



Results for the 3rd Quarter of FY March 2026

February 4, 2026
BIPROGY Inc.



BIPROGY

| Foresight in sight

1 Acquisition of Catalina Marketing Japan K.K. as a Subsidiary

2 Summary of the Results for Q3 FY March 2026

3 Full-Year Performance Forecast for FY March 2026

Reference Information

- CMJ operates one of the largest retail media network in Japan (AOUMI) *1 that connects consumers, retailers and manufacturers. The company promotes marketing innovation for the entire distribution industry.
- CMJ has seen the network rapidly expanding in the markets of food supermarket, drug stores and home centers for the past two years.



Network Size

13,000
shops



Network user
ID count

150
million IDs



Network purchase
amount

14
trillion
yen

Collaborating with 120 or more retailers in 47 prefectures across the nation

**248 marketing business specialists
in total become part of
the BIPROGY Group**



**President & CEO
Sean Chu**



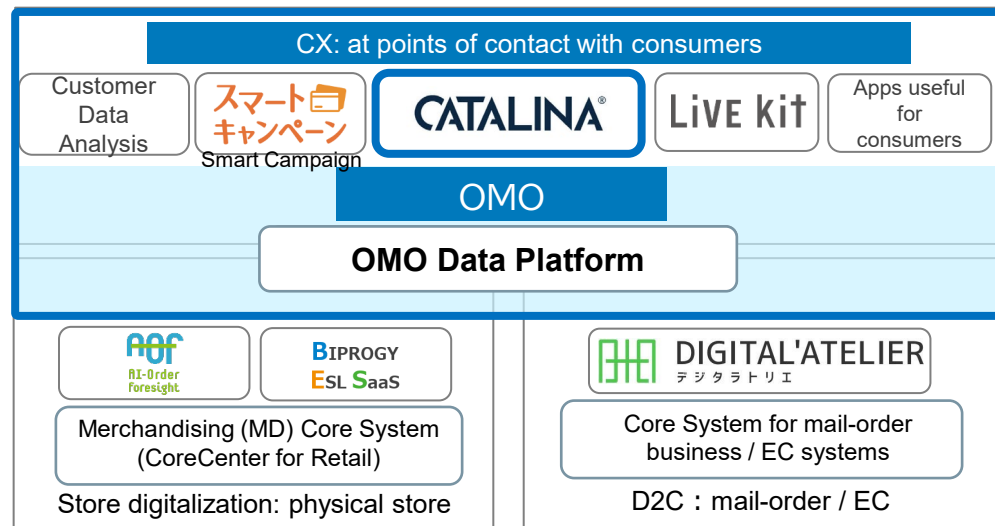
**Executive Vice
President & COO
Isao Matsuda**

Synergies Created by CMJ and BIPROGY

Promote the building of "consumer driven distribution demand chain"
through the collaboration between CMJ and BIPROGY

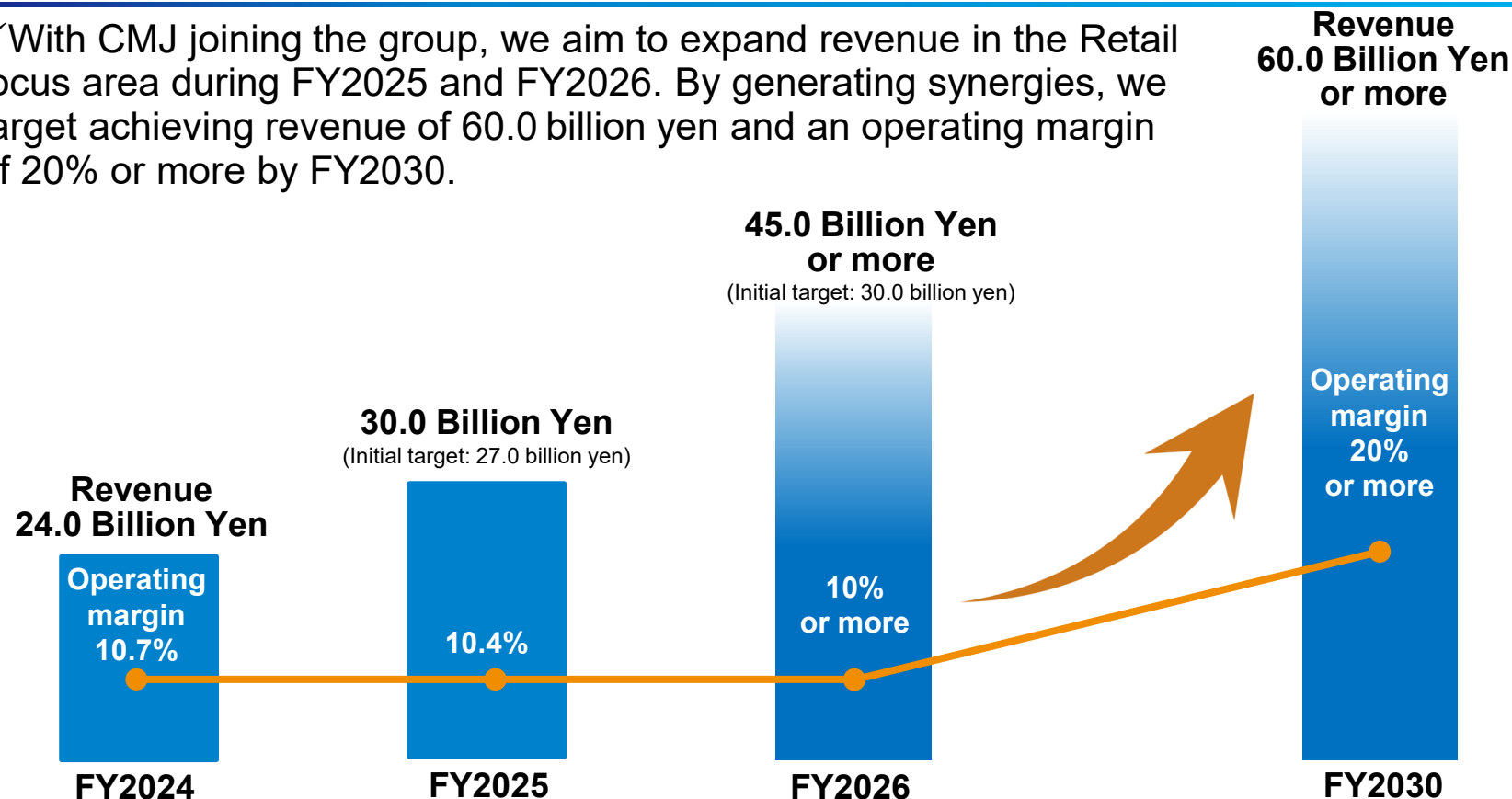
| | |
|------------------------|--|
| Social Problems | The retail and distribution sectors are facing challenges such as decreasing demand, labor shortages, diversification of consumer needs, and food loss |
| GOAL | Establish a platform to enhance the entire distribution industry based on needs and demands of consumers and communities |

