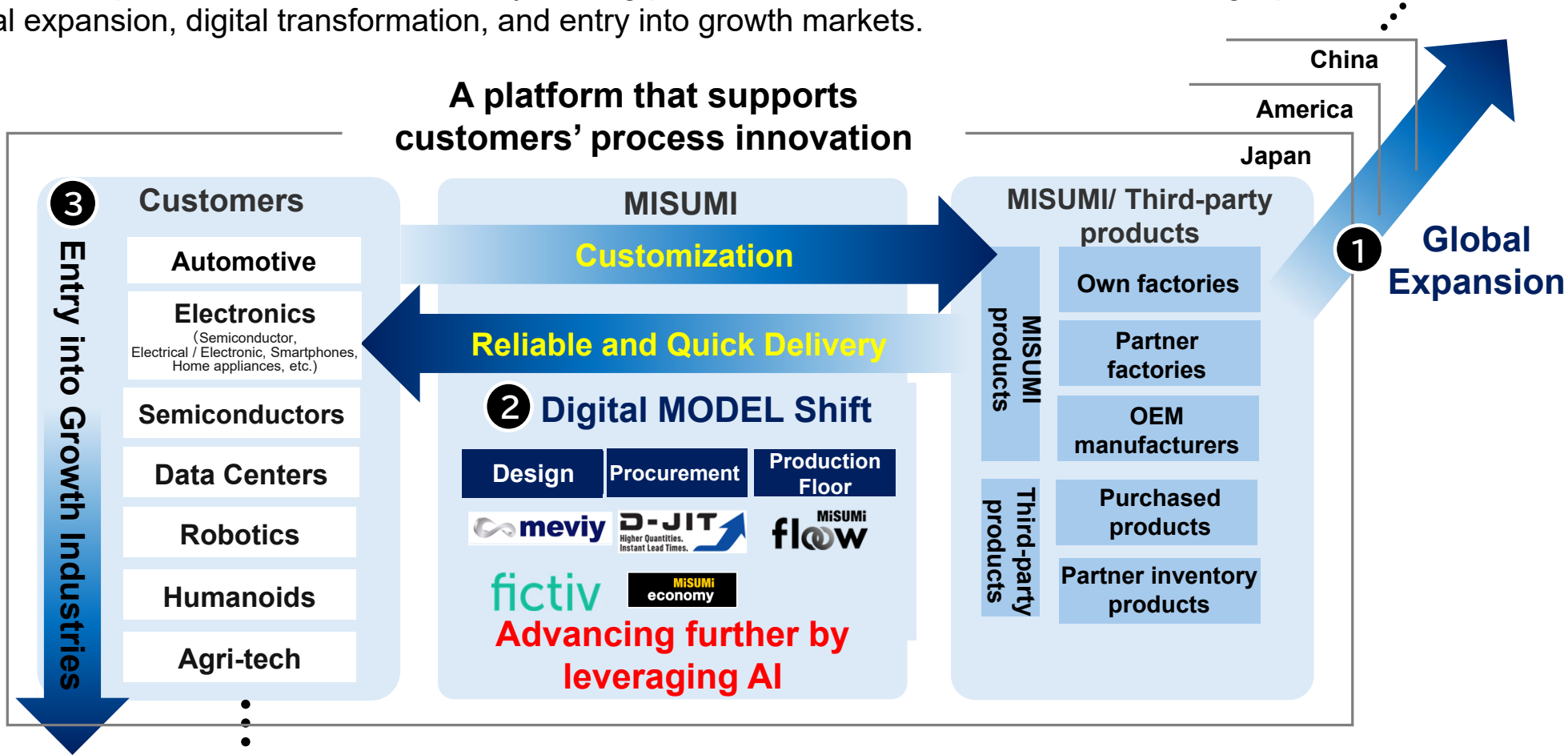
※ Only principal uses of funds are shown
 ※ The Fictiv acquisition amount under strategic investments is calculated at ¥143.23 / USD

2. Future Growth Strategy

2. Future Growth Strategy

MISUMI 3 Growth Strategies

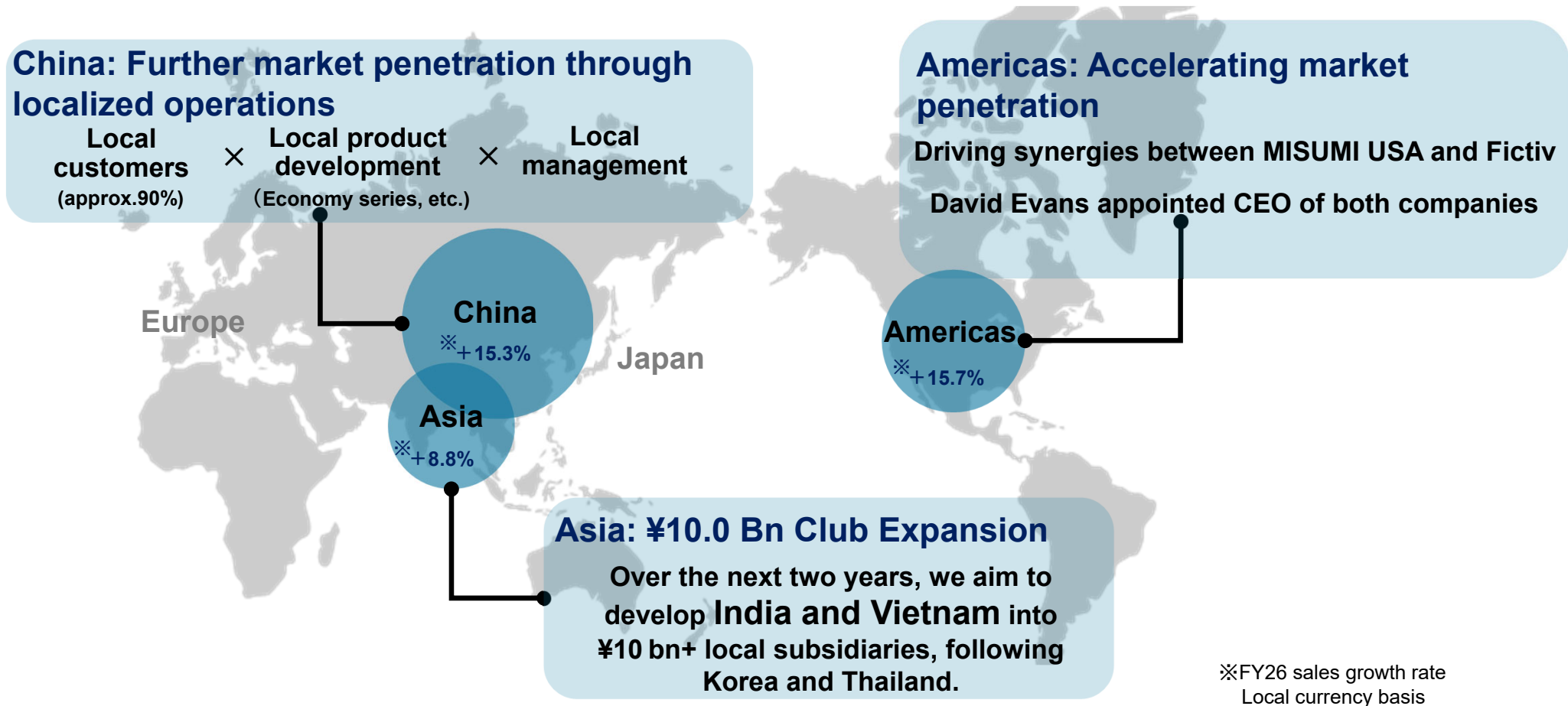
We aim to expand our business domain by making proactive investments across three strategic pillars: global expansion, digital transformation, and entry into growth markets.



