



(Note) Revision of the latest forecast for cash dividends: Yes

3. Consolidated Financial Results Forecast for the Fiscal Year Ending March 31, 2026 (April 1, 2025 to March 31, 2026)

(% indicates changes from the previous corresponding period.)

	Net sales		Operating income		Ordinary income		Net income attributable to owners of parent	Net income per share
Full year	Million yen	%	Million yen	%	Million yen	%	Million yen	Yen
	440,000	9.5	46,200	△0.6	47,300	△5.2	33,900	△7.2
								125.11

(Note) Revision of the latest financial results forecasts: Yes

*Notes:

- (1) Significant changes in the scope of consolidation during the period: Yes
Newly included: 9 companies (Fictiv Inc. and 8 other companies)
- (2) Adoption of special accounting procedures for the preparation of quarterly consolidated financial statements: None
- (3) Changes in accounting policies, changes in accounting estimates and retrospective restatement
 - 1) Changes in accounting policies due to the revision of accounting standards: None
 - 2) Changes in accounting policies other than 1) above: None
 - 3) Changes in accounting estimates: None
 - 4) Retrospective restatement: None
- (4) Total number of shares outstanding (common stock)
 - 1) Total number of shares outstanding at the end of the period (including treasury stock):
As of December 31, 2025: 285,144,897 shares
As of March 31, 2025: 285,057,297 shares
 - 2) Total number of treasury stock at the end of the period:
As of December 31, 2025: 17,614,285 shares
As of March 31, 2025: 10,372,985 shares
 - 3) Weighted average number of shares outstanding during the period:
Nine months ended December 31, 2025: 272,569,272 shares
Nine months ended December 31, 2024: 277,732,136 shares

* Review of the Japanese-language originals of the attached quarterly consolidated financial statements by certified public accountants or an audit firm: None

* Explanation on the appropriate use of forecasts and other notes

The earnings forecasts and other forward-looking statements herein are based on information available to the Company at the time of preparation and certain assumptions deemed to be reasonable, and actual results may differ significantly from the forecasts due to various factors. For the assumptions on the earnings forecasts and notes on their use, please refer to "Explanation of Consolidated Financial Results Forecast and Other Forward-looking Statements" on page 4 of the attached document.

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1. Overview of Business Results, etc.

(1) Overview of Business Results for the Current Quarterly Consolidated Cumulative Period

During the first nine months of this fiscal year, the global economy continued to face uncertainty, driven by U.S. tariff policies and their impact on various countries, as well as the prolonged depreciation of the yen. Consequently, operating activity in the automotive-related sector, which represents our primary customer base, remained at a standstill. On the other hand, demand for telecommunications and semiconductor-related sectors, particularly in China and Asia, remained robust.

In this economic environment, MISUMI Group is leveraging its unique Business MODEL, which encompasses manufacturing and distribution businesses. By advancing the global Business Foundation supporting these operations, we contribute to industries related to automation demand, particularly the manufacturing industry, by meeting customers' needs for Reliable and Quick Delivery.

We continued to develop new businesses, including new products and services, by capitalizing on the robust Business Foundations in IT, production, and logistics that we have built over the years. We also made efforts to accurately capture customer demand by utilizing our global network of sites. However, in some regions, demand stagnation was affected by the tariff policies of the United States.

As a result, consolidated net sales reached ¥320,661 million (6.3% year-over-year increase). In terms of profits, although there were positive factors such as increased volume from proprietary initiatives, ongoing expenditures related to measures for sustainable growth, the impact of exchange rates, and the inclusion of Fictiv Inc.'s performance within the scope of consolidation starting in July led to operating income of ¥32,264 million (10.7% decrease year-over-year), ordinary income of ¥33,414 million (14.1% decrease year-over-year), and quarterly net income attributable to parent company shareholders of ¥23,027 million (18.4% decrease year-over-year).

