Financial Results Presentation for the Six Months Ended September 30, 2026

October 28, 2026
OBIC Co.,Ltd.

Organization for Business Innovation and Communication

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- 2QFY March 2027 Results
- Recent Initiatives
- FY March 2027 Forecasts

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Financial Results (consolidated)

- Double-digit growth was achieved across all profit metrics, setting a new record high.
- Driven by high profitability, EPS also grew steadily to 121.5% compared to the previous period.

(million)

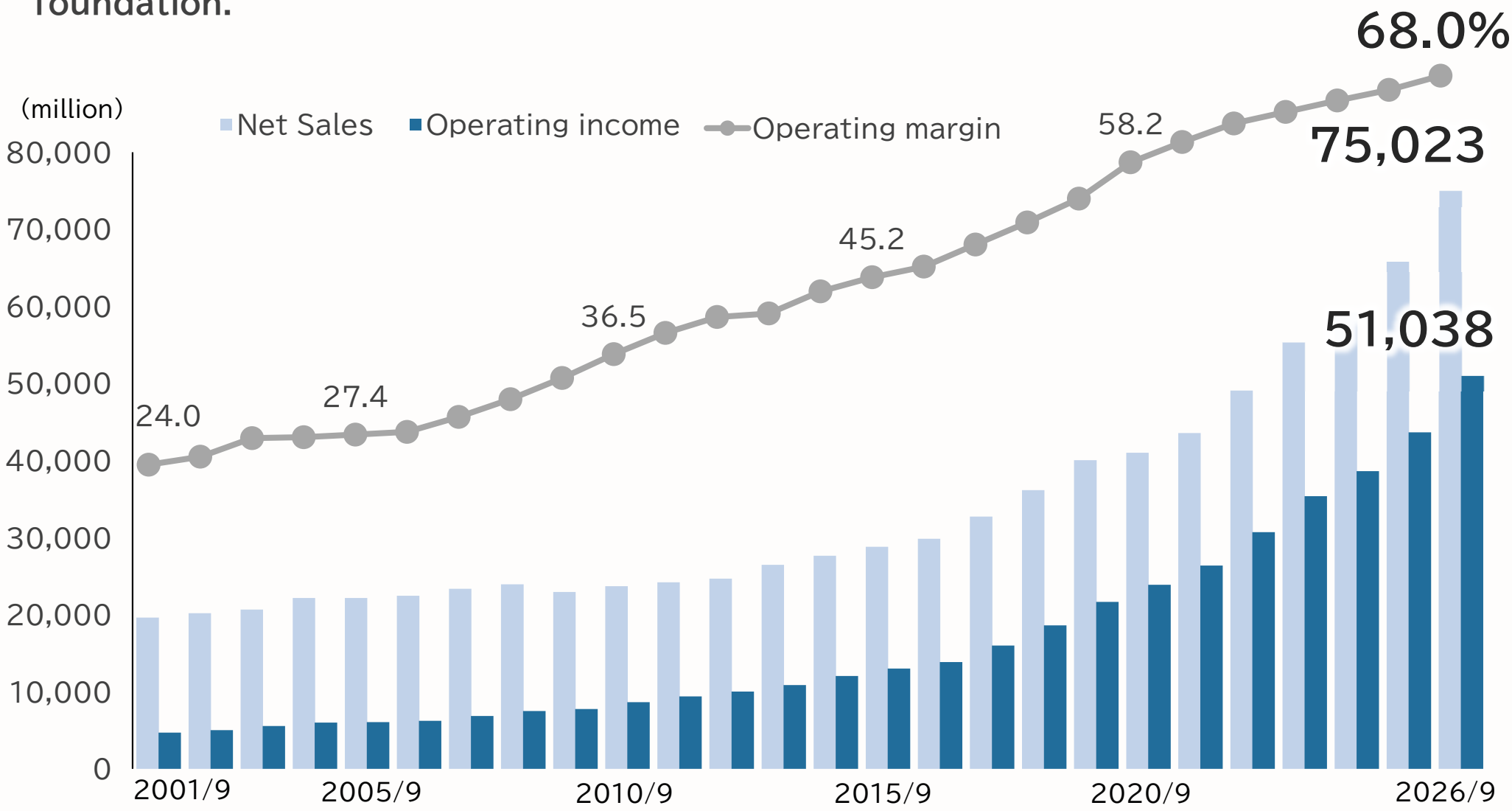
	2025/9	2026/9	YoY
Net sales	65,784	75,023	114.0%
Operating income	43,655	51,038	116.9%
Ordinary income	52,228	62,826	120.3%
Net income	37,303	44,383	119.0%
Basic Earnings per share (EPS) (yen)	84.80	103.00	121.5%
Average number of total shares Outstanding (thousands)	439,901	430,923	-

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Sustainable Growth Capability

- First half operating income achieved 26 consecutive periods of growth, and the operating margin reached a new record high.
- Sustainable growth was achieved through the expansion of our solid business foundation.



