

The background of the slide features a grayscale image of a robotic arm in motion, overlaid with a pattern of binary code (0s and 1s) and various code snippets. The left side has a yellow-to-white gradient with a dot pattern, and the right side has a blue-to-white gradient with a dot pattern.

# FY2025(ending March 31, 2026) First Quarter Earnings Report

July 25, 2025  
MISUMI Group Inc.

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FX rates (vs Yen)	FY24 1Q Actuals	FY25 1Q Actuals
USD	156.5 yen	145.2 yen
EUR	168.4 yen	164.4 yen
RMB	21.5 yen	20.1 yen

# Earnings Overview for the first three months of FY2025

# FY25 1Q Financial Results Overview

Sales growth achieved through unique measures, but slight decrease compared to the previous year due to tariffs and Forex impact

In addition to continued necessary expenditures for growth, profit decreased due to the impact of the Fictiv acquisition

Million yen

Category)	Pre- Consolidation			Fictiv	Post- Consolidation	
	FY24 1Q Actuals	FY25 1Q Actuals	YoY change	FY25 1Q Actuals	FY25 1Q Actuals	YoY change
			Yen basis (Local currency basis)			Yen basis (Local currency basis)
Net Sales	99,527	99,368	-0.2% (+3.6%)	-	99,368	-0.2% (+3.6%)
Operating Income	11,828	10,692	-9.6% (+0.8%)	※ -1,065	9,627	-18.6% (-8.2%)
Margin	11.9%	10.8%	-1.1pt (-0.3pt)	-	9.7%	-2.2pt (-1.4pt)
Ordinary Income	12,916	11,336	-12.2% (-)	-1,065	10,272	-20.5% (-)
Net Income	9,251	8,003	-13.5% (-)	-783	7,219	-22.0% (-)

※ M&A related costs

# FY25 1Q Sales and Operating Income by Business Segment

FA: Sluggish performance in Japan and Europe offset by other regions; earnings temporarily weighed down by M&A related costs

Die components: Decrease in sales and profit due to sluggish operations among automotive customers

VONA: Mass production demand captured in China & Asia, resulting in improved profitability

Million yen

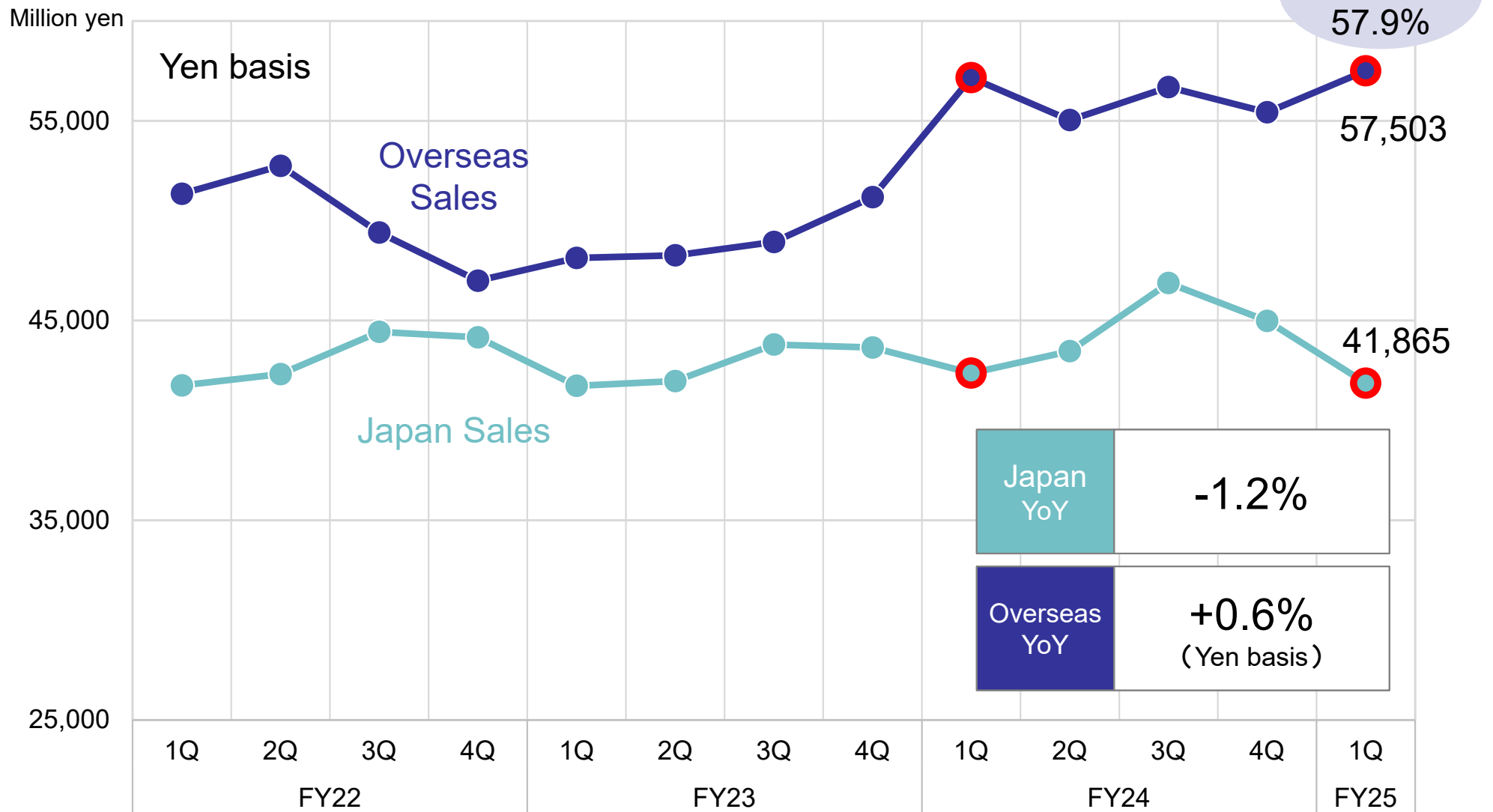
Category	Net Sales			Operating Income				
	FY24 1Q Actuals	FY25 1Q Actuals	YoY change	FY24 1Q Actuals		FY25 1Q Actuals		YoY change
			Yen basis (Local currency basis)					Yen basis (Local currency basis)
Total	99,527	99,368	-0.2% (+3.6%)	11,828	11.9%	9,627	9.7%	-18.6% (-8.2%)
FA business	33,559	33,569	+0.0% (+3.7%)	6,210	18.5%	3,922	11.7%	-36.8% (-28.7%)
Exc.M&A related costs						4,987	14.9%	-19.7% (-11.6%)
Die components business	21,887	21,060	-3.8% (+1.7%)	2,441	11.2%	2,116	10.1%	-13.3% (-1.4%)
VONA business	44,080	44,738	+1.5% (+4.5%)	3,176	7.2%	3,588	8.0%	+13.0% (+26.6%)

# FY25 1Q Japan and Overseas Sales

Japan: Economic sentiment has worsened due to the impact of tariffs, with a cautious stance being adopted by automotive-related customers

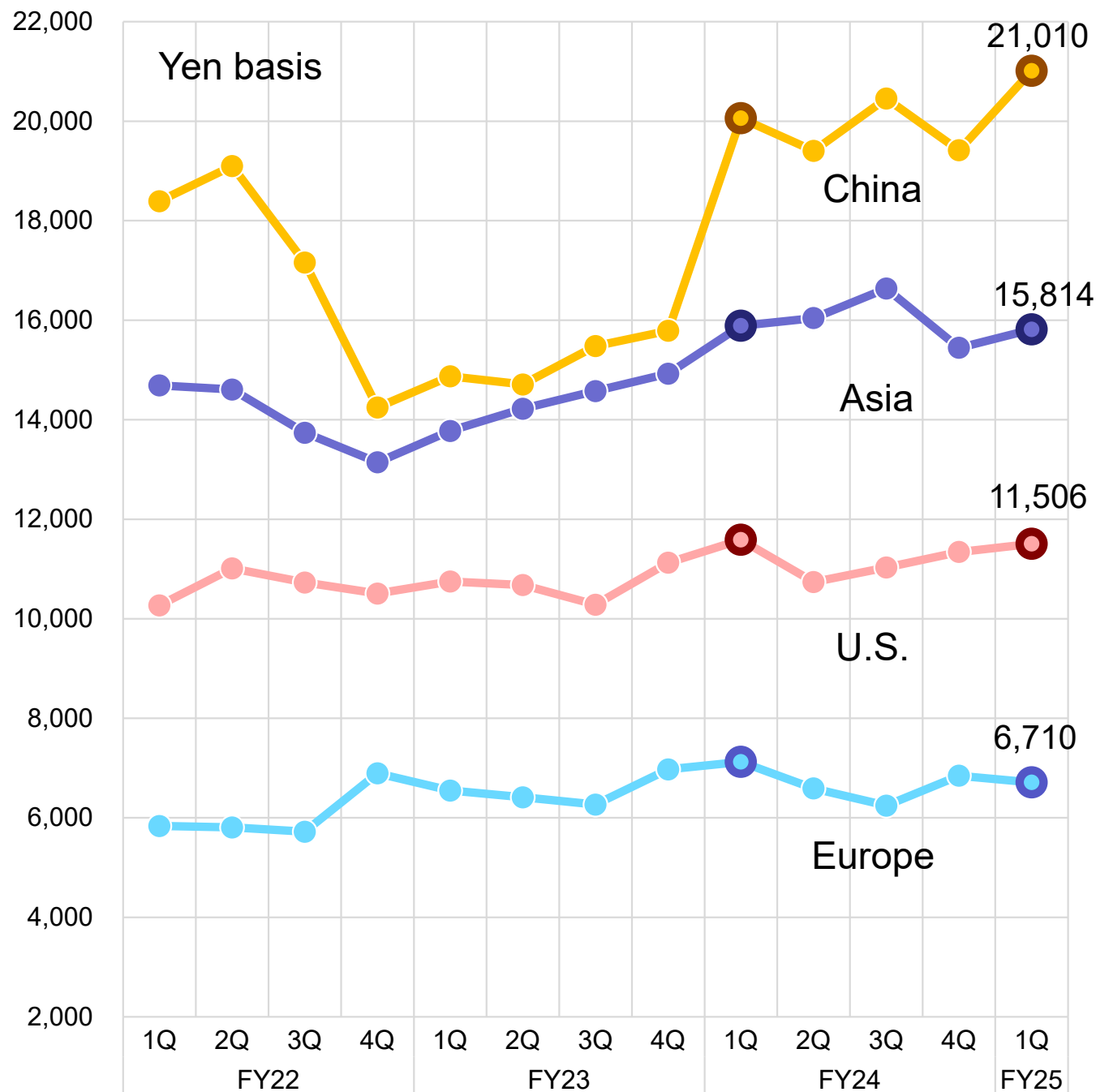
Overseas: China driving growth; excluding Forex impact, US & Asia remain in line with previous year, Europe continues to be sluggish