① Factory Automation (FA) Business

In the FA business, while capital investment demand in Japan remained sluggish, overseas regions generally performed well, driven by increased demand from proprietary initiatives such as capturing demand in China's telecommunications sector, as well as through meviy, the Economy Series, D-JIT, and strong performance by Fictiv Inc. As a result, net sales reached ¥115,919 million (13.5% increase year-over-year). Operating income, impacted by M&A-related expenses and the inclusion of Fictiv Inc.'s results in consolidated accounts, amounted to ¥14,045 million (19.8% decrease year-over-year).

② Die Components Business

In the Die Components business, growth in China and Asia offset weak performance in other regions amid sluggish demand, resulting in net sales of ¥65,203 million (0.7% increase year-over-year). However, sluggish automotive demand in the U.S. and Japan led to operating income of ¥6,285 million (10.4% decrease year-over-year).

③ VONA Business

VONA business is MISUMI Group's distribution segment, which sells manufacturing and automation-related equipment parts - including not only the MISUMI brand but also products from other companies - as well as indirect materials such as MRO (consumables). This business remained steady, especially in China and Asia, with net sales of ¥139,538 million (3.6% increase year-over-year) and operating income of ¥11,933 million (2.7% increase year-over-year).

(2) Overview of Financial Position for the Current Quarterly Consolidated Cumulative Period

1) Assets, liabilities and net assets

Total assets as of the end of the third quarter of the fiscal year were ¥438,099 million, an increase of ¥18,524 million (+4.4%) compared to the previous year-end. This was mainly attributable to a decrease of ¥36,512 million (-11.5%) in current assets due to a reduction of cash and deposits, and an increase of ¥52,876 million (+158.9%) in intangible assets due to an increase in goodwill associated with the acquisition of subsidiary shares.

Total liabilities amounted to ¥71,589 million, an increase of ¥4,078 million (+6.0%) compared to the previous year-end. This was mainly attributable to an increase of ¥3,813 million (+7.4%) in current liabilities due to an increase in notes and accounts payable – trade while income taxes payable and provision for bonuses decreased, and an increase of ¥264 million (+1.7%) in non-current liabilities.

Total net assets amounted to ¥366,510 million, an increase of ¥14,446 million (+4.1%) compared to the previous year-end. This was primarily because shareholders' equity decreased by ¥4,693 million (-1.5%) due to shareholder equity decrease due to the purchasing of treasury stock while an increase in retained earnings and accumulated other comprehensive income, including foreign currency translation adjustments, increased by ¥19,114 million (+42.5%).

As a result, the equity ratio was 83.0%, compared to 83.2% at the end of the previous year.

2) Cash flows

At the end of the third quarter of the fiscal year, cash and cash equivalents amounted to ¥99,515 million, a decrease of ¥28,743 million compared to the previous year-end.

Cash flows from operating activities amounted to a net cash inflow of ¥33,588 million (a net cash inflow of ¥42,917 million for the same period in the previous year). The breakdown is as follows: Income before income taxes were ¥32,910 million. Depreciation and amortization were ¥12,764 million. Amortization of goodwill was ¥1,766 million. The amount of decrease in provision for bonuses was ¥1,543 million. The amount of increase in notes and accounts receivable – trade was ¥5,257 million. The amount of decrease in accounts payable – other was ¥1,426 million. Income taxes paid was ¥9,951 million.

Cash flows from investing activities amounted to a net cash outflow of ¥36,281 million (a net cash outflow of ¥26,092 million for the same period in the previous year). The breakdown is as follows: The purchase of fixed assets was ¥10,915 million. The purchase of shares of subsidiaries resulting in changes in the scope of consolidation was ¥48,483 million. Payments into time deposits were ¥9,771 million. Refund from time deposits were ¥33,052 million.

Cash flows from financing activities amounted to a net cash outflow of ¥33,237 million (a net cash outflow of ¥31,345 million for the same period in the previous year). The breakdown is as follows: Repayment of borrowings by acquired subsidiary was ¥3,356 million. Purchase of treasury stock was ¥17,069 million. Dividends paid was ¥11,322 million.

(3) Explanation of Consolidated Financial Results Forecast and Other Forward-looking Statements

During the first nine months of this fiscal year, the uncertain environment persisted due to the stagnation of the automotive sector, which is one of our main customer industries. On the other hand, various proprietary initiatives promoted by our company - including the performance of Fictiv Inc., which was newly included in our consolidated results from July - remained steady.

