FY2026(ending March 31,2027)

First Half (1H) Earnings Report

October 30, 2026

MISUMI Group Inc. (9962)
Representative Director and President Arata Shimizu
Senior Corporate Officer and CFO Toru Takanami



Key Highlights (1H Results)

Net sales and operating income **reached record highs** on both a quarterly and half-year basis.

Billion yen	FY25 1H Actual ※1	FY26 1H Outlook (Announced on 7/31)	**FY26 1H Actual**	**YoY change (Local currency basis)**	**Vs. Announced FC (7/31) (Local currency basis)**
Net sales	205.8	266.0	**273.6**	**+32.9% (+24.4%)**	**+2.9% (+1.9%)**
Operating income	19.5	35.0	**37.1**	**+89.8% (+59.5%)**	**+6.1% (+3.4%)**
Margin	9.5%	13.2%	**13.6%**	**+4.1pt (+2.7pt)**	**+0.4pt (+0.2pt)**
Net income	13.9	23.3	**25.0**	**+78.9%**	**+7.5%**
Net income per share (yen)	51.06	88.18	**95.05**	**+86.2%**	**+7.8%**

※1: The provisional accounting treatment for the business combination was finalized at the end of FY25, and the finalized amounts are reflected

FY26 1H Exchange rates
USD：160.0 yen, EUR：184.4 yen, RMB：23.6 yen

Key Highlights (Full-year Outlook)

Net sales raised by ¥33.0 Bn and operating income by ¥11.0 Bn vs. the 7/31 forecast.
Operating margin improved to **13.8%** (+1.2pt vs. the previous forecast).

Billion yen	FY25 Actual	FY26 Outlook (Announced on 7/31)	**FY26 Outlook (Announced on 10/30)**	**YoY change (Local currency basis)**	**Vs. Announced FC (7/31) (Local currency basis)**
Net sales	441.3	532.0	**565.0**	**+28.0% (+24.0%)**	**+6.2% (+5.8%)**
Operating income	47.6	67.0	**78.0**	**+63.8% (+53.6%)**	**+16.4% (+15.2%)**
Margin	10.8%	12.6%	**13.8%**	**+3.0pt (+2.6pt)**	**+1.2pt (+1.1pt)**
Net income	40.4	44.8	**52.4**	**+29.5%**	**+17.0%**
Net income per share (yen)	149.30	169.67	**199.98**	**+33.9%**	**+17.9%**

FY26 3Q onward assumed exchange rates
USD：155.0 yen, EUR：175.0 yen, RMB：22.5 yen

1H Highlights: Growth Investment

Integrated growth platform planned in North America, linking growth industries, talent, and manufacturing.
Decided on approx. ¥18.9 Bn in growth investment, incl. the automated-stage capacity expansion.

7/31 briefing

Capex

Investment amount

¥4.6 Bn

Strengthen supply capacity to capture data center and humanoid demand

- More automated-stages and growth-industry parts made in Vietnam, etc.
- Automated-stage capacity to approx. 3x FY2025

MISUMI Ventures

Fund I size

$50 Mn (approx. ¥7.8 Bn)

Build early ties with growing technologies and companies in robotics, aerospace, etc.

- Silicon Valley-based CVC
- 10-year investment period

MISUMI Imprint Foundation

Fund size

$2 Mn (approx. ¥0.3 Bn)

Develop next-gen industrial talent and more engineers who know MISUMI

- Scholarships and educational support
- Monozukuri education
- Industry-academia collaboration

KIBAN

Initial investment

$40 Mn (approx. ¥6.2 Bn)

Establish a manufacturing site in North America

- Precision machining, inspection, packaging, supply chain management, etc. for next-gen frontier technology industries

Announcement dates: Capex (Capacity Expansion) July 31, 2026; MISUMI Ventures and KIBAN September 17, 2026; MISUMI Imprint Foundation October 21, 2026

※US$1 = ¥155 (assumed rate for 3Q onward)

1H Highlights: Core System “NEWTON” Rolled Out to All Sites

Migrated to a global common foundation with stable operations maintained, even in fast-growing regions.

An “AI-ready” foundation connected internally and externally via APIs is now in place, accelerating AI utilization.

Rollout timeline

FY21	FY22	FY23	FY24	FY25	FY26
Taiwan	Thailand	Japan	Europe South Korea	U.S./Mexico China/India	Singapore/Malaysia Indonesia/Vietnam

End of Sept. 2026
Rollout completed at all sites

In the FY25–26 rollouts

FY25–26
8 regions
onboarded

Double-digit sales growth in onboarded regions※

FY25 Full-year	**+23.4%**
FY26 1H	**+45.6%**

While maintaining growth momentum,
the core system was
fully renewed

By establishing an AI utilization framework,
Driving business expansion

※ FY25 Full-year = simple average of YoY sales growth in three regions: Americas, China, and Asia (yen basis); FY26 1H = YoY sales growth in Asia (yen basis)

Table of Contents

1. FY2026 1H Earnings Overview 6

2. FY2026 Full-year Performance Outlook 13

3. Reference Materials 22

1. FY2026 1H Earnings Overview

Consolidated Financial Results

Net sales ¥273.6 Bn (+32.9% YoY), operating income ¥37.1 Bn (+89.8% YoY): quarterly and 1H records.

Billion yen

	Pre-Fictiv consolidation			Fictiv		Post-Fictiv consolidation				
	FY25 1H Actual	**FY26 1H Actual**	**YoY change (Local currency basis)**	FY25 1H Actual ※4	**FY26 1H Actual**	FY25 1H Actual ※4	FY26 1H Outlook (Announced on 7/31)	**FY26 1H Actual**	**YoY change (Local currency basis)**	**Vs. FC (7/31) (Local currency basis)**
Net sales	201.0	**261.6**	**+30.1% (+21.8%)**	4.7	**11.9**	205.8	266.0	**273.6**	**+32.9% (+24.4%)**	**+2.9% (+1.9%)**
※1 Before goodwill amort. Operating income	21.8	**39.4**	**+80.6% (+52.7%)**	※2 -1.3	**-0.3**	20.4	36.8	**39.1**	**+91.1% (+61.4%)**	**+6.1% (+3.3%)**
Margin	10.9%	**15.1%**	**+4.2pt (+2.8pt)**	-	**-**	10.0%	13.9%	**14.3%**	**+4.4pt (+3.0pt)**	**+0.4pt (+0.2pt)**
Operating income	21.8	**39.4**	**+80.6% (+52.7%)**	※3 -2.3	**-2.3**	19.5	35.0	**37.1**	**+89.8% (+59.5%)**	**+6.1% (+3.4%)**
Margin	10.9%	**15.1%**	**+4.2pt (+2.8pt)**	-	**-**	9.5%	13.2%	**13.6%**	**+4.1pt (+2.7pt)**	**+0.4pt (+0.2pt)**
Net income	16.1	**27.5**	**+70.8%**	-2.1	**-2.4**	13.9	23.3	**25.0**	**+78.9%**	**+7.5%**

※1: Profit calculated by adding amortization of goodwill and amortization of intangible assets related to the acquisition of Fictiv Inc. to operating income
※2: Breakdown: FY25 1H: M&A fees -¥1.1 Bn, Fictiv standalone -¥0.3 Bn; FY26 1H: Fictiv standalone -¥0.3 Bn
※3: Of which, amortization of goodwill and related items (FY25 1H: -¥0.9 Bn; FY26 1H: -¥1.9 Bn)
※4: The provisional accounting treatment for the business combination was finalized at the end of FY25, and the finalized amounts are reflected

FY26 1H Exchange rates
USD：160.0 yen, EUR：184.4 yen, RMB：23.6 yen

Sales and Operating Income by Business Segment

FA and VONA businesses posted strong growth in both net sales and operating income.