Four key areas in Retail (CX / OMO / Store digitalization / D2C)
CMJ collaborates across all areas, with growth centered on CX and OMO



FY2030 Target Scale for Retail Focus Area

✓With CMJ joining the group, we aim to expand revenue in the Retail focus area during FY2025 and FY2026. By generating synergies, we target achieving revenue of 60.0 billion yen and an operating margin of 20% or more by FY2030.



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FY March2026 Q3 (Apr-Dec) Consolidated Performance Results

- ✓ Revenue increased due to continued strong performance in system services as well as product sales such as network devices and servers.
- ✓ Operating profit was boosted by an increase in gross profit enabled by higher revenue, which absorbed an increase in SG&A expenses.
- ✓ Orders for system services and outsourcing increased. Order backlogs to be posted as revenue within the fiscal year also steadily accumulated.

(Unit : Billion Yen)

| | FY March 2025 Q3 (Apr-Dec) | FY March 2026 Q3 (Apr-Dec) | YoY | |
|---|-------------------------------|-------------------------------|----------|----------|
| Revenue | 279.3 | 306.8 | +27.6 | (+9.9%) |
| Gross profit | 72.7 | 81.9 | +9.3 | (+12.7%) |
| SG&A expenses | -48.4 | -51.1 | -2.7 | (+5.6%) |
| Share of profit (loss) of investments accounted for using equity method / Other income and expenses | 0.9 | -0.5 | -1.4 | |
| Operating profit | 25.2 | 30.3 | +5.2 | (+20.6%) |
| (Operating margin) | (9.0%) | (9.9%) | (+0.9pt) | |
| Profit attributable to owners of parent | 17.5 | 22.2 | +4.8 | (+27.4%) |
| Adjusted operating profit* | 24.3 | 30.8 | +6.6 | (+27.0%) |
| (Adjusted operating margin) | (8.7%) | (10.1%) | (+1.4pt) | |
| Orders | 281.6 | 302.0 | +20.4 | (+7.3%) |
| Order backlogs | 292.2 | 285.0 | -7.2 | (-2.4%) |
| (Order backlogs in the current FY) | 86.6 | 89.3 | +2.7 | (+3.1%) |

* Adjusted operating profit is the result obtained after deducting cost of sales and SG&A expenses from revenue.

(Revenue)

System services and product sales took the lead in increasing the revenue.

(Gross Profit)

Gross profit rose on the basis of the increase in revenue.

(SG&A expenses)

Personnel expenses and R&D expenses remained within plan. General expenses increased, partly due to ¥0.5 billion in acquisition-related costs. (Personnel expenses up by ¥1.8 billion, R&D expenses up by ¥0.5 billion, and general expenses up by ¥1.2 billion)

(Share of profit (loss) of investments accounted for using equity method / Other income and expenses)

An impairment loss of ¥1.3 billion on intangible assets related to an unprofitable project was recorded under other expenses.

(Operating Profit)

Operating profit grew, with the strong gross profit absorbing the increase in SG&A expenses and other expenses.

(Orders and Order Backlogs)

Strong system services and outsourcing increased orders. Order backlogs to be posted as revenue within the fiscal year also steadily accumulated.