Taking these business conditions into account, as well as the recent trend of the prolonged depreciation of the yen, we have revised our earnings forecast as outlined below.

Please note that this earnings forecast may fluctuate depending on future changes in the business environment. Should any matters requiring disclosure arise, we will promptly announce them.

(For the average exchange rates assumed for the period from January 1, 2026 to March 31, 2026: USD/JPY 155.0, EUR/JPY 182.0, RMB/JPY 22.0.)

[Consolidated Financial Results Forecast for the Fiscal Year Ending March 31, 2026 (April 1, 2025 to March 31, 2026)]

	Net sales (Million yen)	Operating income (Million yen)	Ordinary income (Million yen)	Net income attributable to owners of parent (Million yen)	Net income per share (Yen)
Revised forecast	440,000	46,200	47,300	33,900	125.11
Previous forecast	432,000	45,500	46,300	33,900	124.67

The forecast for dividends is announced in the press release dated January 30, 2026, titled “Announcement Regarding Revisions to Consolidated Business Forecast and Year-End Dividend”

2. Quarterly Consolidated Financial Statements and Key Notes

(1) Quarterly Consolidated Balance Sheet

(Million yen)

	As of March 31, 2025	As of December 31, 2025
Assets		
Current assets		
Cash and deposits	159,296	108,121
Notes and accounts receivable - trade	78,390	90,785
Merchandise and finished goods	57,186	59,180
Work in process	3,661	3,079
Raw materials and supplies	8,805	9,321
Other	10,863	11,682
Allowance for doubtful accounts	(397)	(876)
Total current assets	317,805	281,293
Non-current assets		
Property, plant and equipment		
Buildings and structures, net	21,536	22,845
Machinery, equipment and vehicles, net	15,626	15,294
Land	4,259	4,322
Other, net	11,099	12,544
Total property, plant and equipment	52,522	55,006
Intangible assets		
Software	27,677	27,760
Goodwill	—	53,087
Other	5,605	5,311
Total intangible assets	33,283	86,159
Investments and other assets		
Investment securities	1,224	1,476
Other	15,126	14,620
Allowance for doubtful accounts	(387)	(456)
Total investments and other assets	15,963	15,640
Total non-current assets	101,769	156,806
Total assets	419,574	438,099

(Million yen)

	As of March 31, 2025	As of December 31, 2025
Liabilities		
Current liabilities		
Notes and accounts payable - trade	21,189	24,875
Accounts payable – other	8,667	7,642
Income taxes payable	4,476	3,197
Provision for bonuses	5,882	4,515
Provision for directors' bonuses	230	176
Other	11,429	15,283
Total current liabilities	51,876	55,690
Non-current liabilities		
Liability for retirement benefits	7,337	7,869
Provision for loss on business liquidation	61	66
Other	8,235	7,963
Total non-current liabilities	15,634	15,899
Total liabilities	67,510	71,589
Net assets		
Shareholders' equity		
Capital stock	14,483	14,612
Capital surplus	24,585	24,533
Retained earnings	293,546	305,251
Treasury stock	(28,352)	(44,827)
Total shareholders' equity	304,263	299,570
Accumulated other comprehensive income		
Valuation difference on available-for-sale securities	(51)	137
Foreign currency translation adjustments	44,858	63,796
Remeasurements of defined benefit plans	212	200
Total accumulated other comprehensive income	45,020	64,134
Stock acquisition rights	1,663	1,503
Non-controlling interests	1,116	1,302
Total net assets	352,064	366,510
Total liabilities and net assets	419,574	438,099

(2) Quarterly Consolidated Statement of Income and Comprehensive Income
Quarterly Consolidated Statement of Income
For the Nine Months Ended December 31, 2025 and 2024

(Million yen)