Tariffs: Demand stagnated in Japan, Europe and South Korea



# FY25 1Q Sales by Region

Million yen



## China

Although the outlook for tariffs remains uncertain, Economy products and other unique measures are progressing steadily

YoY

Yen basis

**+4.7%**

Local currency basis

**+12.2%**

## Asia

Investment continues to be sluggish in S. Korea; other regions remain stable

YoY

Yen basis

**-0.5%**

Local currency basis

**+ 4.9%**

## U.S.

Tariffs impact lower than expected, w/ market outlook uncertainty continued

YoY

Yen basis

**-0.7%**

Local currency basis

**+ 7.1%**

## Europe

Restrained investment due to sluggish market conditions continued, mainly in the automotive sector

YoY

Yen basis

**-5.8%**

Local currency basis

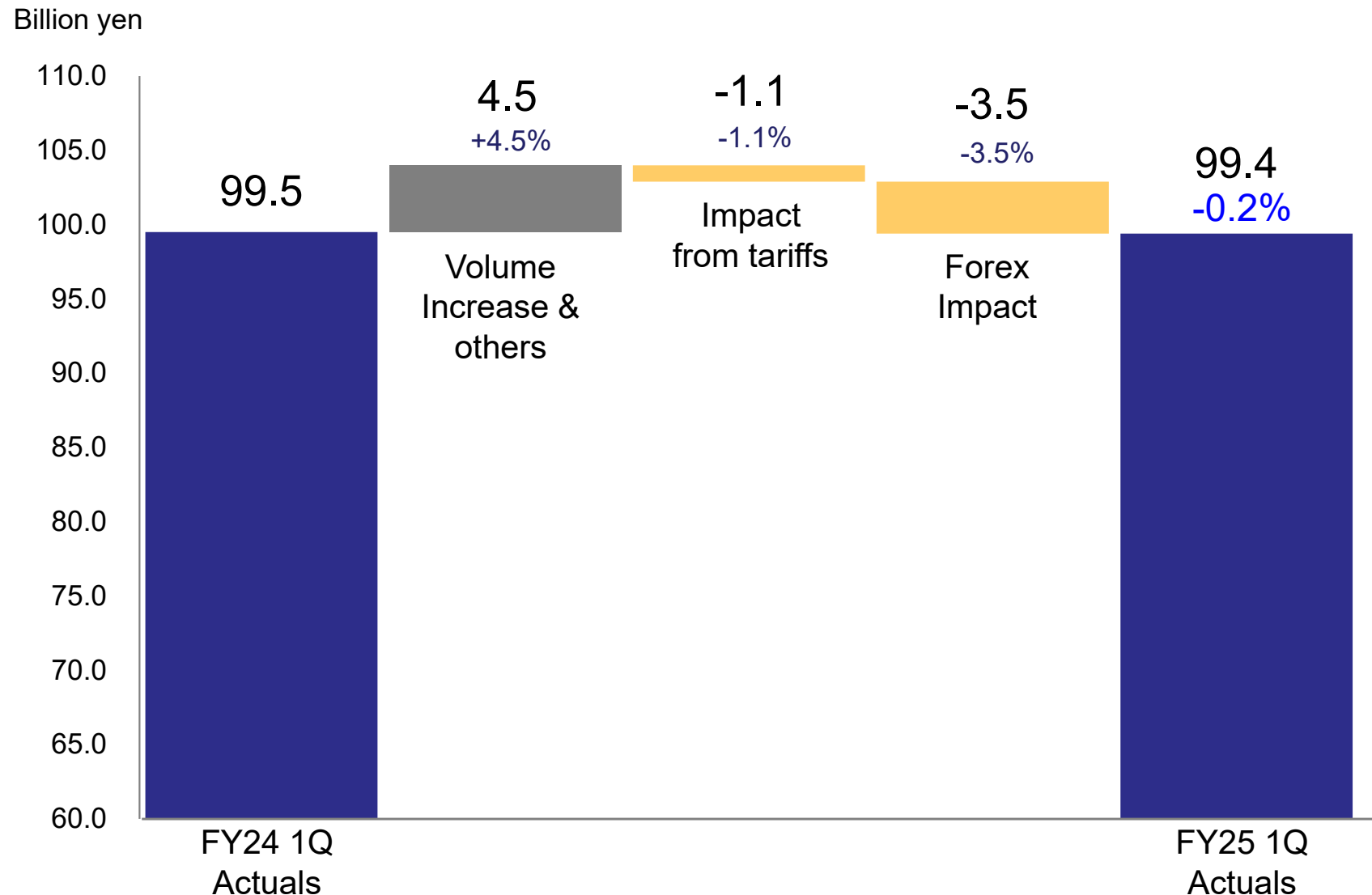
**-3.5%**



# FY25 1Q Sales Analysis (YoY)

Increase in sales volume was due to digital initiatives

Despite tariffs and Forex impact, slight decrease from the previous year, offset by sales volume increase

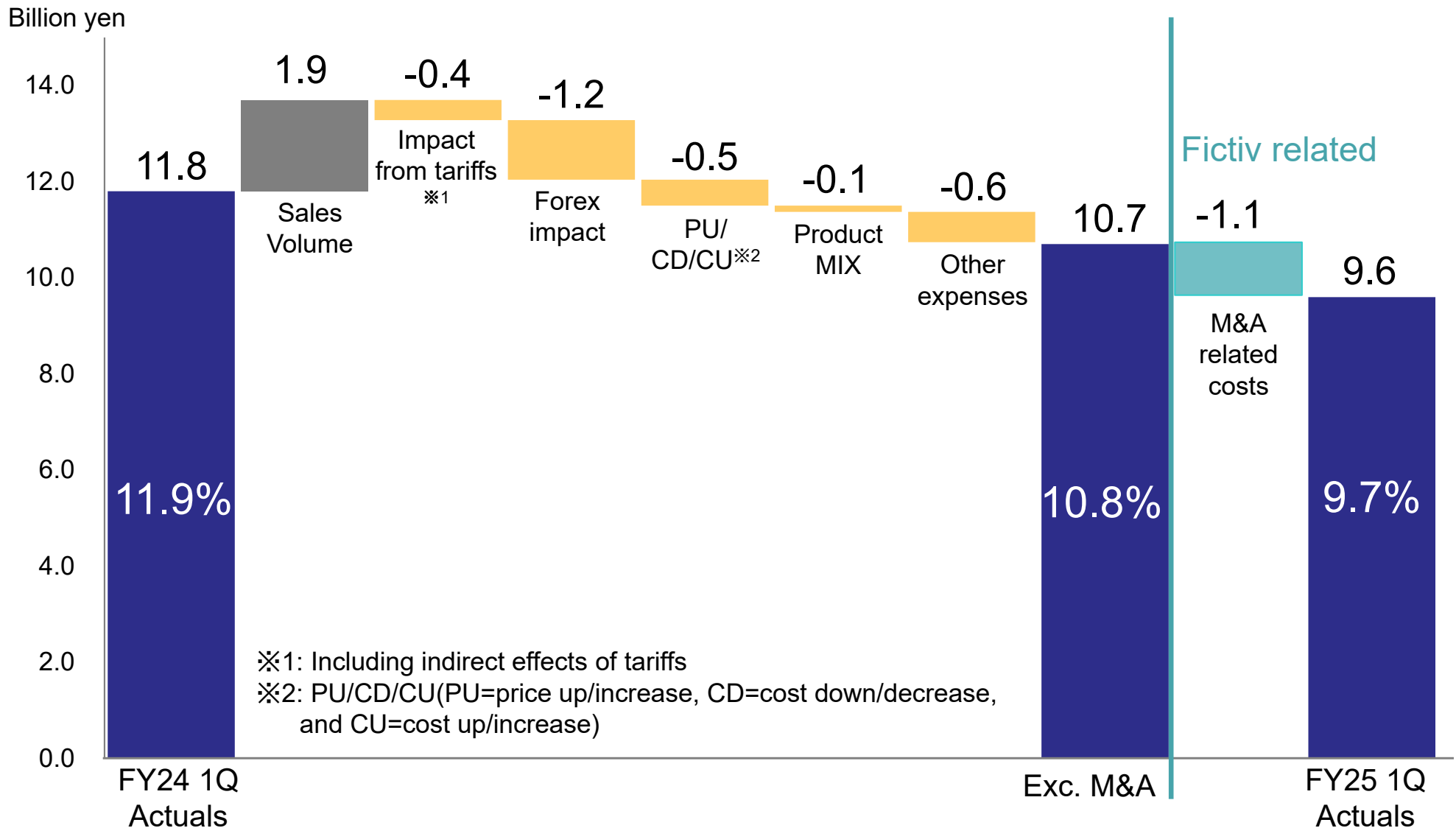




# FY25 1Q Operating Income Analysis (YoY)

Profit increases from unique measures largely absorbed impact of tariffs, Forex and rise of procurement costs. Minimal rebound effect from previous year's product mix