FY March2026 Q3 (Apr-Dec) Revenue and Gross Profit by Segment

[Revenue and Gross Profit (Gross Margin) by Segment]

(Unit : Billion Yen)

| | FY March 2025 Q3 (Apr-Dec) | | FY March 2026 Q3 (Apr-Dec) | | YoY | | | |
|------------------|-------------------------------|--------------------------------|-------------------------------|--------------------------------|---------|----------|--------------------------------|---------------|
| | Revenue | Gross Profit (Gross Margin) | Revenue | Gross Profit (Gross Margin) | Revenue | | Gross Profit (Gross Margin) | |
| System services | 93.5 | 31.9 (34.1%) | 100.5 | 35.5 (35.4%) | +7.0 | (+7.5%) | +3.6 (+1.2pt) | (+11.3%) - |
| Support services | 42.8 | 14.3 (33.4%) | 44.2 | 13.9 (31.5%) | +1.3 | (+3.1%) | -0.4 (-1.9pt) | (-2.9%) - |
| Outsourcing | 62.4 | 13.4 (21.5%) | 67.7 | 15.6 (23.0%) | +5.3 | (+8.6%) | +2.1 (+1.5pt) | (+16.0%) - |
| Other services | 8.4 | 2.0 (23.7%) | 9.0 | 2.2 (24.6%) | +0.6 | (+6.6%) | +0.2 (+0.9pt) | (+10.6%) - |
| Software | 28.2 | 3.7 (13.1%) | 33.6 | 5.1 (15.2%) | +5.4 | (+19.1%) | +1.4 (+2.1pt) | (+38.6%) - |
| Hardware | 43.9 | 7.3 (16.7%) | 51.9 | 9.6 (18.5%) | +8.0 | (+18.1%) | +2.3 (+1.8pt) | (+31.0%) - |
| Total | 279.3 | 72.7 (26.0%) | 306.8 | 81.9 (26.7%) | +27.6 | (+9.9%) | +9.3 (+0.7pt) | (+12.7%) - |

(System services)

Projects for financial institutions, retailers and electric power companies took the lead in stably growing revenue and gross profit.

(Support services)

Revenue from support services that accompany product sales increased as a result of a rise in product sales, as it did in H1. Gross profit was diminished partly due to impacts from rebates.

(Outsourcing)

Revenue and gross profit grew on the back of more "BankVision" operating institutions, initial fees from new 2Q adoptions, and expanded operational services.

(Software)

Revenue and gross profit grew due to posting large-scale projects for government agencies and for the service industry and the manufacturing industry.

(Hardware)

Revenue and gross profit grew due to posting large-scale projects for government agencies and a research institution as well as players in the manufacturing industry.



FY March2026 Q3 (Apr-Dec) Orders and Order Backlogs by Segment

[Orders by Segment]

(Unit: Billion Yen)

| | FY March 2025 Q3 (Apr-Dec) | FY March 2026 Q3 (Apr-Dec) | YoY | |
|------------------|-------------------------------|-------------------------------|-------|----------|
| System services | 93.9 | 104.5 | +10.6 | (+11.3%) |
| Support services | 44.9 | 43.4 | -1.5 | (-3.3%) |
| Outsourcing | 51.2 | 57.2 | +6.0 | (+11.6%) |
| Other services | 9.0 | 8.7 | -0.3 | (-3.4%) |
| Software | 31.4 | 33.7 | +2.3 | (+7.3%) |
| Hardware | 51.2 | 54.5 | +3.3 | (+6.5%) |
| Total | 281.6 | 302.0 | +20.4 | (+7.3%) |

[Order backlogs by Segment]

(Unit: Billion Yen)

| | FY March 2025 End of Q3 | | FY March 2026 End of Q3 | | YoY | | | |
|------------------|----------------------------|--------------------|----------------------------|--------------------|---------------|----------|--------------------|----------|
| | Order backlog | in the current FY* | Order backlog | in the current FY* | Order backlog | | in the current FY* | |
| System services | 37.4 | 25.1 | 42.2 | 27.6 | +4.7 | (+12.7%) | +2.6 | (+10.3%) |
| Support services | 50.1 | 12.7 | 54.7 | 12.9 | +4.6 | (+9.1%) | +0.2 | (+1.7%) |
| Outsourcing | 161.6 | 23.2 | 153.0 | 23.7 | -8.6 | (-5.3%) | +0.5 | (+2.3%) |
| Other services | 6.9 | 2.5 | 6.0 | 2.8 | -0.9 | (-12.7%) | +0.3 | (+12.8%) |
| Software | 12.3 | 8.6 | 7.4 | 5.4 | -4.9 | (-39.6%) | -3.3 | (-37.7%) |
| Hardware | 23.9 | 14.6 | 21.7 | 16.9 | -2.2 | (-9.1%) | +2.3 | (+15.7%) |
| Total | 292.2 | 86.6 | 285.0 | 89.3 | -7.2 | (-2.4%) | +2.7 | (+3.1%) |

*to be posted as revenue within the current FY

(System services)

Orders and order backlogs increased through obtaining large-scale projects for financial institutions and a project for a retailer.