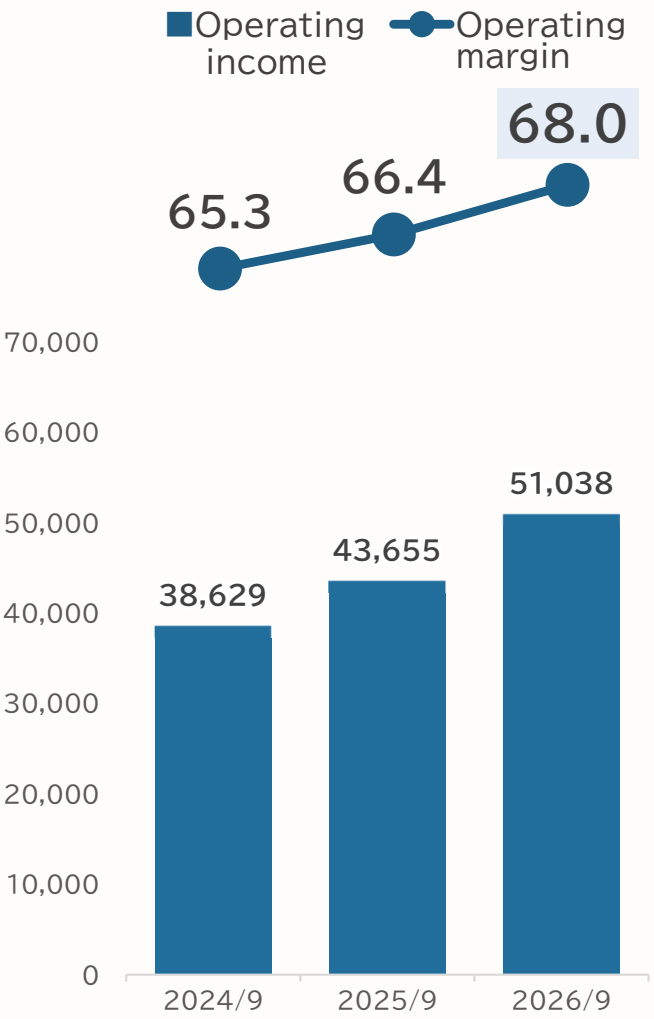
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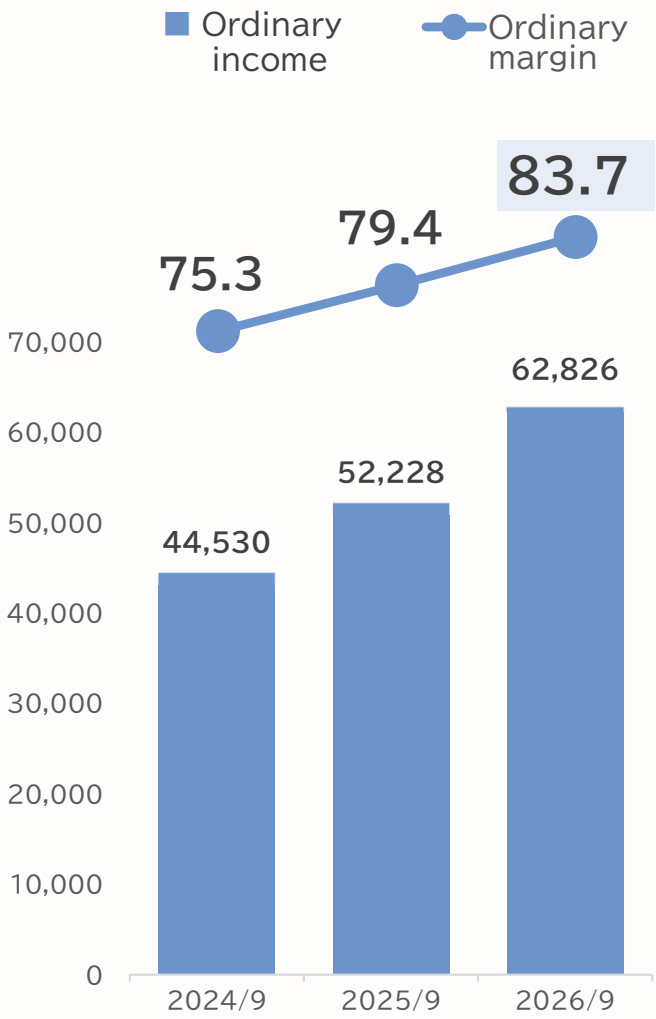
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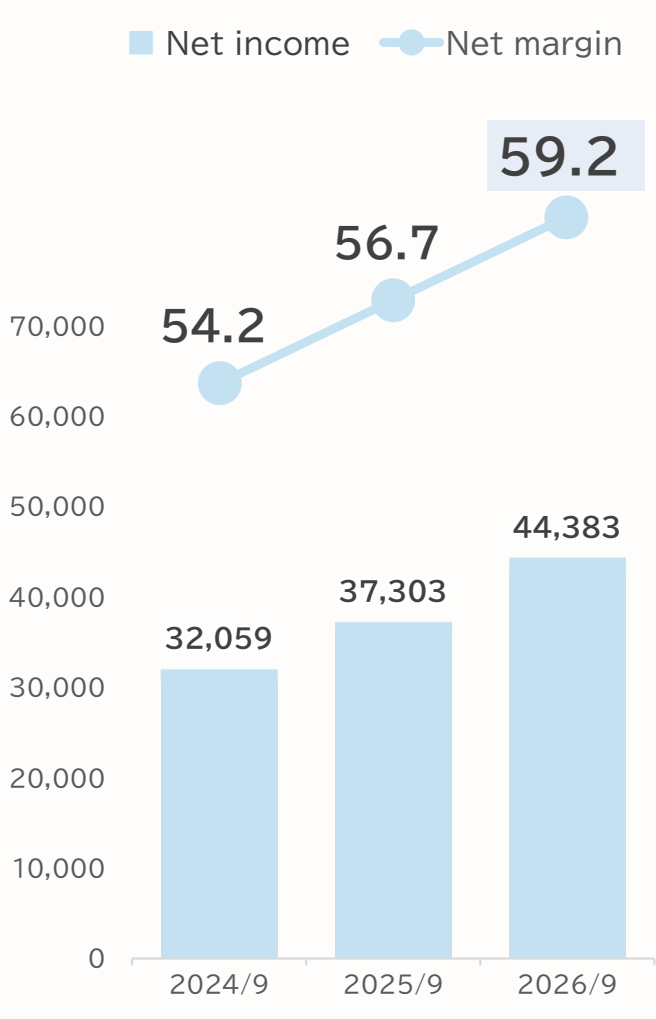
Profitability

- By enhancing our ability to offer value-added proposals to large and mid-sized enterprises and rigorous profit management, margins reached record highs across all profit metrics.

