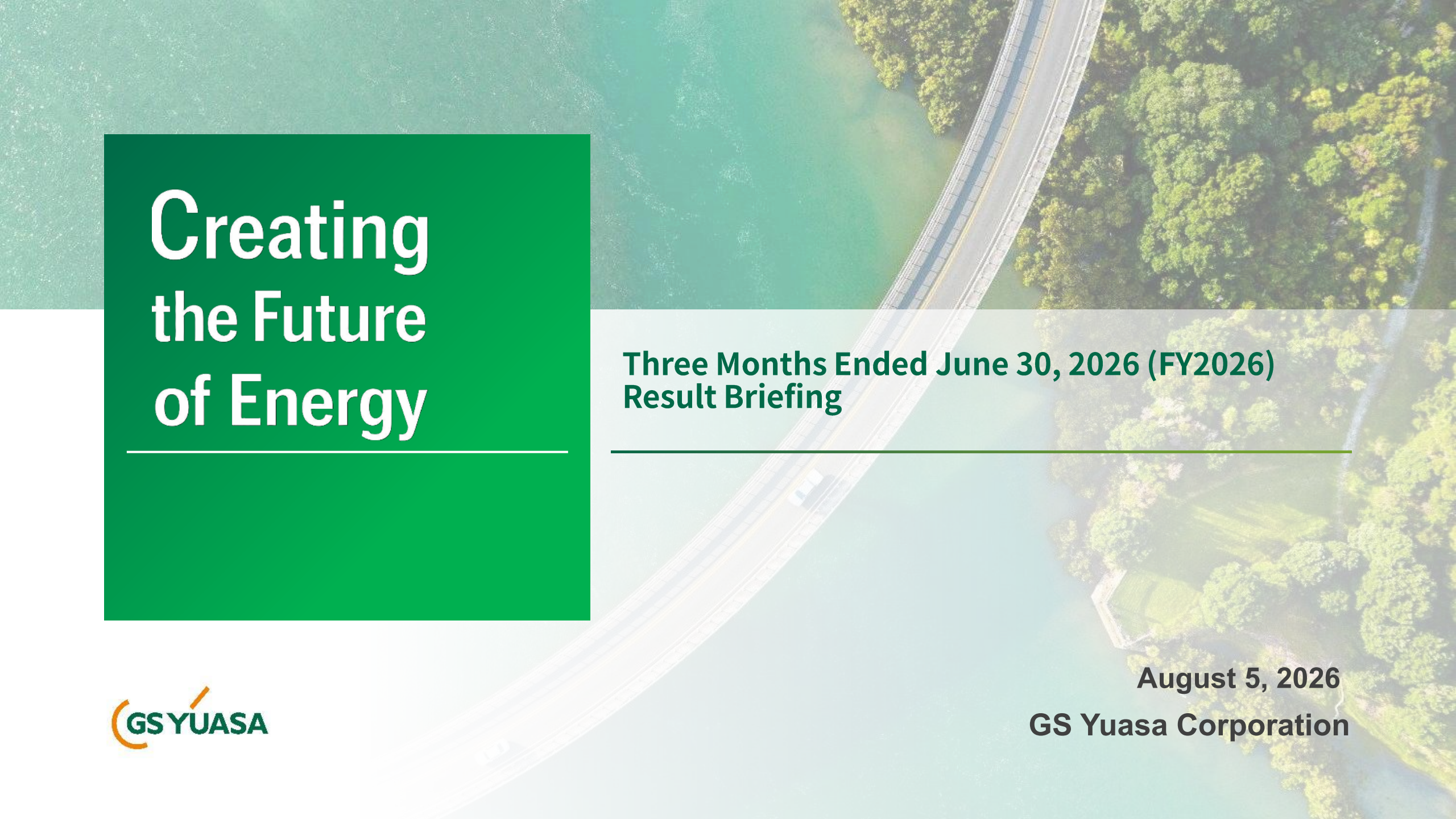

Creating the Future of Energy

Three Months Ended June 30, 2026 (FY2026) Result Briefing

August 5, 2026

GS Yuasa Corporation

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FY2026 First Quarter Financial Results

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GS YUASA
Creating the Future of Energy

FY2026 First Quarter Financial Results

1 Consolidated Financial Summary -Consolidated Results-

(Billion yen)		FY2025 Apr. - Jun.		FY2026 Apr. - Jun.		Change		(YoY%)	[Reference] Forecast for FY2026 (Apr. - Mar.) Initial forecast as of May. 2026 1H (Apr. - Sep.)		Initial forecast as of May. 2026 Full Year (Apr. - Mar.)		Revised forecast as of Aug. 2026 1H (Apr. - Sep.)		Revised forecast as of Aug. 2026 Full Year (Apr. - Mar.)	
Net sales		131.9		Record **141.7**		+9.8		(+7.5%)	309.0		660.0		313.0		680.0	
Gross profit		31.3		**36.3**		+5.0			-		-		-		-	
Operating income (ratio)		8.3	6.3%	Record **11.6**	**8.2%**	+3.3	+1.9P	(+39.3%)	19.0	6.1%	60.0	9.1%	22.0	7.0%	63.0	9.3%
Ordinary income		8.5	6.4%	Record **12.1**	**8.5%**	+3.6	+2.1P	(+42.8%)	16.0	5.2%	56.0	8.5%	21.0	6.7%	61.0	9.0%
Profit before income taxes		10.0		**12.0**		+2.0			-		-		-		-	
Profit (ratio)		6.5	5.0%	Record **7.6**	**5.3%**	+1.1	+0.3P	(+15.7%)	9.0	2.9%	36.0	5.5%	12.0	3.8%	39.5	5.8%
EPS (Basic earnings per share) (¥/share)		¥65.11		**¥75.34**		+¥10.23			¥89.72		¥358.88		¥119.62		¥393.74	
Cash Flow Statements	Depreciation	6.0		6.7		+0.7										
Market Information / Prerequisites	Domestic lead price quote	¥346,400 /t		¥380,100 /t		+¥33,700 /t			¥380,000 /t		¥380,000 /t		¥380,000 /t		¥380,000 /t	
	LME	1,947 US$/t		1,955 US$/t		+8 US$/t			2,100 US$/t		2,100 US$/t		2,000 US$/t		2,000 US$/t	
	Exchange rate	¥143.75 /US$		¥160.72 /US$		+¥16.97 /US$			¥150.00 /US$		¥150.00 円/US$		¥160.00 /US$		¥160.00 円/US$	

Performance Trends

- In the first quarter, net sales and profits at all levels reached record highs.
- While the Industrial Batteries and Power Supplies segment recorded lower sales and profit, Automotive Batteries (Japan and Overseas) and Lithium-Ion Batteries segments achieved higher sales and profit.
- LME prices remained largely flat, while domestic lead prices increased significantly due to the depreciation of the Japanese yen. In addition, prices of certain other raw materials rose sharply.
- The yen continued to weaken year-on-year

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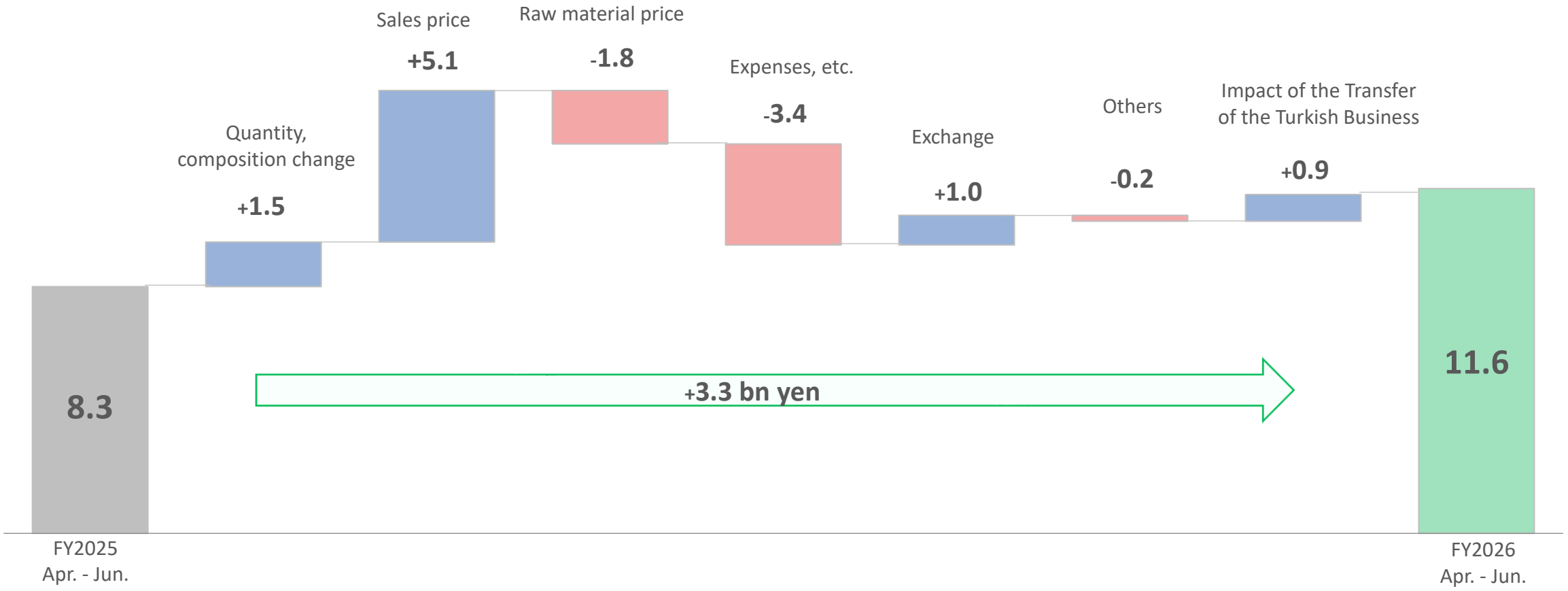
1 Consolidated Financial Summary -Factors for Operating Income Change- (Year on Year Comparison)