Profits, before impact of M&A related costs, in line with plan, which included necessary expenditures to strengthen business foundation



# FY2025 Consolidated Earnings Forecast

FX rates (vs Yen)	FY24	FY25	
	Actuals	Post 2Q	Full year FC
USD	152.5 yen	139.0 yen	140.9 yen
EUR	163.6 yen	160.0 yen	161.3 yen
RMB	21.1 yen	19.3 yen	19.6 yen

# FY25 Full Year Forecast

Pre-consolidation sales improved due to lower than expected tariffs/ Forex impact  
Furthermore, sales impact from the Fictiv consolidation; led to an upward revision

Operating income as planned, w/ increase expected from effects of unique measures  
Impact of Fictiv acquisition likely to reduce post-consolidation profits

Million yen

Category	Pre-Consolidation			Fictiv	Post-Consolidation	
	FY24 Actuals	FY25 Forecast (7/25)	YoY change	FY25 Forecast (Nine months (July 2025 to March 2026))	FY25 Forecast (7/25)	YoY change
			Yen basis (Local currency basis)			Yen basis (Local currency basis)
Net sales	401,987	409,954	+2.0% (+6.0%)	12,046	422,000	+5.0% (+9.4%)
Operating income	46,480	47,896	+3.0% (+14.5%)	※1 -4,995	42,900	-7.7% (+2.6%)
Margin	11.6%	11.7%	+0.1pt (+0.9pt)	-	10.2%	-1.4pt (-0.7pt)
Ordinary income	49,901	48,450	-2.9% (-)	-5,149	43,300	-13.3% (-)
Net income※2	36,549	36,031	-1.4% (-)	-5,232	30,800	-15.7% (-)

※1: Details: (Fictiv Standalone business performance -1,298, M&A related costs -1,065 and goodwill amortization -2,632)

※2: Includes the consolidated tax impact from Fictiv acquisition

# FY25 Sales Forecast by Business Segment

FA: meviy, Economy Series driving sales increase; Fictiv consolidation will further increase sales

Die components: Decline in sales due to reduced operations stemming from a slow down in automotive-related demand and Forex impact

VONA: Growth secured by capturing mass production demand, mainly in China

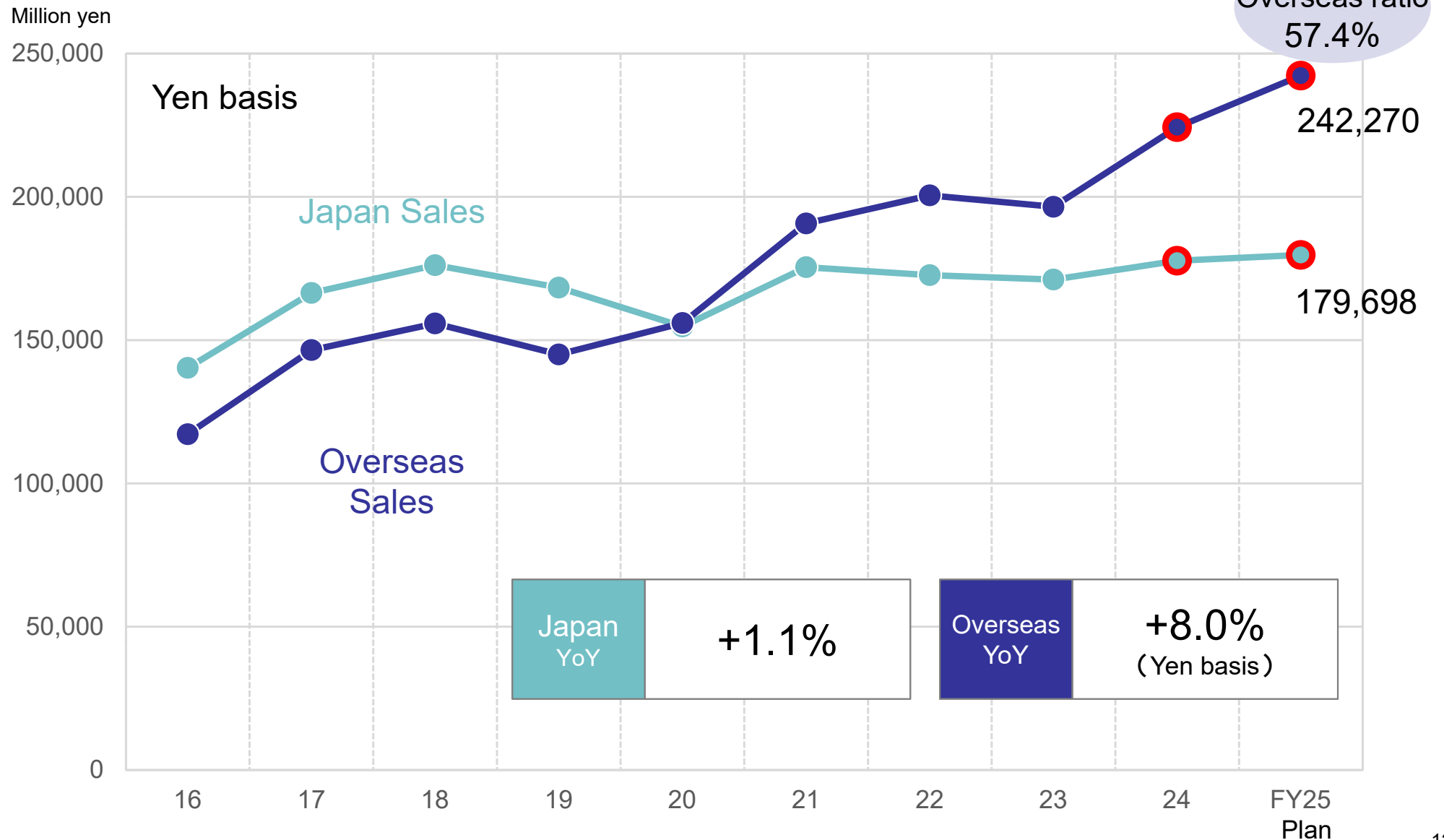
Million yen

Category	FY24	FY25		
	Actuals	Forecast (7/25)	YoY change	
			Yen basis	Local currency basis
Total	401,987	422,000	+5.0%	+9.4%
FA business	135,803	154,555	+13.8%	+18.7%
Pre-Fictiv consolidation		142,509	+4.9%	+8.7%
Die Component business	86,451	83,935	-2.9%	+2.8%
VONA business	179,732	183,510	+2.1%	+5.5%

# FY25 Japan & Overseas Sales Forecast

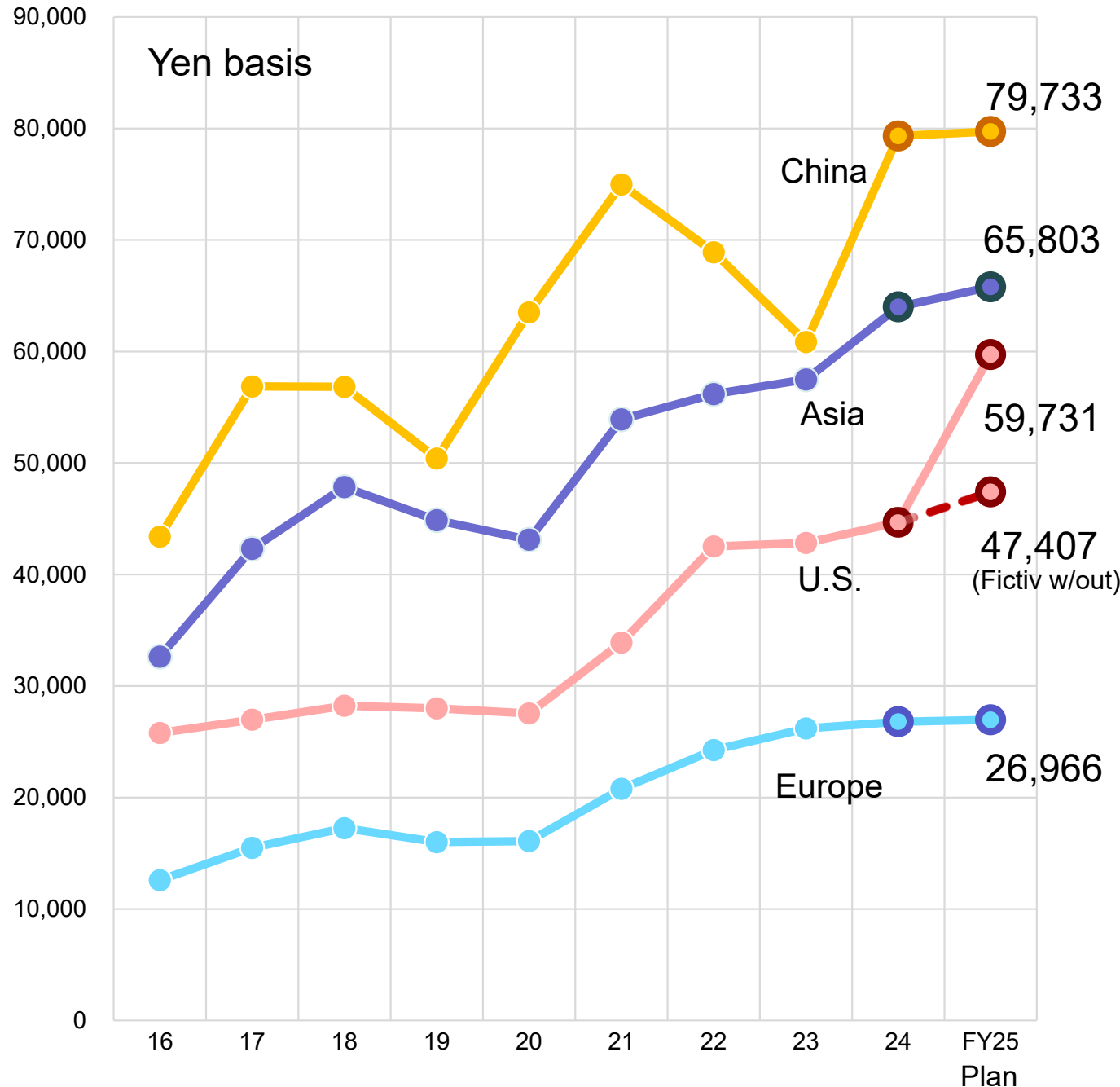
Japan: Automotive-related demand remains sluggish but impact from unique measures sustaining increase of YoY sales