(million)





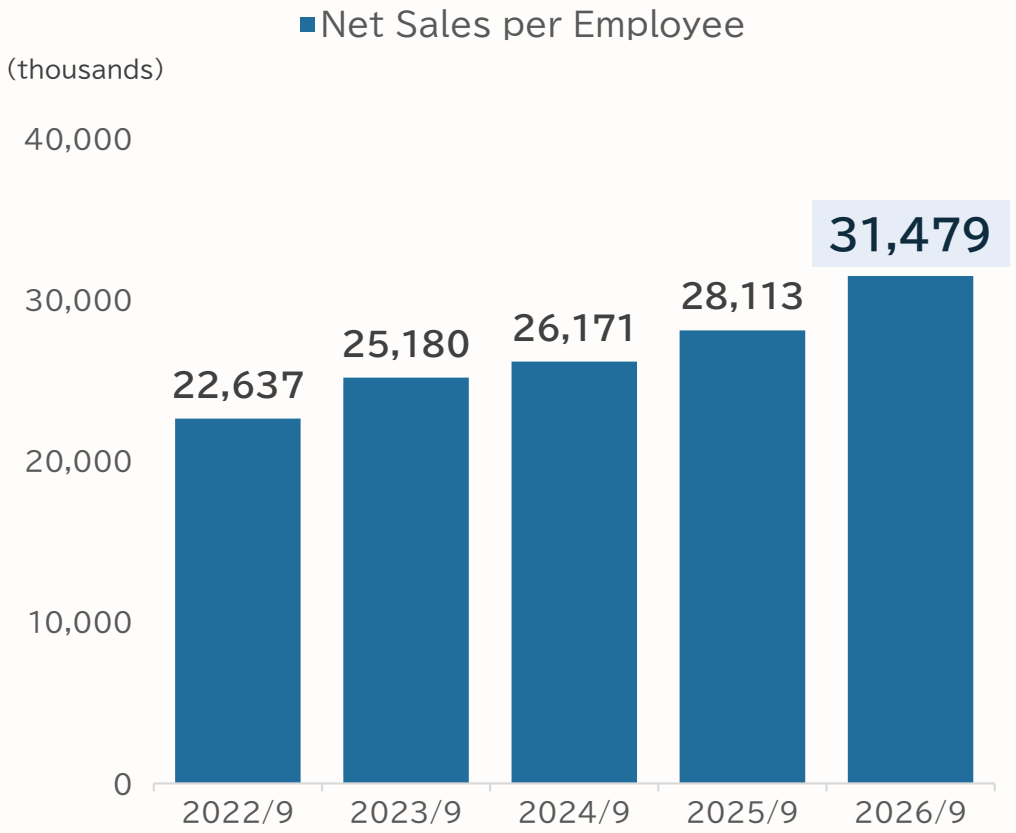


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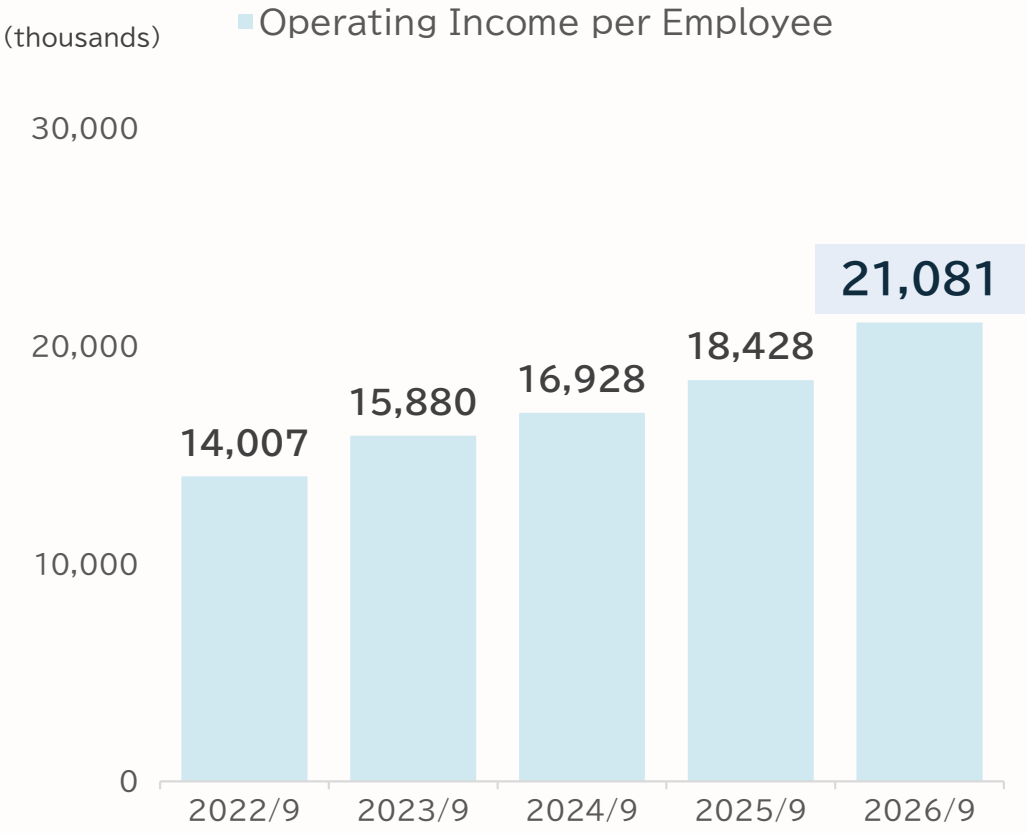
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Productivity

- Through the accumulation of the abundant industry and business know-how and the thorough utilization of our proprietary AI throughout the company, net sales and operating income per employee have continued to grow.



*Calculated based on the average number of employees during the period



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Business Results by Segment

- Sales and income increased across all segments, and profitability improved.
- Our core SI and SS businesses posted double-digit growth in both revenue and profit, driving our financial performance.

