



COMTURE CORPORATION

Third Quarter of the Fiscal Year Ending March 31, 2026

February 12, 2026

Event Summary

[Company Name]	COMTURE CORPORATION	
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[Event Language]	JPN	
[Event Type]	Earnings Announcement	
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[Date]	February 12, 2026	
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[Venue]	Webcast	
[Venue Size]		
[Participants]		
[Number of Speakers]	2	
	Chihiro Sawada	Representative Director, President
	Takahiro Kamei	Managing Executive Officer, Corporate Communications

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Presentation

Kamei: Thank you very much for attending our financial results briefing today. We will be holding a briefing on the financial results for Q3 of the fiscal year ending March 31, 2026, which was recently announced on February 6, 2026.

Now, we will first explain our financial results. President Sawada, please begin.

Sawada: Hello, everyone. I am Sawada, President and Representative Director of COMTURE CORPORATION. I will now explain the financial results for Q3 of the fiscal year ending March 31, 2026.

Financial Highlights



Achieved 16 consecutive years of sales growth and sales and earnings climbing to record highs

(Millions of yen)	3Q FY3/25		3Q FY3/26		YoY change	Progress ratio vs. plan Average of the past three years
	Amount	% to net sales	Amount	% to net sales		
Net sales	26,863	-	28,041	-	+4.4%	70.1% (72.6%)
Operating profit	3,237	12.1%	3,167	11.3%	-2.2%	63.3% (69.0%)
Ordinary profit	3,240	12.1%	3,180	11.3%	-1.9%	63.6% (68.9%)
Profit attributable to owners of parent	2,105	7.8%	2,139	7.6%	+1.6%	64.3% (68.9%)
Net income per share (yen)	66.02	-	67.07	-	+1.6%	-
EBITDA	3,625	13.5%	3,646	13.0%	+0.6%	-

*EBITDA = Operating profit + Depreciation + Goodwill amortization



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First, let me explain the financial results overview.

During Q3 of the fiscal year ending March 31, 2026, our group's business performance increased for the 16th consecutive year, with sales and quarterly net income reaching record highs.

Net sales were JPY28,041 million, up 4.4% YoY, and operating income was JPY3,167 million, down 2.2% YoY.

As a result of the above, net income for the quarter was JPY2,139 million, up 1.6% YoY.

EBITDA, which indicates a company's profitability in its core business, was JPY3,646 million, up 0.6% YoY.

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Contributing Factors

Net sales

Up 4.4% YoY

- + Growth of the data management and AI platform building businesses
- + Growth of business involving Microsoft and ServiceNow
- A delay in the restart of the second phase of large cloud consulting projects
- Shortage of resources, particularly PM professionals

Operating profit

Down 2.2% YoY

- + An increase in earnings due to the acquisition of Human Interactive Technology inc. (HIT)
- + A decline in outsourcing expenses due to more efficient back office business processes
- An increase in personnel expenses due to larger number of employees and higher salaries at business units
- Increase in office rents and facility-related expenses



Next, I will explain the key points of the financial results.

Net sales increased by 4.4% YoY. I will explain the factors behind this figure.

The first positive factor was the growth in the data management business and the AI infrastructure building business. The second was the growth of the Microsoft and ServiceNow businesses.

The first negative factor was the delay in resuming the second phase of a large cloud consulting project. The second was a lack of resources, especially PM personnel.

Operating income decreased by 2.2% YoY. I will explain the factors behind this figure.

The first positive factor was the increase in profit resulting from the inclusion of Human Interactive Technology Inc. in the Group. The second positive factor was the reduction in outsourcing costs due to the streamlining of indirect department operations.

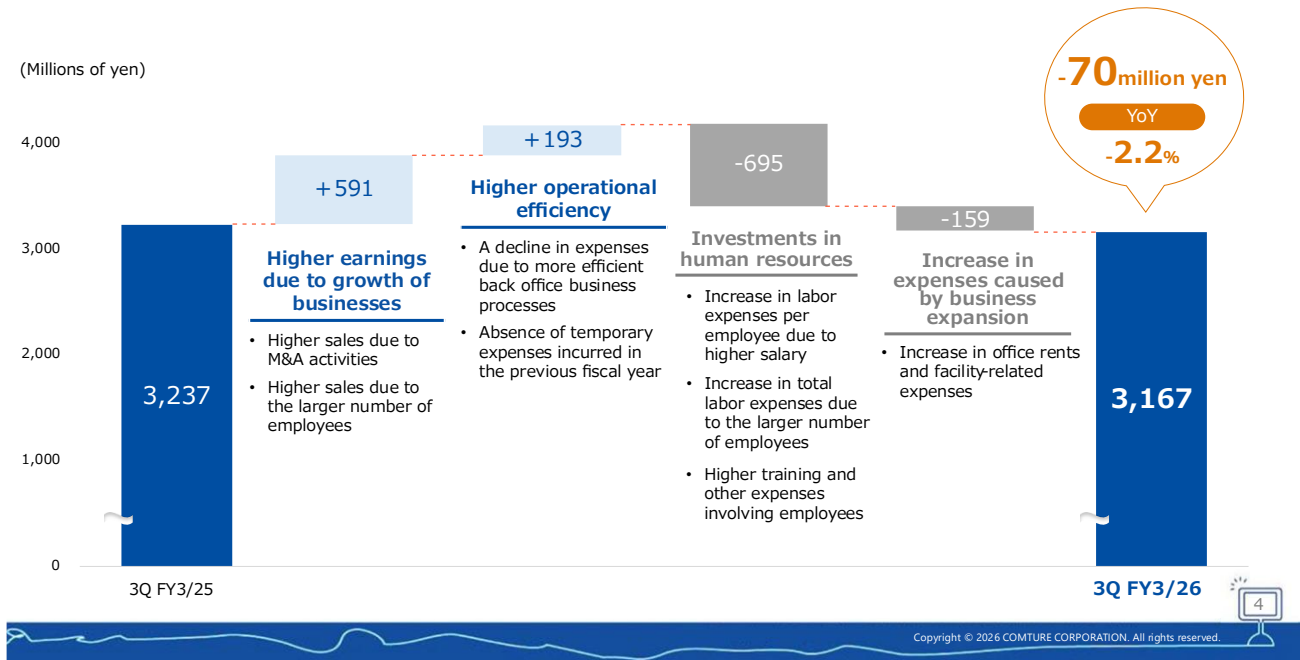
The first negative factor was the increase in the number of employees in the business units and higher labor costs associated with salary increases. The second was the increase in office rent and equipment-related expenses.