2. Future Growth Strategy

① Global Expansion

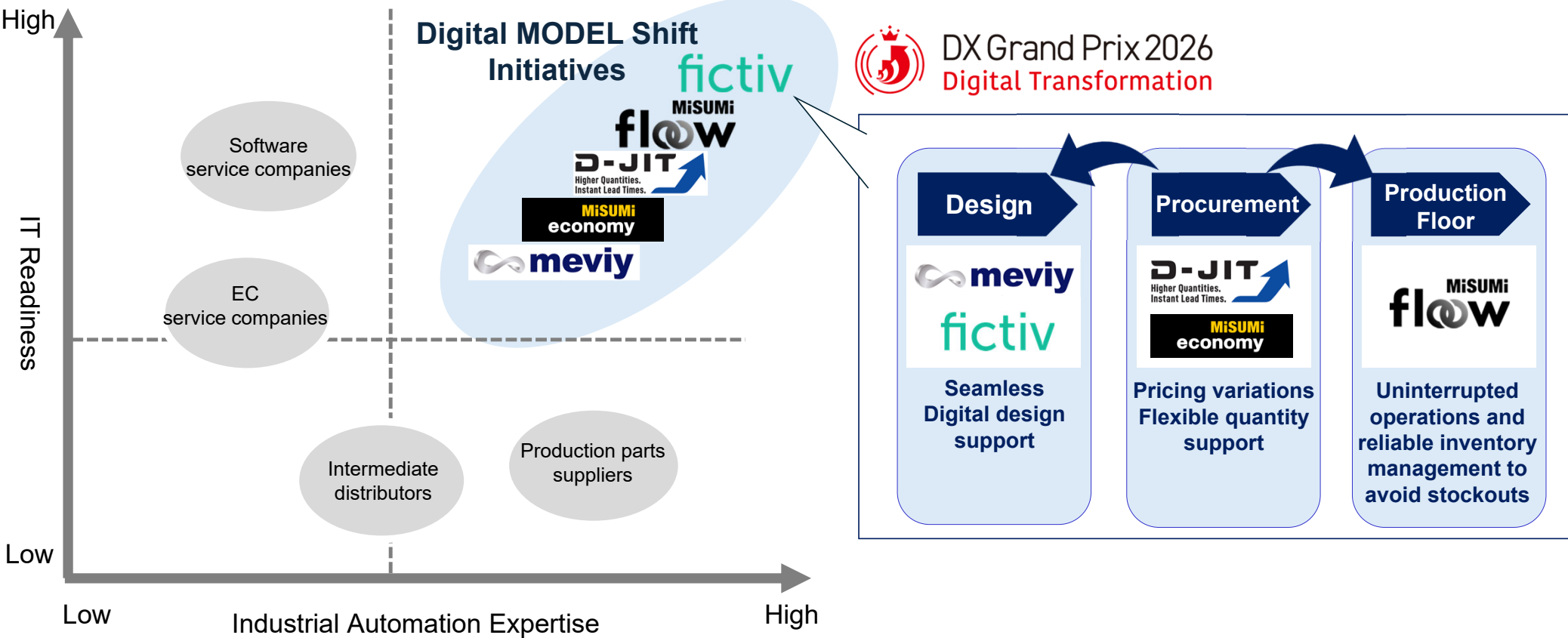
Designation of priority regions and strategic countries to enable focused investment.



2. Future Growth Strategy

② Digital MODEL Shift

Selected as a 2026 DX Stock (Grand Prix); accelerating the Digital MODEL Shift through enhanced AI investment.



2. Future Growth Strategy

③ Entry to Growing Industries

We are actively advancing our entry into new growth industries emerging through AI.



For Data Centers

Investing to double supply capacity for automated stages

¥2.0 Bn (FY26)



For Agri-tech

Capital and business partnership with Oishii Farm; promoting joint R&D

Driving the expansion of the agrifarm market

Capital and business partnership



For Robotics·Humanoids

Advancing partnerships with robotics and humanoid-related companies

Strengthening robotics / supply chain

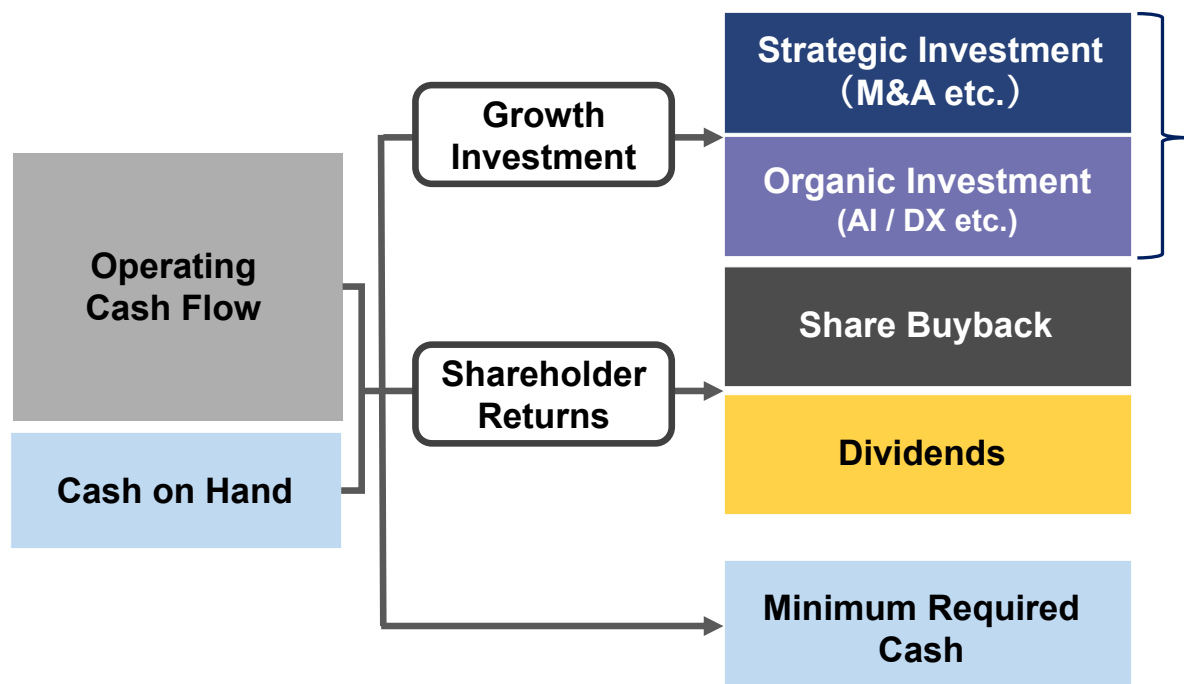
Capital and business partnership
(Under consideration)

2. Future Growth Strategy

Cash Allocation

Setting a growth investment budget for the next 3 years and, in parallel, introducing a progressive dividend premised on dividend increases to clearly define the balance between growth investments and shareholder returns.

FY26-28



- Setting a growth investment budget of up to **¥150.0 Bn** over the next 3 years
- Excess funds to be directed toward share buybacks, taking into account stock price levels
- FY26 share buyback: **¥30.0 Bn**
- Newly introducing a **progressive dividend** with an approximate **35%** payout ratio target, for more stable shareholder returns
- **¥70.0 Bn**
(Maintaining level sufficient to fulfill supply responsibilities for 6 months even in BCP situations)

3. FY2026 Full-year Performance Outlook

3. FY2026 Full-year Performance Outlook

Consolidated Business Outlook

Net sales of ¥491.5 Bn (+11.4% YoY) and operating income of ¥55.0 Bn (+15.5% YoY), with operating income planned to reach a record high.

	Pre-Fictiv consolidation			Fictiv			Post-Fictiv consolidation			Billion yen
	FY25 Actual	FY26 Plan	YoY change (Local currency basis)	FY25 Actual (9months)	FY26 Plan (12months)	YoY change (Local currency basis)	FY25 Actual	FY26 Plan	YoY change (Local currency basis)	
Net Sales	427.0	469.3	+9.9% (+8.9%)	14.3	22.1	+54.3% (+55.3%)	441.3	491.5	+11.4% (+10.4%)	
※1 Before goodwill amort. Operating Income	52.6	59.5	+13.3% (+10.0%)	-2.1	-0.8	-% (-%)	50.4	58.7	+16.5% (+13.6%)	
Margin	12.3%	12.7%	+0.4pt (+0.1pt)	-	-	-	11.4%	12.0%	+0.5pt (+0.3pt)	
Operating Income	52.6	59.5	+13.3% (+10.0%)	※2 -4.9	-4.5	-% (-%)	47.6	55.0	+15.5% (+12.4%)	
Margin	12.3%	12.7%	+0.4pt (+0.1pt)	-	-	-	10.8%	11.2%	+0.4pt (+0.2pt)	
※3 Net income	45.1	41.7	-7.3% (-)	-4.6	-4.3	-% (-%)	40.4	37.4	-7.6% (-)	

※1: Operating income plus amortization of goodwill and intangible assets associated with the acquisition of Fictiv Inc.

※2: Includes amortization of goodwill, etc.: -¥3.7 Bn

FY26 Assumed Exchange Rates
USD: ¥152, EUR: ¥179, RMB: ¥22

3. FY2026 Full-year Performance Outlook

Sales and Operating Income by Business Segment

FA growth driven by the Americas, China, Asia, and the Digital MODEL Shift initiatives.
Improvements in profitability in the Die Components and VONA businesses.