(Support services)

Orders were less compared with FY March 2025 Q3, for the amounts of multiple-year, large-scale network projects for government agencies posted in the previous period.

(Outsourcing)

Orders grew driven by a new adoption "BankVision" in Q2, as well as the acquisition of projects for infrastructure operations. Order backlogs were diminished as a result of posting as revenue orders that had been obtained up to the previous period.

(Software)

Orders grew on the basis of an accumulation of small and medium-sized projects as well as large-scale projects for a service company, a manufacturer and government agencies.

(Hardware)

Orders grew due to posting a large-scale project for a research institution, projects for manufacturing businesses, and network creation projects for government agencies as well as an accumulation of small and medium-sized projects.

FY March2026 Q3 (Apr-Dec) Progress of Businesses in the Focus Areas belonging to the Core Businesses

[Revenue and Operating Profit (Margin) of Businesses in the Focus Areas belonging to the Core Businesses]

(Unit : Billion Yen)

| | FY March 2025 Q3 (Apr-Dec) | | FY March 2026 Q3 (Apr-Dec) | | YoY | | FY March 2025 (Full Year Results) | | FY March 2026 (Full Year Target) | | YoY | |
|-------------------|-------------------------------|--|-------------------------------|--|----------------------|--|--------------------------------------|--|-------------------------------------|--|----------------------|--|
| | Revenue | Operating profit (Operating margin) | Revenue | Operating profit (Operating margin) | Revenue | Operating profit (Operating margin) | Revenue | Operating profit (Operating margin) | Revenue | Operating profit (Operating margin) | Revenue | Operating profit (Operating margin) |
| Financial | 31.6 | 3.0 (9.6%) | 37.3 | 4.3 (11.6%) | +5.7 (+18.1%) | +1.3 (+42.6%) (+2.0pt) | 45.6 | 3.9 (8.6%) | 48.0 | 4.1 (8.6%) | +2.4 (+5.2%) | +0.2 (+5.2%) (+0.0pt) |
| Retail | 17.2 | 1.5 (8.7%) | 19.5 | 1.0 (5.3%) | +2.3 (+13.5%) | -0.5 (-30.3%) (-3.3pt) | 24.0 | 2.6 (10.7%) | 30.0 | 3.1 (10.4%) | +6.0 (+25.2%) | +0.5 (+21.0%) (-0.4pt) |
| Energy | 13.3 | 1.7 (12.6%) | 14.6 | 1.3 (8.8%) | +1.3 (+9.6%) | -0.4 (-23.4%) (-3.8pt) | 19.3 | 3.1 (15.9%) | 20.0 | 3.1 (15.5%) | +0.7 (+3.7%) | +0.0 (+1.2%) (-0.4pt) |
| Mobility | 22.3 | 2.7 (12.1%) | 22.0 | 2.6 (11.8%) | -0.3 (-1.4%) | -0.1 (-3.8%) (-0.3pt) | 30.5 | 3.7 (12.3%) | 32.0 | 4.6 (14.5%) | +1.5 (+4.9%) | +0.9 (+24.1%) (+2.2pt) |
| OT infrastructure | 11.6 | 1.4 (12.0%) | 12.2 | 1.7 (13.6%) | +0.6 (+5.4%) | +0.3 (+19.1%) (+1.6pt) | 20.7 | 1.9 (9.0%) | 21.5 | 1.9 (9.0%) | +0.8 (+4.1%) | +0.1 (+4.6%) (+0.0pt) |
| Total | 96.0 | 10.3 (10.7%) | 105.7 | 10.9 (10.3%) | +9.6 (+10.0%) | +0.6 (+6.0%) (-0.4pt) | 140.0 | 15.2 (10.8%) | 151.5 | 16.9 (11.2%) | +11.5 (+8.2%) | +1.8 (+11.6%) (+0.3pt) |

[FY March 2026 Q3 Progress Situations]

Financial sector:

Revenue and operating profit increased due to a new “BankVision” adoption in H1 and increase in the number of banks in operation in the previous fiscal year, as well as progress of large-scale projects into the development phase. front-end businesses solutions have been expanding in addition to the core-banking system.

Retail sector:

Revenue and operating profit increased due to enjoying stably continued demands for in-store DX solutions such as electronic shelf labels as well as implementing a large-scale merchandizing core system and an integrated e-commerce services solution beginning to serve. The Company has been working on revisiting service operations and increasing size with an eye on improving profitability. An increase in businesses of customer experience /Online merges with Offline areas in the future is expected to be accelerated after making CMJ as a subsidiary.

Energy sector:

Despite an increase in revenue due to a network project for a electric power company making progress, operating profit decreased due to the absence of a highly profitable project. The Company has been working more on enhancing a business related to carbon neutrality

Mobility sector:

Revenue and operating profit decreased due to the absence of a large-scale project in the previous period. The Company has been working more on expanding businesses related to autonomous driving as well as streamlining and optimizing businesses in the areas of distribution and transportation.

OT Infrastructure sector

Projects in the areas of OT network and security were obtained continuously and steadily due to promoting horizontal deployment of best practices. As a result, revenue and operating profit were pushed up. The Company has been expanding pipelines through strengthening relationships with business partners.