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Components of Changes in Operating Profit



A breakdown of the specific amounts is shown on the slide.

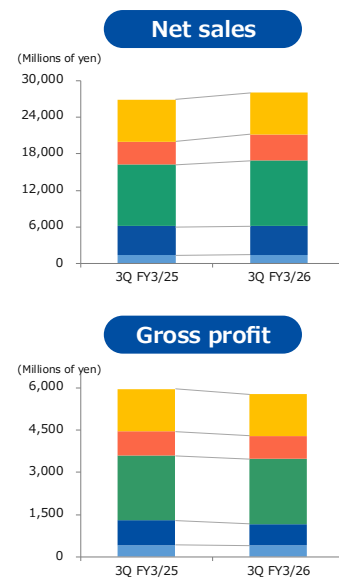
While sales and profit increased due to business expansion, such as M&A and an increase in employees, higher labor costs due to salary increases and headcount growth were the main causes of cost increases.

As a result, operating income decreased by JPY70 million YoY.

Business Segment Performance

(Millions of yen)	3Q FY3/25	3Q FY3/26	YoY change
Net sales	26,863	28,041	+4.4%
Cloud Solutions	6,886	6,876	-0.1%
Digital Solutions	3,751	4,269	+13.8%
Business Solutions	10,083	10,722	+6.3%
Platform, Operation Services	4,739	4,707	-0.7%
Digital Learning	1,402	1,466	+4.5%
Gross profit	5,964	5,779	-3.1%
Cloud Solutions	1,507	1,472	-2.3%
Digital Solutions	863	828	-4.0%
Business Solutions	2,287	2,309	+1.0%
Platform, Operation Services	876	742	-15.3%
Digital Learning	428	425	-0.8%

*Beginning in FY3/26, some of the business segments have been revised. FY3/25 figures of Cloud Solutions and Business Solutions businesses use the revised classification method.



The next slide shows results by business segment.

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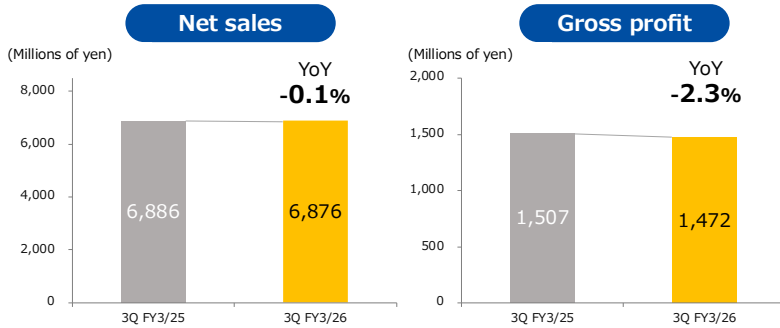
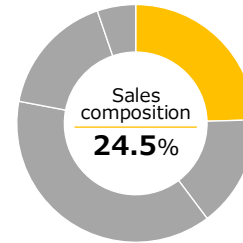
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Cloud Solutions

Major components

- + Contribution of HIT, which became a consolidated subsidiary in 2Q
- + Growth of business involving Microsoft and ServiceNow
- A delay in the restart of the second phase of large cloud consulting projects and the suspension of some Salesforce-related projects
- Shortage of resources, particularly PM professionals



Themes for More Growth

- Partnering with Microsoft Japan to expand low-code application development and explore new opportunities in the utilization of AI and AI platform building
- For Salesforce, growth in the data cloud and other new sectors and in businesses for specific industries, including financial services and communications, while increasing the number of projects that use collaboration with ITOCHU Group companies



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Sales in the cloud solutions business were JPY6,876 million, down 0.1% YoY. Gross profit was JPY1,472 million, down 2.3% YoY.