	Net Sales			Operating Income				Billion yen
	FY25 Actual	FY26 Plan	YoY change (Local currency basis)	FY25 Actual	Margin	FY26 Plan	Margin	
Total	441.3	491.5	+11.4% (+10.4%)	47.6	10.8%	55.0	11.2%	+15.5% (+12.4%)
FA business	160.4	201.4	+25.5% (+24.4%)	20.2	12.6%	22.6	11.3%	+11.8% (+7.9%)
Pre-Fictiv consolidation	146.1	179.2	+22.7% (+21.4%)	25.2	17.3%	27.2	15.2%	+7.9% (+4.3%)
Die Components business	88.3	92.9	+5.1% (+4.1%)	8.6	9.8%	12.4	13.4%	+43.4% (+38.8%)
VONA business	192.5	197.1	+2.4% (+1.6%)	18.6	9.7%	19.8	10.1%	+6.6% (+5.1%)

3. FY2026 Full-year Performance Outlook

Digital MODEL Shift Performance

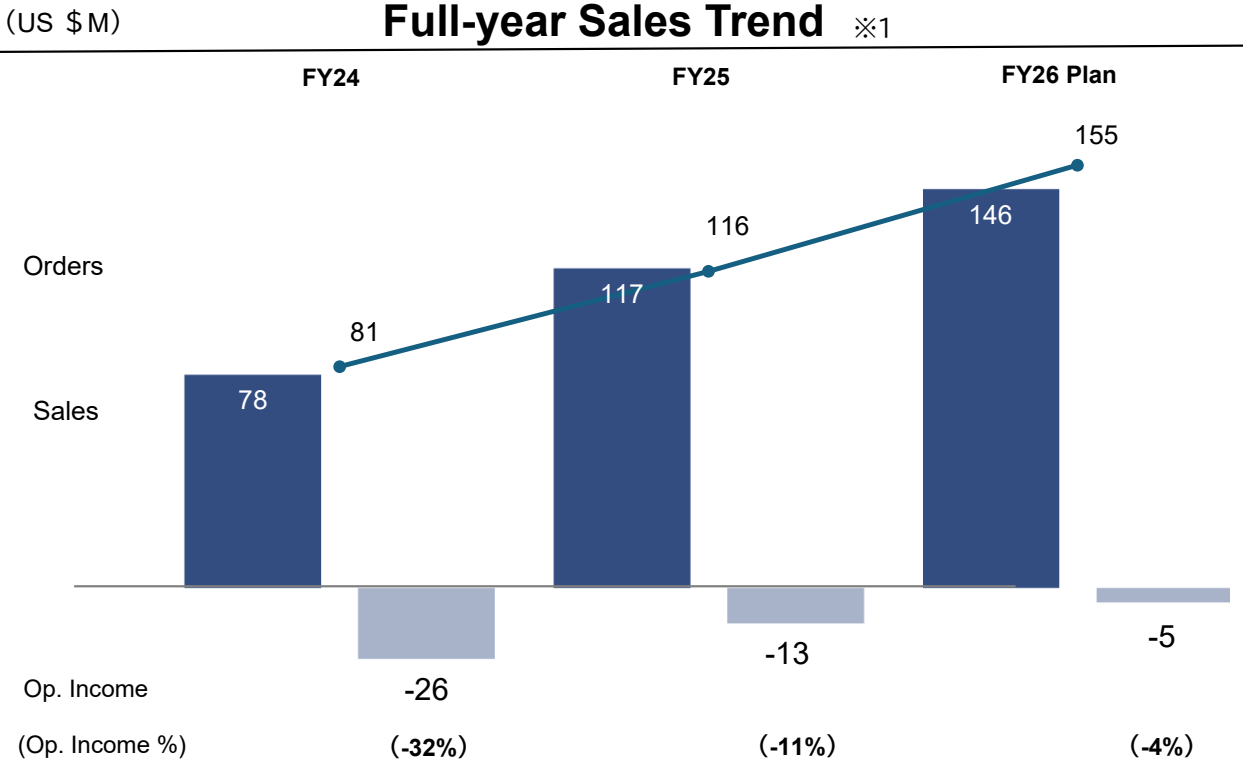
	Net Sales		YoY change	Billion yen	
	FY25 Actual	FY26 Plan			
Total	64.2	87.5	+ 36.3%		
Online Processing Business	32.1	46.4	+ 44.5%		<u>FY26 Action Plans for Each Initiative</u> Addressing both prototyping and mass production needs Expanding customer penetration by enhancing capability and responsiveness Customer expansion driven by continued enhancement of product variety Further expansion of countries of operation
meviy	17.7	24.3	+ 36.8%		
Fictiv	14.3	22.1	+ 54.0% (+24.8%) ※1		
Economy Series	18.3	25.1	+ 37.2%		
D-JIT	13.8	16.0	+ 15.9%		

※1: FY25 figures represent nine-month results; on a full-year basis, YoY growth is +24.8%.

3. FY2026 Full-year Performance Outlook

Fictiv's Business Performance (Standalone Basis)

Sustaining growth with improved profitability, and on track to achieve profitability in FY2027 as originally planned.



Orders Full-year YoY
+33.8%

Sales Full-year YoY
+24.8%

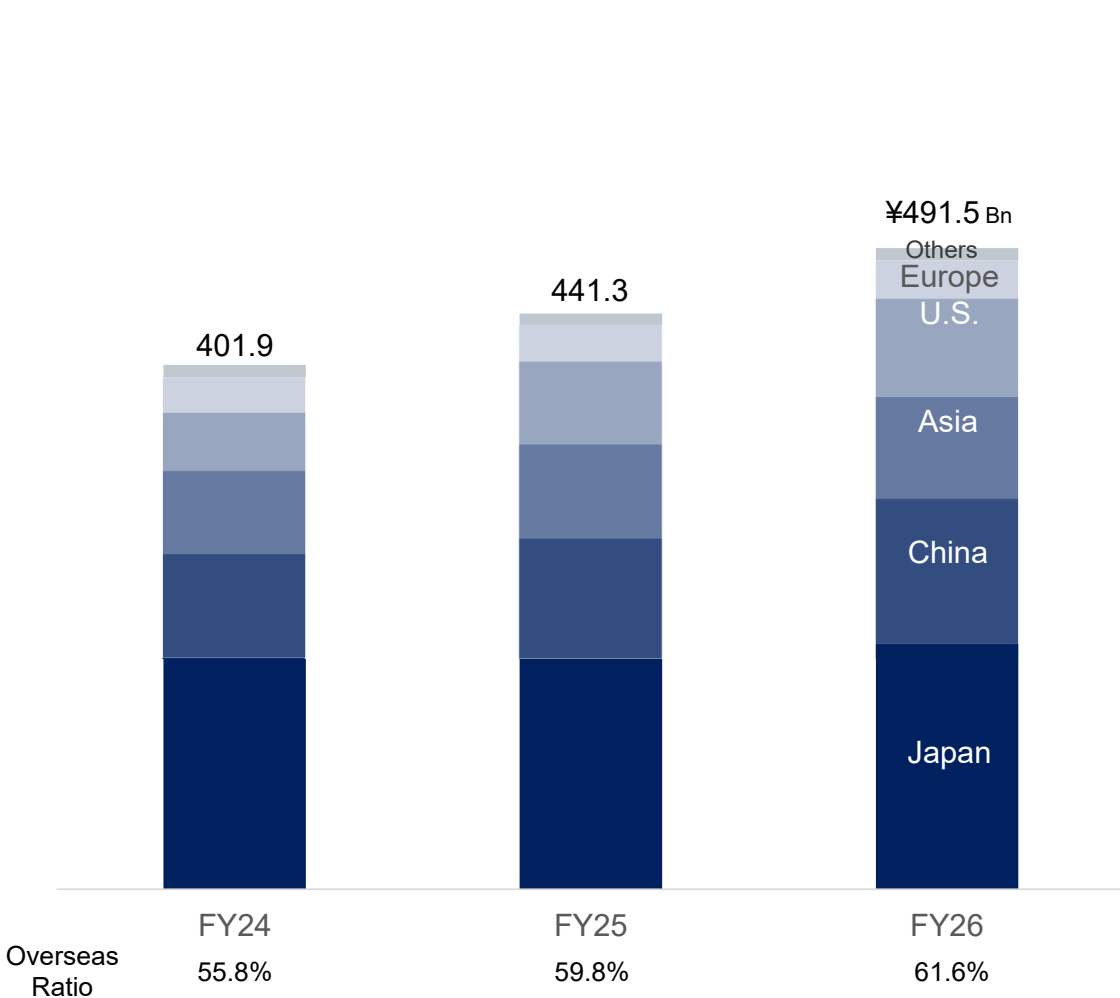
Op. Income Full-year YoY
+7pt

※2

※1: Business performance from July 2025 (Q2) onwards included in consolidated results
 ※2: Excl. M&A intermediary fees and goodwill amortization