Overseas: Overall growth maintained and further accelerated with the consolidation of Fictiv



# FY25 Sales Forecast by Region

Million yen



## China

Sales increase though capturing mass production demand

YoY	Yen basis	Local currency basis
	+0.5%	+8.5%

## Asia

Growth in Economy series continue to contribute to regions growth

YoY	Yen basis	Local currency basis
	+2.8%	+9.6%

## U.S.

Uncertainty from tariffs to continue, gradual recovery + Fictiv to increase sales

YoY	Yen basis	Local currency basis
w/out Fictiv	+6.1%	+14.9%
w/ Fictiv	+33.6%	+45.2%

## Europe

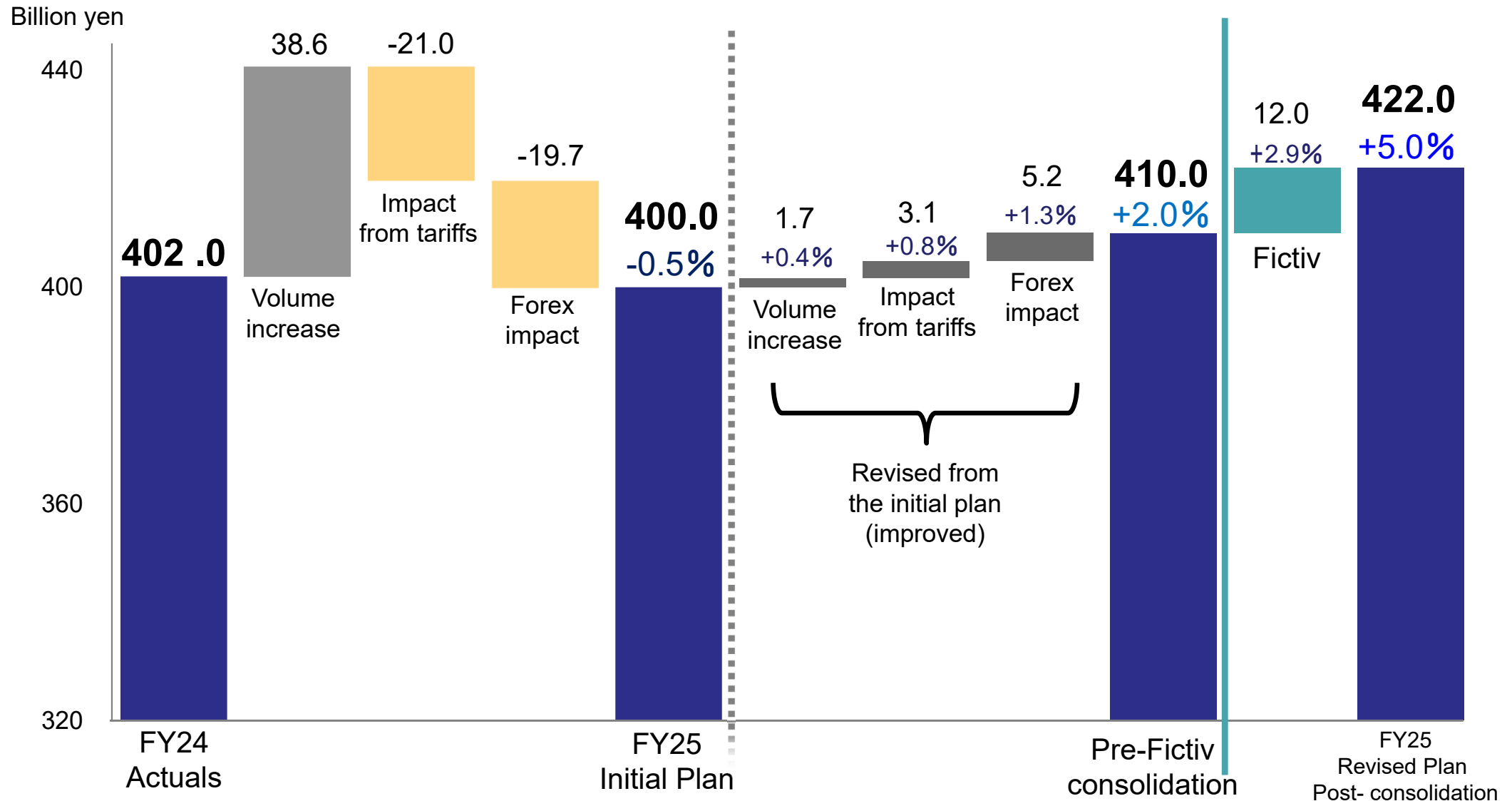
Full recovery expected to take more time including automotive industry

YoY	Yen basis	Local currency basis
	+0.6%	+2.2%

# FY25 Sales Analysis (YoY)

Sales increased on a Pre-Fictiv consolidation basis, as tariffs & Forex impact was smaller than initially planned

Further growth expected with the consolidation of Fictiv

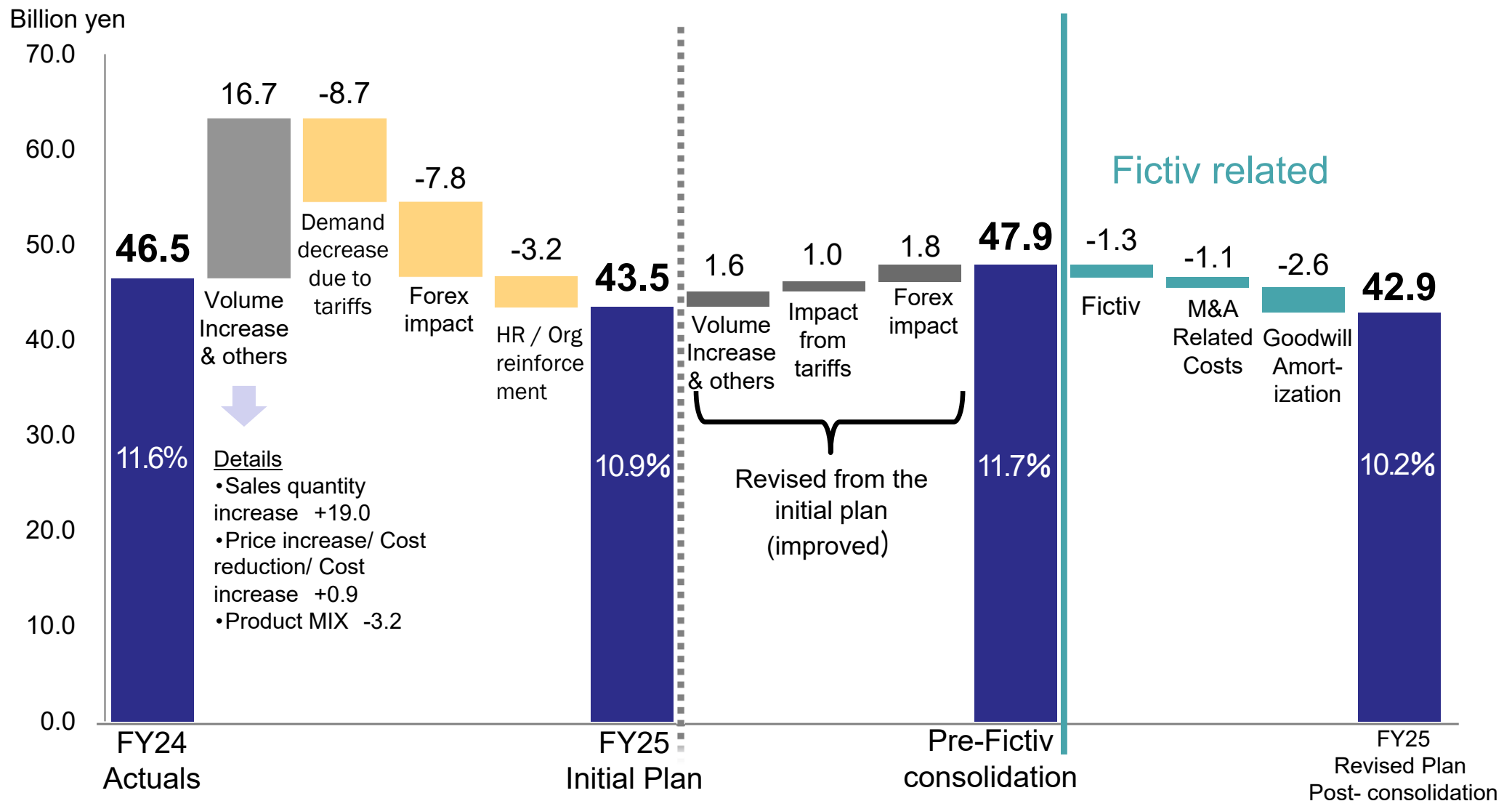




# FY25 Operating Income Analysis (YoY)

As with sales, Pre-Fictiv consolidated profitability increased due to improvements from the initial plan