(million)

		2025/9	2026/9	YoY
SI	Sales	27,330	**30,642**	112.1%
	Operating income	16,686	**19,330**	115.8%
	Operating margin	61.1%	**63.1%**	
SS	Sales	34,499	**40,087**	116.2%
	Operating income	25,621	**30,010**	117.1%
	Operating margin	74.3%	**74.9%**	
OA	Sales	3,955	**4,293**	108.6%
	Operating income	1,347	**1,697**	126.0%
	Operating margin	34.1%	**39.5%**	
Total	Sales	65,784	**75,023**	114.0%
	Operating income	43,655	**51,038**	116.9%
	Operating margin	66.4%	**68.0%**	

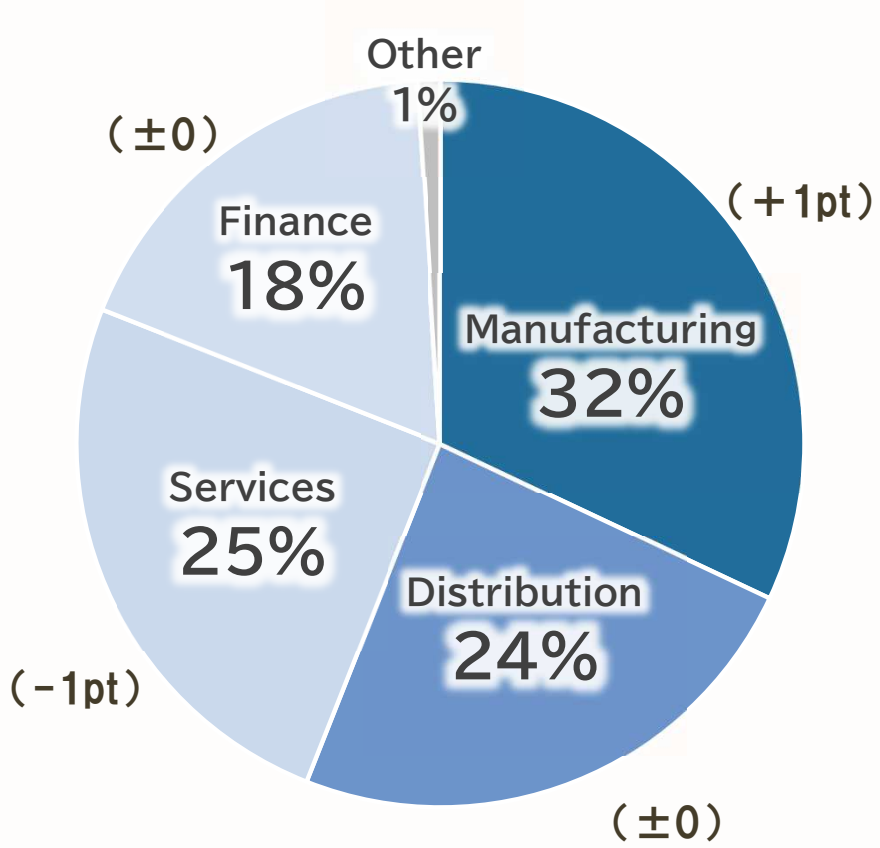
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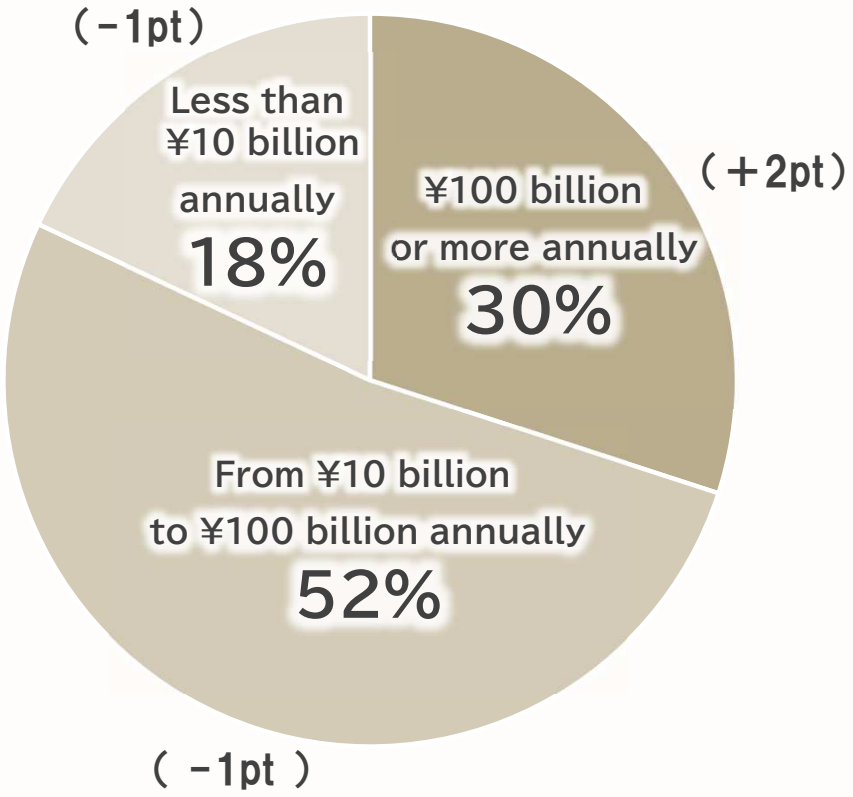
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Trends by Industry and Company Size

- Increased inquiries from major enterprises with annual sales exceeding 100 billion yen.
- Maintain a stable business structure that is resilient to economic fluctuations through well-balanced diversification across a wide range of industries.