While the contribution of Human Interactive Technology (HIT) and growth in growth areas contributed to the performance, delays and freezing of some projects and a shortage of resources, particularly PM personnel, resulted in a decrease in both revenue and profit.

Going forward, we will expand our business through collaboration with Microsoft, initiatives in new Salesforce areas, and the expansion of industry-specific businesses.

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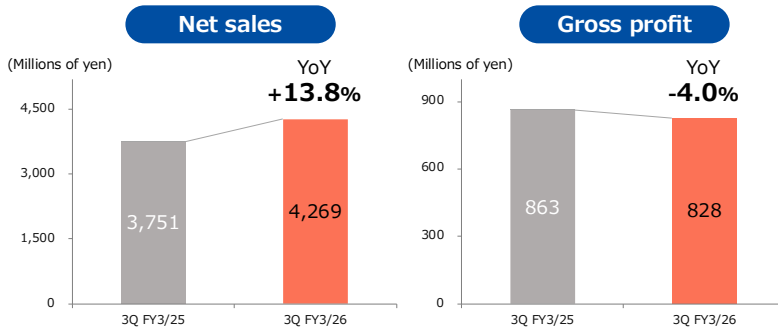
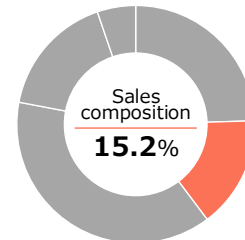
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Digital Solutions

Major components

- + Receipt of large prime contracts in the data analysis and data management domain
- A temporary increase in proposal activity workloads of engineers resulting from more sales opportunities
- Delays in monetization due to a stronger focus on new-employee development



Themes for More Growth

- Use joint activities with SAS, Databricks and Snowflake and increase activities to find new projects. Horizontal expansion of cloud-based data management projects in the financial services sector.
- More projects focused on modernizing and building AI platforms on AWS, as well as AI application development incorporating AWS.
- Use joint activities with large system consulting companies for growth of the data and AI business located outside major metropolitan areas.



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Sales in the digital solutions business were JPY4,269 million, up 13.8% YoY. Gross profit was JPY828 million, down 4% YoY.

While orders for large prime projects were received in the areas of data analysis and data management, there were the temporary increase in the man-hours required for engineers to make proposals, due to an increase in sales opportunities, and the delay in charging fees due to strengthened training for new employees, resulting in increased sales but decreased profit.

Going forward, we will focus on strengthening project discovery, horizontal expansion of projects in the financial industry, and expansion into the AWS domain through collaboration with vendors.

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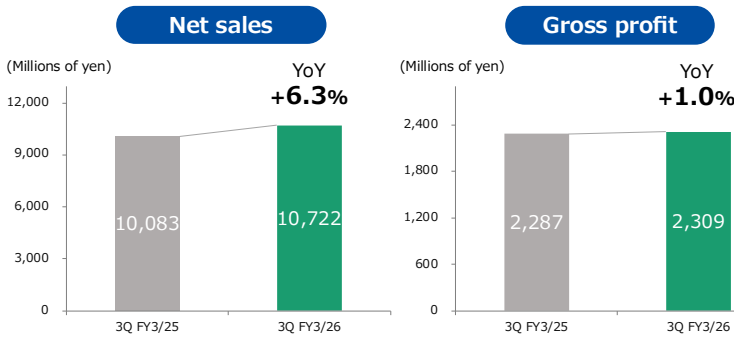
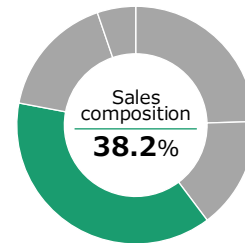
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Business Solutions

Major components

- + Growing demand for the automation of business processes and AI-related businesses
- + Increasing demand for SAP peripheral development
- Prioritizing the renewal of internal systems (including the implementation of SAP HANA)



Themes for More Growth

- Start a large development project for the SAP HANA cloud, develop peripheral applications and increase the number of prime contractor projects for middle-market companies
- Growth of the business for shifting from SAP to the ERP packages of other companies
- Expansion of projects by using cross-selling encompassing all locations of financial institutions; More projects for linkage with the Zengin-Net system

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Sales in the business solutions business were JPY10,722 million, up 6.3% YoY. Gross profit was JPY2,309 million, up 0.1% YoY.

While we prioritized the renewal of our internal systems, we also saw increases in both sales and profit due to the expansion of our business in the financial industry and the continued growth of peripheral SAP development.

Going forward, we will expand our business through large-scale SAP HANA development projects, migration from SAP, cross-selling proposals related to finance, and Zengin net connection projects.