(Billion yen)



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1 Consolidated Financial Results Summary

Factors Affecting Changes in Non-Operating Income and Expenses (Year on Year Comparison)

(Billion yen)	FY2025 Apr. - Jun.	**FY2026 Apr. - Jun.**	Change
Operating income	**8.3**	**11.6**	+3.3
Non-operating income	**2.1**	**1.9**	-0.2
Non-operation loss	**1.9**	**1.4**	-0.5
Ordinary income	**8.5**	**12.1**	+3.6
Extraordinary income	**1.8**	**0.0**	-1.8
Extraordinary loss	**0.3**	**0.1**	-0.2
Net income before income taxes	**10.0**	**12.0**	+2.0
Income taxes	**2.4**	**2.2**	-0.2
Profit attributable to non-controlling interests	**1.1**	**2.2**	+1.1
Profit attributable to owners of parent	**6.5**	**7.6**	+1.1

Major subjects (Amounts in parentheses are factors for changes)

- Equity in earnings of affiliates 0.5 billion yen
  (Increase in equity in earnings of affiliates +0.1 billion yen)
- Gain on net monetary assets - billion yen
  (Impact of the Transfer of the Turkish Business -0.4 billion yen)
- Foreign exchange losses 0.1 billion yen
  (Mainly reflecting foreign exchange gains/losses at European subsidiaries -0.3 billion yen)
- Interest expenses 0.4 billion yen
  (Decrease in interest expenses primarily in Turkey site -1.0 billion yen)

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2 Segment Results

(billion yen)

		FY2025 Apr. - Jun.		FY2026 Apr. - Jun.		Change		[Reference] Forecast for FY2026 Full year (Apr. - Mar.) Initial forecast as of May. 2026		Revised forecast as of Aug. 2026	
		Net sales	Operating income (Op. income ratio: %)	Net sales	Operating income (Op. income ratio: %)	Net sales	Operating income (Op. income ratio: p)	Net sales	Operating income (Op. income ratio: %)	Net sales	Operating income (Op. income ratio: %)
Mobility	Lead-acid Batteries(Japan)	22.4	1.7 (7.5)	**24.5**	**2.4 (9.9)**	+2.1	+0.7 (+2.4)	113.0	11.5 (10.2)	117.0	12.0 (10.3)
	Lead-acid Batteries(Overseas)	51.4	3.8 (7.5)	**57.8**	**7.2 (12.5)**	+6.4	+3.4 (+5.0)	224.0	23.0 (10.3)	240.0	26.5 (11.0)
	Lithium-ion Batteries	19.4	-0.0 (-0.2)	**21.5**	**0.8 (3.7)**	+2.1	+0.8 (+3.9)	107.0	5.0 (4.7)	107.0	4.0 (3.7)
Public Infrastructure	Industrial Batteries and Power Supplies	33.2	2.5 (7.7)	**32.2**	**1.0 (3.0)**	-1.0	-1.5 (-4.7)	190.0	19.5 (10.3)	190.0	19.5 (10.3)
	Aviation, Space and Defense	4.8	0.8 (15.6)	**5.0**	**0.6 (12.6)**	+0.2	-0.2 (-3.0)	23.0	2.5 (10.9)	23.0	2.5 (10.9)
	Others	0.6	-0.5	**0.7**	**-0.5**	+0.1	-0.0	3.0	-1.5	3.0	-1.5
	Total	131.9	8.3 (6.3)	**141.7**	**11.6 (8.2)**	+9.8	+3.3 (+1.9)	660.0	60.0 (9.1)	680.0	63.0 (9.3)

Notes: Beginning in FY2026, the industrial Batteries and Power Supplies (overseas) business previously included in the Lead-acid Battery (Overseas) segment has been reclassified to the Industrial Batteries and Power Supplies segment. FY2025 net sales and operating profit (margin) have been restated based on the revised reporting segments.

FY2026 Result (Apr. - Jun.)

- <**Lead-acid Batteries(Japan)** > Net sales and profit increased due to a significant increase in replacement battery sales volume, despite only a slight year-on-year increase in new automobile sales.
- <**Lead-acid Batteries(Overseas)** > Net sales and profit increased due to significant volume growth, particularly in Europe and Southeast Asia, as well as favorable foreign exchange effects.
- <**Lithium-ion Batteries**> Net sales and profit increased due to higher volumes for Toyota and other customers, despite rising material costs resulting from tensions in the Middle East.
- <**Industrial Batteries and Power Supplies** > Net sales and profit decreased due to the absence of a large project recorded in emergency field (Japan) in the previous year, while regular field and emergency field (overseas) remained solid.
- <**Aviation, Space and Defense** > Net Sales increased due to expanding demand for thermal batteries, while profit decreased due to a revision in the contract price for lithium-ion batteries for submarines.

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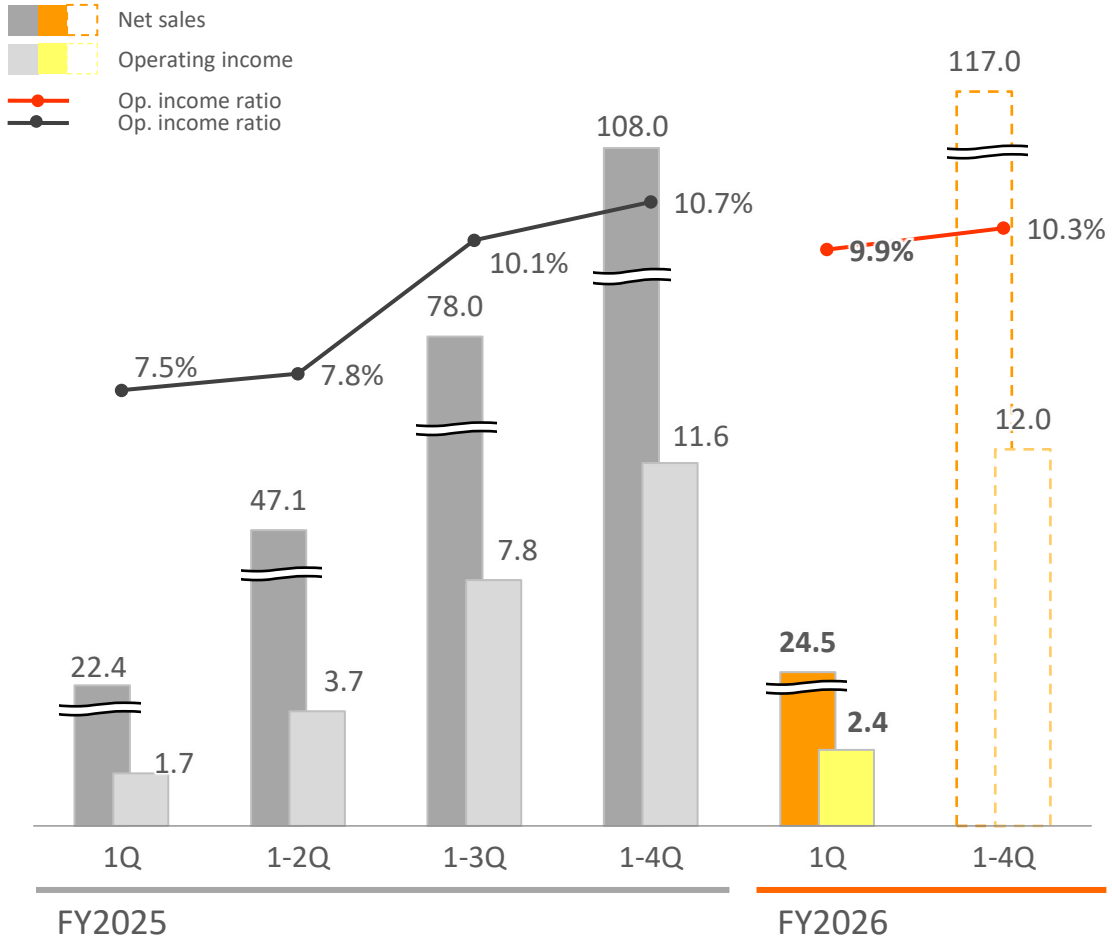
2 Segment Results Mobility: Lead-acid Batteries (Japan)

(Billion yen)

Net Sales, Operating income, Op. income ratio (Apr. - Jun.)