3. FY2026 Full-year Performance Outlook

Sales by Region

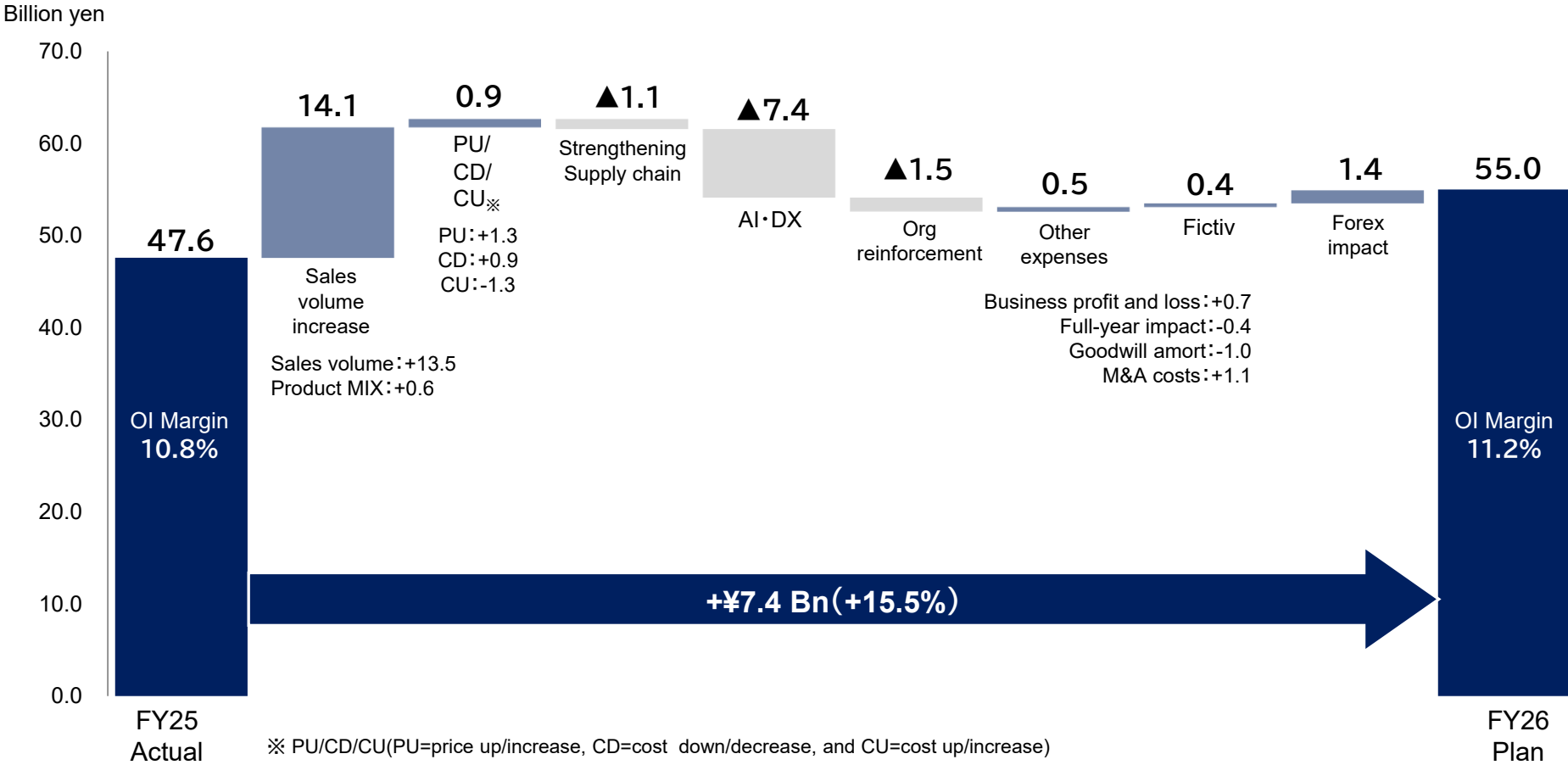


		Yen basis	YoY Local currency basis
Europe	¥29.2 Bn	+5.6%	+3.3%
✓ Gradual market recovery anticipated, though uncertainty is expected to persist			
U.S.	¥75.2 Bn	+18.8%	+18.4%
Pre-Fictiv consolidation	¥53.0 Bn	+8.4%	+7.9%
✓ Accelerating penetration in the Americas market through Fictiv integration			
Asia	¥77.8 Bn	+8.1%	+9.4%
✓ Positioning Vietnam and India as priority countries			
China	¥110.9 Bn	+20.6%	+16.1%
✓ Continued growth through the Digital MODEL, alongside sustained telecommunications-related demand.			
Japan	¥188.7 Bn	+6.5%	—
✓ Gradual recovery in capital expenditure demand, while advancing digital initiatives			

3. FY2026 Full-year Performance Outlook

Operating Income Variance Analysis

Volume-driven profit growth is expected to offset growth investments in AI and DX; operating income planned at ¥55.0 Bn (+15.5% YoY).



4. Reference Materials



MISUMI Selected as DX Stock Grand Prix 2026

Digital Transformation Stock (DX Stock) 2026 - Grand Prix selected from approx. 3,800 listed companies (3 companies)

Key Points for Which MISUMI Was Recognized

1 Realizing “Infinite Manufacturing”

By driving continuous process innovation, MISUMI has expanded beyond standard components into upstream and downstream manufacturing domains. The company enables “unlimited manufacturing” through digital technologies such as 3D CAD data utilization and AI-based image recognition.

2 Company-wide deployment of digital initiatives

MISUMI clearly defined its growth strategy, “Digital MODEL Shift,” and DX vision, embedded digital initiatives into management policies, and implemented structured definition, development, and retention of digital talent.

3 Proactive dialogue with investors

MISUMI was recognized for actively disclosing quantitative results and plans related to its Digital MODEL Shift, clearly communicating its growth direction with a high level of transparency and investor engagement.

4 Evolving into DX encompassing mass production processes

While strengthening its core capability of high-mix, low-volume production with assured short lead times, MISUMI has extended DX to include mass production processes. Through the acquisition of Fictiv, it has evolved into a platform enabling integrated ordering of both standard and custom products.

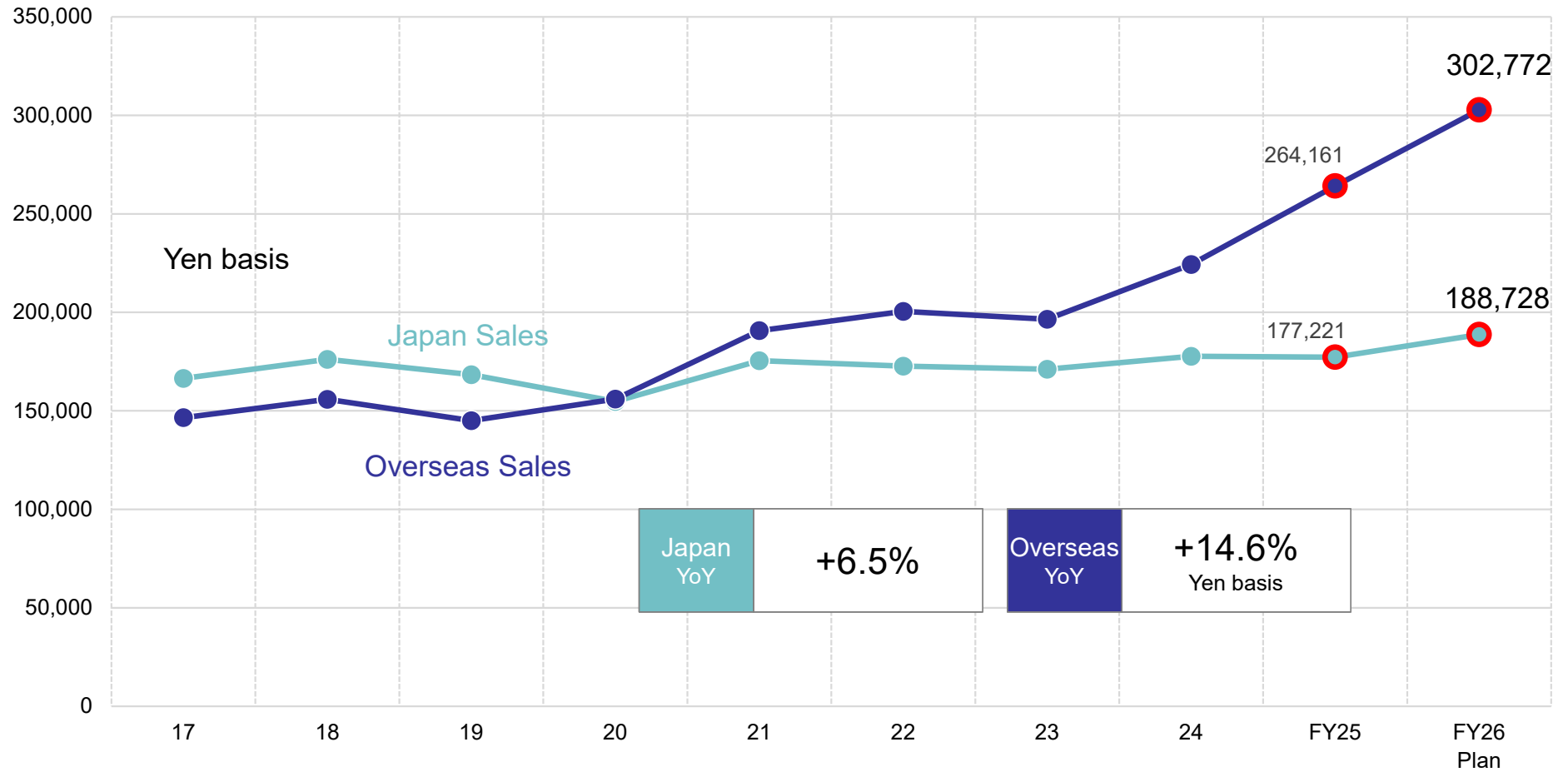
5 Manufacturing foundation and AI utilization built

MISUMI built a manufacturing data platform and implemented an optimal collaboration model linking suppliers and inventory, achieving company-wide optimization. The utilization of generative AI was also highly evaluated in this year’s assessment.

