Fiscal2027 Q2

Supplementary Materials

November 4, 2026

COMTURE CORPORATION

コムチュア株式会社

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Financial Highlights

		FY3/2025							FY3/2026							FY3/2027		
		1Q	2Q	3Q	4Q	2Q(total)	3Q(total)	4Q(total)	1Q	2Q	3Q	4Q	2Q(total)	3Q(total)	4Q(total)	1Q	2Q	2Q(total)
Net sales	(millions of yen)	8,753	9,041	9,068	9,478	17,794	26,863	36,341	8,957	9,695	9,388	10,068	18,652	28,041	38,109	9,553	9,778	19,331
YoY		+8.1%	+4.4%	+6.1%	+6.8%	+6.2%	+6.1%	+6.3%	+2.3%	+7.2%	+3.5%	+6.2%	+4.8%	+4.4%	+4.9%	+6.7%	+0.8%	+3.6%
Gross profit	(millions of yen)	1,880	2,031	2,053	2,271	3,911	5,964	8,235	1,862	2,011	1,905	2,355	3,873	5,779	8,135	1,912	2,162	4,075
Gross margin		21.5%	22.5%	22.6%	24.0%	22.0%	22.2%	22.7%	20.8%	20.7%	20.3%	23.4%	20.8%	20.6%	21.3%	20.0%	22.1%	21.1%
YoY		+4.5%	+8.6%	(0.2%)	+6.8%	+6.6%	+4.2%	+4.9%	(0.9%)	(1.0%)	(7.2%)	+3.7%	(1.0%)	(3.1%)	(1.2%)	+2.7%	+7.5%	+5.2%
Operating income	(millions of yen)	795	1,188	1,253	1,393	1,983	3,237	4,630	867	1,212	1,092	1,487	2,079	3,172	4,660	747	1,329	2,077
Operating margin		9.1%	13.1%	13.8%	14.7%	11.1%	12.1%	12.7%	9.7%	12.5%	11.6%	14.8%	11.2%	11.3%	12.2%	7.8%	13.6%	10.7%
YoY		(7.6%)	+9.1%	(4.4%)	+4.1%	+1.7%	(0.8%)	+0.7%	+9.0%	+2.0%	(12.8%)	+6.8%	+4.8%	(2.0%)	+0.6%	(13.7%)	+9.6%	(0.1%)
EBITDA	(millions of yen)	920	1,318	1,386	1,512	2,239	3,625	5,137	997	1,383	1,265	1,667	2,380	3,646	5,313	989	1,506	2,496
EBITDA margin		10.5%	14.6%	15.3%	16.0%	12.6%	13.5%	14.1%	11.1%	14.3%	13.5%	16.6%	12.8%	13.0%	13.9%	10.4%	15.4%	12.9%
YoY		(6.4%)	+8.7%	(3.5%)	+3.1%	+1.9%	(0.2%)	+0.7%	+8.3%	+4.9%	(8.7%)	+10.3%	+6.3%	+0.6%	+3.4%	(0.7%)	+8.9%	+4.9%
Ordinary income	(millions of yen)	793	1,190	1,256	1,419	1,984	3,240	4,660	863	1,219	1,103	1,525	2,082	3,186	4,711	759	1,340	2,099
Ordinary income margin		9.1%	13.2%	13.9%	15.0%	11.2%	12.1%	12.8%	9.6%	12.6%	11.8%	15.2%	11.2%	11.4%	12.4%	7.9%	13.7%	10.9%
YoY		(7.7%)	+9.6%	(4.4%)	+6.2%	+1.9%	(0.6%)	+1.4%	+8.7%	+2.4%	(12.1%)	+7.5%	+5.0%	(1.7%)	+1.1%	(12.1%)	+9.9%	+0.8%
Profit	(millions of yen)	502	775	826	1,055	1,278	2,105	3,160	571	833	740	1,140	1,404	2,144	3,284	(516)	904	387
Net income margin		5.7%	8.6%	9.1%	11.1%	7.2%	7.8%	8.7%	6.4%	8.6%	7.9%	11.3%	7.5%	7.6%	8.6%	(5.4%)	+9.3%	+2.0%
YoY		(10.1%)	+12.0%	(4.1%)	+3.3%	+2.1%	(0.4%)	+0.8%	+13.7%	+7.4%	(10.5%)	+8.0%	+9.9%	+1.9%	+3.9%	(190.5%)	+8.6%	(72.4%)
Net assets	(millions of yen)	16,941	-	-	-	17,342	17,796	18,468	18,656	-	-	-	19,115	19,447	20,191	19,303	-	19,791
Total assets	(millions of yen)	22,951	-	-	-	24,060	24,389	25,611	25,061	-	-	-	25,902	25,593	27,052	25,189	-	25,754
Total number of issued shares	(thousands of shares)	32,241	-	-	-	32,241	32,241	32,241	32,241	-	-	-	32,241	32,241	32,241	32,241	-	32,241
Net assets per share	(yen)	-	-	-	-	-	-	579.15	-	-	-	-	-	-	633.09	-	-	-
Net income per share	(yen)	15.76	-	-	-	40.09	66.02	99.12	17.91	-	-	-	44.04	67.25	103.00	(16.21)	-	12.16
Ratio of shareholders' equity	(%)	73.8	-	-	-	72.1	73.0	72.1	74.4	-	-	-	73.8	76.0	74.6	76.6	-	76.8
Return on equity	(%)	3.0	-	-	-	7.5	12.2	17.9	3.1	-	-	-	7.5	11.3	17.0	(2.6)	-	1.9
New Graduate Hires	(People)	-	-	-	-	-	-	192	-	-	-	-	-	-	158	-	-	-
Experienced Hires	(People)	25	-	-	-	36	55	64	12	-	-	-	27	40	50	7	-	19
Personnel expense increase per employee	(%)	-	-	-	-	-	-	5.0	-	-	-	-	-	-	5.1	-	-	-
Employee attrition rate	(%)	1.1	-	-	-	2.5	3.6	5.5	2.0	-	-	-	3.8	5.5	7.3	2.0	-	4.1