＊System Integration Sales Composition Ratio
( ):YoY



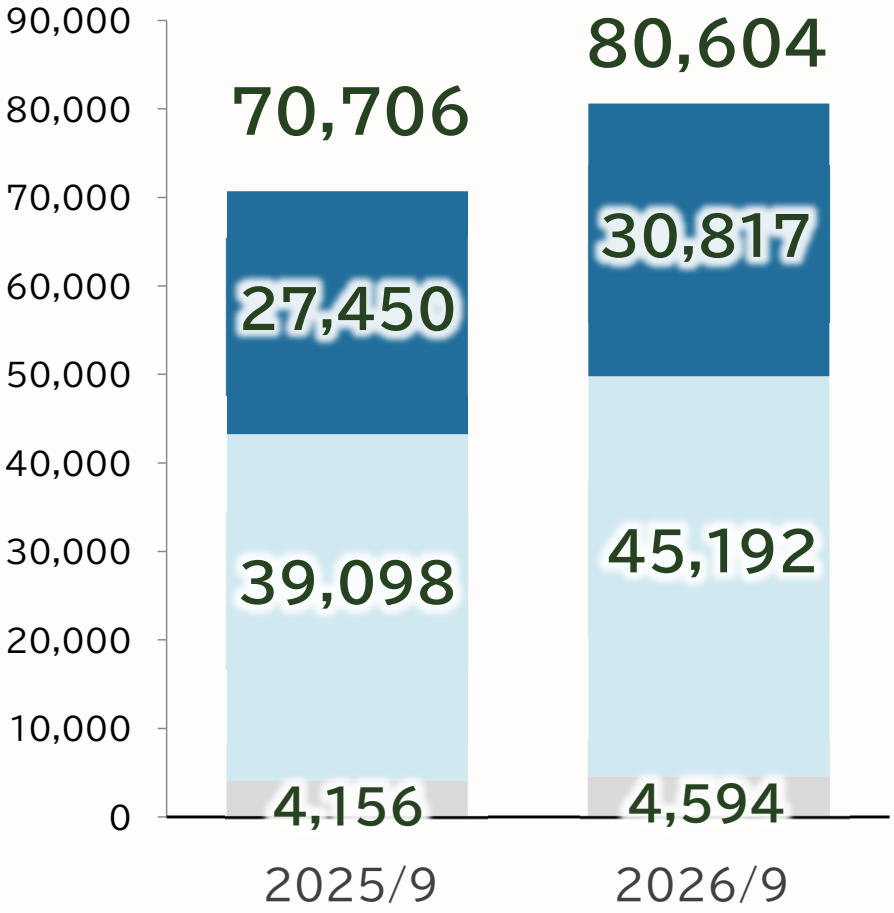


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Consolidated Segment Orders Received

- Orders remained strong across all segments, achieving double-digit growth overall.
- Enhancing the earnings foundation to drive further business expansion, with a focus on the SS business.



	YoY
SI	112.3%
SS	115.6%
OA	110.5%
Total	114.0%

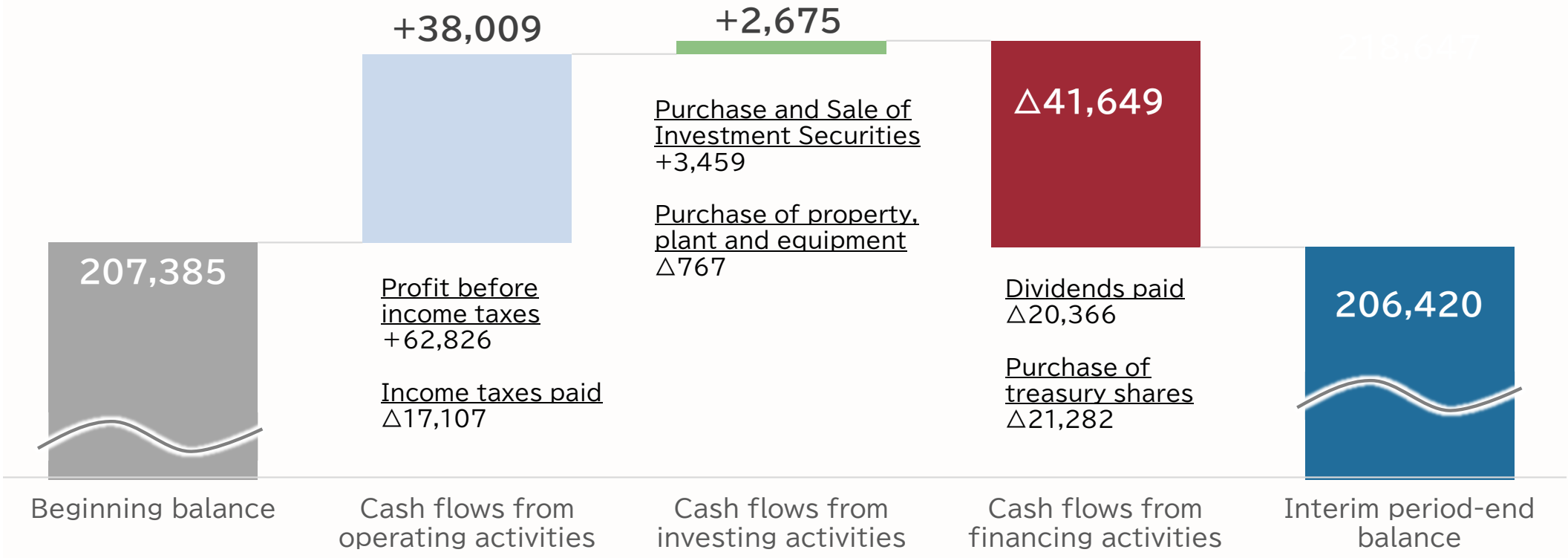
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Consolidated Cash Flow

- Generating ¥38 billion in operating cash flow driven by steady growth in core business.
- Active shareholder returns through dividends and share repurchases.

（million）



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Intellectual Property Strategy – AI Policy-

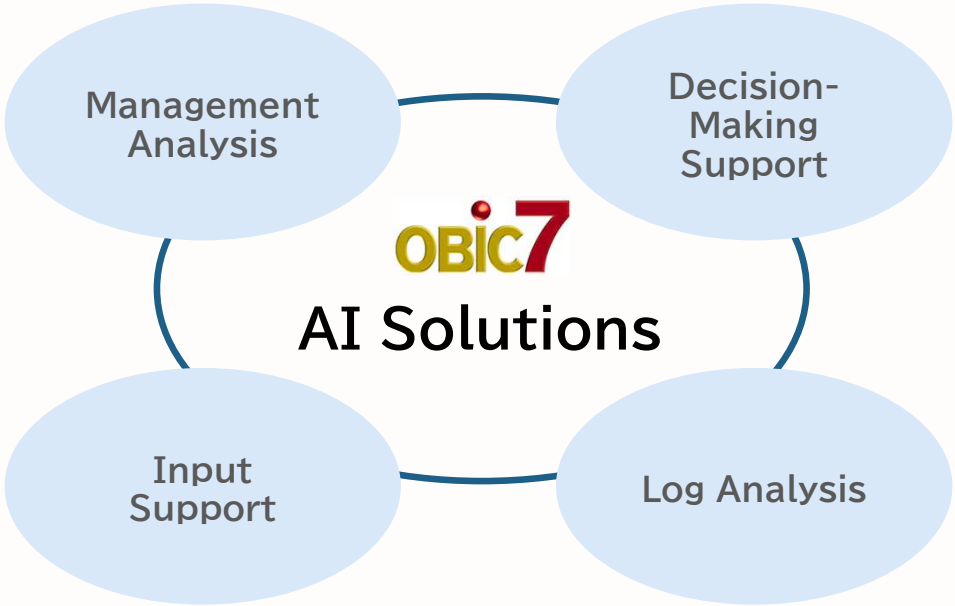
- Accelerating thorough utilization of AI in the company to establish a unique competitive advantage and create high added value.