Ministry of Economy, Trade and Industry (METI), Tokyo Stock Exchange, and IPA jointly selected

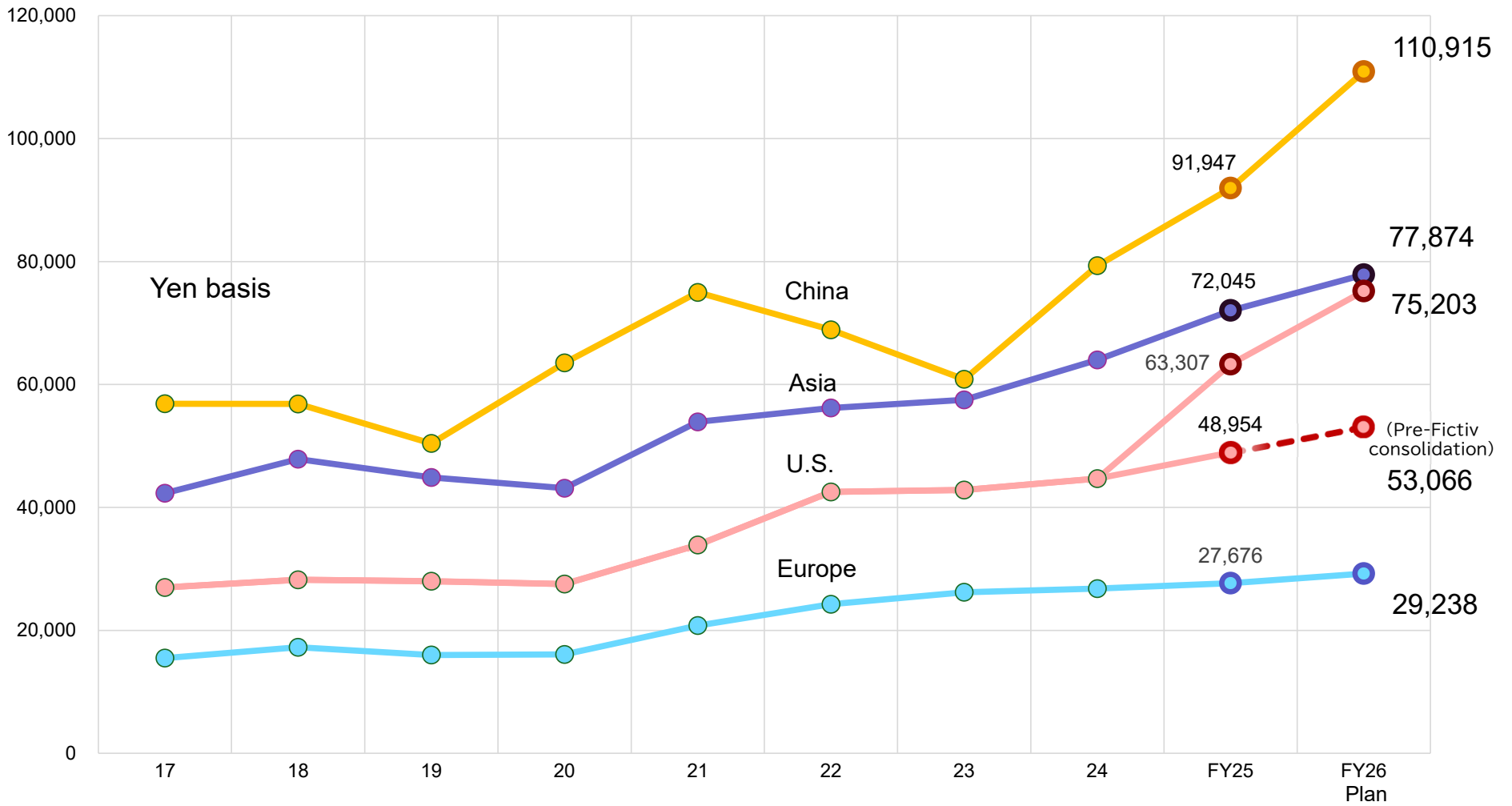
Japan & Overseas Sales

Million yen



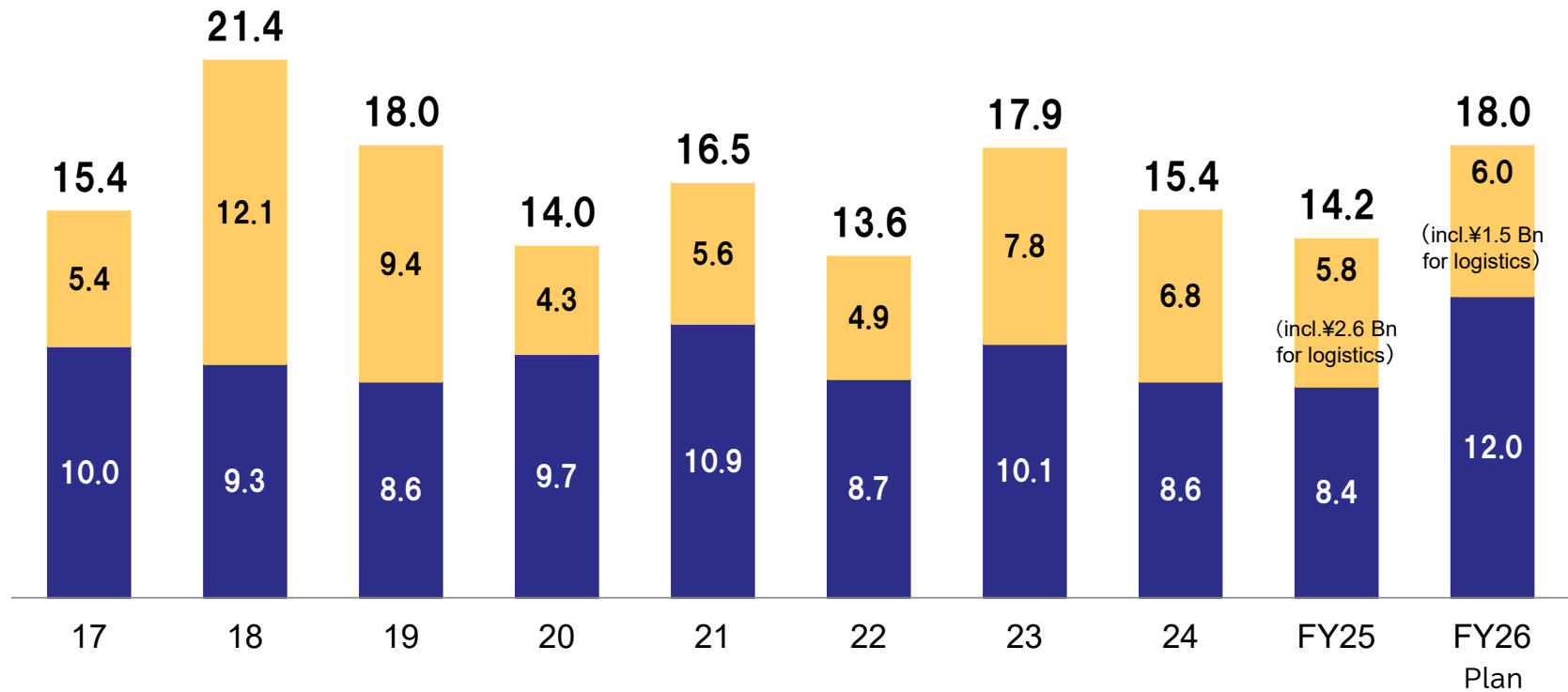
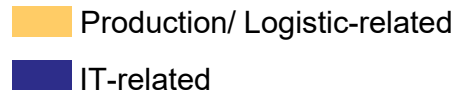
Sales by Region

Million yen



Capital Investment Performance

Billion yen



1 Consolidated Balance Sheet

(million yen)