FY2026 1Q Sales Overview (YoY : Apr. - Jun.)

Sales and profit increased

➢ **[For new automobiles]**
Net sales increased due to slightly higher sales volume, as well as lead price pass-throughs.

➢ **[For replacement]**
Net sales increased due to an increase in sales volume and the improvement in product mix driven by an increase in high value-added product

Profit Change Factors (YoY : Apr. - Jun.)

Quantity, composition change	+0.6	Increase in volume of replacement batteries
Sales price	+1.2	Increase due to selling price revision and lead price pass-through
Raw material price	-0.7	Impact of rising prices of raw materials such as domestic lead
Expenses, etc.	-0.4	

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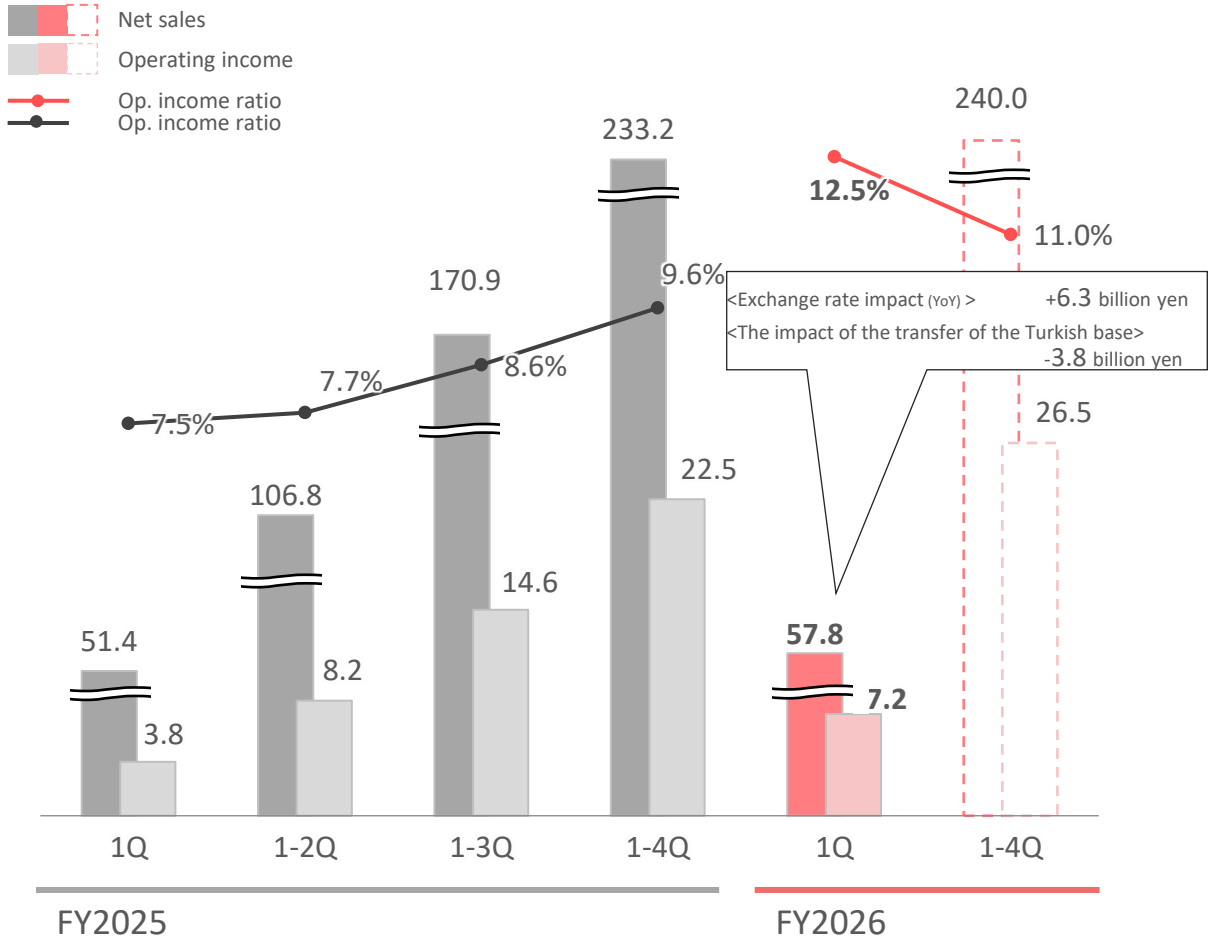
Segment Results Mobility: Lead-acid Batteries (Overseas)

(Billion yen)

Net Sales, Operating income, Op. income ratio (Apr. - Jun.)



Notes: Beginning in FY2026, the industrial Batteries and Power Supplies (overseas) business previously included in the Lead-acid Battery (Overseas) segment has been reclassified to the Industrial Batteries and Power Supplies segment. FY2025 net sales and operating profit (margin) have been restated based on the revised reporting segments.
FY2025 net sales and operating profit (margin) have been restated based on the revised reporting segments. Figures for FY2025 2Q, 3Q, and 4Q are estimates.

FY2026 1Q Sales Overview (YoY : Apr. - Jun.)

Sales and profit increased

- **[Southeast Asia]**
  Mainly in Thailand, Myanmar and Vietnam, sales volume for replacement batteries for both automobiles and motorcycles remained firm
- **[Europe]**
  Sales volume increased for both automobiles and motorcycles.
- **[Australia]**
  Sales volume remained steady under the “Made in Australia” strategy

Profit Change Factors (YoY : Apr. - Jun.)

Quantity, composition change	+1.5	Increase in sales volume, mainly in Southeast Asia
Sales price	+0.7	Increase due to the reflection of rising costs in selling prices
Raw material price	-0.2	Rising raw material prices
Expenses, etc.	-0.3	Increase in expenses due to inflation
Exchange	+0.8	
The impact of of the transfer of the Turkish base	+0.9	

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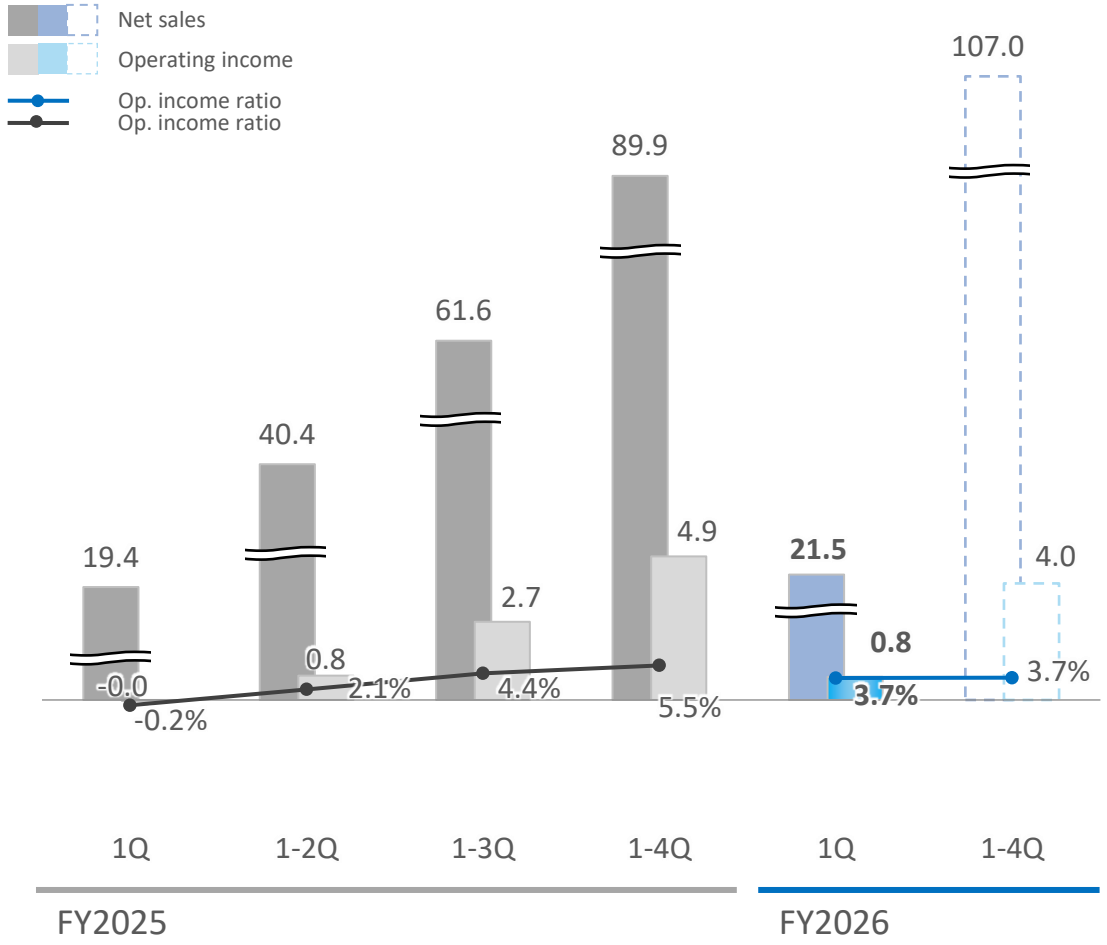
2 Segment Results Mobility: Lithium-ion Batteries-