FY March2026 Q3 (Apr-Dec) Progress of Businesses in the Focus Areas belonging to the Growth Businesses

[Revenue of Businesses in the Focus Areas belonging to the Growth Businesses]

(Unit : Billion Yen)

| | FY March 2025 Q3 (Apr-Dec) | FY March 2026 Q3 (Apr-Dec) | YoY | | FY March 2025 (Full Year Results) | FY March 2026 (Full Year Target) | YoY |
|----------------------|-------------------------------|-------------------------------|---------------|--|--------------------------------------|-------------------------------------|---------------|
| Market development | 3.3 | 3.6 | +0.2 (+7.4%) | | 4.6 | 8.0 | +3.4 (+73.9%) |
| Business development | 3.0 | 2.7 | -0.4 (-11.6%) | | 4.2 | 8.0 | +3.8 (+89.1%) |
| Global initiatives | 2.8 | 3.7 | +0.9 (+32.3%) | | 4.2 | 5.0 | +0.8 (+19.0%) |
| Total revenue | 9.2 | 10.0 | +0.8 (+8.8%) | | 13.0 | 21.0 | +8.0 (+61.1%) |

[FY March 2026 Q3 Progress Situations]

Market development: Capture/Expand new market share by acquiring new service areas and cultivating growth markets

- [Data use & AI use] The Company has been expanding its solution offerings, centered on 'Data & AI Innovation Lab,' a DX support business launched in Q1.
- [Managed services] The Company has been expanding its solution offerings, centered on 'GASSAI', a new service brand launched in Q1.

Business development: Accelerate the development, co-creation, and deployment of social digital transformation businesses that resolve social issues

- The Company has expanded its SMB-DX services through collaboration with Matrzz, Inc. in the area of regional revitalization.
- The efforts in the healthcare area are exemplified by the 'DotHealth Body Measurement Service', which has been put into social implementation.

Global Initiatives: Develop business in major ASEAN countries and strengthen approaches toward North America and other markets

- Making two companies (Nexus System Resources Co., Ltd. and iByte Solutions Sdn. Bhd.) as subsidiaries in the previous period was conducive.

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3 Full-Year Performance Forecast for FY March 2026

Reference Information

FY March 2026 (Full-Year) Performance Forecast

Change in adjusted operating profit only

- ✓ Revenue, operating profit, and profit attributable to owners of parent remain unchanged from the forecast announced as part of the H1 performance results.
- ✓ The adjusted operating profit was upwardly revised partly due to the current business progress situations taken into account.

(Unit : Billion Yen)

| | FY March 2025 (Full Year Results) | FY March 2026 (Full Year Forecast) | YoY | |
|---|--------------------------------------|---------------------------------------|----------|----------|
| Revenue | 404.0 | 427.0 | +23.0 | (+5.7%) |
| Gross profit | 105.8 | 114.6 | +8.8 | (+8.3%) |
| SG&A expenses | -67.4 | -71.7 | -4.3 | (+6.4%) |
| Share of profit (loss) of investments accounted for using equity method / Other income and expenses | 0.6 | -0.3 | -0.9 | |
| Operating profit | 39.1 | 42.6 | +3.5 | (+9.0%) |
| (Operating margin) | (9.7%) | (10.0%) | (+0.3pt) | |
| Profit attributable to owners of parent | 27.0 | 29.0 | +2.0 | (+7.5%) |
| Adjusted operating profit* | 38.4 | 42.9 | +4.5 | (+11.7%) |
| (Adjusted operating margin) | (9.5%) | (10.0%) | (+0.5pt) | |
| (Unit : Yen) | | | | |
| Dividends per share | 110 | 120 | +10 | (+9.1%) |
| Mid-term Dividend | 50 | 60 | +10 | (+20.0%) |
| Year-end Dividend | 60 | 60 | - | - |
| Dividend Payout Ratio | (40.3%) | (40.2%) | (-0.1pt) | |

* Adjusted operating profit is the result obtained after deducting cost of sales and SG&A expenses from revenue.

(Acquisition of CMJ as a Subsidiary)

- Full acquisition of CMJ in January 2026. The wholly-owned subsidiary will be consolidated in Q4 and thereafter (revenue: +¥2.3 billion, operating Profit : ¥0.0 billion).
- ¥0.5 billion was posted in Q3 as part of the advisory expenses related to the acquisition. Approx. ¥0.3 billion is expected to be posted in Q4.

(Renewal of Internal Core Systems)

- Production operations to begin in April 2026 as planned
- Costs for the fiscal year ending March 2026 are expected to be approximately ¥2.5 billion, down by ¥0.3 billion compared with the previous period, as initially forecast.

(Unprofitable Project)

- Approx. ¥1.3 billion was recorded under Other Expenses in Q3 for a project that was explained as potentially unprofitable in the Q2 results.