-By combining AI technology with the abundant industry and business know-how accumulated through our in-house development and direct sales, we are accelerating improvements in service quality and productivity.

-Through thorough in-house practice, we are driving initiatives aimed at realizing ”AI-driven development” in the future. By delivering prompt solutions that capture customer needs, we will create even greater added value.

Thorough utilization of AI in the company	
Marketing Sales	Improving the Quality of Proposals
Product Development	Faster Development and Improved Quality
Customer Support	Improving Support Quality and Customer Satisfaction

Provision to client companies



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Intellectual Property Strategy – Internal AI Utilization-

- Achieving secure, cost-effective company-wide AI utilization powered by in-house private GPU infrastructure and open-weight models.

【High Security】
Mitigating the risk of confidential data and know-how leaks through on-premises operation with in-house GPU infrastructure

【Cost Optimization】
Eliminating usage-based token costs as utilization expands by leveraging open-weight models

Thorough utilization of AI in the company				OBIC AI
Marketing Sales	Improving the Quality of Proposals	Strategy formulation	Market research	Hypothesis verification for proposal scenarios and approach strategies
		Support for proposal preparation	Automatic Generation of Meeting Minutes	Schedule and task management serving as a ”virtual executive assistant”
Product Development	Faster Development and Improved Quality	Support for preparing design documents	Automatic program generation	Automated code generation via prompt instructions and establishment of an SE review/quality inspection system
		Quality check	Test automation	
Customer Support	Improving Support Quality and Customer Satisfaction	Faster response to inquiries	Analysis of customer churn risk	Instant automated generation of FAQ and support knowledge tailored to legal and tax revisions
		Internal information search	Creation of support articles	Standardization and acceleration of support quality based on trend analysis of past inquiry histories

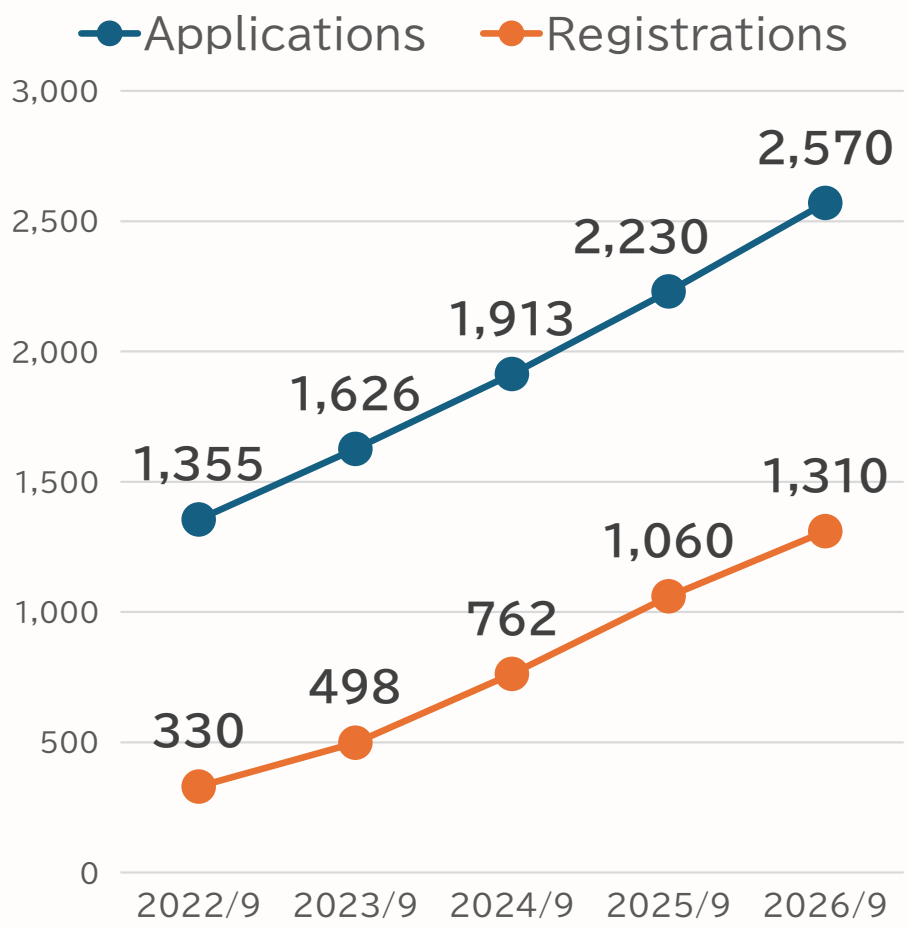
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Intellectual Property Strategy - AI × Patents for Clients-

- We are building a portfolio of AI-related patents that help solve our customers' business challenges and driving further improvements in our ability to offer value-added solutions.