Post-consolidated profits declined due to impact of Fictiv acquisition; profitability to remain in double digits



# Digital MODEL Shift Outlook

FY25 Growth rate: YoY

## DM #1 meviy

### Sales Plan

**21.9** Bn yen  
(+38%)

### FY24 Actuals

Sales **15.9** Bn yen  
(+38%)  
# of users **190** K  
(+34%)

## DM #2 Economy Series

### Sales Plan

**15.8** Bn yen  
(+42%)

### FY24 Actuals

Sales **11.1** Bn yen  
(+61%)  
# of customers **90** K  
(+25%)

## DM #3 D-JIT

### Sales Plan

**11.9** Bn yen  
(+45%)

### FY24 Actuals

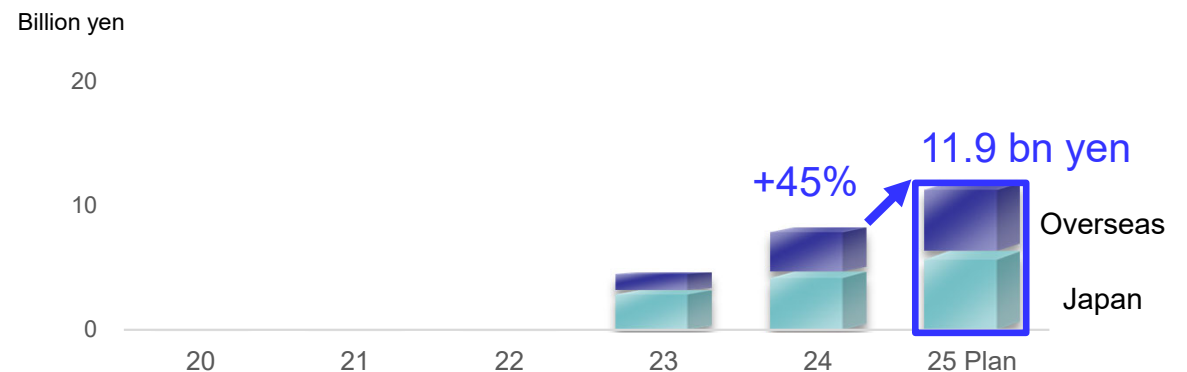
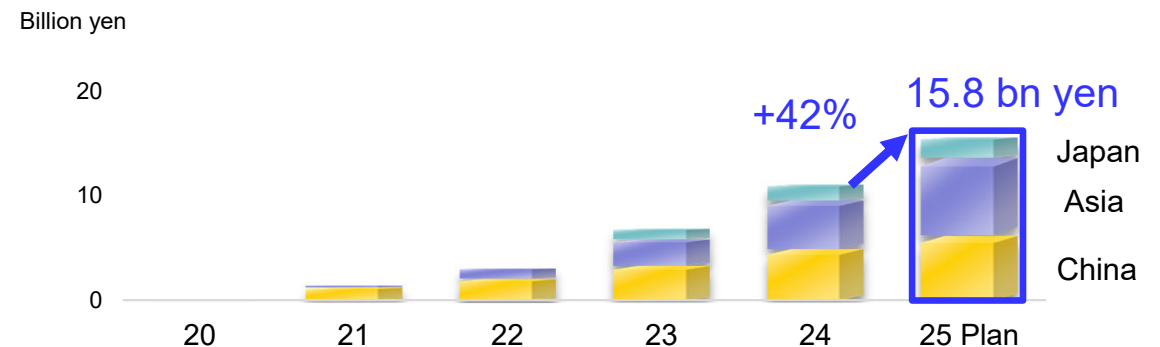
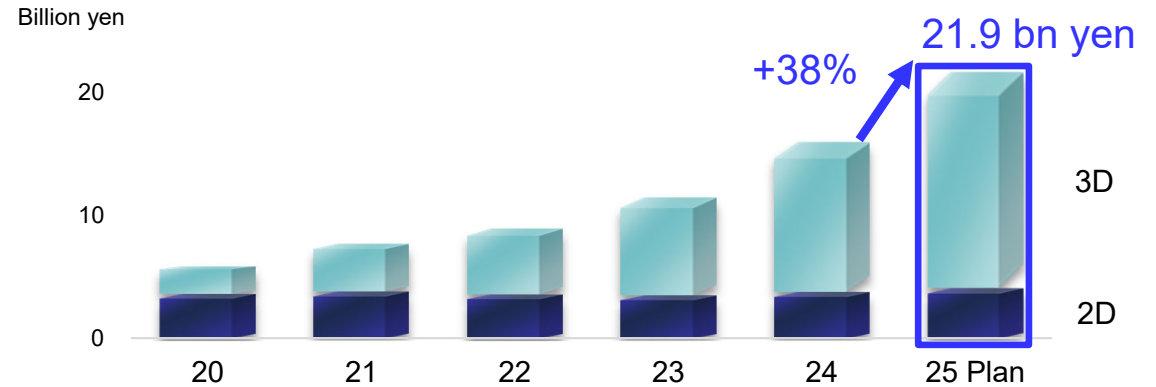
Sales **8.2** Bn yen  
(+77%)

### FY25 Total

**49.6** Bn yen  
YoY +14.4 Bn yen  
(+41%)

### FY24 Total

**35.2** Bn yen



# IFRS Voluntary Adoption

## ■ Purpose

Enhance the comparability of financial information in international capital markets

## ■ Content

MISUMI Group Inc. announces the voluntarily adoption of International Financial Reporting Standards (“IFRS”) in place of Japanese Generally Accepted Accounting Principles (“J-GAAP”) for MISUMI Group Inc.’s consolidated financial statements and related documents from the 4Q of the fiscal year ending March 31, 2028

## ■ Schedule for Adoption (Planned)

Earnings forecasts for the financial results for the fiscal year ending March 31, 2028, will be reported based on IFRS

# Fictiv Business Performance/ Synergy Plans

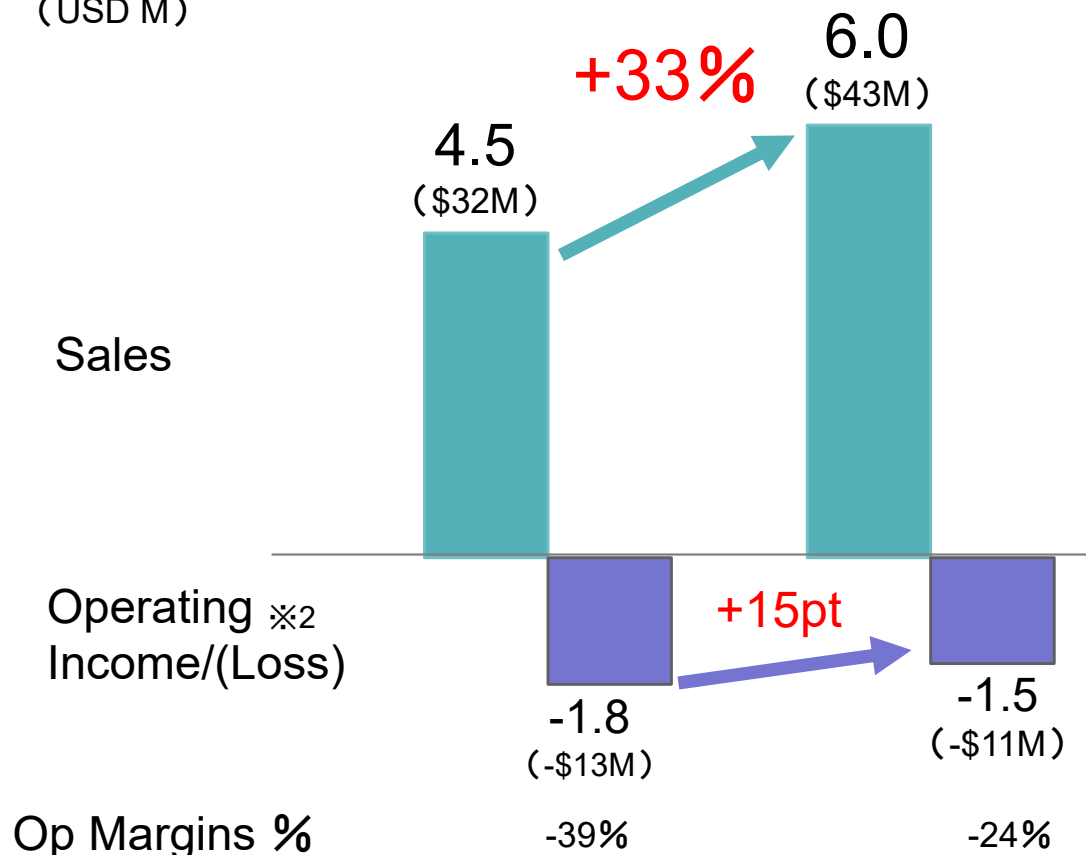
# Fictiv Business Performance

1H CY25 +33% growth despite market uncertainty, +35% expected for full year  
Operating margins improve +15 pt in 1H; +13 pt for full year