	For the nine months ended December 31, 2024	For the nine months ended December 31, 2025
Net sales	301,585	320,661
Cost of sales	160,759	171,756
Gross profit	140,825	148,904
Selling, general and administrative expenses	104,675	116,640
Operating income	36,150	32,264
Non-operating income		
Interest income	3,196	1,472
Miscellaneous income	446	527
Total non-operating income	3,643	2,000
Non-operating expenses		
Interest expenses	118	106
Foreign exchange losses	389	626
Commission expenses	164	2
Miscellaneous loss	216	113
Total non-operating expenses	888	850
Ordinary income	38,904	33,414
Extraordinary income		
Reversal of provision for loss on business liquidation	1,020	—
Total extraordinary income	1,020	—
Extraordinary losses		
Impairment losses	300	504
Loss on liquidation of business	680	—
Total extraordinary losses	981	504
Income before income taxes	38,942	32,910
Income taxes	10,647	9,754
Net income	28,294	23,156
Net income attributable to non-controlling interests	81	128
Net income attributable to owners of parent	28,213	23,027

Quarterly Consolidated Statement of Comprehensive Income
For the Nine Months Ended December 31, 2025 and 2024

(Million yen)

	For the nine months ended December 31, 2024	For the nine months ended December 31, 2025
Net income	28,294	23,156
Other comprehensive income		
Valuation difference on available-for-sale securities	(69)	188
Foreign currency translation adjustments	9,093	18,949
Remeasurements of defined benefit plans, net of tax	(0)	(12)
Share of other comprehensive income in associates	1	(3)
Total other comprehensive income	9,025	19,122
Comprehensive income	37,320	42,278
Comprehensive income attributable to		
Owners of parent	37,280	42,141
Non-controlling interests	39	136

(3) Quarterly Consolidated Statement of Cash Flows

(Million yen)

	For the nine months ended December 31, 2024	For the nine months ended December 31, 2025
Cash flows from operating activities		
Income before income taxes	38,942	32,910
Depreciation and amortization	13,351	12,764
Amortization of goodwill	—	1,766
Impairment losses	300	504
Increase (decrease) in liability for retirement benefits	274	425
Increase (decrease) in provision for bonuses	1,077	(1,543)
Increase (decrease) in provision for directors' bonuses	8	(53)
Increase (decrease) in allowance for doubtful accounts	19	395
Interest and dividend income	(3,196)	(1,529)
Interest expenses	118	106
Share-based payment expenses	604	583
Foreign exchange (gains) losses	117	(85)
Share of (profit) loss of entities accounted for using equity method	(26)	(27)
Reversal of provision for loss on business liquidation	(1,020)	—
Loss on liquidation of business	680	—
(Increase) decrease in notes and accounts receivable – trade	(3,116)	(5,257)
(Increase) decrease in inventories	5,096	733
(Increase) decrease in consumption taxes refund receivable	(399)	(344)
Increase (decrease) in notes and accounts payable – trade	(1,188)	1,155
Increase (decrease) in accounts payable – other	(1,075)	(1,426)
(Increase) decrease in other assets	(1,029)	86
Increase (decrease) in other liabilities	1,440	518
Subtotal	50,980	41,681
Interest and dividend income received	2,385	1,965
Interest expenses paid	(118)	(106)
Income taxes paid	(10,331)	(9,951)
Net cash provided by operating activities	42,917	33,588
Cash flows from investing activities		
Purchase of investment securities	(1,269)	—
Purchase of fixed assets	(11,566)	(10,915)
Payments into time deposits	(34,476)	(9,771)
Refund from time deposits	21,019	33,052
Payments for lease and guarantee deposits	(164)	(470)
Proceeds from collection of lease and guarantee deposits	383	190
Purchase of shares of subsidiaries resulting in change in scope of consolidation	—	(48,483)
Other, net	(19)	115
Net cash used in investing activities	(26,092)	(36,281)
Cash flows from financing activities		
Purchase of treasury stock	(20,164)	(17,069)
Repayments of borrowings	—	(3,356)
Dividends paid	(9,653)	(11,322)
Repayments of lease obligations	(1,518)	(1,443)
Other, net	(9)	(45)
Net cash used in financing activities	(31,345)	(33,237)
Effect of exchange rate change on cash and cash equivalents	4,656	7,186
Net increase (decrease) in cash and cash equivalents	(9,864)	(28,743)
Cash and cash equivalents at beginning of period	133,376	128,259
Cash and cash equivalents at end of period	123,512	99,515