(Billion yen)

Net Sales, Operating income, Op. income ratio (Apr. - Jun.)



FY2026 1Q Sales Overview (YoY : Apr. - Jun.)

Sales and profit increased

- **[For HEVs]**
  Net sales increased due to the significant increase in sales volume to Toyota
- **[For PHEVs]**
  Net sales decreased due to the decrease in volume for Mitsubishi Motors Corporation
- **[12V Lithium-ion batteries]**
  Net sales increased due to higher sales volume

Profit Change Factors (YoY : Apr. -Jun.)

Quantity, composition change	-0.3	Decrease due to a change in the HEV model mix.
Sales price	+2.8	Increase due to selling price revision implemented in the second half of the previous fiscal year
Raw material price	-0.6	Decrease due to rising prices of certain raw materials
Expenses, etc.	-1.2	Increase in depreciation due to the launch of a new production line

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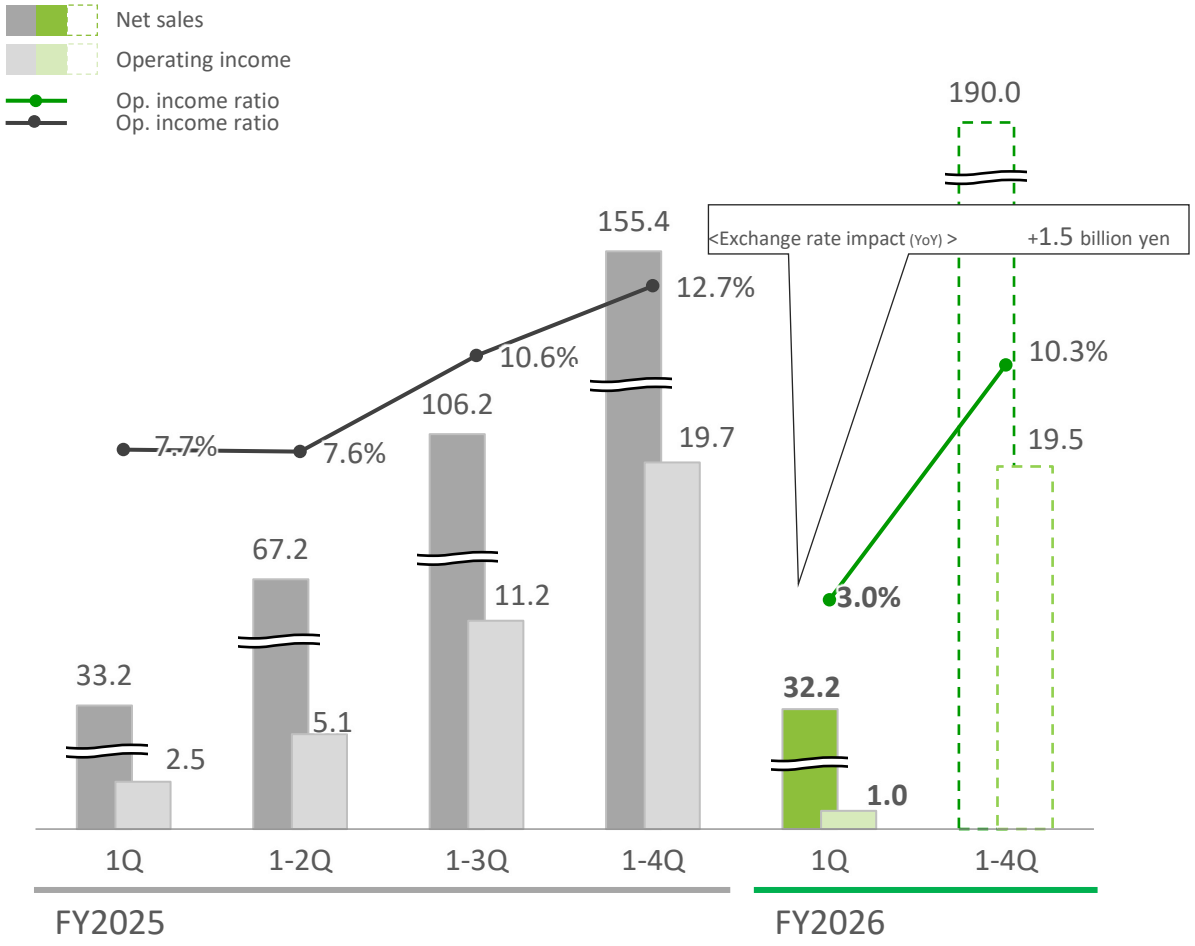
2 Segment Results Public Infrastructure: Industrial Batteries and Power Supplies

(Billion yen)

Net Sales, Operating income, Op. income ratio (Apr. - Jun.)



FY2026 1Q Sales Overview (YoY : Apr. - Jun.)

Sales and profit decreased

- **[Regular field (Japan)]**
  Net sales significantly increased, mainly due to projects postponed to this term in addition to a rise in new projects
- **[Emergency field (Japan)]**
  Net sales decreased due to the absence of large projects for telecommunications and convenience stores recorded in the previous year, despite continued firm demand from nuclear power plants and data centers.
- **[Emergency field (Overseas)]**
  Net sales increased due to a new AI data center project in North America
- **[For forklifts (Global)]**
  Net sales remained flat due to the selling price revision, although sales volume decreased

Profit Change Factors (YoY : Apr. - Jun.)

Quantity, composition change	-0.6	Decrease due to the absence of a large project in the emergency field (Japan) in the previous year
Sales price	+0.5	A large project with a low profit margin last year
Raw material price	-0.2	Despite lower domestic lead prices, rising costs of certain raw materials
Expenses, etc.	-1.4	Increase in R&D expenses and labor costs
Exchange	+0.1	

Notes: Beginning in FY2026, the industrial Batteries and Power Supplies (overseas) business previously included in the Lead-acid Battery (Overseas) segment has been reclassified to the Industrial Batteries and Power Supplies segment. FY2025 net sales and operating profit (margin) have been restated based on the revised reporting segments.
FY2025 net sales and operating profit (margin) have been restated based on the revised reporting segments. Figures for FY2025 2Q, 3Q, and 4Q are estimates.