## Fictiv Standalone Financial Performance

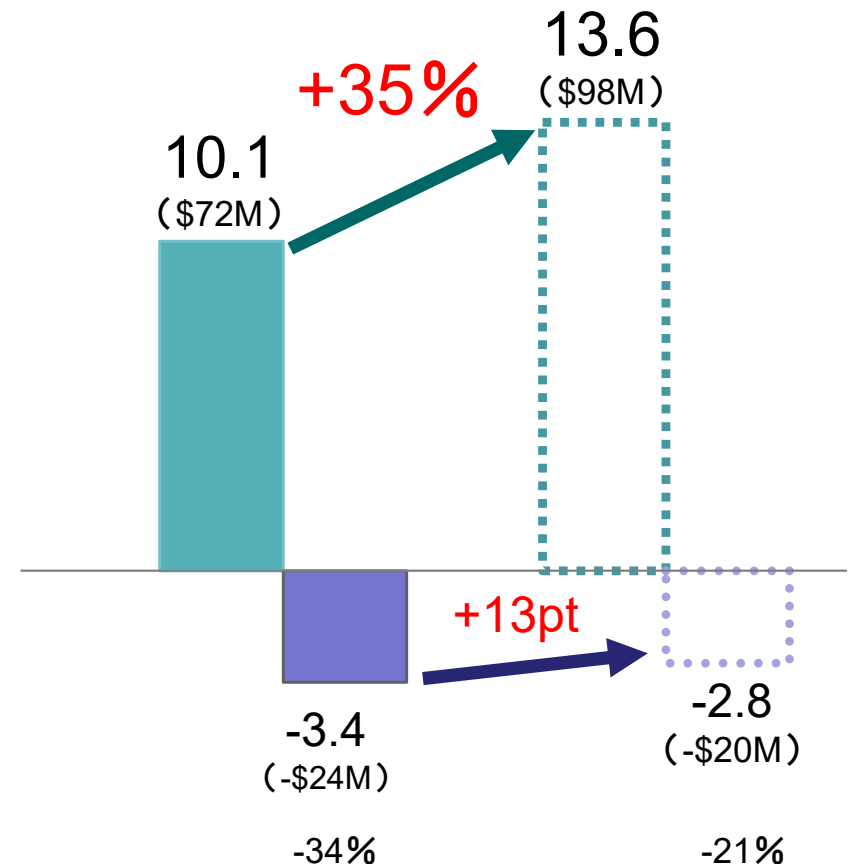
1H24 vs. 1H25 (Jan~Jun)

Unit: Bn yen ※1  
(USD M)



CY24 vs. CY25 (Jan~Dec)

Financial performances to be consolidate from Jul 25



※1: Calculated based on the exchange rate assumption of 1 USD = 139 JPY

※2: M&A related costs and goodwill amortization not included

# Synergy Plans

## 【Phase 1: Accelerating Fictiv's growth by leveraging MISUMI resources】

### Synergy① Lean Transformation

- Cost reduction through MISUMI factories & partner manufacturers
- Promotion of shared services between MISUMI-Fictiv
- Shared/joint procurement initiatives

### Synergy② Cross-Selling

- Promoting strategic sales to MISUMI customers
  - Expand Fictiv sales opportunities to 320K MISUMI customers (35K in N. America)
  - Key points are brand awareness, credibility and customer accounts
  - Improved efficiency & shortened lead times for customer development & retention

— — — Aiming to achieve Fictiv standalone profitability, no later than FY27 . — — — .

## 【Phase 2: MISUMI and Fictiv Integrated Model】

### Synergy③ Expansion of Business Domain

- Expansion of Fictiv's main domain (product development (prototyping, small-lot)) business
- Expansion of new domain as MISUMI utilizes Fictiv's business platform and leverage expertise
  - Approx. 7-fold as many product development designers as equipment designers
  - Shortened product development lead time to ensure quick delivery of parts and materials (KSF)

# Product Development (Prototyping, Small-Lot) Business

Fictiv's main domain “**Product Development**” differs from MISUMI’s “**Equipment Manufacturing**”

Combining Fictiv's business foundation + MISUMI's strengths to fundamentally expand MISUMI's domain



Key to growth is “**Devices for corporations**” + “**industry business process innovation**”