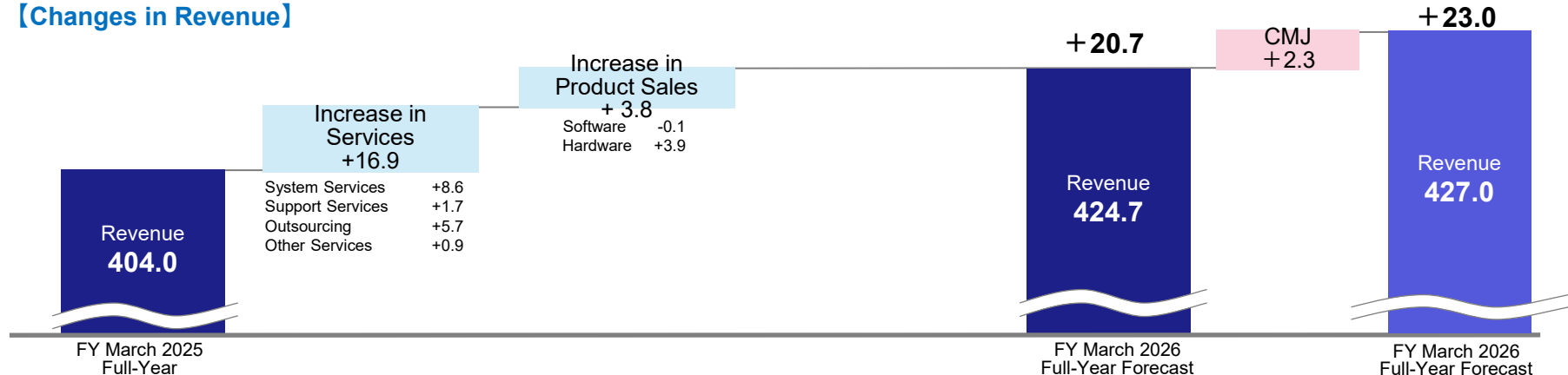
(Reference Materials)

FY March 2026 (Full-Year) Performance Forecast Breakdown Details

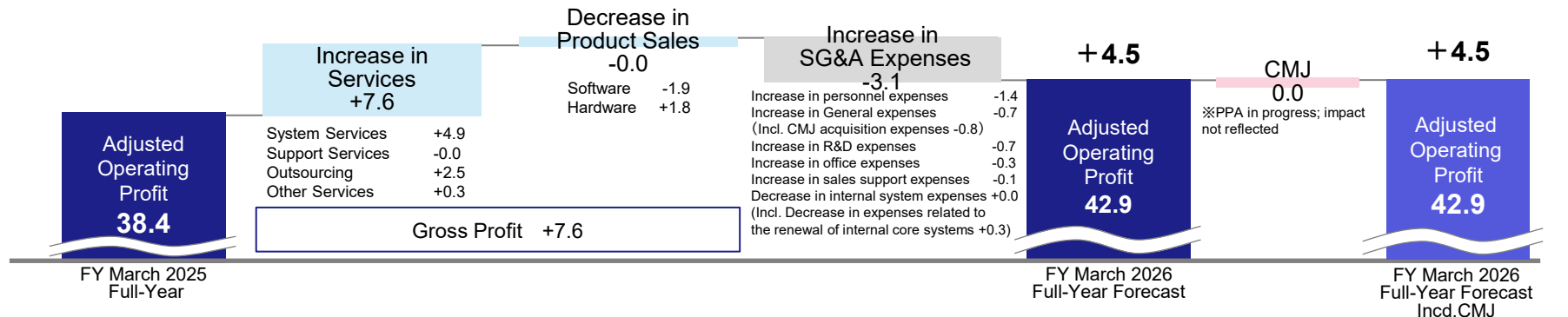
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【Changes in Revenue】

(Unit: Billion Yen)



【Changes in Adjusted Operating Profit】



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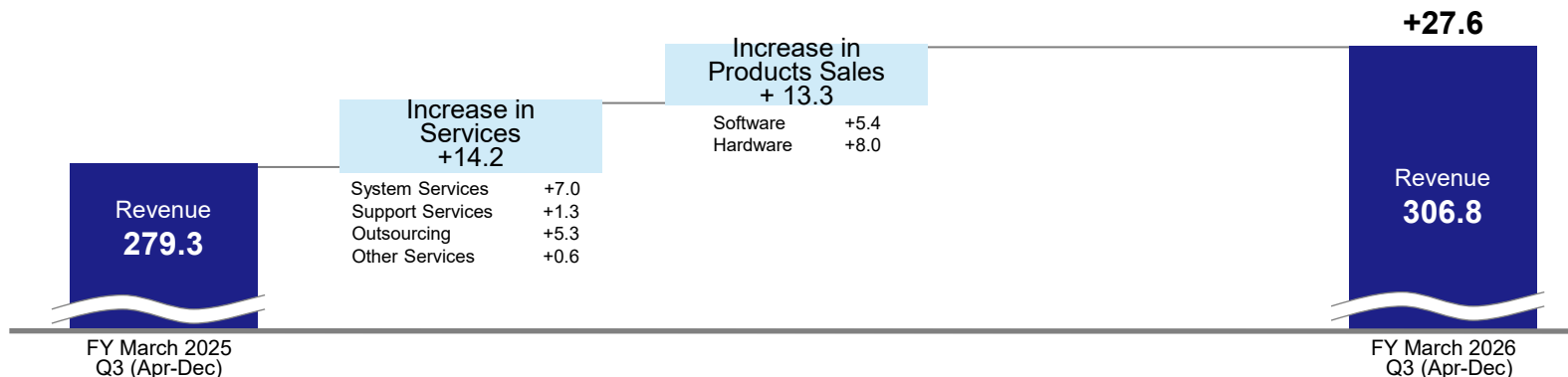
Reference Information