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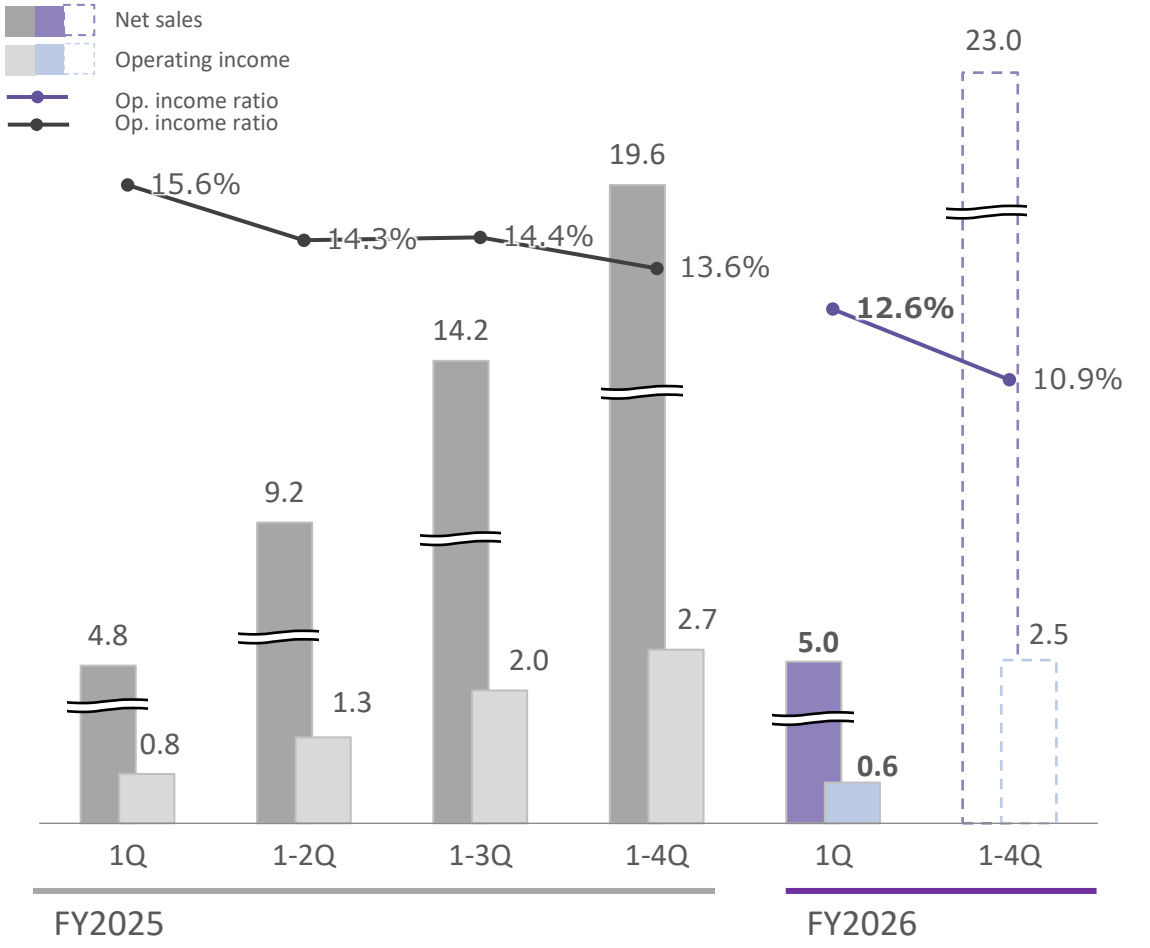
2 Segment Results Public Infrastructure: Aviation, Space and Defense

(Billion yen)

Net Sales, Operating income, Op. income ratio (Apr. - Jun.)



FY2026 1Q Sales Overview (YoY : Apr. - Jun.)

Sales increased, profit decreased

- **[Lithium-ion batteries for submarines]** ↘
  Net sales decreased due to the revision of contract unit prices driven by lower raw material prices
- **[Thermal batteries]** ↗
  Net sales increased due to expanding demand for defense
- **[Lithium-ion batteries for aircraft and space]** ↗
  Net sales for airlines (for replacement) increased

Profit Change Factors (YoY : Apr. -Jun.)

Quantity, composition change	+0.2	Expanding demand for thermal batteries
Sales price	-0.2	Decrease due to the revision of contract unit prices
Raw material price	-0.1	
Expenses, etc.	-0.1	

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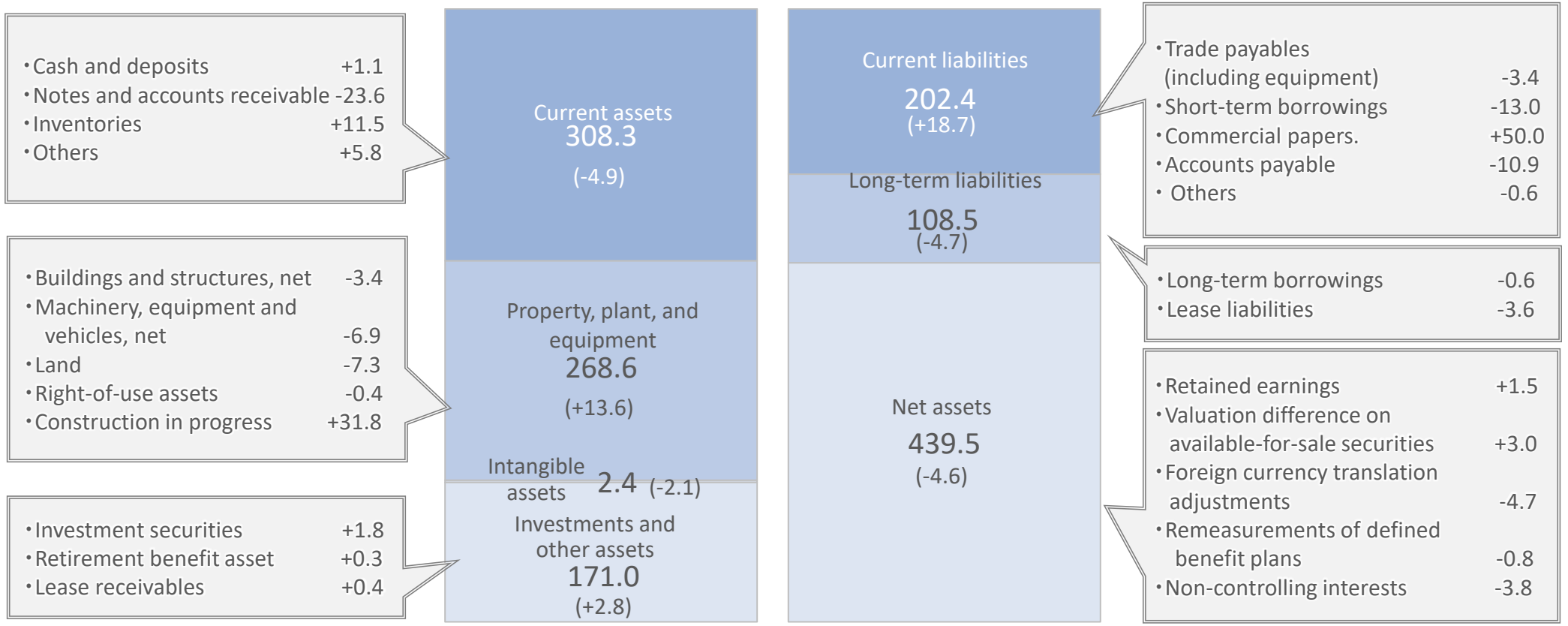
3 Balance Sheet

(Billion yen)



Note: As of June 30, 2026
Comparisons with figures as of March 31, 2026

Points

- Cash and deposits remained flat despite the collection of receivables, reflecting ESS-related investments and dividend payments.
- Inventories increased mainly in Industrial Batteries and Power Supplies and Lithium-ion Batteries
- Property, plant and equipment increased due to ESS-related investments

	3/31/2026	6/30/2026
Equity ratio	53.3%	52.5%
Total borrowings	¥87.8bn	¥124.3bn

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FY2026 Financial Forecast

1 Financial Forecast

(billion yen)	FY2025 Actual 1Q (Apr. - Jun.)	FY2025 Actual Full Year (Apr. - Mar.)	FY2026 Forecast 1Q (Apr. - Jun.)	FY2026 Forecast Initial forecast (Apr. - Mar.)(B)	FY2026 Forecast Revised forecast (Apr. - Mar.)(A)	Charge ((A)-(B))	(YoY%)
Net Sales	131.9	609.0	141.7	660.0	**680.0**	+20.0	(+11.7%)
Operating income (ratio)	8.3 6.3%	60.2 9.9%	11.6 8.2%	60.0 9.1%	**63.0 9.3%**	+3.0 +0.2P	(+4.7%)
Ordinary income	8.5 6.4%	58.2 9.6%	12.1 8.5%	56.0 8.5%	**61.0 9.0%**	+5.0 +0.5P	(+4.8%)
Profit (ratio)	6.5 5.0%	41.9 6.9%	7.6 5.3%	36.0 5.5%	**39.5 5.8%**	+3.5 +0.3P	(-5.6%)
EPS (Basic earnings per share) (¥/share)	¥65.11	¥417.33	¥75.34	¥358.88	**¥393.74**	+¥34.86	
Annual dividend (¥/share)	-	¥90	-	¥98	**¥98**	-	
Market Information / Prerequisites — Domestic lead price quote	¥346,400 /t	¥360,100 /t	¥380,100 /t	¥380,000 /t	**¥380,000 /t**	-	
Market Information / Prerequisites — LME	1,947 US$/t	1,953 US$/t	1,955 US$/t	2,100 US$/t	**2,000 US$/t**	-100 US$/t	
Market Information / Prerequisites — Exchange rate	¥143.75 /US$	¥151.09 /US$	¥160.72 /US$	¥150.00 /US$	**¥160.00 /US$**	+¥10.00 /US$	

Revision of Earnings Forecasts

- Although business conditions varied by segment, both Lead-acid Batteries (Japan) and Lead-acid Batteries (Overseas) continued to perform more strongly than expected. As a result, we revised upward our full-year forecasts for net sales and profit at all levels.