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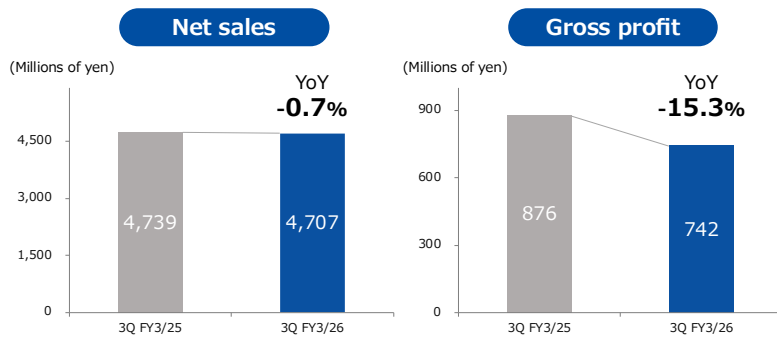
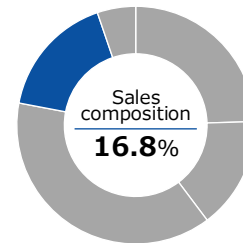
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Platform, Operation Services

Major components

- + Higher demand for the outsourcing and security support of IT system operations
- Reexamination of the framework for our remote surveillance service to reinforce its service model
- A delay in the start of the second phase of a network construction project for a government agency



Themes for More Growth

- More infrastructure projects by using alliances with ITOCHU Group companies and large system integrators
- Start of full-scale operation of the second phase of infrastructure project for government agencies
- Support for the visualization and automation of IT system operations and growth of the business for enabling clients to move to the cloud
- Shift to solution-type services centered on security

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Sales in the platform and operation services business were JPY4,707 million, down 0.7% YoY. Gross profit was JPY742 million, down 15.3% YoY.

While demand for outsourcing system operations and security support increased, a review of the remote monitoring service system and delays in the launch of the second phase of projects for government agencies resulted in a decrease in both revenue and profit.

Going forward, we aim to achieve a recovery in sales through business collaboration with ITOCHU Corporation and major consulting firms, as well as the resumption of projects for government agencies.

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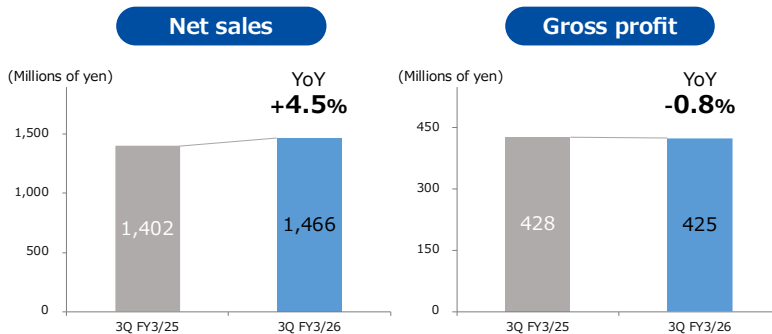
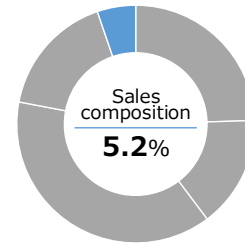
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Digital Learning

Major components

- + Higher demand for Microsoft (AI, etc.) training programs
- + Larger number of students and courses for outsourced training programs for new employees
- Fewer open training sessions primarily for Salesforce and ServiceNow certifications



Themes for More Growth

- Upgrade Microsoft AI training activities and hold more classes
- Use joint activities with software resellers and distributors to expand sales channels for the Microsoft training course resale business
- Business growth by offering more courses for employees of IT subsidiaries of large corporations



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Sales in the digital learning business were JPY1,466 million, up 4.5% YoY. Gross profit was JPY425 million, down 0.8% YoY.

While there were the increase in demand for generative AI-related training provided by Microsoft, increase in the number of new employee training participants, and expansion of the courses offered, the number of open training sessions related to Salesforce and ServiceNow decreased, resulting in increased revenue but decreased profit.

Going forward, we will focus on expanding AI-related training courses and expanding sales channels for Microsoft training courses.

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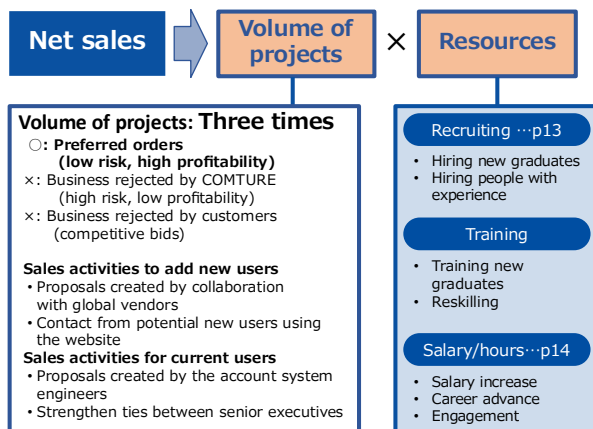
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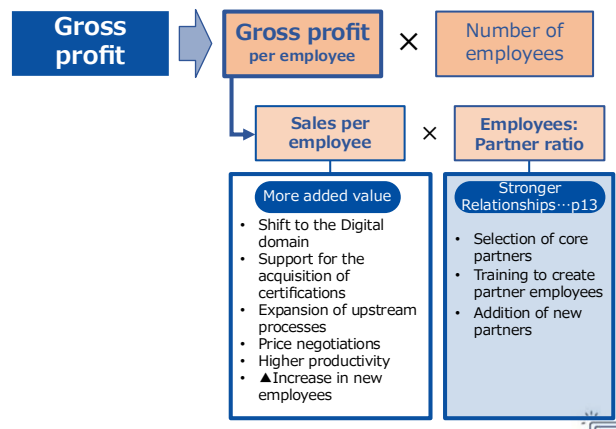
Investments in People Linked with the Growth of Corporate Value

Key performance indicator management for high value-added business and consistent growth

■ KPI concerning achievement of sales plans



■ KPI concerning achievement of earnings plans



Next, I will explain our human capital investments.