(Reference Materials)

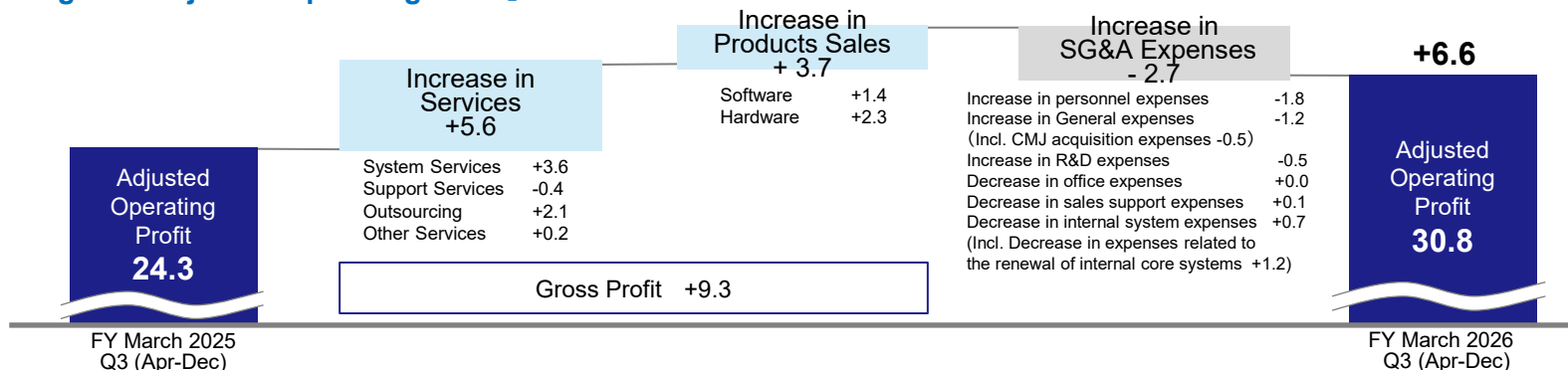
FY March 2026 Q3 (Apr-Dec) Performance Breakdown Details

(Unit: Billion of Yen)

【Changes in Revenue】



【Changes in Adjusted Operating Profit】



(Reference Materials)

FY March 2026 Q3 (Oct-Dec) Consolidated Performance Results

(Unit : Billion Yen)

| | FY March 2025 Q3 (Oct-Dec) | FY March 2026 Q3 (Oct-Dec) | YoY | |
|---|-------------------------------|-------------------------------|----------|----------|
| Revenue | 93.2 | 101.7 | +8.5 | (+9.1%) |
| Gross profit | 24.0 | 28.2 | +4.2 | (+17.6%) |
| SG&A expenses | -17.0 | -18.0 | -1.0 | (+6.0%) |
| Share of profit (loss) of investments accounted for using equity method / Other income and expenses | 0.2 | -1.2 | -1.4 | |
| Operating profit | 7.2 | 9.0 | +1.8 | (+24.6%) |
| (Operating margin) | (7.7%) | (8.8%) | (+1.1pt) | |
| Profit attributable to owners of parent | 5.7 | 6.9 | +1.2 | (+21.6%) |
| Adjusted operating profit* | 7.0 | 10.2 | +3.2 | (+45.8%) |
| (Adjusted operating margin) | (7.5%) | (10.0%) | (+2.5pt) | |
| Orders | 93.8 | 98.2 | +4.4 | (+4.6%) |

* Adjusted operating profit is the result obtained after deducting cost of sales and SG&A expenses from revenue.

(Revenue)

Services and product sales in good shape boosted revenue.

(Gross Profit)

Gross profit increased on the basis of the revenue growth.

(SG&A expenses)

Personnel expenses and R&D expenses remained within plan. General expenses increased, partly due to ¥0.5 billion in acquisition-related costs.

(Personnel expenses up by ¥0.8 billion, R&D expenses up by ¥0.2 billion, and general expenses up by ¥0.6 billion, internal system expenses down by ¥0.2 billion)

(Share of profit (loss) of investments accounted for using equity method / Other income and expenses)

An impairment loss of ¥1.3 billion on intangible assets related to an unprofitable project was recorded under other expenses.

(Operating Profit)

Operating profit grew, with the strong gross profit absorbed the increase in SG&A expenses and other expenses.

(Orders)

Orders grew attributable to the strength of system services and outsourcing.