Billion yen

	Net Sales			Operating Income				
	FY25 1H Actual	**FY26 1H Actual**	**YoY change (Local currency basis)**	FY25 1H Actual ※1	Margin	**FY26 1H Actual**	**Margin**	**YoY change (Local currency basis)**
Total	205.8	**273.6**	**+32.9% (+24.4%)**	19.5	9.5%	**37.1**	**13.6%**	**+89.8% (+59.5%)**
FA business	72.7	**109.2**	**+50.2% (+39.7%)**	8.0	11.1%	**19.0**	**17.4%**	**+135.5% (+89.1%)**
Pre-Fictiv consolidation	68.0	**97.2**	**+43.1% (+33.1%)**	10.3	15.3%	**21.3**	**22.0%**	**+105.8% (+68.1%)**
Die Components business	42.5	**48.4**	**+13.9% (+5.6%)**	4.1	9.8%	**5.6**	**11.6%**	**+34.3% (+17.6%)**
VONA business	90.4	**115.8**	**+28.0% (+21.1%)**	7.3	8.1%	**12.5**	**10.8%**	**+71.2% (+50.8%)**

※1: The provisional accounting treatment for the business combination was finalized at the end of FY25, and the finalized amounts are reflected

Digital MODEL Shift: Performance

Net Sales Billion yen

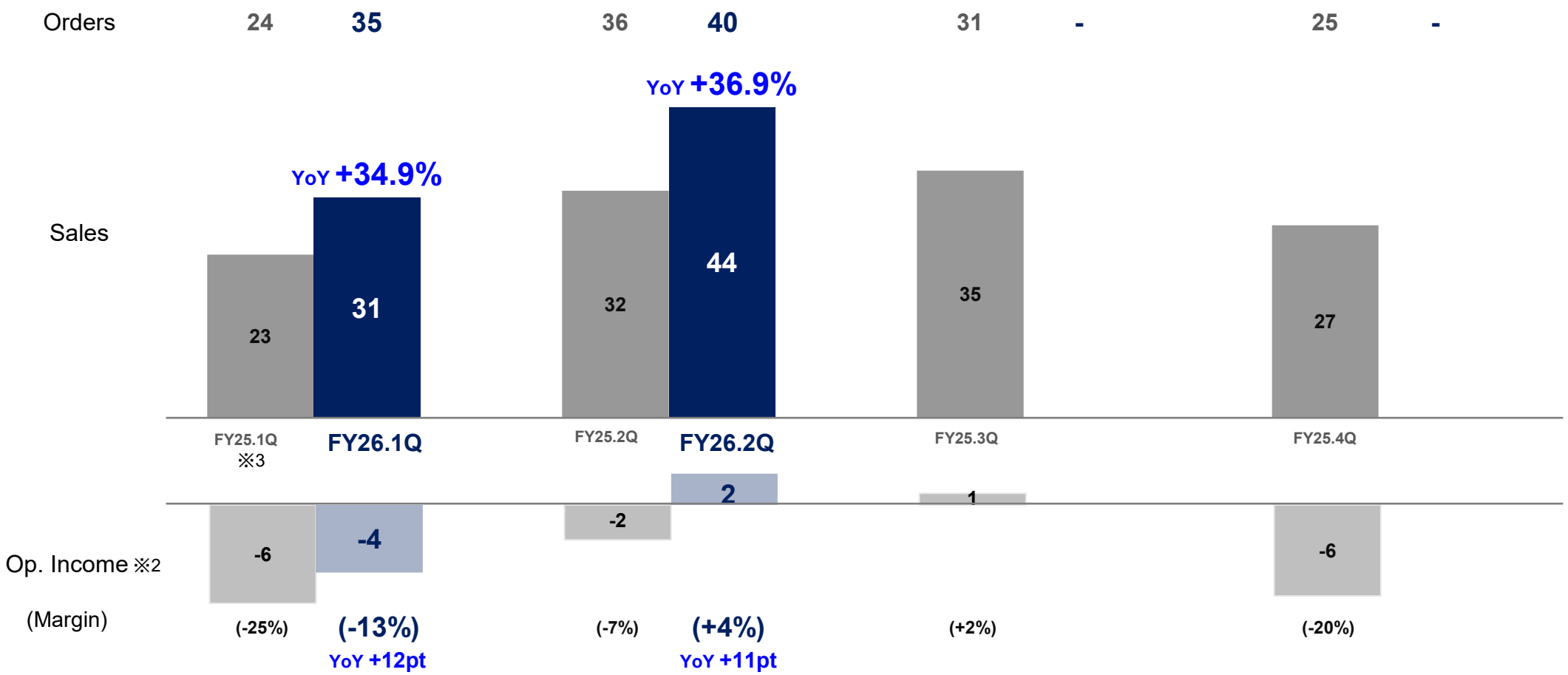
	FY25 1H Actual	**FY26 1H Actual**	**YoY change**	Progress
Total	27.4	**45.5**	**+66.2%**	
Online Processing Business	13.4	**21.5**	**+60.7%**	
meviy	8.7	**9.5**	**+10.1%**	North America business integrated into Fictiv; +19.3% YoY excl. North America
Fictiv	※1 4.7	**11.9**	**+153.5%**	Faster penetration of growth industries, e.g. aerospace and humanoids
Economy Series	7.8	**15.3**	**+97.7%**	High growth continued, led by China and Asia
D-JIT	6.2	**8.6**	**+38.6%**	Stronger large-order capability, mainly in full-rollout regions

※1: FY25 figures consolidated from July 2025 onward

Fictiv's Business Performance (Standalone Basis)

Orders and net sales grew YoY and QoQ; profitability improved as planned, with 2Q in the black.

Quarterly Business Performance (US $M) ※1

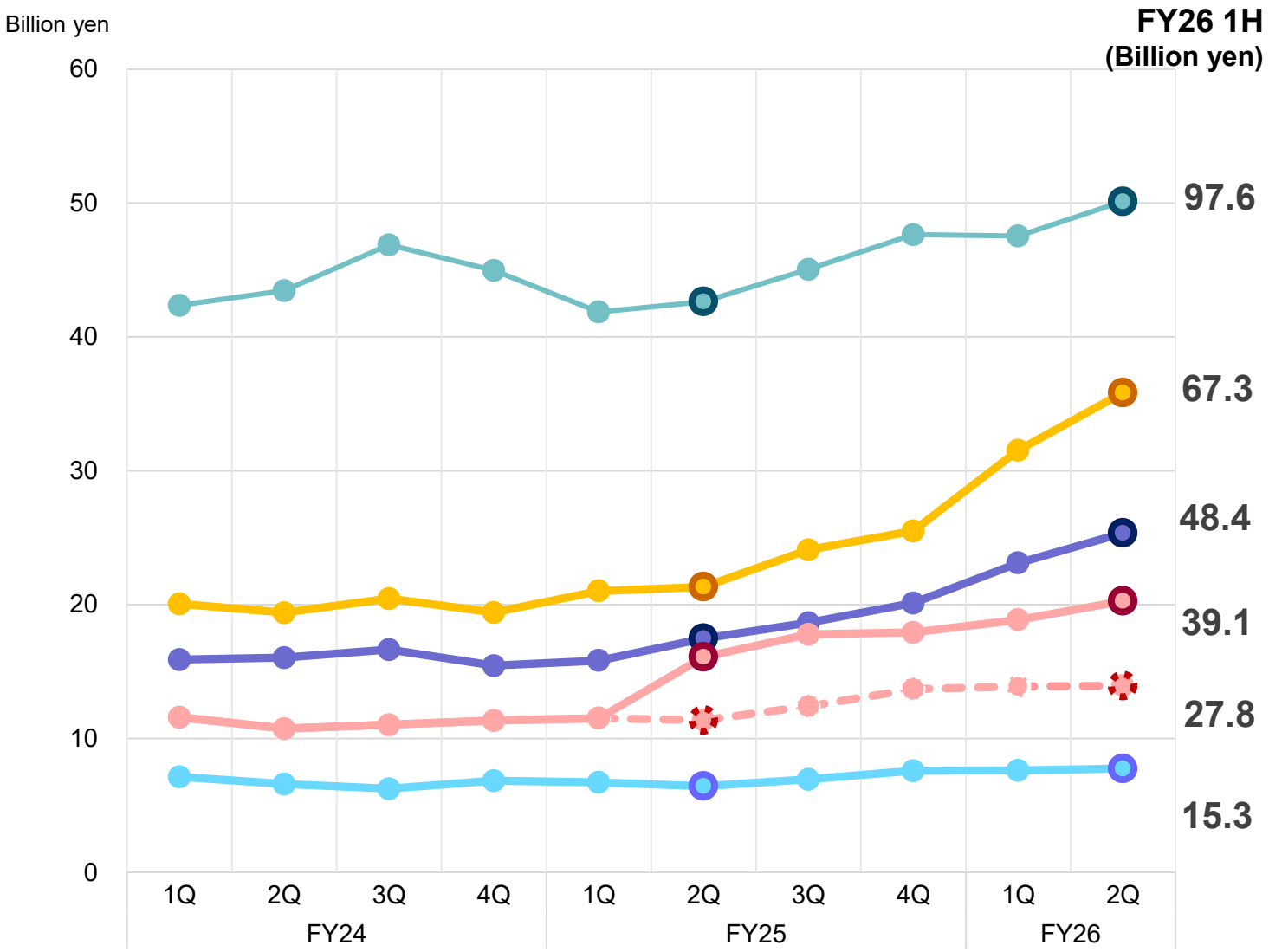


※1: Business performance from July 2025 (Q2) onward included in consolidated results