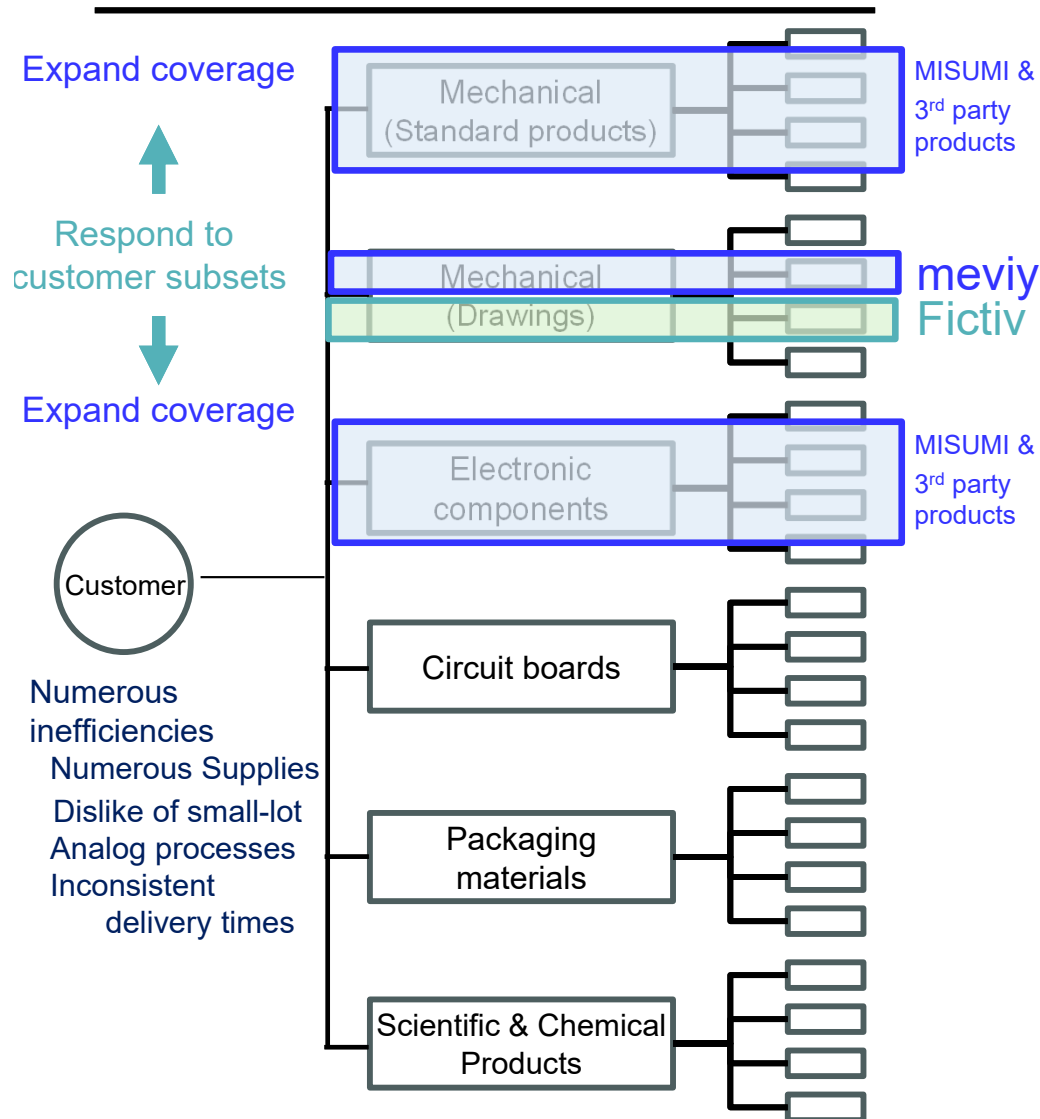


# Product Development (Prototyping, Small-Lot) Business Expansion Step

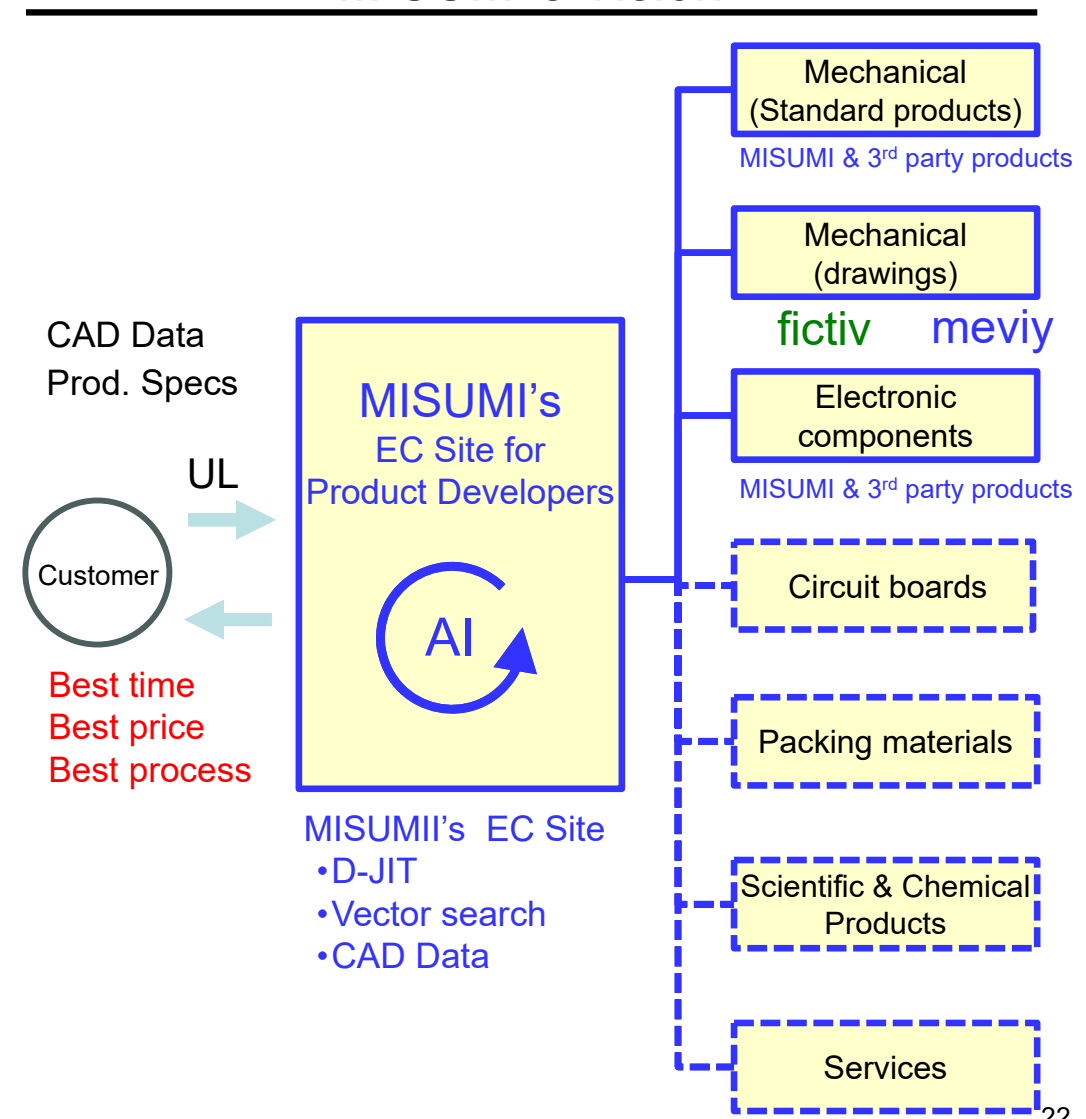
Parts & materials procurement in the product development burdensome for customers due to the high variety of products in small quantities

Fictiv + MISUMI join forces to **revolutionize inefficient industry processes**

## Current Status / Outlook



## MISUMI's Vision



# Review of Capital Policy / Stock Buy-Back

# Review of Capital Policy

Reduced capital requirements due to improved cash management which now includes China

## <Capital Policy>

- Prioritizing growth investment from a medium- to long-term perspective to realize Growth Chain-reaction Aspired Management
- Focus on improving capital efficiency and aim to expand equity spreads

## <Cash Allocation>

- Flexibly allocating cash on hand and future cash flows, including the use of leverage, to growth investments, such as M&A, and purchasing shares based on price and other circumstances
- Due to progress in cash management, required funds for BCP and other needs were revised from 100 billion yen to 70 billion yen

# Stock Buy-Back

Based on the current situation and share price, Company to repurchase an equivalent of 25.0 billion yen of shares

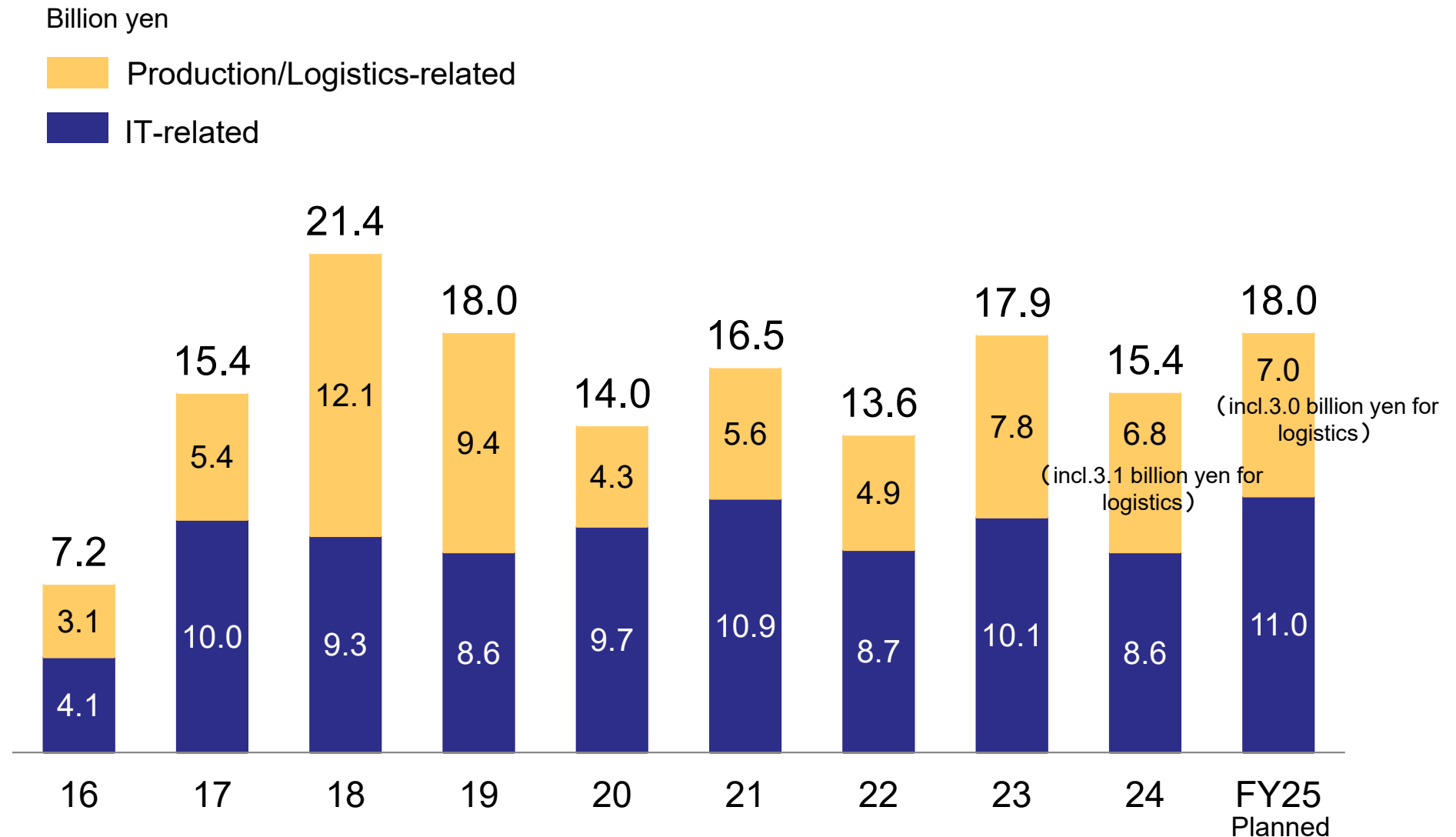
The Company has resolved as follows:

- Maximum purchase amount : 25.0 Bn yen
- Maximum number of shares to be purchased : 17 M Shares
- Purchase period : August 1<sup>st</sup>, 2025～ March 31<sup>st</sup>, 2026

# Reference materials

# Capital Investment Performance

FY25: In addition to the IT infrastructure, additional investments are planned for digital initiatives such as meviy

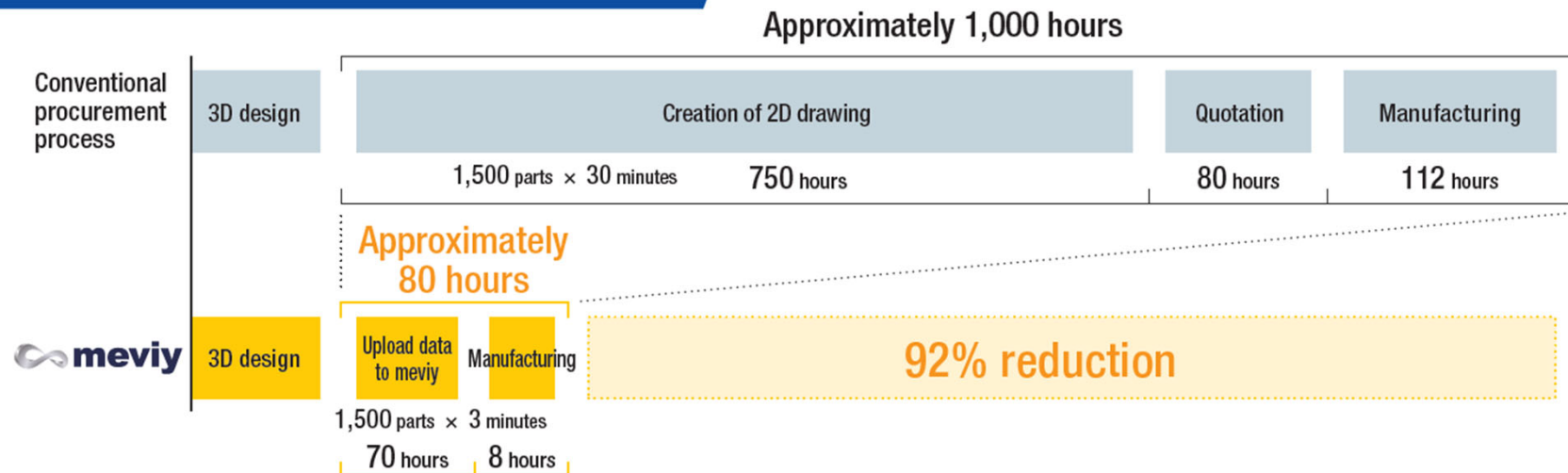


# A Revolution in Parts Procurement: meviy

- 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)