- Figures for FY3/26 reflect the finalization of provisional accounting for the business combination, except for the balance sheet and related indicators for 1Q–3Q.

Results by Three Business Categories

	FY3/2025							FY3/2026							FY3/2027		
(millions of yen)	1Q	2Q	3Q	4Q	2Q(total)	3Q(total)	4Q(total)	1Q	2Q	3Q	4Q	2Q(total)	3Q(total)	4Q(total)	1Q	2Q	2Q(total)
Net sales	8,753	9,041	9,068	9,478	17,794	26,863	36,341	8,957	9,695	9,388	10,068	18,652	28,041	38,109	9,553	9,778	19,331
Technology	3,319	3,644	3,674	4,005	6,963	10,637	14,643	3,434	3,953	3,757	4,342	7,387	11,145	15,488	3,693	3,891	7,585
% to sales	37.9%	40.3%	40.5%	42.3%	39.1%	39.6%	40.3%	38.3%	40.8%	40.0%	43.1%	39.6%	39.7%	40.6%	38.7%	39.8%	39.2%
YoY	-	-	-	-	-	-	-	+3.5%	+8.5%	+2.3%	+8.4%	+6.1%	+4.8%	+5.8%	+7.5%	(1.6%)	+2.7%
Business Transformation	3,303	3,375	3,404	3,646	6,679	10,083	13,729	3,372	3,685	3,664	3,833	7,057	10,722	14,555	3,694	3,747	7,442
% to sales	37.7%	37.3%	37.5%	38.5%	37.5%	37.5%	37.8%	37.6%	38.0%	39.0%	38.1%	37.8%	38.2%	38.2%	38.7%	38.3%	38.5%
YoY	-	-	-	-	-	-	-	+2.1%	+9.2%	+7.6%	+5.1%	+5.7%	+6.3%	+6.0%	+9.6%	+1.7%	+5.4%
Managed Services & Education	2,130	2,021	1,990	1,825	4,151	6,141	7,967	2,150	2,056	1,966	1,892	4,207	6,173	8,065	2,165	2,138	4,303
% to sales	24.3%	22.4%	21.9%	19.3%	23.3%	22.9%	21.9%	24.0%	21.2%	20.9%	18.8%	22.6%	22.0%	21.2%	22.7%	21.9%	22.3%
YoY	+9.7%	+9.4%	+7.5%	+3.8%	+9.6%	+8.9%	+7.7%	+0.9%	+1.7%	(1.2%)	+3.6%	+1.3%	+0.5%	+1.2%	+0.7%	+4.0%	+2.3%
Cost of sales	6,873	7,009	7,015	7,206	13,883	20,898	28,105	7,094	7,684	7,482	7,712	14,779	22,261	29,974	7,641	7,615	15,256
Gross profit	1,880	2,031	2,053	2,271	3,911	5,964	8,235	1,862	2,011	1,905	2,355	3,873	5,779	8,135	1,912	2,162	4,075
Technology	706	817	847	935	1,523	2,371	3,307	746	825	729	1,034	1,571	2,301	3,336	727	883	1,610
Gross margin	21.3%	22.4%	23.1%	23.4%	21.9%	22.3%	22.6%	21.7%	20.9%	19.4%	23.8%	21.3%	20.7%	21.5%	19.7%	22.7%	21.2%
YoY	-	-	-	-	-	-	-	+5.6%	+1.0%	(13.9%)	+10.6%	+3.1%	(2.9%)	+0.9%	(2.5%)	+7.0%	+2.5%
Business Transformation	677	785	823	1,029	1,463	2,287	3,317	693	780	836	1,000	1,473	2,309	3,310	757	807	1,565
Gross margin	20.5%	23.3%	24.2%	28.2%	21.9%	22.7%	24.2%	20.6%	21.2%	22.8%	26.1%	20.9%	21.5%	22.7%	20.5%	21.5%	21.0%
YoY	-	-	-	-	-	-	-	+2.3%	(0.7%)	+1.5%	(2.9%)	+0.7%	+1.0%	(0.2%)	+9.3%	+3.4%	+6.2%
Managed Services & Education	495	428	381	305	923	1,305	1,610	423	405	339	320	828	1,168	1,489	426	472	899
Gross margin	23.3%	21.2%	19.2%	16.7%	22.3%	21.3%	20.2%	19.7%	19.7%	17.3%	17.0%	19.7%	18.9%	18.5%	19.7%	22.1%	20.9%
YoY	-	-	-	-	-	-	-	(14.6%)	(5.4%)	(11.0%)	+5.1%	(10.3%)	(10.5%)	(7.6%)	+0.9%	+16.6%	+8.6%