※2: Excl. M&A intermediary fees and goodwill amortization

※3: Excluding one-time stock-based compensation expenses in 1Q

Sales by Region



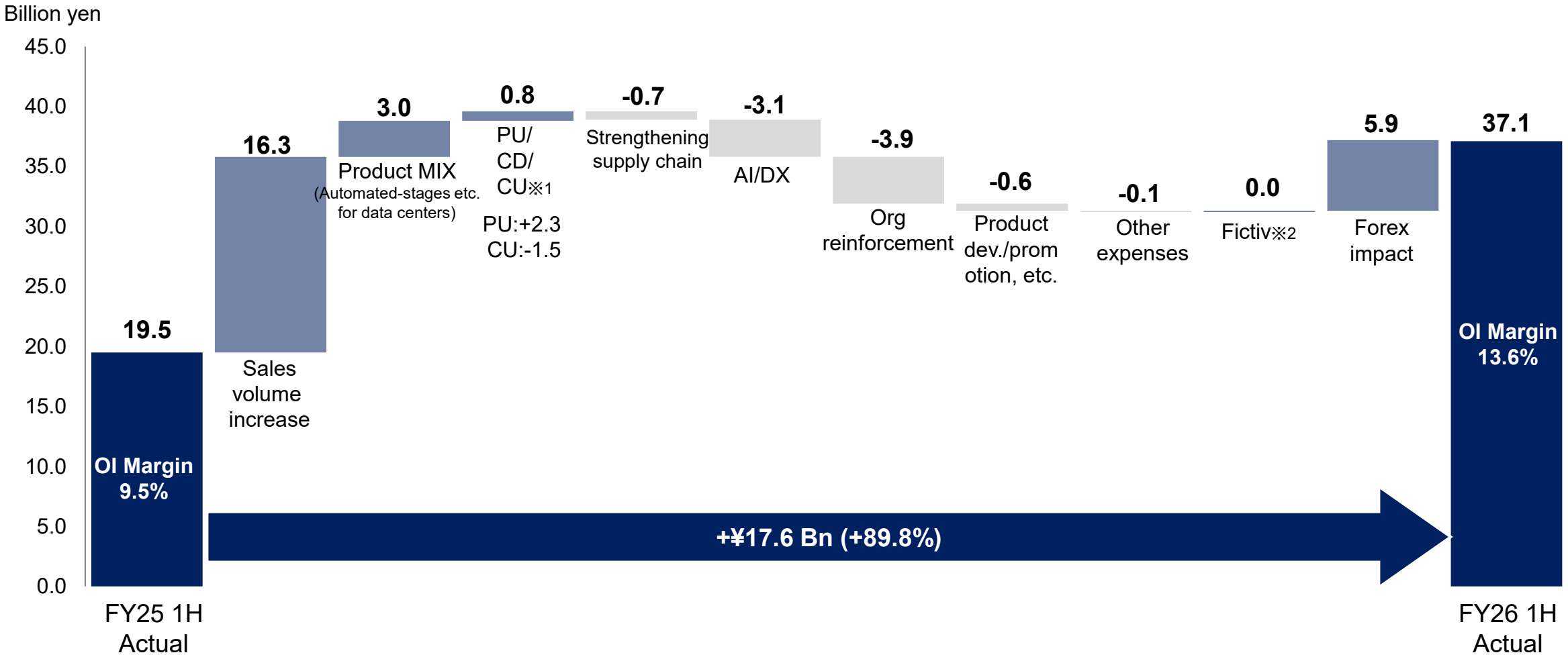
	YoY (1H) Yen basis	YoY (1H) Local currency basis
Japan	**+15.6%**	**-**
✓ Growth led by semiconductor and electronics demand		
China	**+59.1%**	**+37.6%**
✓ Strong telecom/semiconductor demand; Economy Series boosts growth		
Asia	**+45.6%**	**+36.4%**
✓ Growth from semiconductor/telecom demand and Economy Series penetration		
U.S.	**+41.8%**	**+30.1%**
Pre-Fictiv consolidation	**+21.6%**	**+11.4%**
✓ Growth supported by the start of cross-selling with Fictiv, etc.		
Europe	**+16.8%**	**+6.2%**
✓ Growth amid a gradual recovery across manufacturing		

Overseas ratio 64.3%

※The chart shows quarterly (three-month) figures; figures on the right are FY26 1H (1Q+2Q)

Operating Income Variance Analysis

Sales volume and product mix more than absorbed upfront spending: +¥17.6 Bn YoY (+89.8%).



※1: PU/CD/CU(PU=price up/increase, CD=cost down/decrease, and CU=cost up/increase)

※2: Net Fictiv-related change of ±¥0.0 Bn (goodwill amortization, etc. -¥1.1 Bn; M&A costs +¥1.1 Bn)

2. FY2026 Full-year Performance Outlook

Consolidated Business Outlook

Net sales raised to ¥565.0 Bn (+¥33.0 Bn) and operating income to ¥78.0 Bn (+¥11.0 Bn).

Consolidated Business Results & Outlook

Billion yen

	FY25 Actual	FY26 Outlook (Announced on 7/31)	**FY26 Outlook (Announced on 10/30)** ※2	**YoY change (Local currency basis)**	**Vs. Announced FC (7/31) (Local currency basis)**
Net sales	441.3	532.0	**565.0**	**+28.0% (+24.0%)**	**+6.2% (+5.8%)**
※1 Before goodwill amort. Operating income	50.4	70.9	**81.9**	**+62.3% (+52.5%)**	**+15.6% (+14.3%)**
Margin	11.4%	13.3%	**14.5%**	**+3.1pt (+2.6pt)**	**+1.2pt (+1.1pt)**
Operating income	47.6	67.0	**78.0**	**+63.8% (+53.6%)**	**+16.4% (+15.2%)**
Margin	10.8%	12.6%	**13.8%**	**+3.0pt (+2.6pt)**	**+1.2pt (+1.1pt)**
Net income	40.4	44.8	**52.4**	**+29.5%**	**+17.0%**

※1: Profit calculated by adding amortization of goodwill and amortization of intangible assets related to the acquisition of Fictiv Inc. to operating profit
※2: Of which, Fictiv's FY26 Outlook (Previously announced on 7/31)
Net sales: Previous ¥22.9 Bn ⇒ Current ¥23.0 Bn
Operating income before goodwill amortization: Previous -¥0.8 Bn ⇒ Current -¥0.8 Bn
Operating income: Previous -¥4.7 Bn ⇒ Current -¥4.7 Bn

FY26 3Q onward assumed exchange rates
USD：155.0 yen, EUR：175.0 yen, RMB：22.5 yen

Sales and Operating Income by Business Segment

Higher sales and profit YoY expected in all businesses; operating margin to improve to 13.8% (+3.0pt YoY).

Billion yen

	Net Sales					Operating Income							
	FY25 Actual	FY26 FC (7/31)	**FY26 FC (10/30)**	**YoY change (Local currency basis)**	**Vs. FC (7/31)**	FY25 Actual	Margin	FY26 FC (7/31)	Margin	**FY26 FC (10/30)**	**Margin**	**YoY change (Local currency basis)**	**Vs. FC (7/31)**
Total	441.3	532.0	**565.0**	**+28.0% (+24.0%)**	**+6.2% (+5.8%)**	47.6	10.8%	67.0	12.6%	**78.0**	**13.8%**	**+63.8% (+53.6%)**	**+16.4% (+15.2%)**
FA business	160.4	216.5	**233.5**	**+45.5% (+40.5%)**	**+7.9% (+7.4%)**	20.2	12.6%	30.0	13.9%	**40.1**	**17.2%**	**+98.0% (+83.5%)**	**+33.9% (+32.1%)**
Pre-Fictiv consolidation	146.1	193.6	**210.5**	**+44.1% (+39.0%)**	**+8.6% (+8.3%)**	25.2	17.3%	34.7	18.0%	**44.9**	**21.3%**	**+77.7% (+65.5%)**	**+29.5% (+27.8%)**
Die Components business	88.3	94.1	**95.8**	**+8.5% (+4.4%)**	**+1.9% (+1.4%)**	8.6	9.8%	12.6	13.4%	**12.2**	**12.7%**	**+40.3% (+33.5%)**	**-3.2% (-3.9%)**
VONA business	192.5	221.4	**235.6**	**+22.4% (+19.1%)**	**+6.4% (+6.0%)**	18.6	9.7%	24.4	11.0%	**25.6**	**10.9%**	**+37.5% (+30.6%)**	**+5.0% (+4.3%)**