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1 Financial Forecast

	(billion yen)	FY2025 Actual Net sales	FY2025 Actual Operating income (Op. income ratio: %)	FY2026 Initial forecast Net sales	FY2026 Initial forecast Operating income (Op. income ratio: %)	**FY2026 Revised forecast Net sales**	**FY2026 Revised forecast Operating income (Op. income ratio: %)**	Charge ((A)-(B)) Net sales	Charge ((A)-(B)) Operating income (Op. income ratio: P)
Mobility	Lead-acid Batteries(Japan)	108.0	11.6 (10.7)	113.0	11.5 (10.2)	**117.0**	**12.0 (10.3)**	+4.0	+0.5 (+0.1)
Mobility	Lead-acid Batteries(Overseas)	233.2	22.5 (9.6)	224.0	23.0 (10.3)	**240.0**	**26.5 (11.0)**	+16.0	+3.5 (+0.7)
Mobility	Lithium-ion Batteries	89.9	4.9 (5.5)	107.0	5.0 (4.7)	**107.0**	**4.0 (3.7)**	-	-1.0 (-1.0)
Public Infrastructure	Industrial Batteries and Power Supplies	155.4	19.7 (12.7)	190.0	19.5 (10.3)	**190.0**	**19.5 (10.3)**	-	- (-)
Public Infrastructure	Aviation, Space and Defense	19.6	2.7 (13.6)	23.0	2.5 (10.9)	**23.0**	**2.5 (10.9)**	-	- (-)
	Others	2.9	-1.2	3.0	-1.5	**3.0**	**-1.5**	-	-
	Total	609.0	60.2 (9.9)	660.0	60.0 (9.1)	**680.0**	**63.0 (9.3)**	+20.0	+3.0 (+0.2)

Reasons for Revision by Segment

- **<Lead-acid Batteries(Japan)>** Net sales and profit revised upward, supported by strong replacement demand despite concerns over higher raw material costs, including resin and tin, from 2Q onward.
- **<Lead-acid Batteries(Overseas)>** Net sales and profit revised upward, reflecting strong 1Q results driven by favorable exchange rates and solid underlying demand.
- **<Lithium-ion Batteries>** Profit revised downward due to production adjustments resulting from component procurement risks associated with the situation in the Middle East and rising raw material prices.

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Creating the Future of Energy

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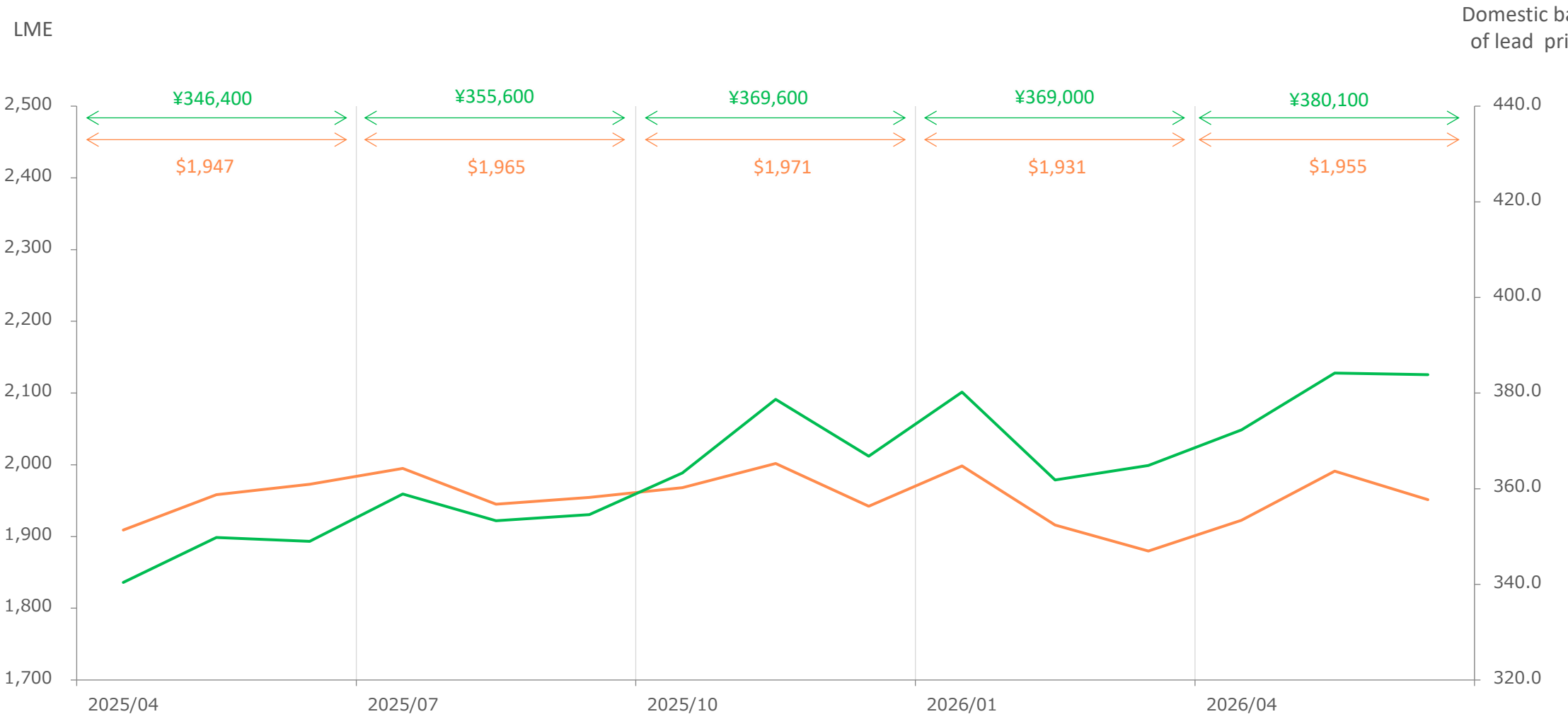
Reference

Reference. Changes in Raw Material Prices



Recent quotes (as of July 28, 2026)
LME $1,856 Domestic lead prices ¥372,000

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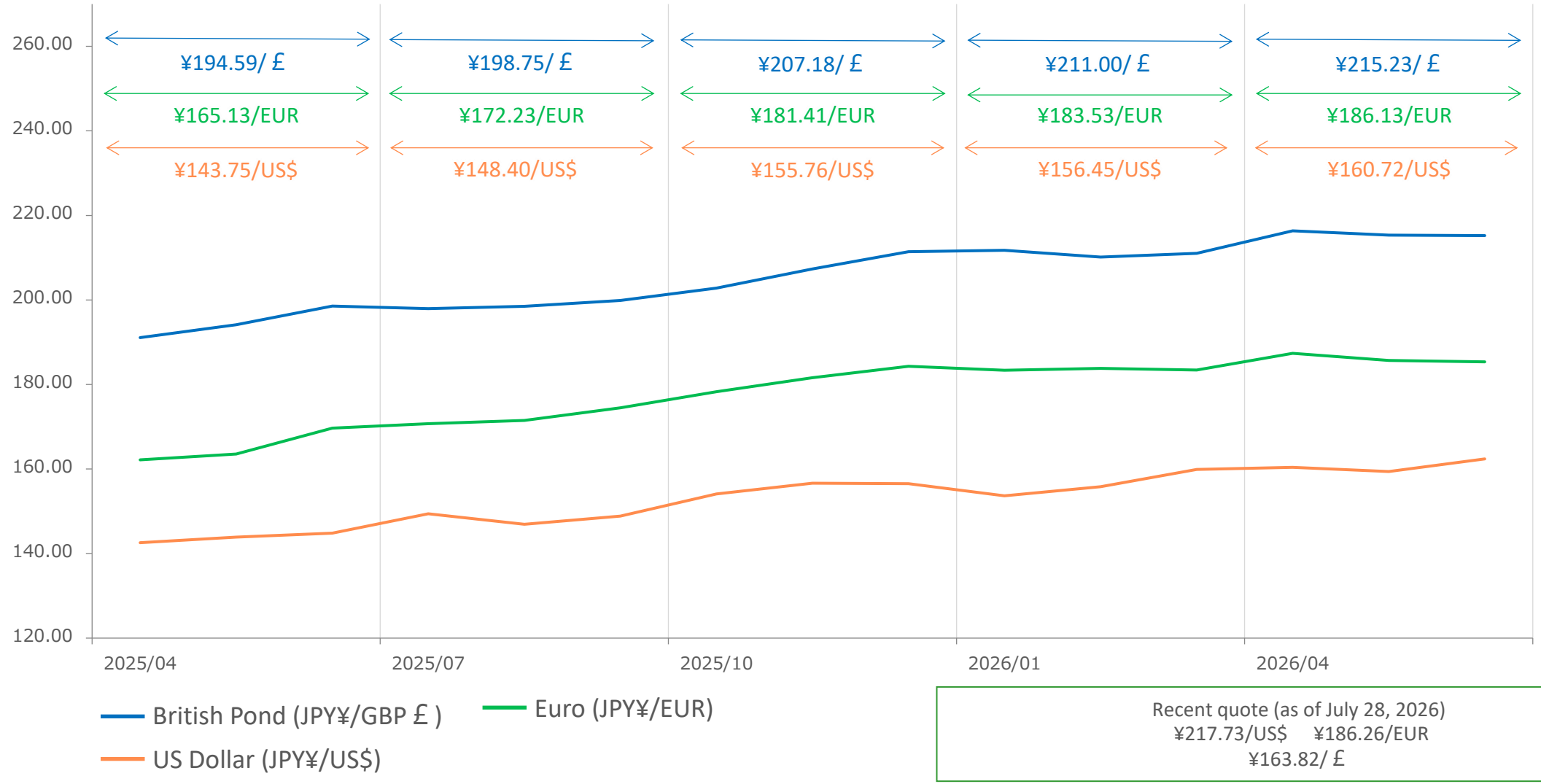
Reference. Changes in Exchange Rate