	As of March 31, 2023		As of March 31, 2024		As of March 31, 2025		As of March 31, 2026	
	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%	317,805	1.4%	295,654	-7.0%
Cash and Deposits	119,558	9.8%	148,848	24.5%	159,296	7.0%	112,941	-29.1%
Notes receivable and accounts receivable	76,359	-0.6%	75,869	-0.6%	78,390	3.3%	98,520	25.7%
Inventories	77,391	25.3%	78,378	1.3%	69,652	-11.1%	73,439	5.4%
Other current assets	9,313	64.3%	10,285	10.4%	10,466	1.8%	10,753	2.7%
Fixed assets	95,835	1.7%	100,136	4.5%	101,769	1.6%	169,314	66.4%
Property, Plant and Equipment	48,405	4.1%	51,042	5.4%	52,522	2.9%	56,638	7.8%
Buildings and structures	14,604	5.7%	14,252	-2.4%	21,536	51.1%	23,005	6.8%
Machinery, equipment and vehicles	15,666	-3.7%	16,084	2.7%	15,626	-2.8%	16,133	3.2%
Land	3,898	0.6%	3,880	-0.5%	4,259	9.8%	4,323	1.5%
Other tangible fixed assets	14,235	13.4%	16,824	18.2%	11,099	-34.0%	13,175	18.7%
Intangible fixed assets	35,021	-2.0%	36,109	3.1%	33,283	-7.8%	90,370	171.5%
Goodwill	-	-	-	-	-	-	43,962	-
Intangible fixed assets	35,021	-2.0%	36,109	3.1%	33,283	-7.8%	46,407	39.4%
Investments and Other assets	12,408	3.2%	12,984	4.6%	15,963	22.9%	22,306	39.7%
Investment securities	6	0.0%	6	0.0%	1,224	-	5,552	353.6%
Deferred tax assets	6,891	5.2%	7,679	11.4%	9,052	17.9%	10,800	19.3%
Other investments	5,510	0.8%	5,298	-3.9%	5,686	7.3%	5,953	4.7%
Total assets	378,458	8.9%	413,517	9.3%	419,574	1.5%	464,969	10.8%
Current liabilities	48,942	-6.6%	49,929	2.0%	51,876	3.9%	65,180	25.6%
Notes payable and Accounts payable	22,434	3.8%	20,984	-6.5%	21,189	1.0%	29,852	40.9%
Other current liabilities	26,507	-13.9%	28,944	9.2%	30,686	6.0%	35,327	15.1%
Long-Term liabilities	15,291	1.8%	15,908	4.0%	15,634	-1.7%	17,279	10.5%
Deferred tax liabilities	798	-14.9%	648	-18.8%	1,043	60.8%	1,708	63.8%
Liability for Retirement Benefits	7,025	2.2%	7,436	5.9%	7,337	-1.3%	7,362	0.3%
Other long-term liabilities	7,467	3.6%	7,823	4.8%	7,253	-7.3%	8,208	13.2%
Total liabilities	64,234	-4.7%	65,837	2.5%	67,510	2.5%	82,460	22.1%
Common stock	13,936	2.0%	14,146	1.5%	14,483	2.4%	14,727	1.7%
Capital surplus	24,292	1.1%	24,303	0.0%	24,585	1.2%	24,721	0.6%
Retained earnings	245,557	11.4%	266,651	8.6%	293,546	10.1%	322,681	9.9%
Treasury stock	△ 80	-	△ 9,159	-	△ 28,352	209.6%	△ 52,392	84.8%
Total accumulated other comprehensive income	27,580	44.4%	48,573	76.1%	45,020	-7.3%	70,094	55.7%
Stock acquisition rights	1,989	2.7%	2,087	4.9%	1,663	-20.3%	1,293	-22.3%
Non-controlling interests	948	18.9%	1,076	13.5%	1,116	3.8%	1,383	23.9%
Total net assets	314,224	12.2%	347,679	10.6%	352,064	1.3%	382,509	8.6%
Total liabilities and net assets	378,458	8.9%	413,517	9.3%	419,574	1.5%	464,969	10.8%

(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 and "Other long-term liabilities".

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

2 Consolidated Statement of Income

(million yen)

	Fiscal year ended March 2023		Fiscal year ended March 2024		Fiscal year ended March 2025		Fiscal year ended March 2026		Fiscal year ended March 2027 Forecast	
	Amount	Sales ratio YoY%	Amount	Sales ratio YoY%	Amount	Sales ratio YoY%	Amount	Sales ratio YoY%	Amount	Sales ratio YoY%
Factory Automation	121,932	32.7% 2.2%	118,219	32.2% -3.0%	135,803	33.8% 14.9%	160,498	36.4% 18.2%	201,415	41.0% 25.5%
Die Components	79,125	21.2% 5.3%	79,932	21.7% 1.0%	86,451	21.5% 8.2%	88,368	20.0% 2.2%	92,919	18.9% 5.2%
VONA	172,093	46.1% 0.2%	169,497	46.1% -1.5%	179,732	44.7% 6.0%	192,516	43.6% 7.1%	197,166	40.1% 2.4%
Net sales	373,151	100.0% 1.9%	367,649	100.0% -1.5%	401,987	100.0% 9.3%	441,383	100.0% 9.8%	491,500	100.0% 11.4%
Cost of sales	202,073	54.2% 1.4%	200,272	54.5% -0.9%	214,997	53.5% 7.4%	235,367	53.3% 9.5%		
Gross profit	171,078	45.8% 2.5%	167,377	45.5% -2.2%	186,990	46.5% 11.7%	206,015	46.7% 10.2%		
S G & A expenses	124,463	33.4% 8.6%	129,011	35.1% 3.7%	140,509	35.0% 8.9%	158,402	35.9% 12.7%		
Operating income	46,615	12.5% -10.7%	38,365	10.4% -17.7%	46,480	11.6% 21.2%	47,613	10.8% 2.4%	55,000	11.2% 15.5%
Non-operating income	2,283	0.6% 118.9%	4,199	1.1% 84.0%	4,701	1.2% 11.9%	2,618	0.6% -44.3%		
Non-operating expenses	1,059	0.3% 40.6%	1,299	0.4% 22.7%	1,279	0.3% -1.6%	1,135	0.3% -11.3%		
Ordinary income	47,838	12.8% -8.9%	41,265	11.2% -13.7%	49,901	12.4% 20.9%	49,095	11.1% -1.6%	55,900	11.4% 13.9%
Extraordinary income/losses(Δ)	Δ 1,305	-0.3% -4.6%	Δ 2,045	-0.6% 56.6%	38	0.0% -101.9%	Δ 597	-0.1% -1654.6%		
Income taxes	12,126	3.2% -10.2%	10,964	3.0% -9.6%	13,285	3.3% 21.2%	7,873	1.8% -40.7%		
Net income attributable to non-controlling interests	124	0.0% 92.5%	102	0.0% -17.3%	105	0.0% 2.6%	167	0.0% 58.7%		
Net income attributable to owners of parent	34,282	9.2% -8.7%	28,152	7.7% -17.9%	36,549	9.1% 29.8%	40,457	9.2% 10.7%	37,400	7.6% -7.6%

3 Consolidated Statement of Cash Flows

(million yen)

	Fiscal year ended March 2023		Fiscal year ended March 2024		Fiscal year ended March 2025		Fiscal year ended March 2026	
	Amount	YoY	Amount	YoY	Amount	YoY	Amount	YoY
Operating activities	31,447	△ 23,943	54,567	23,120	60,461	5,893	52,190	△ 8,270
Income before income taxes	46,533	△ 4,598	39,219	△ 7,313	49,940	10,720	48,498	△ 1,441
Depreciation, Amortization	16,587	1,245	17,564	977	17,718	153	17,939	221
Amortization of goodwill	-	-	-	-	-	-	2,209	2209
Decrease (Increase) in working capital	△ 11,766	△ 9,426	6,059	17,826	4,228	△ 1,831	△ 6,044	△ 10,272
Other	△ 19,906	△ 11,164	△ 8,276	11,629	△ 11,425	△ 3,148	△ 10,412	1,013
Investing activities	△ 19,033	3,728	△ 18,995	38	△ 32,452	△ 13,457	△ 43,203	△ 10,751
Purchase of fixed assets	△ 13,625	2,882	△ 17,976	△ 4,350	△ 15,434	2,541	△ 14,288	1,146
Deposits and withdrawals of time deposits	△ 5,416	943	△ 1,483	3,933	△ 16,100	△ 14,617	23,746	39,847
Purchase of shares of subsidiaries resulting in change	-	-	-	-	-	-	△ 48,483	-48483
Other	9	△ 97	464	455	△ 916	△ 1,381	△ 4,177	△ 3,261
Financing activities	△ 11,169	△ 1,560	△ 18,968	△ 7,799	△ 31,759	△ 12,790	△ 41,801	△ 10,042
Dividends paid	△ 9,244	△ 1,427	△ 7,058	2,185	△ 9,653	△ 2,595	△ 11,322	△ 1,668
Purchase of treasury stock	△ 0	0	△ 10,095	△ 10,094	△ 20,164	△ 10,068	△ 25,132	△ 4,968
Other	△ 1,924	△ 132	△ 1,814	109	△ 1,940	△ 126	△ 5,346	△ 3,405
Effect of exchange rate change on cash and cash equivalents	3,952	△ 2,506	10,132	6,179	△ 1,367	△ 11,500	8,757	10,125
Net increase (decrease) in cash and cash equivalents	5,197	△ 24,281	26,736	21,538	△ 5,117	△ 31,853	△ 24,056	△ 18,938
Cash and cash equivalents at beginning of year	101,443	29,479	106,640	5,197	133,376	26,736	128,259	△ 5,117
Cash and cash equivalents at end of year	106,640	5,197	133,376	26,736	128,259	△ 5,117	104,202	△ 24,056

(Note1)The "Other" category under cash flows from financing activities for the half year ended March 2026 includes an outflow of ¥3,392 million for the repayment of borrowings by acquired subsidiaries.