- Business categories have been revised beginning in FY3/27. Figures for FY3/26 and earlier have been reclassified based on the revised business categories.

Orders and Order Backlog

	FY3/2025							FY3/2026							FY3/2027		
(millions of yen)	1Q	2Q	3Q	4Q	2Q(total)	3Q(total)	4Q(total)	1Q	2Q	3Q	4Q	2Q(total)	3Q(total)	4Q(total)	1Q	2Q	2Q(total)
Orders	9,525	9,168	9,071	9,286	18,694	27,766	37,052	9,559	9,557	9,627	10,522	19,116	28,743	39,266	9,332	10,033	19,366
YoY	-	-	-	-	-	-	-	+0.4%	+4.2%	+6.1%	+13.3%	+2.3%	+3.5%	+6.0%	(2.4%)	+5.0%	+1.3%
Technology	3,016	3,411	3,743	3,912	6,428	10,172	14,084	3,386	3,827	4,159	4,321	7,213	11,373	15,694	3,790	4,110	7,900
% to sales	31.7%	37.2%	41.3%	42.1%	34.4%	36.6%	38.0%	35.4%	40.0%	43.2%	41.1%	37.7%	39.6%	40.0%	40.6%	41.0%	40.8%
YoY	-	-	-	-	-	-	-	+12.3%	+12.2%	+11.1%	+10.5%	+12.2%	+11.8%	+11.4%	+11.9%	+7.4%	+9.5%
Business Transformation	4,423	3,726	3,616	3,028	8,150	11,766	14,794	4,176	3,653	3,717	3,665	7,830	11,548	15,214	3,677	3,820	7,497
% to sales	46.4%	40.6%	39.9%	32.6%	43.6%	42.4%	39.9%	43.7%	38.2%	38.6%	34.8%	41.0%	40.2%	38.7%	39.4%	38.1%	38.7%
YoY	-	-	-	-	-	-	-	(5.6%)	(1.9%)	+2.8%	+21.0%	(3.9%)	(1.9%)	+2.8%	(12.0%)	+4.6%	(4.3%)
Managed Services & Education	2,084	2,030	1,712	2,345	4,114	5,827	8,172	1,995	2,076	1,749	2,535	4,072	5,821	8,357	1,864	2,102	3,967
% to sales	21.9%	22.1%	18.9%	25.3%	22.0%	21.0%	22.1%	20.9%	21.7%	18.2%	24.1%	21.3%	20.3%	21.3%	20.0%	21.0%	20.5%
YoY	+13.8%	+2.0%	+2.0%	+4.8%	+7.7%	+5.9%	+5.6%	(4.3%)	+2.3%	+2.2%	+8.1%	(1.0%)	(0.1%)	+2.3%	(6.6%)	+1.3%	(2.6%)
Order backlog	9,072	-	-	-	9,080	8,030	8,779	9,148	-	-	-	8,857	8,239	9,757	9,288	-	9,473
YoY	+26.6%	-	-	-	+14.3%	+12.2%	+1.9%	+0.8%	-	-	-	(2.5%)	+2.6%	+11.1%	+1.5%	-	+7.0%