GBP £ ・ EUR ・ US $



Recent quote (as of July 28, 2026)
¥217.73/US$ ¥186.26/EUR
¥163.82/ £

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Reference. Quarterly Results by Segment

	(Billion yen)	FY2025 1Q (Apr. - Jun.) Net sales	FY2025 1Q (Apr. - Jun.) Operating income (Op. income ratio: %)	FY2025 2Q (Jul. - Sep.) Net sales	FY2025 2Q (Jul. - Sep.) Operating income (Op. income ratio: %)	FY2025 3Q (Oct. - Dec.) Net sales	FY2025 3Q (Oct. - Dec.) Operating income (Op. income ratio: %)	FY2025 4Q (Jan. - Mar.) Net sales	FY2025 4Q (Jan. - Mar.) Operating income (Op. income ratio: %)	FY2025 Full (Apr. - Mar.) Net sales	FY2025 Full (Apr. - Mar.) Operating income (Op. income ratio: %)	FY2025 Full (Apr. - Mar.) EBITDA (EBITDA Margin:%)
Mobility	Lead-acid Batteries(Japan)	22.4	1.7 (7.5)	24.7	2.0 (8.0)	30.9	4.2 (13.5)	30.0	3.7 (12.4)	108.0	11.6 (10.7)	
Mobility	Lead-acid Batteries(Overseas)	51.4	3.8 (7.5)	55.4	4.3 (7.8)	64.1	6.5 (10.1)	62.3	7.8 (12.5)	233.2	22.5 (9.6)	
Mobility	Lithium-ion Batteries	19.4	-0.0 (-0.2)	21.1	0.9 (4.1)	21.2	1.8 (8.7)	28.3	2.2 (7.9)	89.9	4.9 (5.5)	
Public Infrastructure	Industrial Batteries and Power Supplies	33.2	2.5 (7.7)	33.9	2.6 (7.5)	39.0	6.1 (15.6)	49.2	8.5 (17.3)	155.4	19.7 (12.7)	
Public Infrastructure	Aviation, Space and Defense	4.8	0.8 (15.6)	4.4	0.6 (12.8)	5.0	0.7 (14.5)	5.4	0.6 (11.6)	19.6	2.7 (13.6)	
	Others	0.6	-0.5	0.7	0.1	0.7	-0.1	0.8	-0.7	2.9	-1.2	
	Total	131.9	8.3 (6.3)	140.3	10.4 (7.4)	160.8	19.2 (12.0)	176.0	22.2 (12.6)	609.0	60.2 (9.9)	86.8 (14.3)

	(Billion yen)	FY2026 1Q (Apr. - Jun.) Net sales	FY2026 1Q (Apr. - Jun.) Operating income (Op. income ratio: %)	FY2026 2Q (Jul. - Sep.) Net sales	FY2026 2Q (Jul. - Sep.) Operating income (Op. income ratio: %)	FY2026 3Q (Oct. - Dec.) Net sales	FY2026 3Q (Oct. - Dec.) Operating income (Op. income ratio: %)	FY2026 4Q (Jan. - Mar.) Net sales	FY2026 4Q (Jan. - Mar.) Operating income (Op. income ratio: %)	FY2026 Full (Apr. - Mar.) Net sales	FY2026 Full (Apr. - Mar.) Operating income (Op. income ratio: %)	FY2026 Full (Apr. - Mar.) EBITDA (EBITDA Margin:%)
Mobility	Lead-acid Batteries(Japan)	24.5	2.4 (9.9)	-	-	-	-	-	-	117.0	12.0 (10.3)	-
Mobility	Lead-acid Batteries(Overseas)	57.8	7.2 (12.5)	-	-	-	-	-	-	240.0	26.5 (11.0)	-
Mobility	Lithium-ion Batteries	21.5	0.8 (3.7)	-	-	-	-	-	-	107.0	4.0 (3.7)	-
Public Infrastructure	Industrial Batteries and Power Supplies	32.2	1.0 (3.0)	-	-	-	-	-	-	190.0	19.5 (10.3)	-
Public Infrastructure	Aviation, Space and Defense	5.0	0.6 (12.6)	-	-	-	-	-	-	23.0	2.5 (10.9)	-
	Others	7.0	-0.5	-	-	-	-	-	-	3.0	-1.5	-
	Total	141.7	11.6 (8.2)	-	-	-	-	-	-	680.0	63.0 (9.3)	88.0 (12.9)

Notes: Beginning in FY2026, the industrial Batteries and Power Supplies (overseas) business previously included in the Lead-acid Battery (Overseas) segment has been reclassified to the Industrial Batteries and Power Supplies segment.
FY2025 net sales and operating profit (margin) have been restated based on the revised reporting segments.
FY2025 net sales and operating profit (margin) have been restated based on the revised reporting segments. Figures for FY2025 2Q, 3Q, and 4Q are estimates.

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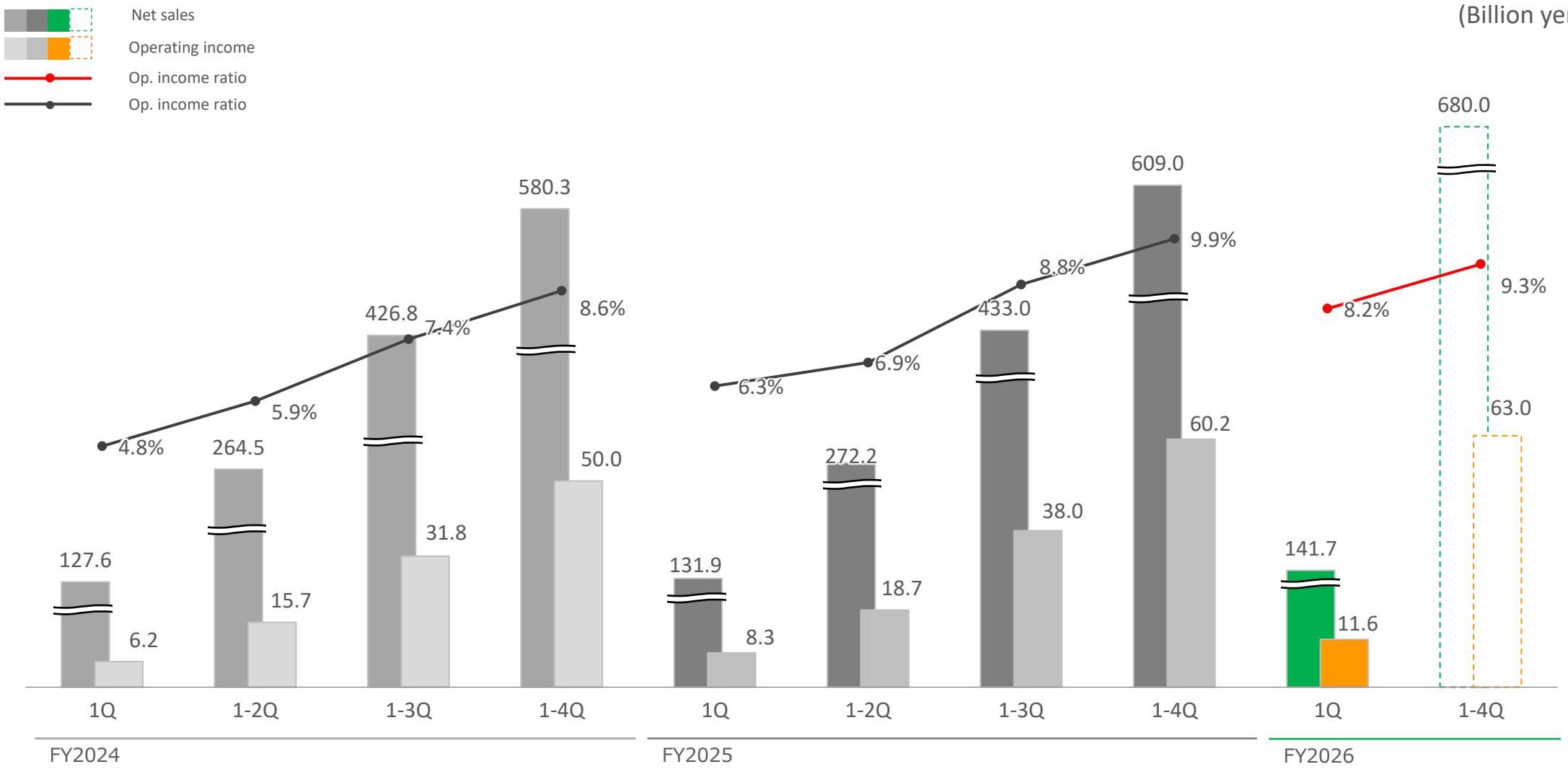
Reference. Net Sales, Operating Income, Op. Income Ratio