Digital MODEL Shift: Performance

Net Sales Billion yen

	FY25 Actual	FY26 FC (7/31)	**FY26 FC (10/30)**	**YoY change**	**Vs. FC (7/31)**
Total	64.2	91.2	**93.1**	**+45.0%**	**+2.1%**
Online Processing Business	32.1	46.0	**45.7**	**+42.6%**	**-0.6%**
meviy	17.7	23.1	**22.7**	**+28.4%**	**-1.7%**
Fictiv	※1 14.3	22.9	**23.0**	**+60.3%**	**+0.4%**
Economy Series	18.3	27.2	**29.4**	**+60.6%**	**+7.9%**
D-JIT	13.8	17.9	**17.9**	**+29.7%**	**+0.2%**

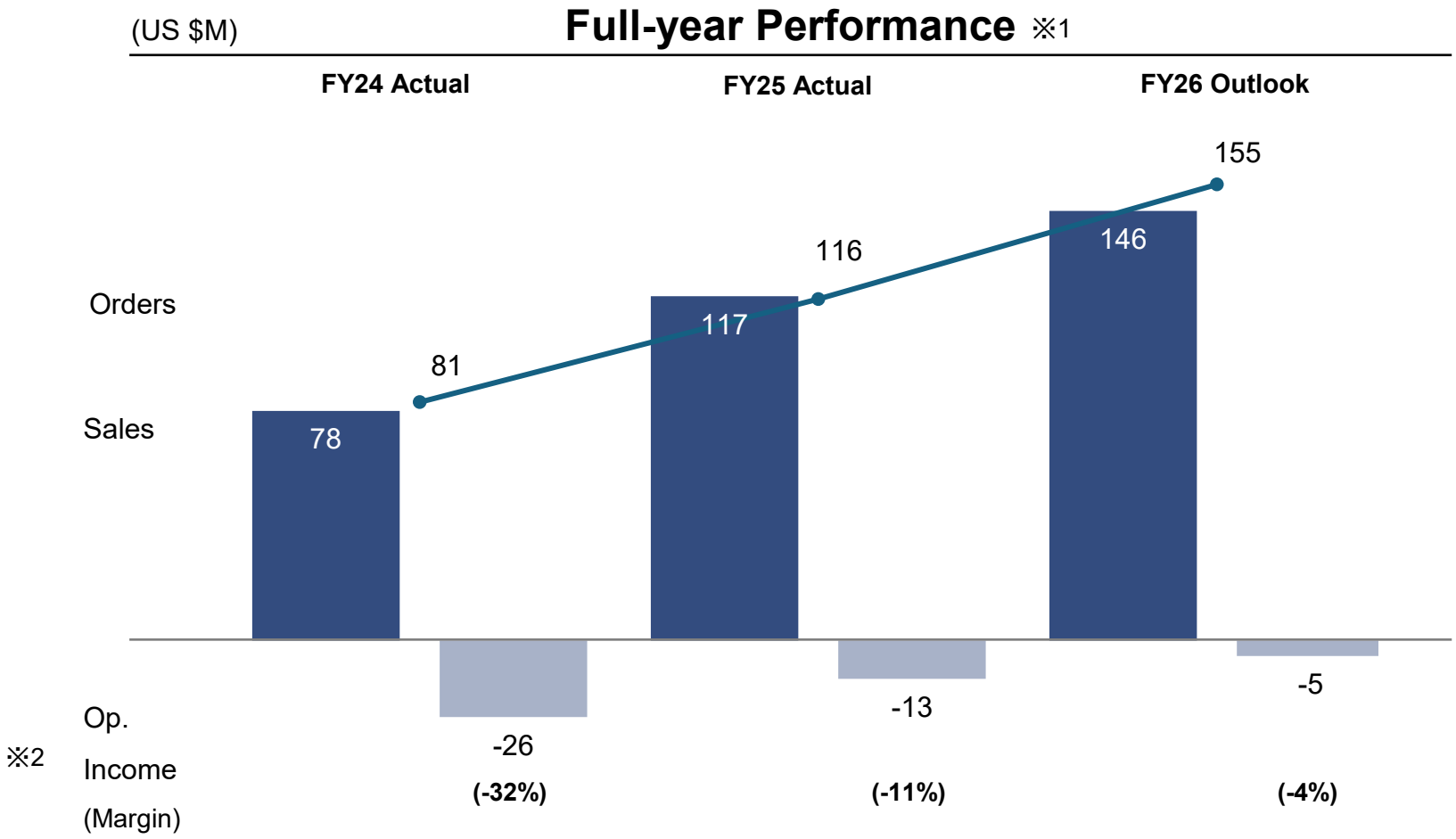
FY26 Action Plans for Each Initiative

North America operations consolidated into Fictiv Excluding North America, +39.4% YoY growth
Expanding customer penetration by enhancing capability and responsiveness
Customer expansion driven by continued enhancement of product variety
NEWTON rollout to all regions completed; moving to maximize use of D-JIT

※1: FY25 figures represent nine-month results

Fictiv's Business Performance (Standalone Basis)

Progressing as planned.