Number of Patents (Cumulative)



Case Studies of AI-Related Patents

(For Clients)

- ✓Forecast simulation of future financial results
- ✓Automated detection of safety stock fluctuations and optimal inventory simulation
- ✓Automated detection of anomalies/deviations from historical performance in project progress
- ✓AI-enabled negotiation support function for optimal price adjustments with clients following supplier price revisions

(In-house)

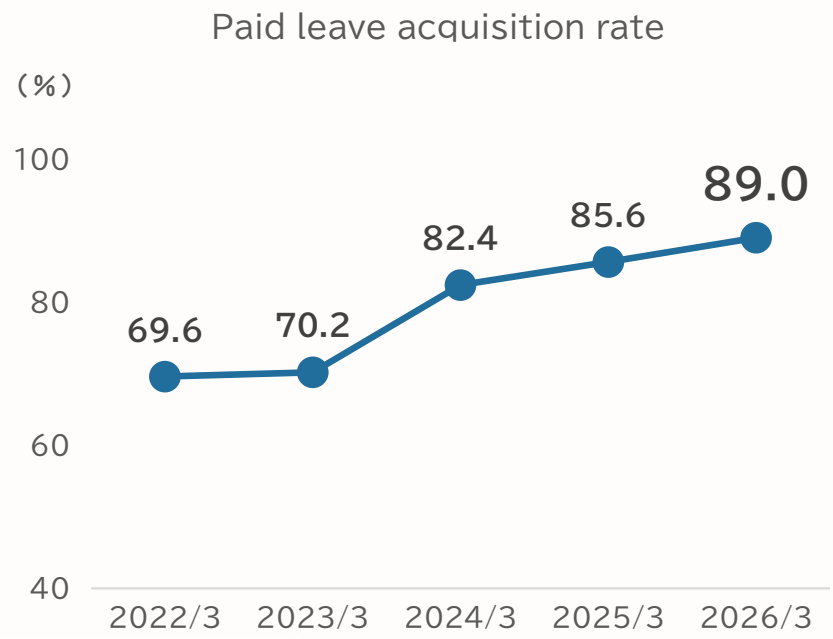
- ✓Customer inquiry forecasting in anticipation of legal revisions

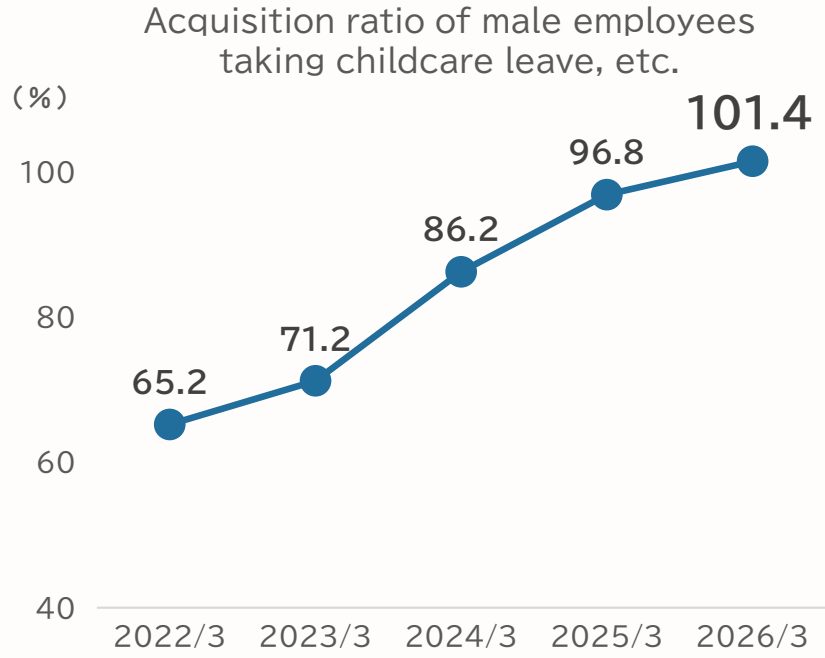
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Toward Productivity Improvement

- Setting a target of 100% for paid leave acquisition rate and acquisition ratio of male employees taking childcare leave, etc., we promote both work-life balance enhancement and productivity improvement.





2026 健康経営優良法人 KENKO Investment for Health 大規模法人部門 ホワイト500

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FY March 2027 (Full-year)

- In light of strong recent performance trends, we have revised our full-year earnings forecasts upward.
- We will maximize corporate value by enhancing value-added services through the use of AI and other technologies.

(million)

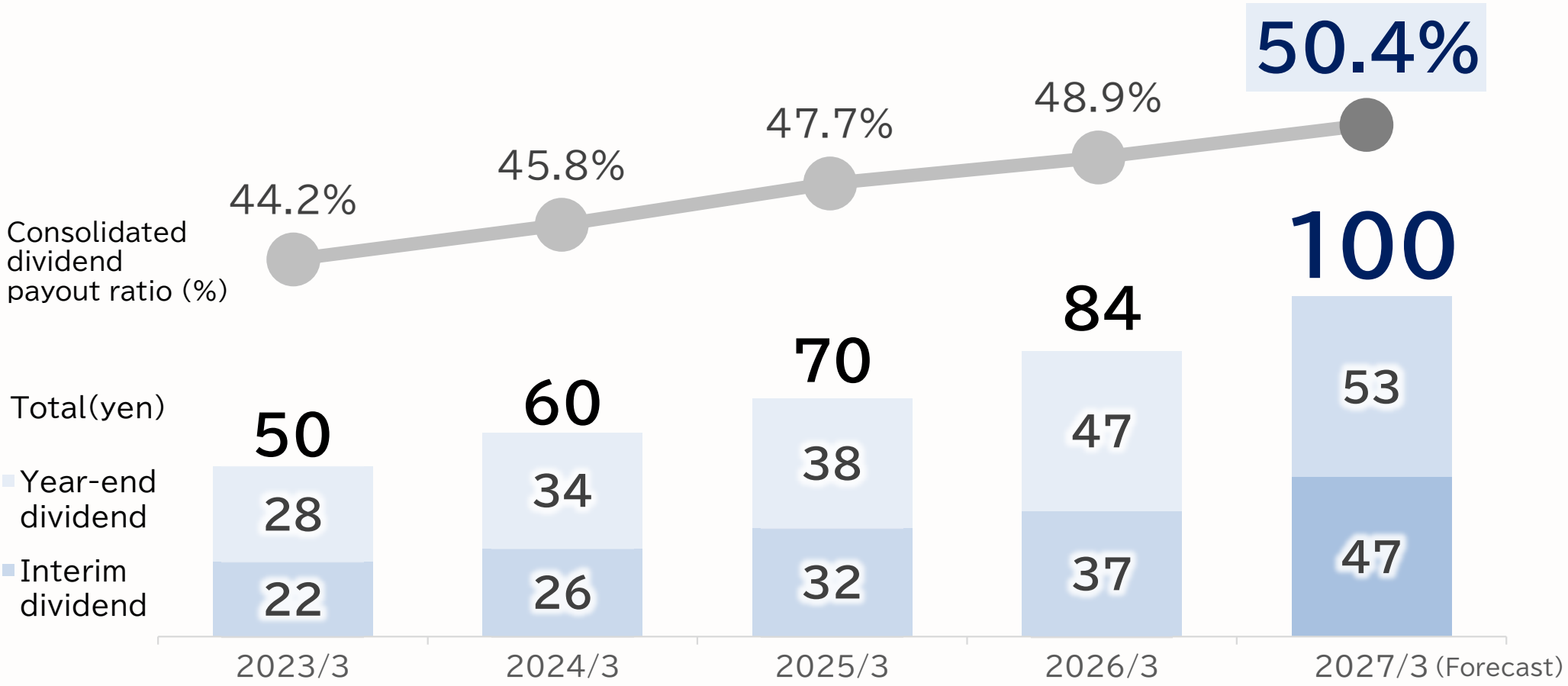
	Previous forecast (A)	YonY (A)	Margin (A)	Change (B)-(A)	Revised forecast (B)	YonY (B)	Margin (B)
Net sales	148,700	110.0%	-	+2,500	151,200	111.8%	-
Operating income	98,000	110.3%	65.9%	+2,500	100,500	113.1%	66.5%
Ordinary income	114,500	109.3%	77.0%	+5,500	120,000	114.5%	79.4%
Net income	82,000	109.1%	55.1%	+3,000	85,000	113.0%	56.2%