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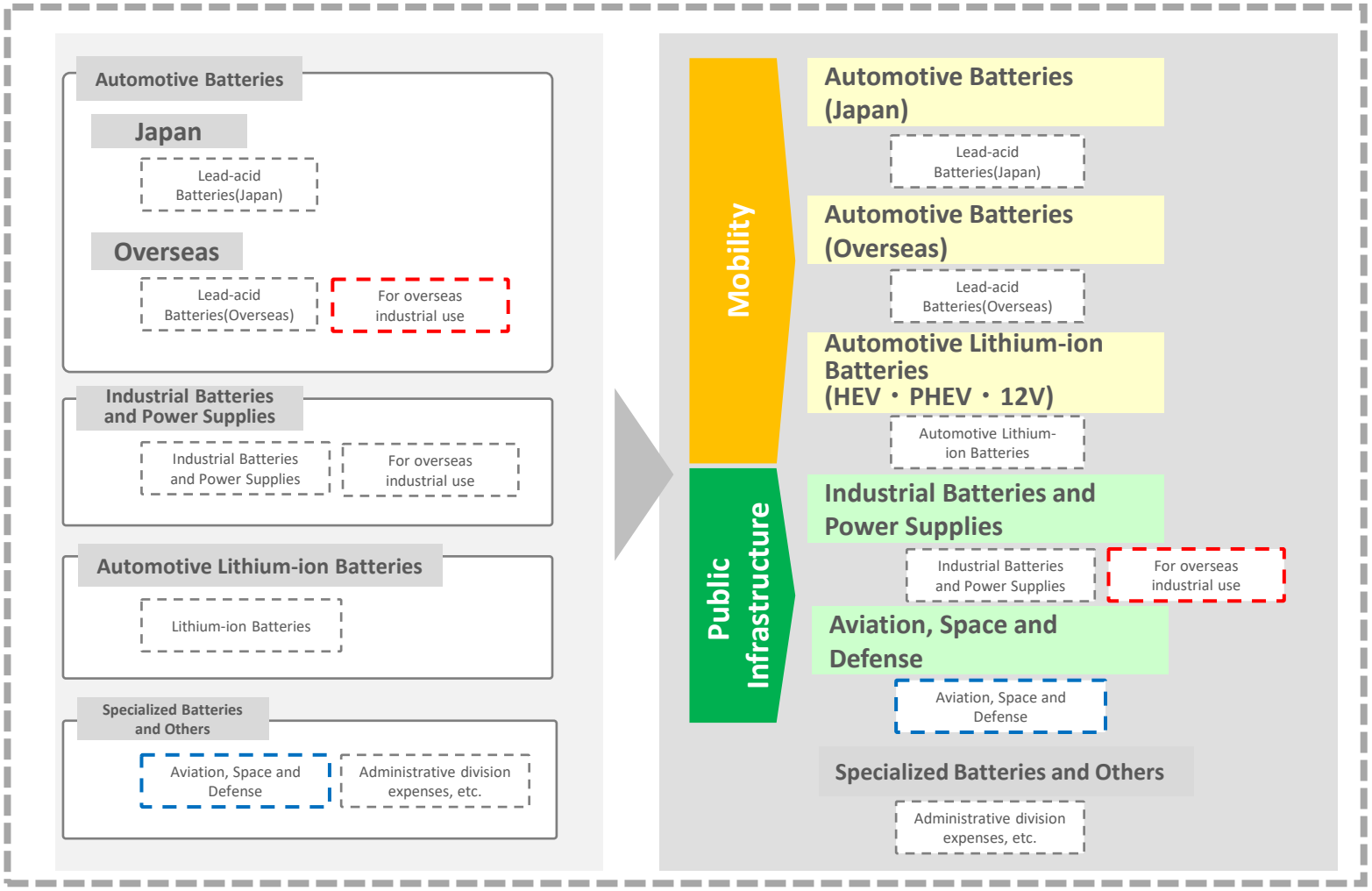
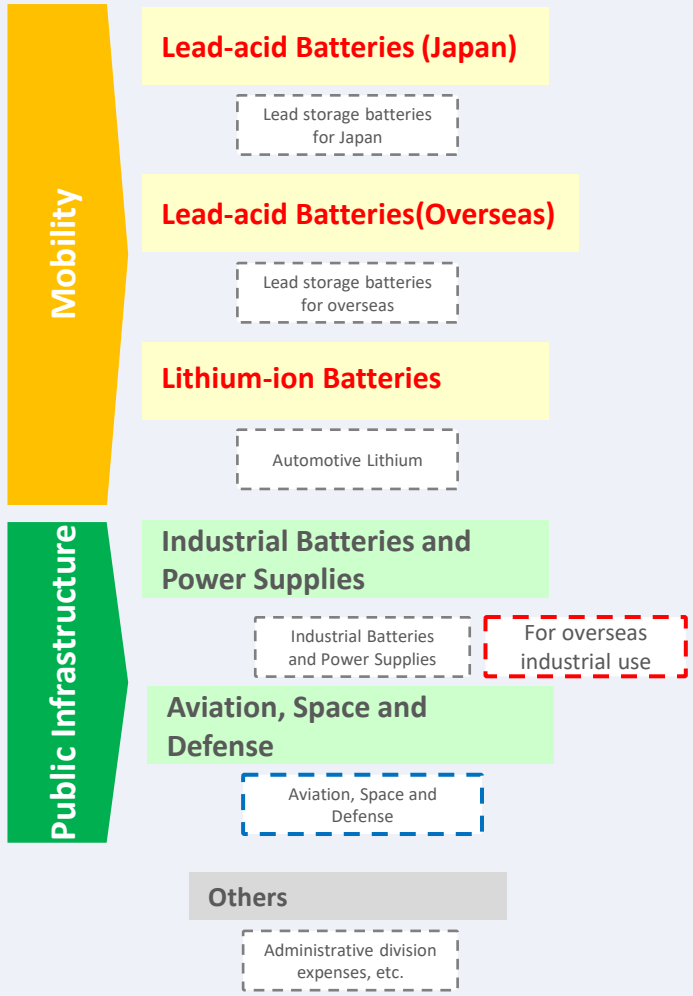
Reference. Segment Name Change

Details of segment changes for the FY2025 full-year financial results and the 7th Medium-Term Management Plan



Designation from the Q1 financial results of the fiscal year ending March 31, 2027 (FY2026)



*This is a change of name only; there is no impact on business performance.

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Reference. Upcoming IR Events

Date	Name of Events	Speaker
November 6, 2026 15:00	Results announcement for the Six Months ended September 30, 2026 (For media organizations)	President and Representative Director Takashi Abe Director and CFO Hiroaki Matsushima
November 6, 2026 16:00 - 17:00	Results briefing for the Six Months ended September 30, 2026 (For institutional investors and analysts)	President and Representative Director Takashi Abe Director and CFO Hiroaki Matsushima

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