- Order backlog reflects only the portion expected to contribute to sales in the current fiscal year.
  (For the full-year figure, order backlog reflects only the portion expected to contribute to sales in the following fiscal year.)
  Beginning with 3Q FY2026, the order backlog includes Human Interactive Technology Inc., which became a consolidated subsidiary at the end of June 2025.
- Business categories have been revised beginning in FY3/27. Figures for FY3/26 and earlier have been reclassified based on the revised business categories.

Balance Sheet

	FY3/2025				FY3/2026				FY3/2027	
(millions of yen)	30-Jun	30-Sep	31-Dec	31-Mar	30-Jun	30-Sep	31-Dec	31-Mar	30-Jun	30-Sep
Current assets	18,654	19,456	19,707	20,843	18,685	19,441	19,084	18,776	18,324	19,581
Cash and deposits	11,879	10,842	12,418	12,881	11,186	11,841	11,598	10,826	10,809	12,025
Notes and accounts receivable-trade	5,903	7,915	6,480	7,178	6,364	6,727	6,629	7,481	6,926	7,133
Work in process	215	198	287	128	362	218	324	78	0	0
Other current assets	656	499	521	655	772	654	531	390	588	421
Non-current assets	4,297	4,603	4,682	4,767	6,376	6,461	6,509	8,276	6,864	6,173
Property, plant and equipment	680	834	802	859	849	820	785	753	727	734
Intangible assets	1,632	1,778	1,908	2,024	3,322	3,410	3,512	3,589	1,966	1,801
Investments and other assets	1,983	1,990	1,971	1,883	2,203	2,230	2,211	3,933	4,171	3,636
Total assets	22,951	24,060	24,389	25,611	25,061	25,902	25,593	27,052	25,189	25,754

	FY3/2025				FY3/2026				FY3/2027	
(millions of yen)	30-Jun	30-Sep	31-Dec	31-Mar	30-Jun	30-Sep	31-Dec	31-Mar	30-Jun	30-Sep
Current liabilities	5,264	5,911	5,811	6,590	5,749	6,120	5,482	6,220	5,252	5,385
Accounts payable-trade	1,792	1,884	1,945	1,976	2,056	1,952	1,943	1,922	1,825	1,740
Short-term loans payable	200	200	200	200	200	200	200	200	200	200
Provision for bonuses	813	1,604	950	1,572	860	1,680	874	1,693	888	1,726
Other current liabilities	2,458	2,222	2,715	2,841	2,632	2,288	2,464	2,404	2,338	1,718
Non-current liabilities	745	805	782	552	655	666	663	640	632	577
Asset retirement obligations	311	363	364	447	461	461	462	462	463	463
Other non-current liablities	434	441	418	105	193	204	201	177	169	113
Total liabilities	6,010	6,717	6,593	7,143	6,404	6,787	6,146	6,860	5,885	5,962
Capital stock	1,022	1,022	1,022	1,022	1,022	1,022	1,022	1,022	1,022	1,022
Capital surplus	3,652	3,662	3,662	3,662	3,662	3,674	3,674	3,674	3,674	3,684
Retained earnings	12,363	12,757	13,201	13,874	14,062	14,494	14,833	15,580	14,693	15,183
Treasury shares	(103)	(102)	(102)	(102)	(102)	(99)	(99)	(99)	(99)	(97)
Valuation and translation adjustments	7	2	11	11	11	24	17	14	13	(1)
Total net assets	16,941	17,342	17,796	18,468	18,656	19,115	19,447	20,191	19,303	19,791
Total liabilities and net assets	22,951	24,060	24,389	25,611	25,061	25,902	25,593	27,052	25,189	25,754

- Figures as of the end of June, September, and December in FY3/26 are as originally reported under provisional accounting for the business combination.