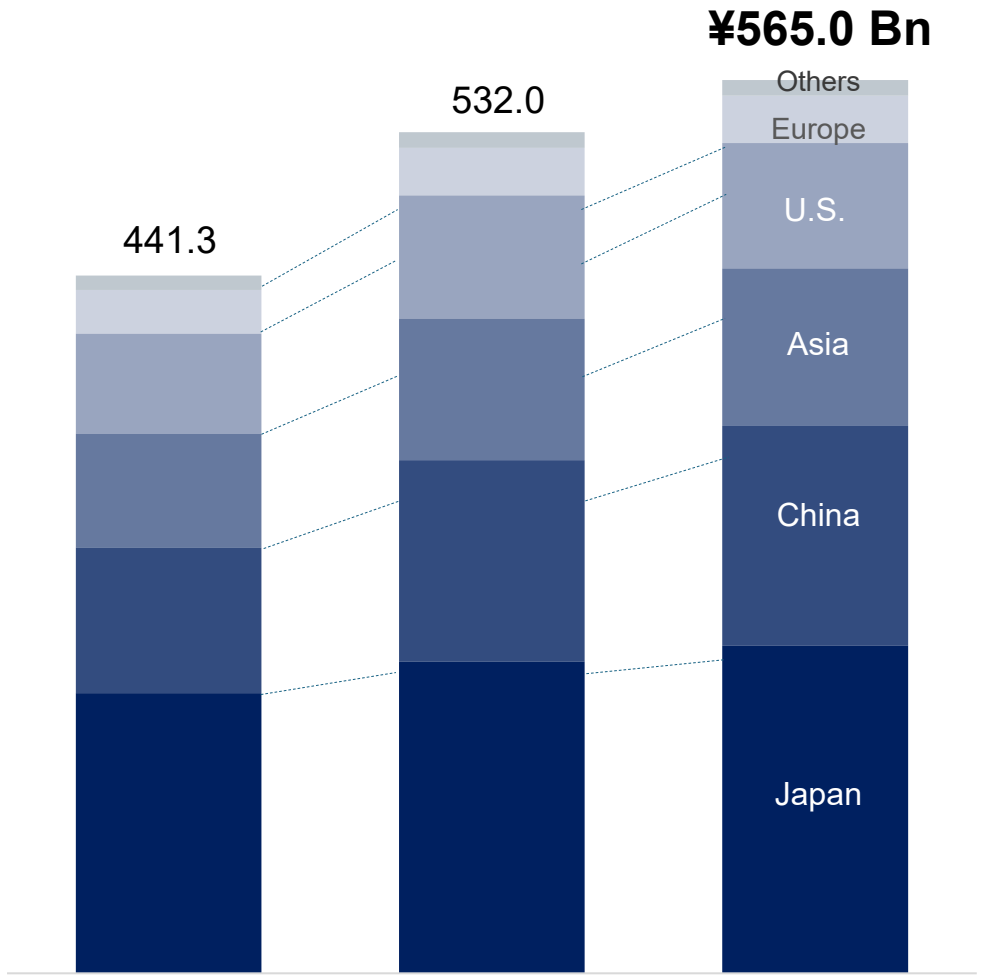
Orders Full-year YoY
+33.8%

Sales Full-year YoY
+24.8%

Margin Full-year YoY
+7pt

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

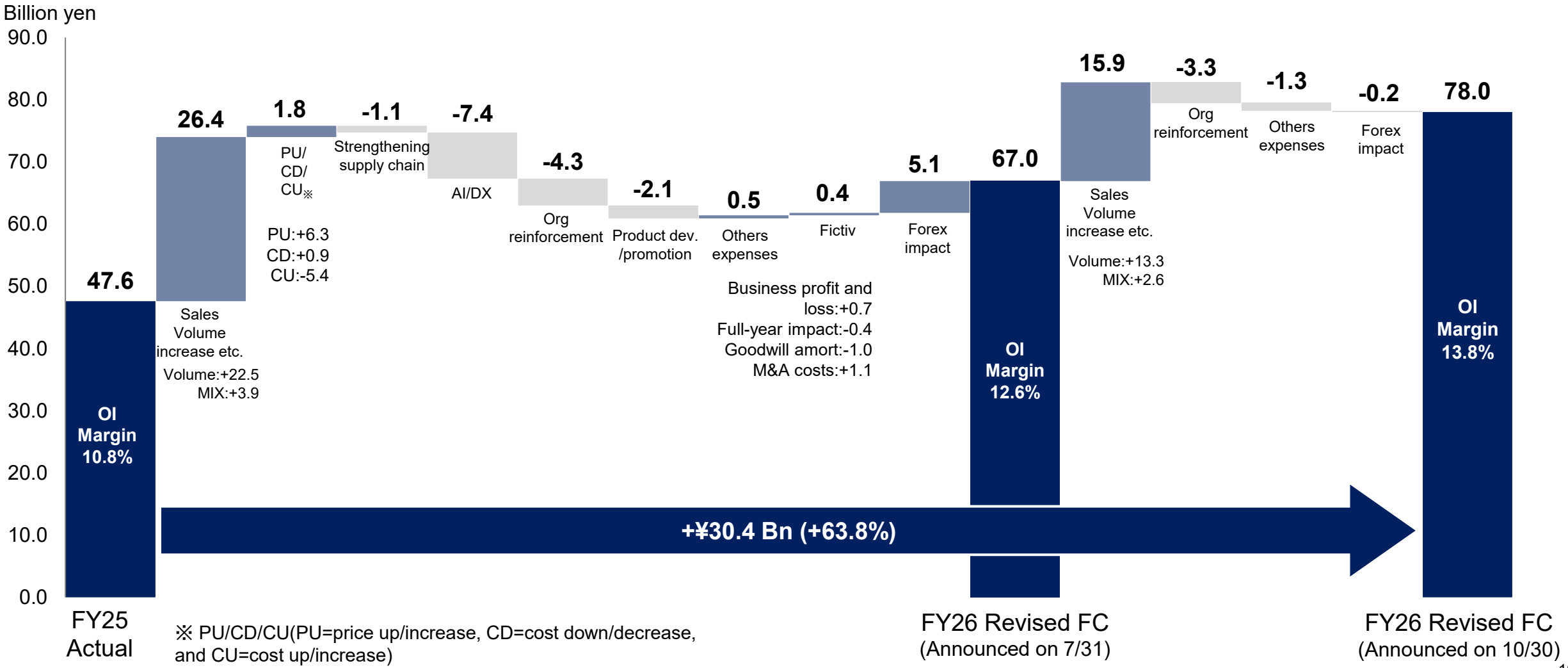
Sales by Region



	Sales	YoY change		Vs. Announced FC (7/31)	
		Yen basis	Local currency basis	Yen basis	Local currency basis
Europe	**¥29.9 Bn**	**+8.3%**	**+4.8%**	**-0.6%**	**+1.4%**
✓ Steady growth expected amid a gradual recovery across manufacturing					
U.S.	**¥79.3 Bn**	**+25.4%**	**+20.0%**	**+1.8%**	**+1.1%**
Pre-Fictiv consolidation	**¥56.3 Bn**	**+15.1%**	**+9.4%**	**+2.2%**	**+1.6%**
✓ Cross-selling with Fictiv and entry into growth industries, plus steady demand expected					
Asia	**¥99.5 Bn**	**+38.1%**	**+34.9%**	**+11.3%**	**+10.5%**
✓ Digital MODEL penetration plus strong semiconductor/telecom demand					
China	**¥139.0 Bn**	**+51.2%**	**+39.9%**	**+9.2%**	**+8.1%**
✓ Digital MODEL benefits and continued growth in telecom/semiconductor demand expected					
Japan	**¥207.1 Bn**	**+16.9%**	**-**	**+5.0%**	**-**
✓ Reflects growing capex demand, led by semiconductors and electronics					

Operating Income Variance Analysis

Operating income +¥11.0 Bn vs. the 7/31 FC on higher volume, etc., while incorporating further growth initiatives, incl. organizational strengthening.
Operating margin improved to 13.8% (+1.2pt).

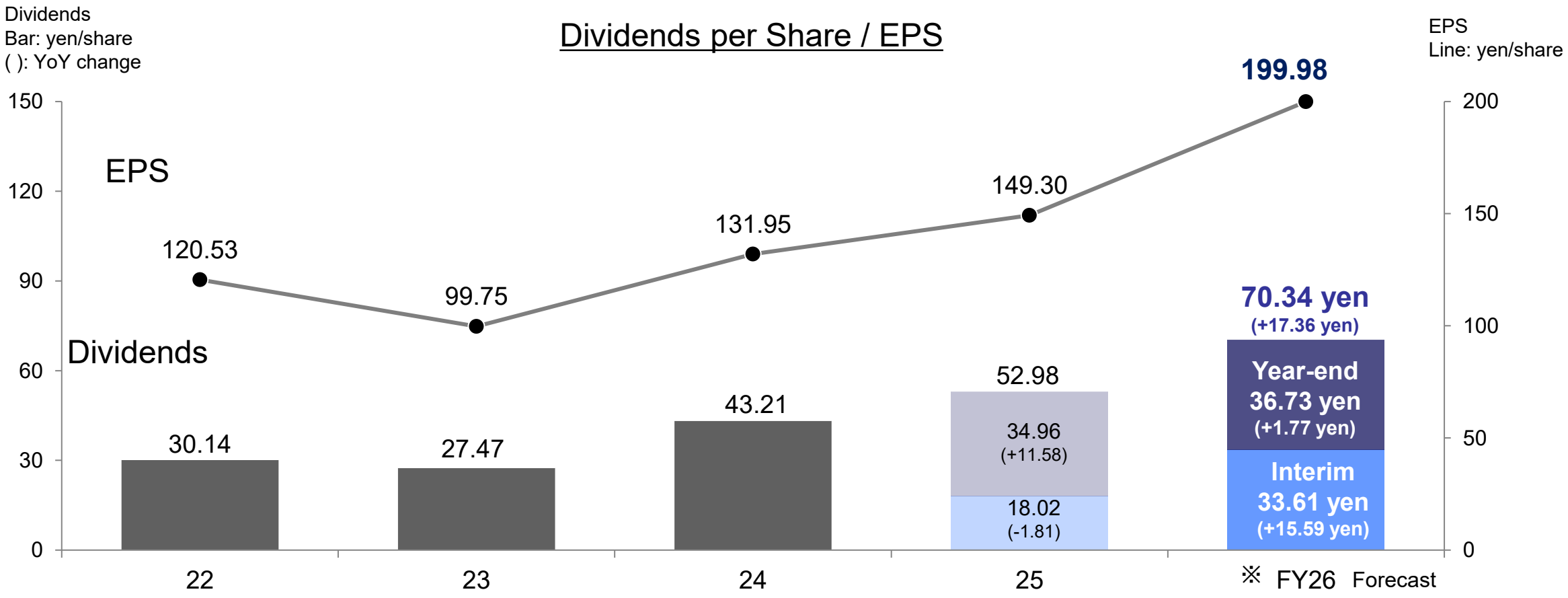


※ PU/CD/CU(PU=price up/increase, CD=cost down/decrease, and CU=cost up/increase)

Shareholder Returns

FY2026 interim dividend: 33.61 yen, up 15.59 yen YoY (up 2.69 yen vs. the 7/31 forecast)

Full-year dividend forecast: 70.34 yen (+17.36 yen YoY; +10.89 yen vs. the 7/31 forecast)



Payout ratio	25.0%	27.5%	32.5%	35.0%	35.0%

※From FY26: Change to a progressive dividend policy with a target payout ratio of 35%

Medium- to Long-term Growth Plan

The growth path, net sales, operating income, EPS, ROE, and capital policy will be presented with the FY2026 full-year results.