(4) Notes to the Quarterly Consolidated Financial Statements

(Notes on going concern assumption)

Not applicable

(Notes on significant changes in shareholders' equity)

During the first nine months of the current fiscal year, the Company purchased 7,451,500 shares of treasury stock pursuant to a resolution of the Board of Directors on July 25, 2025. In addition, during the same period, the Company disposed of 216,700 shares of treasury stock as restricted stock compensation for directors pursuant to a resolution of the Board of Directors on June 26, 2025. Mainly due to these factors, treasury stock increased by ¥16,475 million, reaching ¥44,827 million at the end of the period.

(Changes in accounting policies)

Not applicable

(Segment information)

[Segment information]

For the nine months ended December 31, 2024 (from April 1, 2024 to December 31, 2024)

1. Net sales, segment income, and information on disaggregation of revenue by reportable segment

(Million yen)

	Reportable Segments				Adjustments	Consolidated
	FA Business	Die Components Business	VONA Business	Total		
Net sales						
Revenue from contracts with customers	102,158	64,721	134,705	301,585	—	301,585
Sales to customers	102,158	64,721	134,705	301,585	—	301,585
Internal sales to other segments	—	—	—	—	—	—
Total	102,158	64,721	134,705	301,585	—	301,585
Segment income	17,517	7,015	11,616	36,150	—	36,150

(Note) Total of segment income corresponds to operating income in the Consolidated Statement of Income.

2. Impairment loss on non-current assets or goodwill by reportable segment

Description is omitted due to immateriality.

For the nine months ended December 31, 2025 (from April 1, 2025 to December 31, 2025)

1. Net sales, segment income, and information on disaggregation of revenue by reportable segment

(Million yen)

	Reportable Segments				Adjustments	Consolidated
	FA Business	Die Components Business	VONA Business	Total		
Net sales						
Revenue from contracts with customers	115,919	65,203	139,538	320,661	—	320,661
Sales to customers	115,919	65,203	139,538	320,661	—	320,661
Internal sales to other segments	—	—	—	—	—	—
Total	115,919	65,203	139,538	320,661	—	320,661
Segment income *1	14,045	6,285	11,933	32,264	—	32,264

Segment income before amortization of goodwill *2	15,811	6,285	11,933	34,030	—	34,030
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Note 1. Total of segment income corresponds to operating income in the Consolidated Statement of Income.

Note 2. Operating income before amortization of goodwill relating to the acquisition of Fictiv Inc. in June 2025.

2. Impairment loss on non-current assets or goodwill by reportable segment
(Significant impairment loss on non-current assets)

Description is omitted due to immateriality.

(Significant changes in goodwill)

The Company acquired Fictiv Inc. and its eight subsidiaries in the current nine months consolidated fiscal period. As a result, goodwill of ¥53,087 million is recorded in the FA Business. The amount of goodwill is a provisional figure, as the allocation of the acquisition cost has not been completed as of December 31, 2025.

[Supplementary information]

For the nine months ended December 31, 2024 (from April 1, 2024 to December 31, 2024)

Information by region

(1) Net sales

(Million yen)

Japan	China	Asia	America	Europe	Others	Total
132,707	59,918	48,566	33,355	19,958	7,078	301,585

* Net sales represent the net sales of the Group in Japan and other countries or regions.

(2) Property, plant and equipment

(Million yen)

Japan	China	Vietnam	America	Others	Total
15,068	16,342	4,982	9,719	8,358	54,472

For the nine months ended December 31, 2025 (from April 1, 2025 to December 31, 2025)

Information by region

(1) Net sales

(Million yen)

Japan	China	Asia	America	Europe	Others	Total
129,570	66,434	51,928	45,374	20,092	7,261	320,661

* Net sales represent the net sales of the Group in Japan and other countries or regions.

(2) Property, plant and equipment

(Million yen)

Japan	China	Vietnam	America	Others	Total
16,747	16,260	3,896	9,331	8,771	55,006