4 Number of Customers / 5 Capex and Depreciation

4 Number of Customers

	Fiscal year ended March 2023		Fiscal year ended March 2024		Fiscal year ended March 2025		Fiscal year ended March 2026	
	Number of customers	YoY%	Number of customers	YoY%	Number of customers	YoY%	Number of customers	YoY%
Domestic	115,934	-10.7%	108,663	-6.3%	107,438	-1.1%	109,482	1.9%
Overseas	204,442	-0.3%	209,434	2.4%	216,418	3.3%	229,895	6.2%
Total	320,376	-4.3%	318,097	-0.7%	323,856	1.8%	339,377	4.8%

(Note1) Number of Customers : Number of customer companies to which our group sold products during the applicable period.

5 Capex and Depreciation

(million yen)

	Fiscal year ended March 2023				Fiscal year ended March 2024				Fiscal year ended March 2025				Fiscal year ended March 2026			
	Domestic	Overseas	Total	YoY	Domestic	Overseas	Total	YoY	Domestic	Overseas	Total	YoY	Domestic	Overseas	Total	YoY
Buildings, Structures and Land	176	43	220	△ 12	336	80	417	197	446	156	602	184	10	260	271	△ 330
Machinery and Fixtures	1,798	3,939	5,738	1,345	732	6,177	6,910	1,171	2,792	4,653	7,446	536	3,057	2,265	5,323	△ 2,123
Intangible Fixed Assets	6,514	1,153	7,667	△ 4,214	9,975	673	10,648	2,981	6,639	746	7,386	△ 3,262	7,038	1,655	8,693	1,307
Total Capital Expenditure	8,489	5,136	13,625	△ 2,882	11,044	6,931	17,976	4,350	9,878	5,556	15,434	△ 2,541	10,106	4,181	14,288	△ 1,146
Depreciation, Amortization (note1)	9,377	4,832	14,209	1,087	10,081	5,071	15,152	943	10,091	5,411	15,502	349	9,514	5,354	14,868	△ 634
Amortization of goodwill	-	503	503	36	-	595	595	92	-	640	640	45	-	3,568	3,568	2,928
Total (note2)	9,377	5,335	14,712	1,123	10,081	5,666	15,747	1,035	10,091	6,051	16,142	394	9,514	8,922	18,436	2,293

(Note1) The right-to-use assets depreciation (according to application of IFRS16 "Leases"), etc. are excluded. The excluded amount in 2026/3 is 1,712 Million Yen.

(Note 2) From September 2025 (interim period), the amortization of other intangible assets relating to the acquisition of Dayton Lamina Corporation and the amortization of goodwill relating to the acquisition of Fictiv Inc are included.

6 Key Financial Indicator

	Fiscal year ended March 2023	Fiscal year ended March 2024	Fiscal year ended March 2025	Fiscal year ended March 2026
EBITDA (million yen)	63,202	55,930	64,199	67,762
Net income per share(yen)	120.53	99.75	131.95	149.30
Operating Income Margin (%)	12.5	10.4	11.6	10.8
Return on Assets (%)	9.4	7.1	8.8	9.1
Return on Equity (%)	11.7	8.6	10.5	11.1
Current Ratio (%)	577.5	627.7	612.6	453.6
Equity Ratio (%)	82.3	83.3	83.2	81.7
Receivables Turnover (Days)	74.9	75.6	70.0	73.1
Inventory Turnover (Months)	4.1	4.7	4.1	3.6

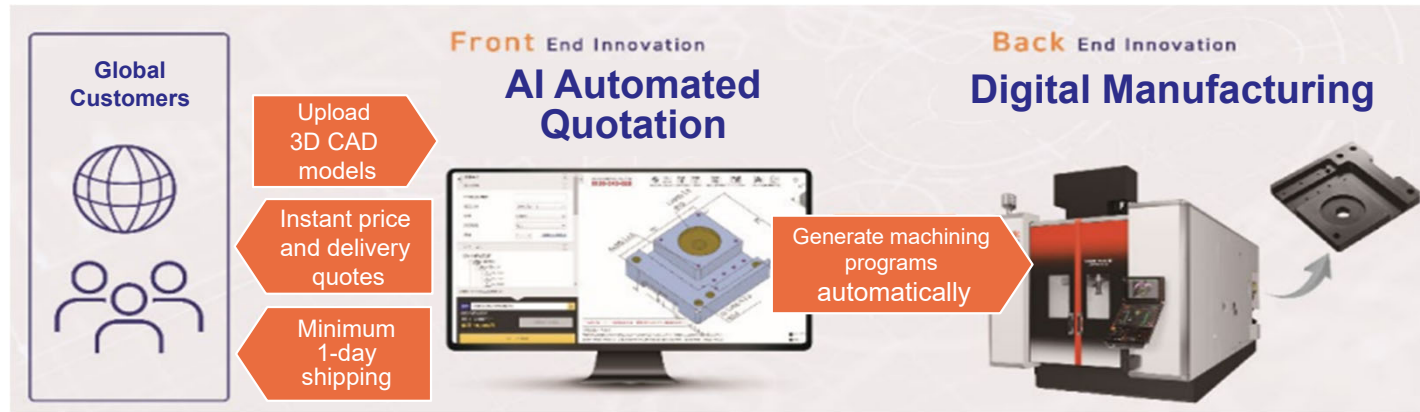
- Formula -

- 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(365 Days)
- Inventory Turnover (Months) : (Last Ending Inventory + Ending Inventory)/2/COGS × 12Months(12 Months)

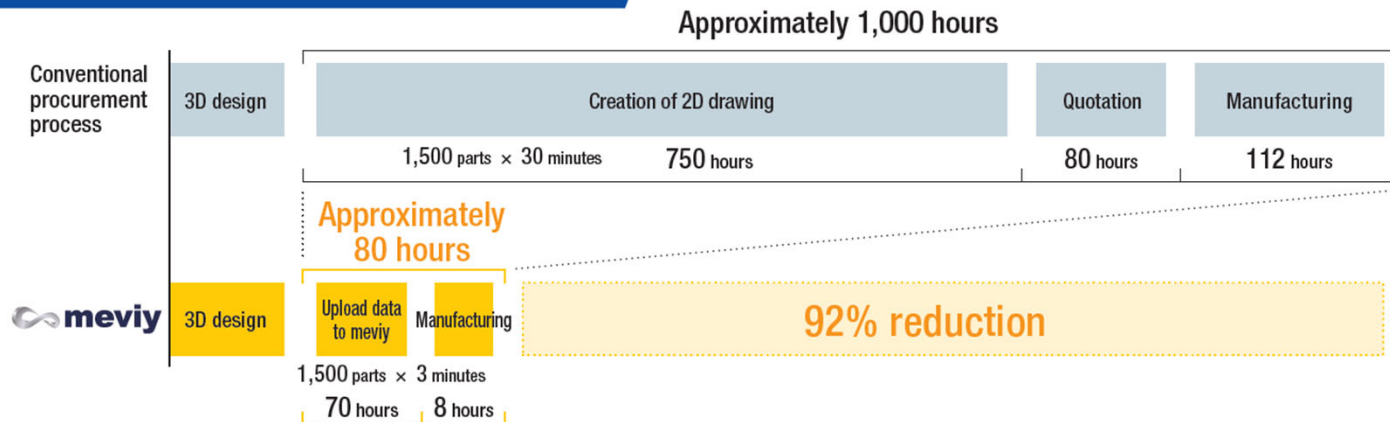
Digital MODEL Shift #1

A Revolution in Parts Procurement: meviy

- Simply upload 3D data for machine parts, and AI automatically generates instant quotations. Our proprietary digital manufacturing platform (available free of charge) enables shipping in as little as one day