1. Definition of target market segments
    - Size and room for growth
2. Growth path
    - Tactical measures and rollout policy
3. Financial framework
    - EPS and ROE
4. Capital policy
    - Growth investment and shareholder returns

3. Reference Materials

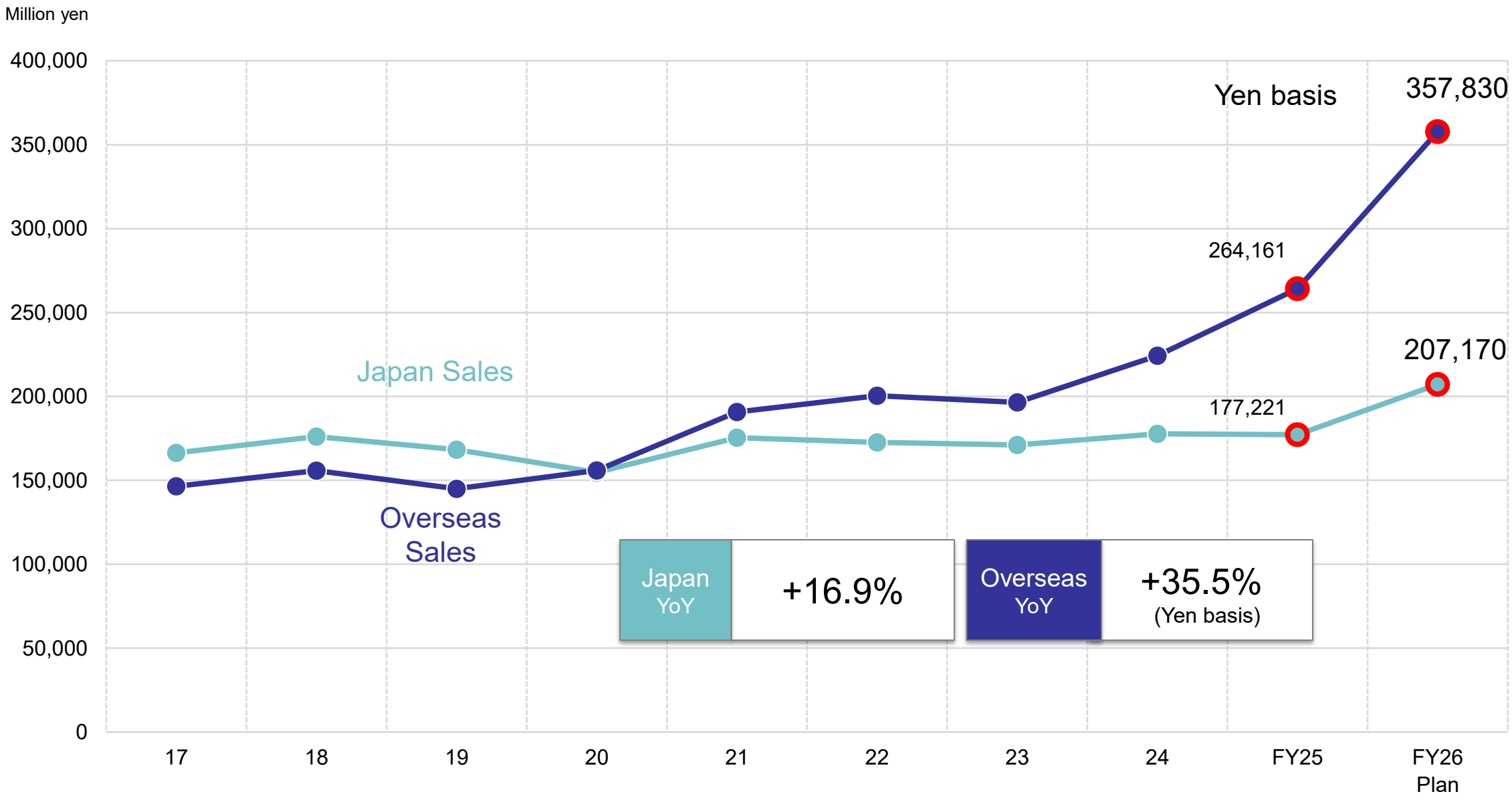
Integrated Report 2026 Published (online Oct. 29, 2026)