We continue to make aggressive investments in human capital to achieve sustainable growth. Although this will increase costs in the current business performance, we regard this as a strategic investment linked to our KPIs.

Key Initiatives of FY3/26

Major investments foster faster organic growth

Market conditions	<ul style="list-style-type: none"> Digital domain investments are expected to increase at companies as their use of digital technologies grows More outsourcing of support for system integrators as companies form teams to perform tasks internally and continue digital technology training for their employees The rapid increase in the use of generative AI requires fundamental changes in the IT services industry concerning development methods and service models 	
Investments in people	Recruiting	<ul style="list-style-type: none"> New graduates: 200 (to be hired in April 2026) Experienced people: 70 (FY3/26)
	Training	<ul style="list-style-type: none"> Strengthen training programs for project managers and consultants Reskilling: 30-40 per six months Larger and upgraded training system, increase the use of online learning platform Goal is 1,000 certifications
	Salaries/benefits	<ul style="list-style-type: none"> Salary increase: 5.0% More upgrades to personnel systems and employee benefits
Innovations	<ul style="list-style-type: none"> R&D for the use of generative AI for IT system development and project management activities Use of the Microsoft Copilot generative AI tool for improvements and innovations of all business processes; new/revised core IT system and internal infrastructure Website and branding renewals and other improvements to raise awareness of COMTURE 	

The priority measures we are currently working on are shown on the slide, with a focus on human capital investment.

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Progress with Key Initiatives – Corporate Resources

Recruiting activities for faster growth

Recruiting talented new graduates

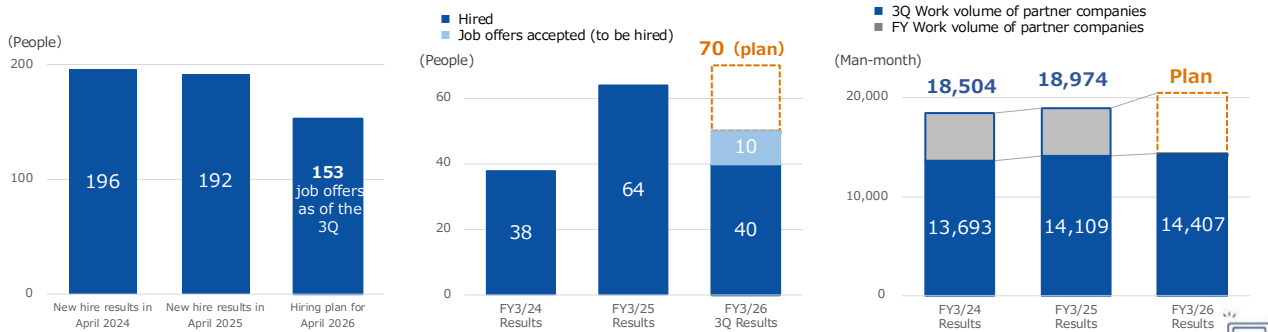
- Reduced hiring plan from 200 to 150 new graduates due to business process innovation using AI and to the retention of new graduates hired in recent years
- Using a rigorous recruiting process to select new graduates

More hiring of experienced people

- Hired 40 people with prior work experience as of the end of December 2025
- Using referrals, scouting and other measures to recruit experienced people

Stronger relationships with partner companies

- Work volume of partner companies was 2.1% more than one year earlier (excluding HIT)



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I will explain the progress of each category.

Our recruitment efforts focus on three pillars: new graduate recruitment, mid-career recruitment, and the use of partner companies.

In light of the high retention rate of new graduates in recent years, we have revised our recruitment plan and are now conducting recruitment activities with more selective criteria. Taking into account the transformation of our business operations through the use of AI, we will also consider reviewing our recruitment activities from next fiscal year onwards.

For mid-career recruitment, we are making steady progress against the plan by working on employee referral recruitment and strengthening collaboration with recruitment companies.

We will strengthen collaboration with partner companies to fill any areas where we are short of employees. Although the number of outsourced contracts only increased by 2.1% compared to the previous fiscal year, we will once again strive to strengthen collaboration, particularly with core partners.