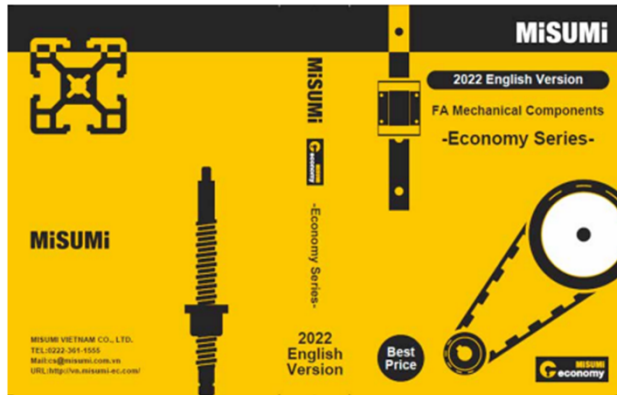


Example: Parts procurement for equipment with 1,500 components



Product Range Reform: Economy Series

- 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
 (I.D. Intersection)

-0.009 to 0

Economy series



-0.012 to +0.003
 (Middle range accuracy)

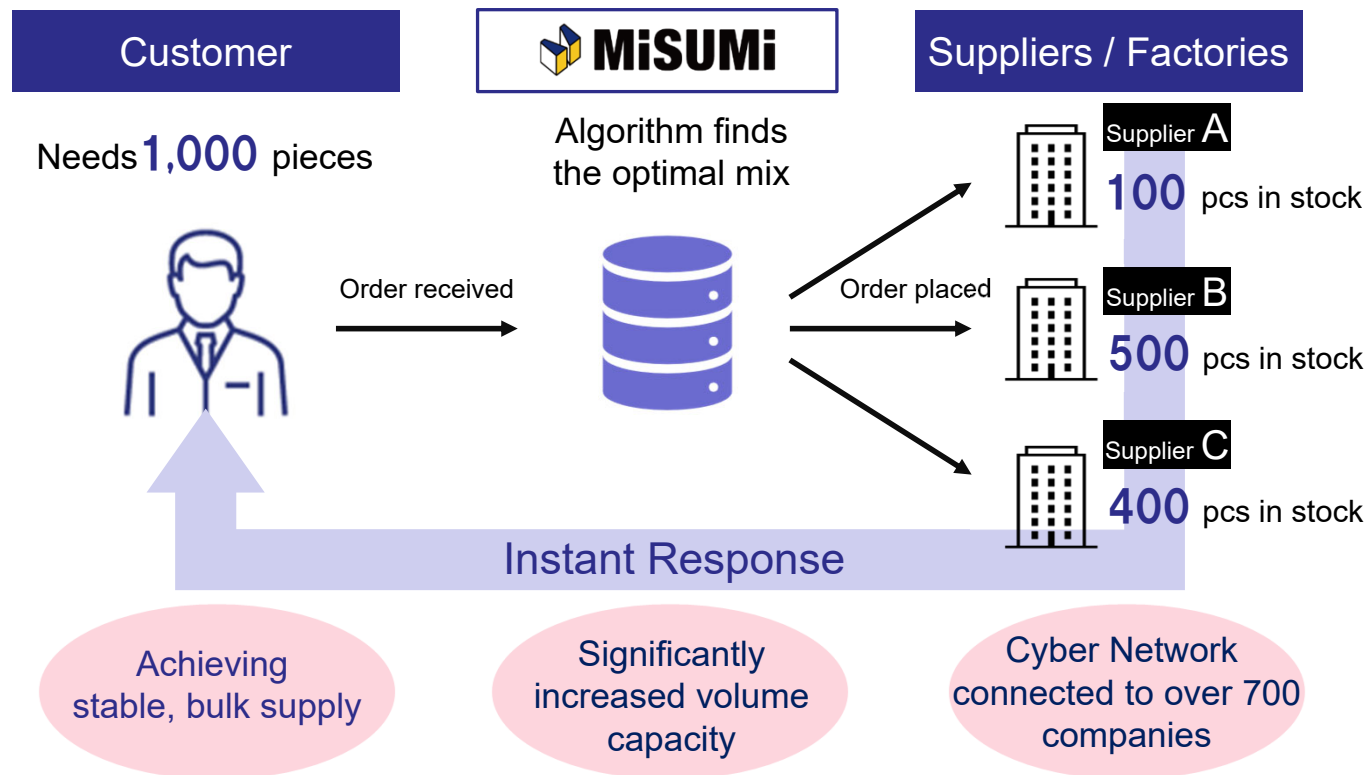
Price index

100

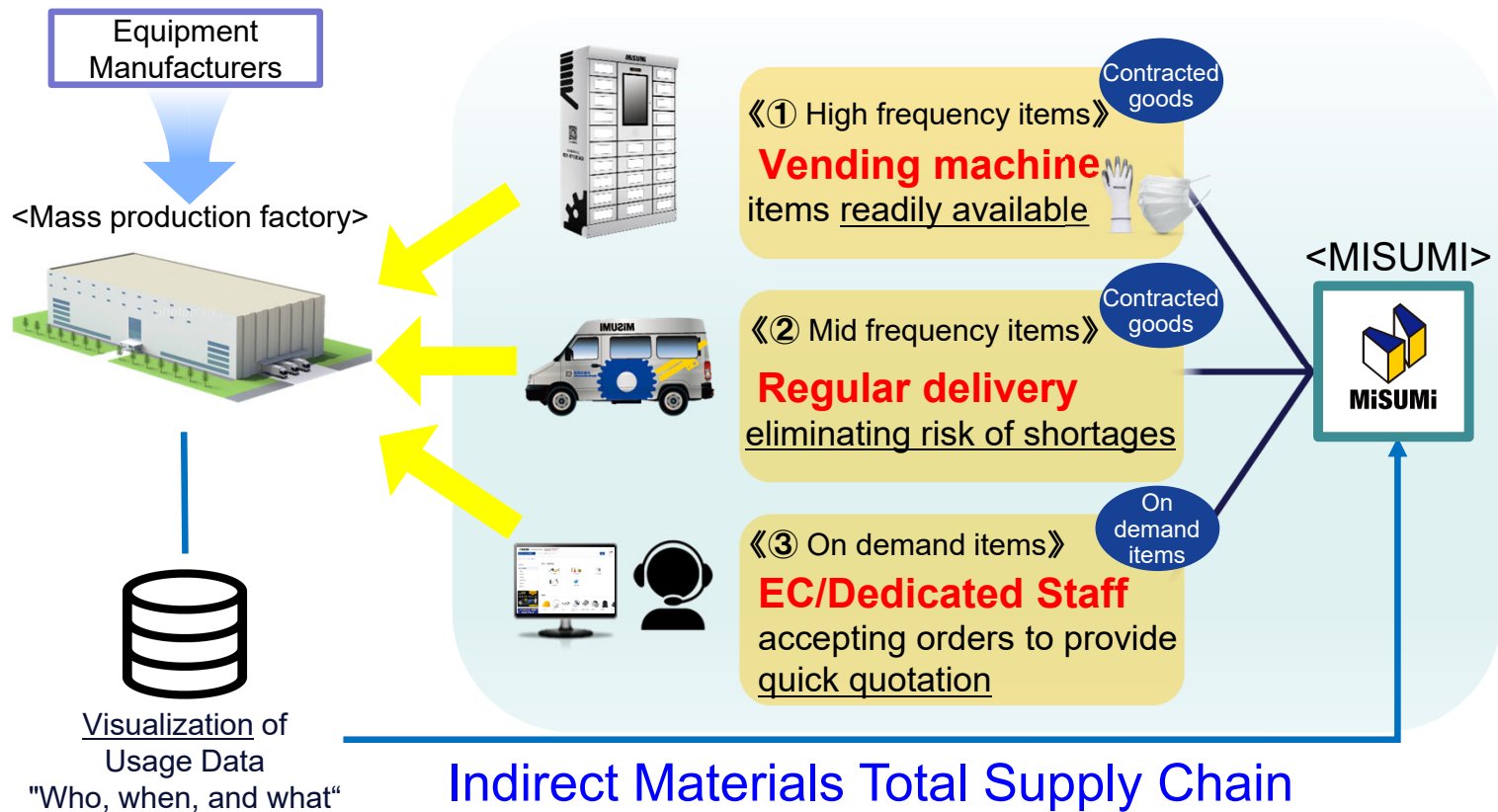
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Improving Response to Quantity: D-JIT

- 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



- Total cost reduction for indirect materials, tailored to customers' purchasing patterns
- Expand from existing equipment manufacturing customers to mass-production factory customers across different industries



Business Foundation

IT

- Our company has made proactive investments in IT to drive sustainable growth
- Starting in fiscal year 2021, we began a comprehensive overhaul of our core systems
 - Achieved a threefold increase in new feature development speed while reducing development costs to one-third

Production/ Logistics

- Strengthening our globally Reliable and Quick Delivery system to achieve a more stable supply of products