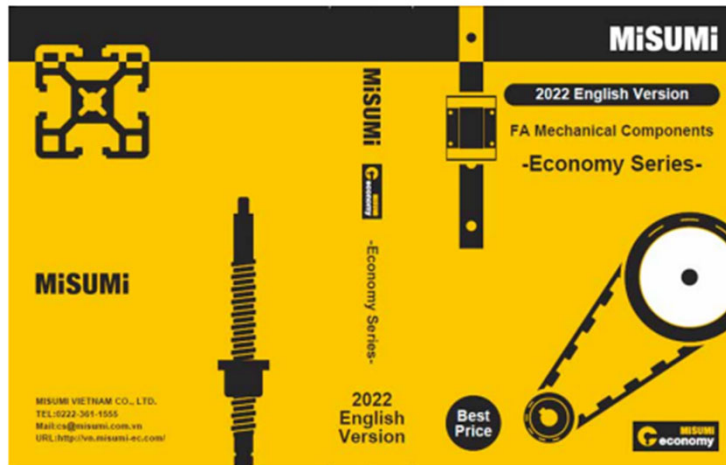
Example: Parts procurement for equipment with 1,500 components





# 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)

Price index 100

Economy product



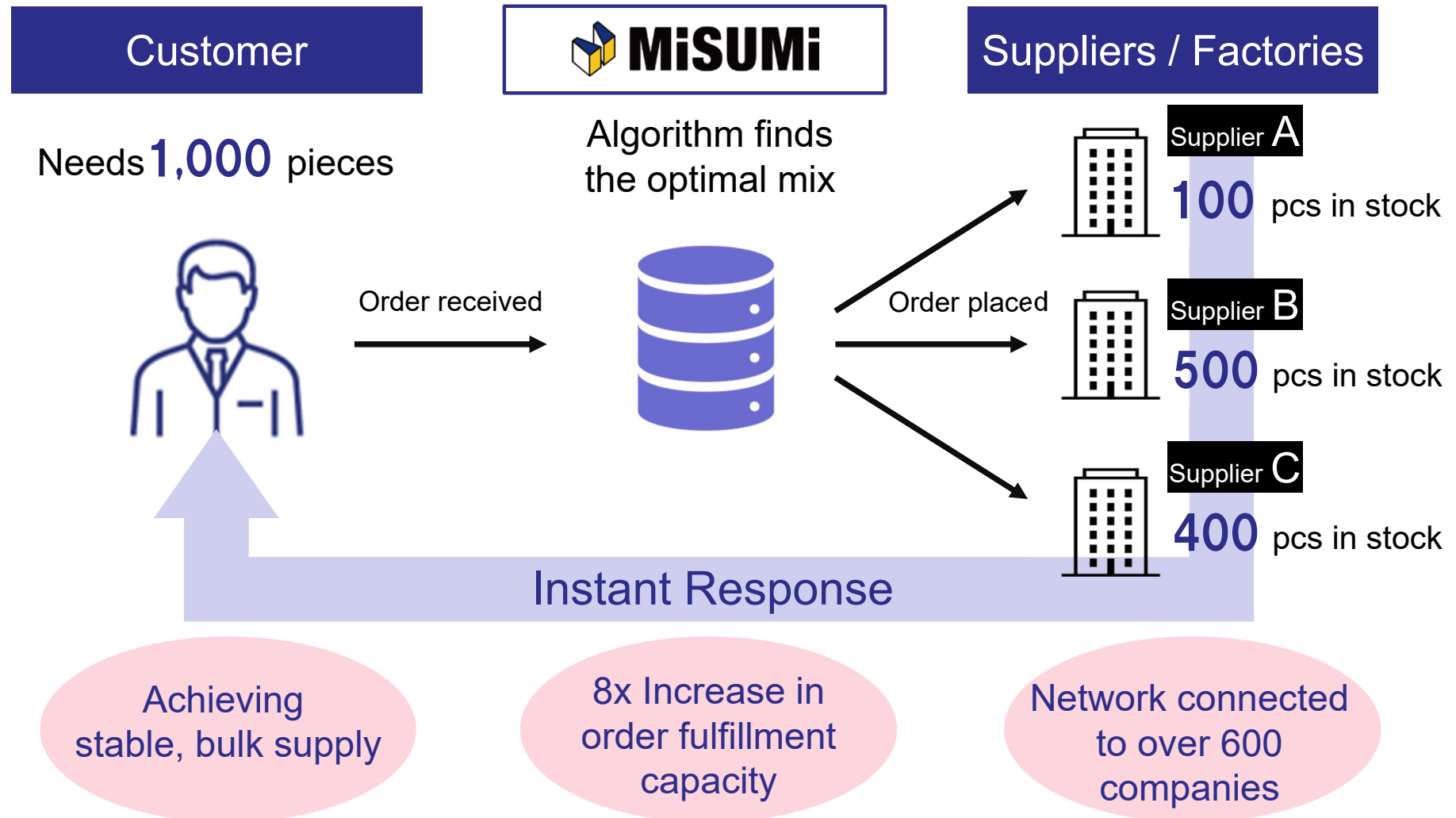
-0.012 to +0.003  
 (Middle range accuracy)

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-lot, quick delivery**” to “**MISUMI for bulk, too**”, which will be rolled out globally from Japan

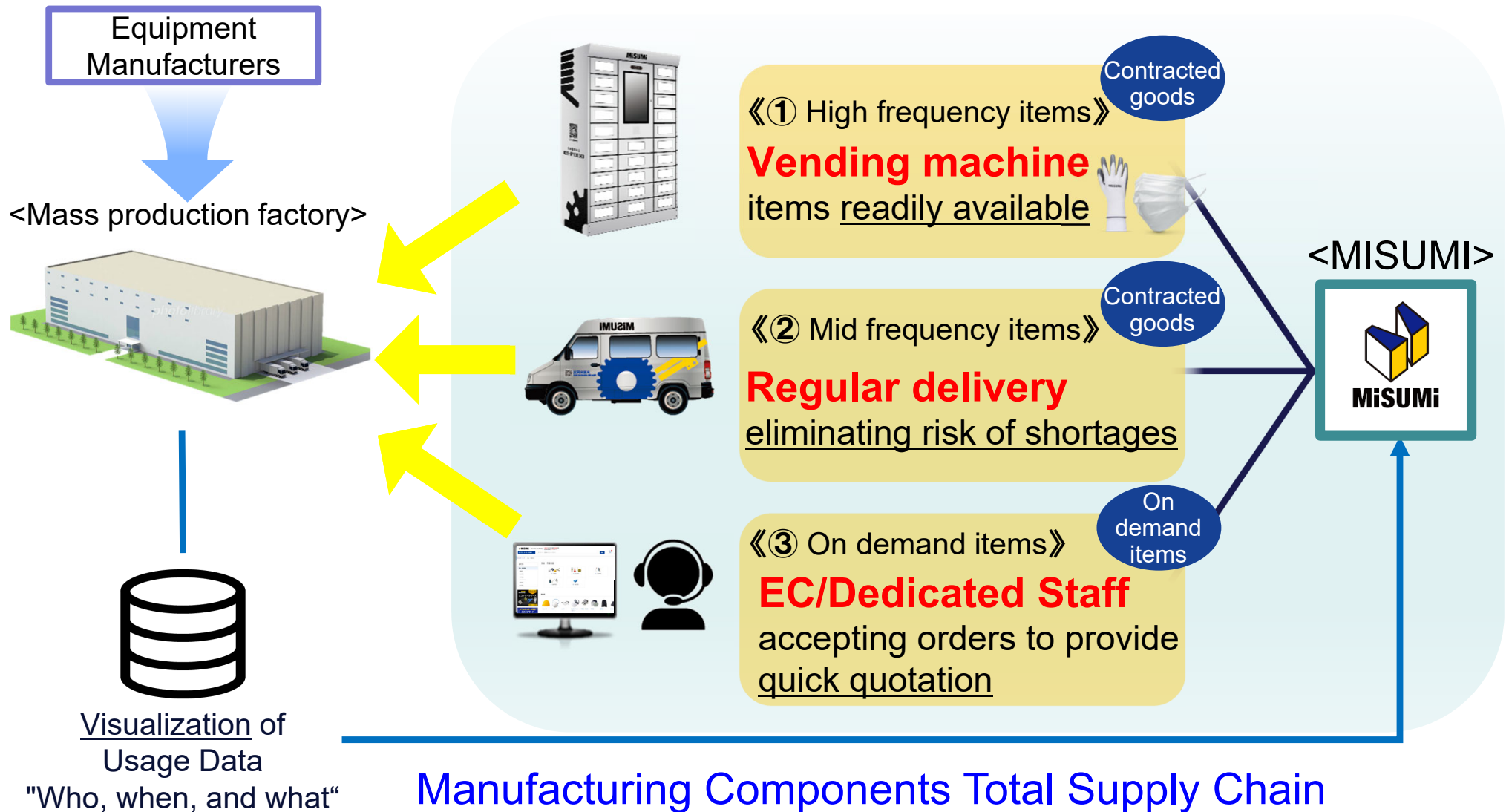


Approx. 50 bln yen MISUMI inventory → Approx. 400 bln yen virtual inventory

# The 4th Digital MODEL Shift: flow

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



# 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