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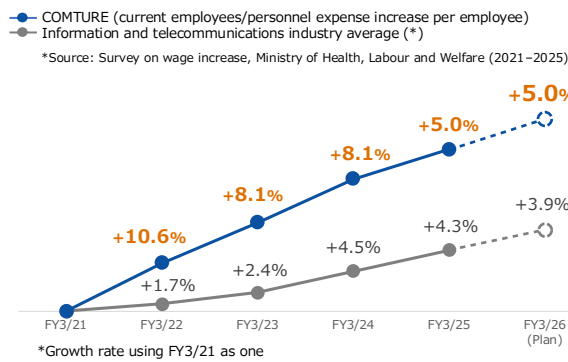
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Progress with Key Initiatives – Improvements in Salaries and Benefits

Improvement of employee satisfaction and retention

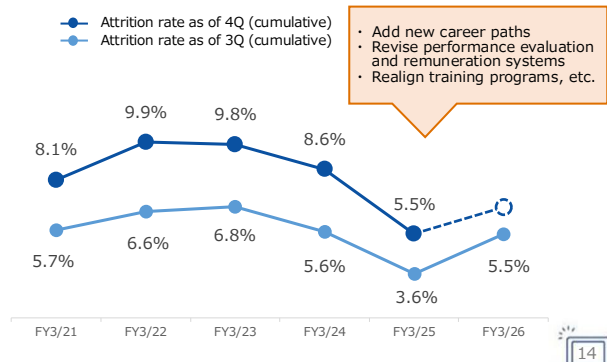
Higher labor expenses

- Continuing to raise salaries while remaining far ahead of peer companies



Improvement in employee attrition rate

- Continuously improving benefits, increasing engagement and taking other actions to retain people



We are also continuously working to improve our employee benefits.

As you can see, we have been ahead of our competitors in implementing aggressive salary increases.

Although the retirement rate is on an upward trend compared to the previous fiscal year, we will continue to invest in improving employee benefits and create an environment that supports the retention and success of talented employees while continuing to verify and strengthen the effectiveness of the HR system revisions and employee engagement improvement measures implemented in the previous fiscal year.

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FY3/26 Earnings Forecast

(No revisions to the May 15, 2025 forecast)

The first step for achieving the sales goal of 100 billion yen

(Millions of yen)	FY3/25 Results		FY3/26 Forecast		YoY change (%)
	Amount	% to net sales	Amount	% to net sales	
Net sales	36,341	-	40,000	-	+10.1%
Operating profit	4,630	12.7%	5,000	12.5%	+8.0%
Ordinary profit	4,660	12.8%	5,000	12.5%	+7.3%
Profit attributable to owners of parent	3,160	8.7%	3,325	8.3%	+5.2%
Net income per share (yen)	99.12	-	104.27	-	+5.2%
EBITDA	5,137	14.1%	5,813	14.5%	+13.2%
Dividend per share (yen)	48.00	-	50.00	-	-
Payout ratio	48.4%	-	48.0%	-	-
ROE	17.9%	-	17.2%	-	-

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Next, I will explain the full-year forecast for the fiscal year ending March 2026.

As you can see, there is no change from the previous forecast.

We will continue to closely monitor business trends and steadily promote initiatives.

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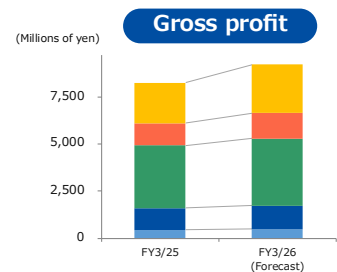
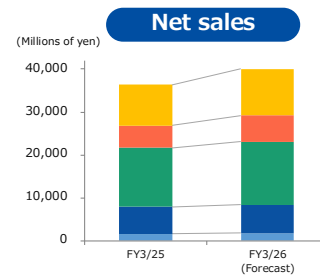
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Business Segment Forecast (Revised on November 7)

(Millions of yen)	FY3/25 Results	FY3/26 Forecast	YoY change (%)
Net Sales	36,341	40,000	+10.1%
Cloud Solutions	9,466	10,740	+13.5%
Digital Solutions	5,176	6,160	+19.0%
Business Solutions	13,729	14,700	+7.1%
Platform, Operation Services	6,322	6,600	+4.4%
Digital Learning	1,645	1,800	+9.4%
Gross profit	8,235	9,200	+11.7%
Cloud Solutions	2,128	2,560	+20.3%
Digital Solutions	1,178	1,350	+14.5%
Business Solutions	3,317	3,550	+7.0%
Platform, Operation Services	1,173	1,250	+6.5%
Digital Learning	437	490	+12.1%

*Beginning in FY3/26, some of the business segments have been revised. FY3/25 figures of Cloud Solutions and Business Solutions businesses use the revised classification method.



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The forecast for each business segment is as shown on the slide.

There is no change from the previously announced values here either.

Toward these goals, we are taking step-by-step short-, medium-, and long-term measures to expand sales and improve profitability in Q4 and in the next fiscal year and beyond.

