

**COMTURE CORPORATION**  
**Financial Results Briefing Session for**  
**3Q of the Fiscal Year Ending March 31, 2026 (Held on February 12, 2026)**  
**Key Questions and Answers**

Some sections of these questions and answers have been revised to make this information easier to understand.

**Q:** What is your sales growth for individual vendors?

**A:** Sales in the first nine months for major vendors compared with the first nine months of the previous fiscal year are as follows.

**Cloud Solutions**

\*These figures do not include the sales contribution of Human Interactive Technology inc. (HIT), which became a consolidated subsidiary on June 30, 2025.

· Microsoft:	+15%
· Salesforce:	+4%
· ServiceNow:	+14%
· Cybozu:	-9%

**Digital Solutions**

· Data science:	+17%
· AWS (Amazon Web Services):	+45%

**Business Solutions**

· SAP:	-1%
--------	-----

In the Cloud Solutions Business, Microsoft sales increased steadily backed by sales cooperation with Microsoft Japan.

Salesforce sales in some categories are primarily due to the expansion of services for current customers. Progress involving new customers for Salesforce services in the market overall has been slower than anticipated. As a result, our growth was not significant. However, a recovery is expected because of progress with receiving orders from new customers due to alliances with ITOCHU Group companies and other reasons.

ServiceNow sales continue to increase steadily due to market growth.

Cybozu sales decreased because this company temporarily focused on direct sales activities. The result was a brief downturn in the receipt of some new projects. We believe these sales will start growing again because Cybozu has changed its stance and plans to work with partners.

In the Digital Solutions Business, sales involving the AI platform building business that use AWS increased significantly. In the data science category, demand is increasing for the construction of data infrastructures and for data analysis as companies prepare for the age of AI. As a result, there is steady growth centered on Databricks and Snowflake.

In the Business Solutions Business, sales involving SAP decreased slightly. The cause is probably our decision to place priority on activities for starting the implementation of the SAP HANA Cloud. This is a temporary up-front investment to prepare for strengthening external sales operations. We believe this investment positions us for growth in the next fiscal year and afterward.

**Q:** You explained that cloud solutions sales decreased because of a delay in restarting the second phase of large cloud consulting projects. What is your outlook for restarting the second phase?

**A:** These are large cloud consulting projects where orders were received and work began in the previous fiscal year. In this fiscal year, some customers briefly suspended cloud consulting because the size of the investments was having an impact on their earnings. These customers plan to restart the consulting projects in April. Therefore, we expect that these projects will start contributing to our sales and earnings in the next fiscal year.

**Q:** Although you did not revise your fiscal year forecast, your forecast looks like a difficult goal based on your sales and earnings at this point. Please explain your assessment of your performance in the first nine months and your confidence about the fiscal year forecast.

**A:** We are aware that our performance in the first nine months is not in line with the fiscal year forecast. For earnings, we have not been able to raise prices enough to offset the higher cost of labor, which we have increased significantly. There are currently initiatives in all areas of the company to improve profitability, including short-term measures such as more price negotiations with customers and a higher utilization rate of our people and other resources, and reach our sales and earnings forecasts.

**Q:** I believe that Comture is benefiting from the increasing use of AI. Are there any negative effects due to customers using AI to perform tasks internally instead of using external vendors or any other changes? What is the current situation and your outlook?

**A:** We believe that most of our customers are at the stage of preparing to use AI rather than fully utilizing this technology. The establishment of data platforms for using AI and other preparatory steps for AI are contributing to our performance. Therefore, we are currently benefiting in many ways from the emergence of AI.

On the other hand, progress with the digital transformation is altering the business climate for our customers. In prior years, the IT system departments of our customers and our system integrators worked together on large IT system development projects using the waterfall model. Now we are seeing an increase in projects where the business units of our customers are conducting agile development operations on their own using a short cycle. We are responding to this change by strengthening our support capabilities by working closely with customers beginning at an even earlier upstream stage. In sectors where customers cannot completely internalize tasks, we are using our diverse experience and expertise involving the installation of new systems to provide customers with efficient and best possible solutions. We are seeing an increase in the need for the outsourcing of operations and maintenance. Our plan is to grow in this category by using service centers that consolidate the operations of several customers and using AI for higher efficiency. Activities are under way to switch to a business model that reflects changes in the business climate regarding both our customers' use of AI and advances in technologies used for our business processes.