Statement of Income

	FY3/2025							FY3/2026							FY3/2027		
(millions of yen)	1Q	2Q	3Q	4Q	2Q(total)	3Q(total)	4Q(total)	1Q	2Q	3Q	4Q	2Q(total)	3Q(total)	4Q(total)	1Q	2Q	2Q(total)
Net sales	8,753	9,041	9,068	9,478	17,794	26,863	36,341	8,957	9,695	9,388	10,068	18,652	28,041	38,109	9,553	9,778	19,331
Cost of sales	6,873	7,009	7,015	7,206	13,883	20,898	28,105	7,094	7,684	7,482	7,712	14,779	22,261	29,974	7,641	7,615	15,256
Gross profit	1,880	2,031	2,053	2,271	3,911	5,964	8,235	1,862	2,011	1,905	2,355	3,873	5,779	8,135	1,912	2,162	4,075
SG&A expenses	1,084	842	799	877	1,927	2,727	3,604	995	798	813	867	1,793	2,606	3,474	1,164	833	1,997
Operating income	795	1,188	1,253	1,393	1,983	3,237	4,630	867	1,212	1,092	1,487	2,079	3,172	4,660	747	1,329	2,077
Non-operating income	1	2	2	26	4	7	34	2	7	11	38	9	21	59	11	19	31
Non-operating expenses	3	1	0	0	4	4	5	6	1	0	0	7	8	8	0	8	9
Ordinary income	793	1,190	1,256	1,419	1,984	3,240	4,660	863	1,219	1,103	1,525	2,082	3,186	4,711	759	1,340	2,099
Profit before income taxes	792	1,187	1,256	1,350	1,980	3,236	4,586	863	1,219	1,103	1,525	2,082	3,186	4,711	(675)	1,401	725
Income taxes	290	411	429	294	701	1,131	1,425	292	386	363	385	678	1,041	1,426	(158)	497	338
Profit attributable to owners of parent	502	775	826	1,055	1,278	2,105	3,160	571	833	740	1,140	1,404	2,144	3,284	(516)	904	387

- Beginning in FY3/27, the Company changed the method of recognizing revenue for certain projects.
- Figures for FY3/26 reflect the finalization of provisional accounting for the business combination.

Stock Information

Stock status (As of September 30, 2026)

Total number of authorized shares	104,400,000 shares
Total number of issued shares	32,241,600 shares
Number of shareholders	27,493

Stock price trends (1 year)



Shareholder composition

	31-Dec-25			31-Mar-26			30-Jun-26			30-Sep-26		
	No. of shareholders	No. of shares held	Shareholding ratios	No. of shareholders	No. of shares held	Shareholding ratios	No. of shareholders	No. of shares held	Shareholding ratios	No. of shareholders	No. of shares held	Shareholding ratios
Financial institutions	11	4,991,500	15.5%	10	4,230,100	13.1%	10	4,131,400	12.8%	10	3,821,700	11.9%
Securities firms	33	1,297,422	4.0%	32	772,882	2.4%	35	1,810,834	5.6%	31	844,845	2.6%
Other entities	71	7,600,069	23.6%	83	7,598,506	23.6%	75	7,553,654	23.4%	121	7,579,850	23.5%
Foreign entities, etc.	150	8,992,753	27.9%	137	9,576,351	29.7%	141	8,454,664	26.2%	163	7,849,107	24.3%
Individuals and others	11,277	9,011,484	27.9%	13,063	9,715,389	30.1%	13,248	9,942,426	30.8%	27,167	11,802,856	36.6%
Treasury shares	1	348,372	1.1%	1	348,372	1.1%	1	348,622	1.1%	1	343,242	1.1%
Total	11,543	32,241,600	100.0%	13,326	32,241,600	100.0%	13,510	32,241,600	100.0%	27,493	32,241,600	100.0%

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