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Measures for sales growth and higher profitability (1/2)

Sales/profit benefit		Prior years and FY3/26 1Q-3Q	FY3/26 4Q and afterward
Short-term	Make new graduate employees productive	<ul style="list-style-type: none"> Pct. of productive new graduates: About 95% (As of end of December) Slower progress temporarily due to a small volume of large projects and other reasons 	<ul style="list-style-type: none"> 100% to be productive by the end of the 4Q Expect new graduates to become productive due to the start of full-scale operation of large projects and other reasons Use a thorough selection process for FY3/27 new graduate recruiting, place priority on project manager training
	Alliance with ITOCHU	<ul style="list-style-type: none"> Continued joint activities centered on the SAP, Salesforce and ServiceNow projects Growth of related businesses by starting to define requirements of large projects and sharing many projects Used joint proposals to receive orders for large, multifaceted projects (cloud, infrastructure, training) 	<ul style="list-style-type: none"> Increase cross-selling by strengthening sales activities Move faster for collaboration involving SaaS (Salesforce, Microsoft, others), consulting, data management and other sectors Collaboration between our group companies and ITOCHU Group companies
Medium-term	Sales activities for cross-selling	<ul style="list-style-type: none"> Reorganized sales functions and strengthened the framework for cross-selling proposals Started sales activities targeting the current users of all business units Created new projects with a value of 600 million yen during the third quarter 	<ul style="list-style-type: none"> Sales activities targeting the current main users of the COMTURE Group The goal for the second half of FY3/26 is to create new projects with a value of one billion yen
	AI platforms for business process internalization	<ul style="list-style-type: none"> Sales activities with AWS for building AI platforms Provided demonstrations and internalization support for users that want to use generative AI 	<ul style="list-style-type: none"> Significantly upgrade productivity for infrastructure designs and document production In addition to building platforms, expand business operations to include AI-driven development activities
	Activities for the utilization of AI in development operations	<ul style="list-style-type: none"> Completed demonstrations involving development and design document preparation operations for SaaS (Salesforce, kintone). (Productivity increased 30%-50% and was up 90% for some activities.) Acquired know-how involving prompt templates and other tools 	<ul style="list-style-type: none"> Use AI for the verification of actual projects and build a development environment covering COMTURE as well as other domains Accumulate and use knowledge by using community activities encompassing the entire COMTURE Group

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As of the end of December, approximately 95% of new graduates were paid roles. In Q4, we expect this number to increase further, as large-scale projects get underway. As we have been more selective in hiring new graduates, next fiscal year, we plan to prioritize mid-career hiring and PM training and focus on improving profitability.

We will continue to collaborate with ITOCHU in the areas of SAP, Salesforce, and ServiceNow and are also making concrete progress on joint proposals for complex large-scale projects. We will accelerate our collaboration in the areas of SaaS, consulting and data management.

Through cross-selling sales activities, we expanded our reach and generated JPY600 million worth of business in Q3. We will continue to expand the business to the Group's major users, aiming to create new projects worth JPY1 billion in H2 of the fiscal year.

In the medium term, we will continue to strengthen our business foundation leading up to the next fiscal year. In the AI infrastructure building business, we collaborated with AWS to provide services for users to demonstrate the use of generative AI and support in-house production. In addition to improving productivity in infrastructure design and documentation, we will expand the scope of our business to include AI-driven development.

AI-driven development is being introduced within the Company. We have completed demonstrations with Salesforce and Kintone and have confirmed productivity gains of up to 90%. We will continue to verify the system in actual projects and accelerate company-wide deployment and knowledge sharing.

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Measures for sales growth and higher profitability (2/2)

Sales/profit benefit		Prior years and FY3/26 1Q-3Q	FY3/26 4Q and afterward
Medium-term	Synergies with HIT	<ul style="list-style-type: none"> Benefited from synergies involving sales activities (new business from the new users and partners of HIT) Used collaboration among COMTURE Group companies to add 23 new projects 	<ul style="list-style-type: none"> Continue activities for creating new business in the AI, Microsoft Azure and IT consulting sectors Enlargement of support domains by using the scale of the COMTURE Group through more collaboration among group companies Give all COMTURE Group companies access to HIT's AI expertise and services
	AI business for financial institutions	<ul style="list-style-type: none"> Received with SAS an order from Chugoku Bank Ltd. for a sales DX project to support data utilization and AI analysis The first step for receiving orders for projects using advanced technologies (building data lakes in a cloud environment) 	<ul style="list-style-type: none"> More proposals for horizontal expansion to meet other regional banks in Japan with similar needs Activities with SAS and other partners to strengthen business activities for using digital technologies at financial institutions
Long-term	Progress in PM training activities	<ul style="list-style-type: none"> To upgrade project manager skills, currently using the internal PM certification program for more project managers and started a new practical training program for intermediate project managers Many activities are under way to give people training to become advanced project managers with outstanding capabilities 	<ul style="list-style-type: none"> Goal is 30 advanced (second highest rank) project managers by the end of FY3/26 Upgrade incentives, use a mentor program and take other actions to establish a sound PM training environment
	M&A strategies	<ul style="list-style-type: none"> Used joint activities with financial institutions and others to continue creating a list of potential M&A opportunities and working on specific opportunities Objectives are to reinforce operations in growing business domain, increase the provision of added value and build a sound customer base 	<ul style="list-style-type: none"> Strengthen ties between financial institutions and M&A firms to strengthen sourcing for midsize and large projects Expected 3-year M&A investments from FY3/26 to FY3/28: 5 billion to 12 billion yen

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Synergies with Human Interactive Technology (HIT) are materializing on the sales front, with 23 new deals created by Q3. We will continue to promote the creation of projects in the areas of AI, Microsoft Azure, and IT consulting, as well as deploy AI knowledge and services throughout the Group.