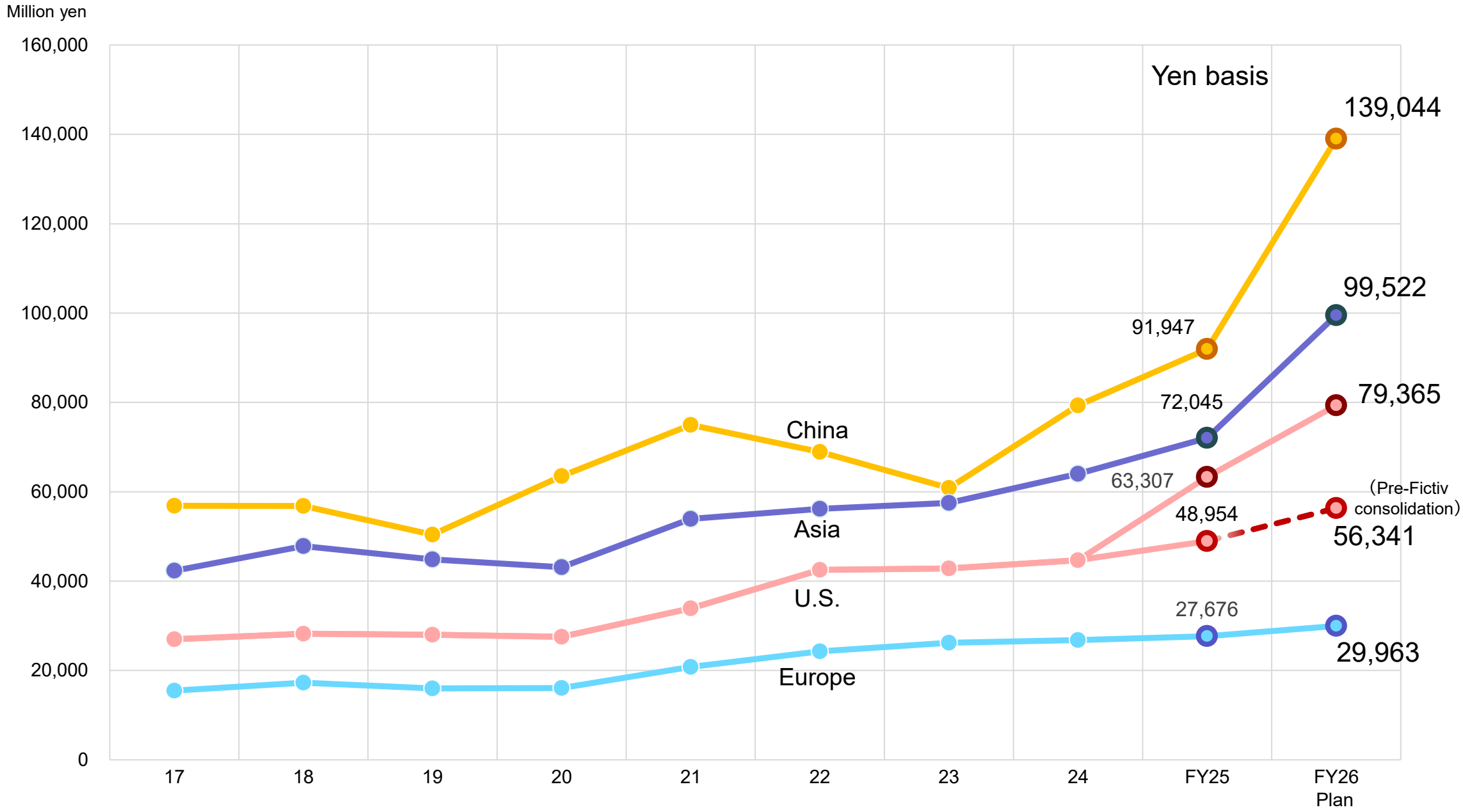
URL

https://www.misumi.co.jp/english/ir/library/annual_report

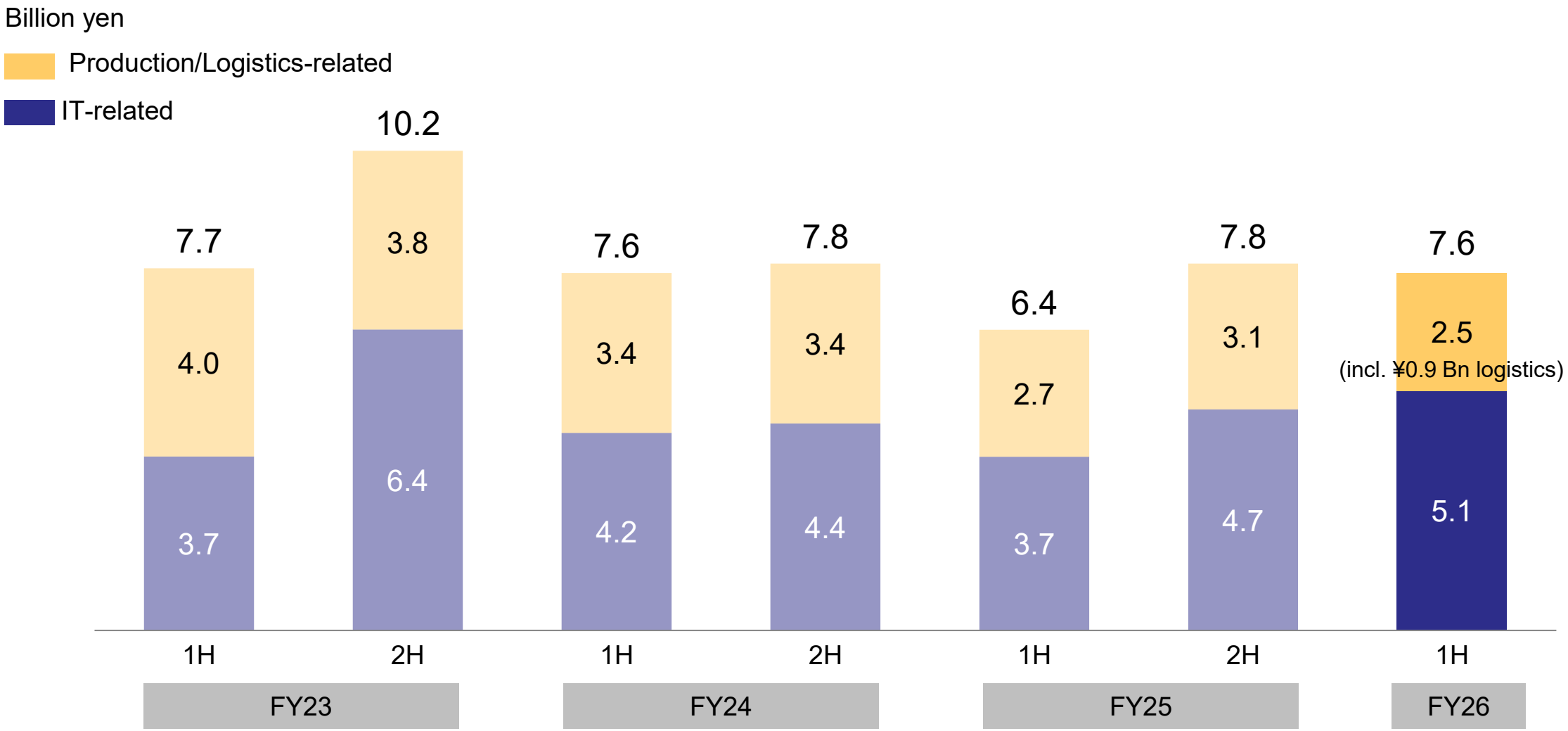
FY2026 Japan & Overseas Sales



FY2026 Overseas Sales by Region



Capital Investment Trends



1 Consolidated Balance Sheet

(million yen)

	As of March 31, 2024		As of March 31, 2025		As of Sep. 30, 2025		As of March 31, 2026		As of Sep. 30, 2026	
	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	313,381	10.9%	317,805	1.4%	272,539	-14.2%	295,654	-7.0%	314,729	6.5%
Cash and Deposits	148,848	24.5%	159,296	7.0%	105,372	-33.9%	112,941	-29.1%	110,707	-2.0%
Notes receivable and accounts receivable	75,869	-0.6%	78,390	3.3%	84,305	7.5%	98,520	25.7%	111,587	13.3%
Inventories	78,378	1.3%	69,652	-11.1%	69,877	0.3%	73,439	5.4%	77,368	5.4%
Other current assets	10,285	10.4%	10,466	1.8%	12,985	24.1%	10,753	2.7%	15,066	40.1%
Fixed assets	100,136	4.5%	101,769	1.6%	156,714	54.0%	169,314	66.4%	163,357	-3.5%
Property, Plant and Equipment	51,042	5.4%	52,522	2.9%	52,887	0.7%	56,638	7.8%	55,097	-2.7%
Buildings and structures	14,252	-2.4%	21,536	51.1%	21,955	1.9%	23,005	6.8%	22,846	-0.7%
Machinery, equipment and vehicles	16,084	2.7%	15,626	-2.8%	15,089	-3.4%	16,133	3.2%	15,852	-1.7%
Land	3,880	-0.5%	4,259	9.8%	4,301	1.0%	4,323	1.5%	4,314	-0.2%
Other tangible fixed assets	16,824	18.2%	11,099	-34.0%	11,540	4.0%	13,175	18.7%	12,084	-8.3%
Intangible fixed assets	36,109	3.1%	33,283	-7.8%	87,552	163.1%	90,370	171.5%	86,744	-4.0%
Goodwill	-	-	-	-	42,374	-	43,962	-	41,748	-5.0%
Intangible fixed assets	36,109	3.1%	33,283	-7.8%	45,178	35.7%	46,407	39.4%	44,995	-3.0%
Investments and Other assets	12,984	4.6%	15,963	22.9%	16,274	1.9%	22,306	39.7%	21,515	-3.5%
Investment securities	6	0.0%	1,224	-	1,302	6.4%	5,552	353.6%	5,706	2.8%
Deferred tax assets	7,679	11.4%	9,052	17.9%	9,134	0.9%	10,800	19.3%	10,575	-2.1%
Other investments	5,298	-3.9%	5,686	7.3%	5,837	2.7%	5,953	4.7%	5,233	-12.1%
Total assets	413,517	9.3%	419,574	1.5%	429,254	2.3%	464,969	10.8%	478,086	2.8%
Current liabilities	49,929	2.0%	51,876	3.9%	52,661	1.5%	65,180	25.6%	79,369	21.8%
Notes payable and Accounts payable	20,984	-6.5%	21,189	1.0%	22,803	7.6%	29,852	40.9%	33,489	12.2%
Other current liabilities	28,944	9.2%	30,686	6.0%	29,857	-2.7%	35,327	15.1%	45,880	29.9%
Long-Term liabilities	15,908	4.0%	15,634	-1.7%	19,466	24.5%	17,279	10.5%	17,414	0.8%
Deferred tax liabilities	648	-18.8%	1,043	61.0%	4,488	330.3%	1,708	63.8%	2,207	29.2%
Liability for Retirement Benefits	7,436	5.9%	7,337	-1.3%	7,703	5.0%	7,362	0.3%	7,660	4.0%
Other long-term liabilities	7,823	4.8%	7,253	-7.3%	7,273	0.3%	8,208	13.2%	7,545	-8.1%
Total liabilities	65,837	2.5%	67,510	2.5%	72,127	6.8%	82,460	22.1%	96,783	17.4%
Common stock	14,146	1.5%	14,483	2.4%	14,598	0.8%	14,727	1.7%	14,868	1.0%
Capital surplus	24,303	0.0%	24,585	1.2%	24,520	-0.3%	24,721	0.6%	24,956	1.0%
Retained earnings	266,651	8.6%	293,546	10.1%	301,121	2.6%	322,681	9.9%	338,457	4.9%
Treasury stock	△ 9,159	-	△ 28,352	209.6%	△ 34,655	22.2%	△ 52,392	84.8%	△ 68,081	29.9%
Total accumulated other comprehensive income	48,573	76.1%	45,020	-7.3%	48,872	8.6%	70,094	55.7%	68,650	-2.1%
Stock acquisition rights	2,087	4.9%	1,663	-20.3%	1,503	-9.6%	1,293	-22.3%	1,011	-21.8%
Non-controlling interests	1,076	13.5%	1,116	3.7%	1,166	4.5%	1,383	23.9%	1,440	4.1%
Total net assets	347,679	10.6%	352,064	1.3%	357,127	1.4%	382,509	8.6%	381,303	-0.3%
Total liabilities and net assets	413,517	9.3%	419,574	1.5%	429,254	2.3%	464,969	10.8%	478,086	2.8%

(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 Other current liabilities and "Other long-term liabilities".
(Note2)Items where the increase/decrease rate exceeds 1,000% are indicated as "-".
(Note3)The provisional accounting treatment for business combinations was finalized at the end of the fiscal year ended March 31, 2026. Figures for the six months ended September 30, 2025 reflect the finalized accounting treatment.