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Enhancing Shareholder Returns -Dividends-

- Annual dividend planned at ¥100 for FY ending March 2027, up ¥6 from the initial plan.
- We will steadily improve our consolidated dividend payout ratio and promote proactive profit distribution.



Note: On October 1, 2024, the Company conducted a 5-for-1 share split of its common shares.
Dividends amount is calculated assuming that the share split was conducted at the beginning of each FY from FY2023 - FY2025.

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Basic Management Policies

Management focus on both quantity and quality

- Emphasis on compliance

Efficient management

- Promotion of innovation management
- Selection and concentration
  Persistence is the key to achieve corporate growth

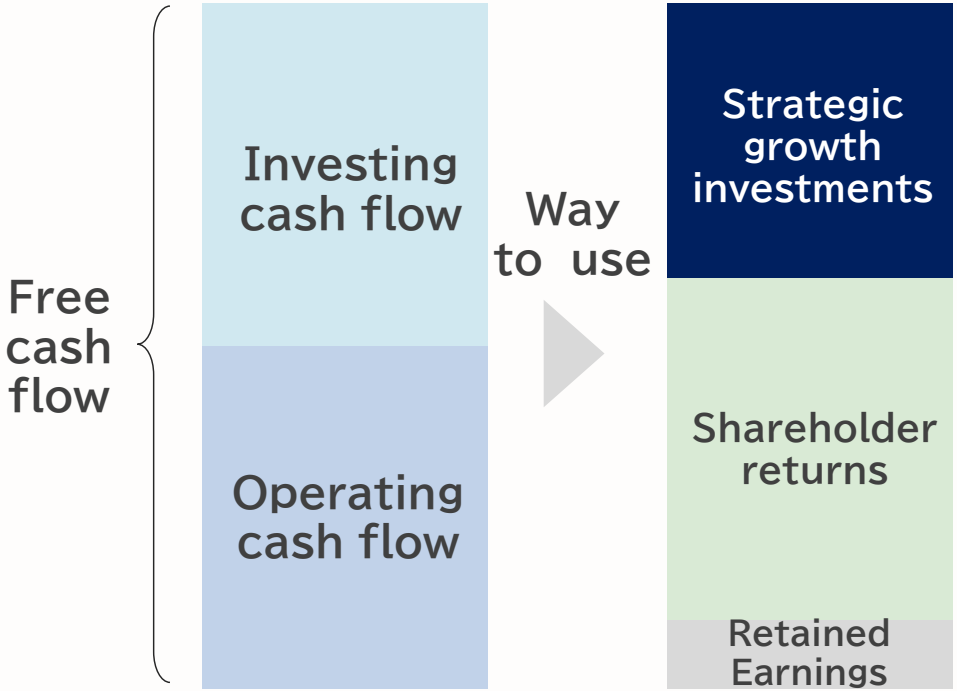
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Capital Allocation

With the aim of sustainably enhancing corporate value, we will make investment in growth areas that offer profitability above the cost of capital the top priority in our capital allocation.
We will first allocate free cash flow (FCF) generated from business activities to strategic growth investments in human resources, the cloud, AI, and other areas to strengthen our future competitive advantage, while also enhancing shareholder returns.

Looking at shareholder returns, we will work to maintain and improve our consolidated dividend payout ratio based on stable and continuous dividends.
Funds remaining after dividend payments will be used for flexible share repurchases and other measures to improve capital efficiency and maximize shareholder value.



<Core Areas>
- ✓ Human capital investment (recruitment, employee development, and expansion of human capital)
- ✓ Cloud investment (data centers, server procurement)
- ✓ AI R&D, etc.

<Fiscal year ending march 2027 plan>

✓ Annual dividend per share	100 yen
✓ Repurchase of own shares	10 million shares,
(upper limit)	50 billion yen
✓ Cancellation of treasury shares	16 million shares
✓ Consolidated dividend payout ratio	50.4%
✓ Consolidated Total payout ratio	111.4%

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- Appendix -

Overview of Group Companies (As of Sep 30, 2026)

	Established	Paid-in capital	Number of employees
OBIC CO., Ltd	Apr. 1968	¥19.17billion	2,122
Consolidated subsidiaries			
OBIC Office Automation Co., Ltd.	Nov.1979	¥320million	235

Number of employees (consolidated) 2,357

Equity-method affiliates			
OBIC Business Consultant Co., Ltd.	Dec. 1980	¥10.51billion	1,155

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Such forward-looking statements are not guarantees of future performance and involve risks and uncertainties.
Actual results may differ from those in the forward-looking statements as a result of various factors.
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