In the AI business for financial institutions, we will aim to expand by building on the sales digital transformation project for Chugoku Bank, for which we received an order in Q2. We will actively promote horizontal expansion to regional banks nationwide that face similar challenges and strengthen our digital promotion business.

In the area of PM training, progress was made in the training of beginner- and intermediate-level personnel by Q3, and we were able to broaden the base from which to train advanced PMs. We expect to train 30 senior PMs this fiscal year, and we will continue to develop human resources with advanced practical skills in accordance with our medium-term management plan.

Finally, I would like to discuss our M&A strategy for long-term growth. We always maintain multiple pipelines and carefully select and consider candidates from the perspective of business synergies and other factors. Over the three years of the medium-term management plan, we expect to invest a cumulative total of JPY5 billion to JPY12 billion to strengthen our business portfolio.

Through these measures, we will achieve sustainable growth, from short-term profit improvement to medium-term expansion in the AI and digital domains, as well as long-term strengthening of our business foundation.

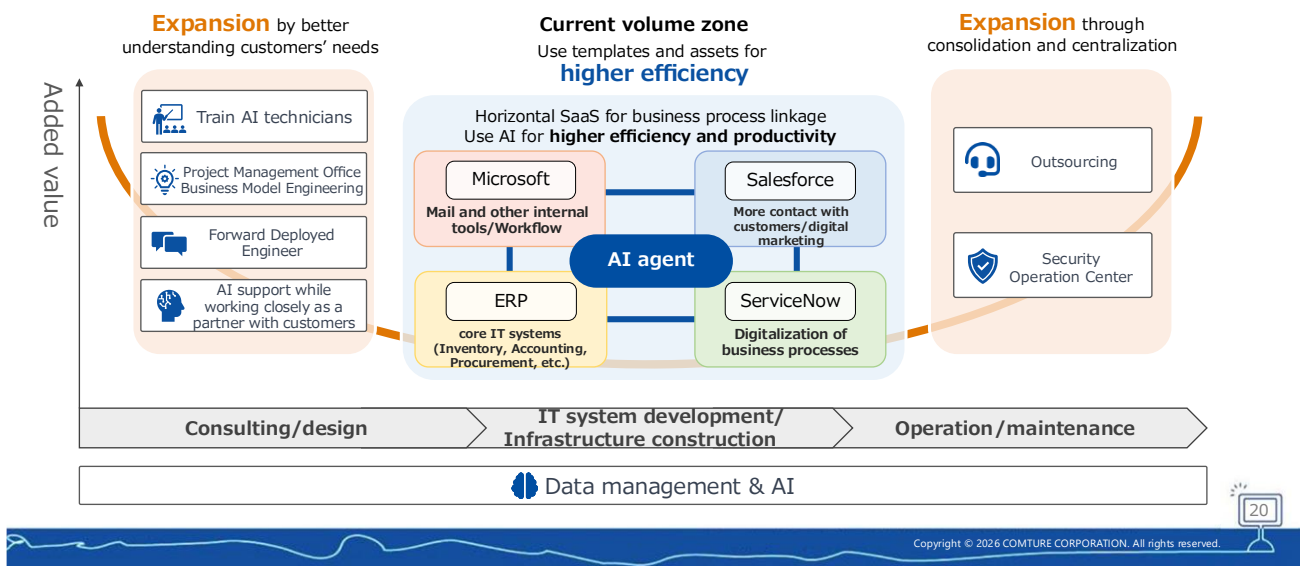
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The COMTURE Earnings Growth Model for the Age of AI

Expansion of customer-centric businesses and increased efficiency in technology-driven businesses



In addition to the implementation of individual measures, the Company is also working on business transformation to a new growth revenue model for the coming AI era. Currently, the major area of our business is the development and construction of systems, as shown in the center of the diagram.

In the age of AI, we will continue to improve efficiency and productivity in these areas. We also plan to further expand into the areas of consulting and design, which are more upstream processes, and operation and maintenance, which are expected to generate continuous profit.

We will thoroughly streamline areas where AI can be used efficiently, and by expanding further upstream and into wider areas, we will establish a new revenue model that is in line with the times.

This concludes my explanation.

We look forward to your continued support. Thank you for your attention.

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Kamei: Thank you.

Finally, President Sawada would like to conclude by saying a few words to the participants.

Sawada: Thank you very much for attending our financial results briefing today.

Looking at our performance through Q3, we have seen a decrease in profit, which is by no means satisfactory. However, as I mentioned earlier, we believe that a major factor in this is that we have not been able to fully pass on the increases in employee salaries that we have continuously raised to our prices.

In the short term, we are working to pass on these increases to prices by negotiating unit prices and increasing our operating rates. As for the medium term, we are working on a shift in our business model to respond to the AI era, as I mentioned a little earlier on the last page.

The information service industry is currently undergoing a period of great change, and we are working hard to determine the direction we should take to achieve solid performance in the short term, as well as to prepare for future growth in the medium term.

We would appreciate your continued support. Thank you.

Kamei: Thank you, President Sawada.

We will now conclude the briefing. Thank you very much for joining us today.

Sawada: Thank you.

[END]

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1. *This document has been translated by SCRIPTS Asia.*

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