2 Consolidated Statement of Income

(million yen)

	Fiscal year ended March 2024		Fiscal year ended March 2025		Half Year ended September 2025		Fiscal year ended March 2026		Half Year ended September 2026		Fiscal year ended March 2027 Forecast	
	Amount	Sales ratio YoY%	Amount	Sales ratio YoY%	Amount	Sales ratio HoH%	Amount	Sales ratio YoY%	Amount	Sales ratio HoH%	Amount	Sales ratio YoY%
Factory Automation	118,219	32.2% -3.0%	135,803	33.8% 14.9%	72,743	35.3% 8.8%	160,498	36.4% 18.2%	109,246	39.9% 50.2%	233,534	41.3% 45.5%
Die Components	79,932	21.7% 1.0%	86,451	21.5% 8.2%	42,573	20.7% -0.6%	88,368	20.0% 2.2%	48,497	17.7% 13.9%	95,844	17.0% 8.5%
VONA	169,497	46.1% -1.5%	179,732	44.7% 6.0%	90,498	44.0% 2.4%	192,516	43.6% 7.1%	115,861	42.3% 28.0%	235,622	41.7% 22.4%
Net sales	367,649	100.0% -1.5%	401,987	100.0% 9.3%	205,814	100.0% 3.9%	441,383	100.0% 9.8%	273,606	100.0% 32.9%	565,000	100.0% 28.0%
Cost of sales	200,272	54.5% -0.9%	214,997	53.5% 7.4%	110,812	53.8% 5.3%	235,367	53.3% 9.5%	142,594	52.1% 28.7%		
Gross profit	167,377	45.5% -2.2%	186,990	46.5% 11.7%	95,002	46.2% 2.4%	206,015	46.7% 10.2%	131,012	47.9% 37.9%		
S G & A expenses	129,011	35.1% 3.7%	140,509	35.0% 8.9%	75,442	36.7% 8.7%	158,402	35.9% 12.7%	93,879	34.3% 24.4%		
Operating income	38,365	10.4% -17.7%	46,480	11.6% 21.2%	19,559	9.5% -16.4%	47,613	10.8% 2.4%	37,132	13.6% 89.8%	78,000	13.8% 63.8%
Non-operating income	4,199	1.1% 84.0%	4,701	1.2% 11.9%	1,424	0.7% -41.9%	2,618	0.6% -44.3%	1,199	0.4% -15.8%		
Non-operating expenses	1,299	0.4% 22.7%	1,279	0.3% -1.6%	646	0.3% 4.3%	1,135	0.3% -11.3%	1,273	0.5% 97.1%		
Ordinary income	41,265	11.2% -13.7%	49,901	12.4% 20.9%	20,338	9.9% -19.4%	49,095	11.1% -1.6%	37,058	13.5% 82.2%	77,800	13.8% 58.5%
Extraordinary income/losses(△)	△ 2,045	-0.6% 56.6%	38	0.0% -101.9%	△ 504	-0.2% 354.5%	△ 597	-0.1% -1654.6%	345	0.1% -168.5%		
Income taxes	10,964	3.0% -9.6%	13,285	3.3% 21.2%	5,758	2.8% -16.2%	7,873	1.8% -40.7%	12,287	4.5% 113.4%		
Net income attributable to non-controlling interests	102	0.0% -17.3%	105	0.0% 2.6%	77	0.0% 89.1%	167	0.0% 58.7%	79	0.0% 2.6%		
Net income attributable to owners of parent	28,152	7.7% -17.9%	36,549	9.1% 29.8%	13,997	6.8% -23.1%	40,457	9.2% 10.7%	25,037	9.2% 78.9%	52,400	9.3% 29.5%

(Note) The provisional accounting treatment for business combinations was finalized at the end of the fiscal year ended March 31, 2026. Figures for the six months ended September 30, 2025 reflect the finalized accounting treatment.

3 Consolidated Statement of Cash Flows

(million yen)

	Fiscal year ended March 2024		Fiscal year ended March 2025		Half Year ended September 2025		Fiscal year ended March 2026		Half Year ended September 2026	
	Amount	YoY	Amount	YoY	Amount	HoH	Amount	YoY	Amount	HoH
Operating activities	54,567	23,120	60,461	5,893	17,528	△ 13,834	52,190	△ 8,270	32,347	14,819
Income before income taxes	39,219	△ 7,313	49,940	10,720	19,834	△ 5,276	48,498	△ 1,441	37,404	17,570
Depreciation, Amortization	17,564	977	17,718	153	8,581	△ 295	17,939	221	9,724	1,143
Amortization of goodwill	-	-	-	-	711	711	2,209	2,209	1,543	832
Decrease (Increase) in working capital	6,059	17,826	4,228	△ 1,831	△ 2,488	△ 4,952	△ 6,044	△ 10,272	△ 11,257	△ 8,769
Other	△ 8,276	11,629	△ 11,425	△ 3,148	△ 9,110	△ 4,021	△ 10,412	1,013	△ 5,066	4,043
Investing activities	△ 18,995	38	△ 32,452	△ 13,457	△ 34,340	△ 13,700	△ 43,203	△ 10,751	△ 3,940	30,399
Purchase of fixed assets	△ 17,976	△ 4,350	△ 15,434	2,541	△ 6,443	1,187	△ 14,288	1,146	△ 7,630	△ 1,186
Deposits and withdrawals of time deposits	△ 1,483	3,933	△ 16,100	△ 14,617	20,756	33,922	23,746	39,847	4,165	△ 16,590
Purchase of shares of subsidiaries resulting in change	-	-	-	-	△ 48,483	△ 48,483	△ 48,483	△ 48,483	△ 480	48,003
Other	464	455	△ 916	△ 1,381	△ 168	△ 326	△ 4,177	△ 3,261	4	173
Financing activities	△ 18,968	△ 7,799	△ 31,759	△ 12,790	△ 17,684	5,123	△ 41,801	△ 10,042	△ 26,418	△ 8,733
Dividends paid	△ 7,058	2,185	△ 9,653	△ 2,595	△ 6,422	△ 2,231	△ 11,322	△ 1,668	△ 9,262	△ 2,839
Purchase of treasury stock	△ 10,095	△ 10,094	△ 20,164	△ 10,068	△ 6,896	10,626	△ 25,132	△ 4,968	△ 15,909	△ 9,013
Other	△ 1,814	109	△ 1,940	△ 126	△ 4,366	△ 3,271	△ 5,346	△ 3,405	△ 1,246	3,119
Effect of exchange rate change on cash and cash equivalents	10,132	6,179	△ 1,367	△ 11,500	1,442	5,438	8,757	10,125	△ 26	△ 1,469
Net increase (decrease) in cash and cash equivalents	26,736	21,538	△ 5,117	△ 31,853	△ 33,053	△ 16,972	△ 24,056	△ 18,938	1,962	35,016
Cash and cash equivalents at beginning of year	106,640	5,197	133,376	26,736	128,259	△ 5,117	128,259	△ 5,117	104,202	△ 24,056
Cash and cash equivalents at end of year	133,376	26,736	128,259	△ 5,117	95,205	△ 22,090	104,202	△ 24,056	106,165	10,960

(Note1)The "Other" category under cash flows from financing activities for the half year ended September 2025 includes an outflow of ¥3,322 million for the repayment of borrowings by acquired subsidiaries.

(Note 2) The provisional accounting treatment for business combinations was finalized at the end of the fiscal year ended March 31, 2026. Figures for the six months ended September 30, 2025 reflect the finalized accounting treatment.

4 Key Financial Indicators

	Fiscal year ended March 2024	Fiscal year ended March 2025	Half Year ended September 2025	Fiscal year ended March 2026	Half Year ended September 2026
EBITDA (million yen)	55,930	64,199	28,853	67,762	48,401
Net income per share(yen)	99.75	131.95	51.06	149.30	95.05
Operating Income Margin (%)	10.4	11.6	9.5	10.8	13.6
Return on Assets (%)	7.1	8.8	3.3	9.1	5.3
Return on Equity (%)	8.6	10.5	4.0	11.1	6.6
Current Ratio (%)	627.7	612.6	517.5	453.6	396.5
Equity Ratio (%)	83.3	83.2	82.6	81.7	79.2
Receivables Turnover (Days)	75.6	70.0	72.3	73.1	70.3
Inventory Turnover (Months)	4.7	4.1	3.8	3.6	3.2

(Note1) The provisional accounting treatment for business combinations was finalized at the end of the fiscal year ended March 31, 2026.
Figures for the six months ended September 30, 2025 reflect the finalized accounting treatment.

- 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(183 Days)
- Inventory Turnover (Months) : (Last Ending Inventory ＋Ending Inventory)/2/COGS×12Months(6 Months)