(Reference Materials)

FY March 2026 Q3 (Oct-Dec) Revenue and Gross Profit by Segment

[Revenue and Gross Profit (Gross Margin) by Segment]

(Unit : Billion Yen)

| | FY March 2025 Q3 (Oct-Dec) | | FY March 2026 Q3 (Oct-Dec) | | YoY | | | |
|------------------|-------------------------------|--------------------------------|-------------------------------|--------------------------------|---------|----------|--------------------------------|----------------|
| | Revenue | Gross Profit (Gross Margin) | Revenue | Gross Profit (Gross Margin) | Revenue | | Gross Profit (Gross Margin) | |
| System services | 32.9 | 11.2 (34.1%) | 35.2 | 12.2 (34.5%) | +2.4 | (+7.2%) | +1.0 (+0.4pt) | (+8.5%) - |
| Support services | 14.6 | 4.8 (32.8%) | 14.9 | 4.8 (32.4%) | +0.3 | (+2.3%) | +0.0 (-0.4pt) | (+0.9%) - |
| Outsourcing | 19.7 | 4.3 (21.9%) | 22.1 | 5.5 (24.9%) | +2.5 | (+12.6%) | +1.2 (+3.0pt) | (+28.3%) - |
| Other services | 2.7 | 0.6 (21.5%) | 3.0 | 0.6 (21.8%) | +0.3 | (+9.4%) | +0.1 (+0.3pt) | (+11.0%) - |
| Software | 8.2 | 0.8 (10.2%) | 10.9 | 2.1 (19.4%) | +2.7 | (+33.6%) | +1.3 (+9.2pt) | (+153.4%) - |
| Hardware | 15.3 | 2.3 (14.8%) | 15.6 | 2.9 (18.8%) | +0.3 | (+2.0%) | +0.7 (+3.9pt) | (+29.2%) - |
| Total | 93.2 | 24.0 (25.7%) | 101.7 | 28.2 (27.7%) | +8.5 | (+9.1%) | +4.2 (+2.0pt) | (+17.6%) - |

(System services)

Revenue and gross profit increased through obtaining projects for financial institutions, a government agency, and a retailer. No unprofitable project was posted in Q3.

(Support services)

Revenue from support services that accompany product sales increased as a result of a rise in product sales. We are continuing price revisions to improve profitability.

(Outsourcing)

Revenue and profit increased driven by the growth in the number of financial institutions using "BankVision", revenue recognition of lump-sum fees, and the increase in third-party cloud services.

(Software)

Revenue increased ascribable to posting large-scale projects for a manufacturer and government agencies. Gross profit increased on the basis of the revenue growth and due to posting highly profitable project.

(Hardware)

Revenue and gross profit increased due to posting projects for a wide range of businesses such as those in the government agencies as well as the manufacturing industries and the service industry.



(Reference Materials)

FY March 2026 Q3 (Oct-Dec) Orders by Segment

[Orders by Segment]

(Unit: Billion Yen)

| | FY March 2025 Q3 (Oct-Dec) | FY March 2026 Q3 (Oct-Dec) | YoY | |
|------------------|-------------------------------|-------------------------------|------|----------|
| System services | 29.8 | 33.2 | +3.4 | (+11.5%) |
| Support services | 14.1 | 13.9 | -0.1 | (-1.0%) |
| Outsourcing | 18.9 | 20.9 | +2.1 | (+10.9%) |
| Other services | 3.3 | 3.2 | -0.1 | (-2.9%) |
| Software | 10.8 | 10.8 | +0.1 | (+0.5%) |
| Hardware | 17.0 | 16.0 | -0.9 | (-5.5%) |
| Total | 93.8 | 98.2 | +4.4 | (+4.6%) |

(System services)

Orders increased due to obtaining orders for large-scale projects for electric power companies, financial institutions and a project for retailers.

(Support services)

Orders were less compared with FY March 2025 Q3, for the amounts of multiple-year, large-scale network projects for government agencies posted in the previous period.

(Outsourcing)

Orders increased due to the order bookings for projects for financial institutions and the service sector.

(Software)

Orders increased compared with the same period of the previous fiscal year, driven by an accumulation of projects for government agencies and financial institutions, despite the impact of large-scale projects for government agencies recorded in the prior period.

(Hardware)

Despite an accumulation of network construction projects for government agencies and projects for the research institutions, orders declined because large-scale projects for government agencies were recognized in the same period of the previous year.



(Reference Materials)

UNIADEX Performance Summary

- ✓ Revenue and profit increased partly through posting large-scale projects for government agencies.
- ✓ The gross margin of support services is gradually improving due to the stabilization of rebate impacts and the progress in price revisions.

【Consolidated Performance Results】

(incl. internal businesses among consolidated companies)

(Unit : Billion Yen)

| | FY March 2025 Q3 (Apr-Dec) | FY March 2026 Q3 (Apr-Dec) | YoY | |
|--------------------|-------------------------------|-------------------------------|----------|----------|
| Revenue | 120.6 | 134.1 | +13.5 | (+11.2%) |
| Gross profit | 25.3 | 28.1 | +2.8 | (+11.0%) |
| SG&A expenses | -12.7 | -14.1 | -1.4 | (+11.2%) |
| Operating profit | 12.6 | 13.9 | +1.4 | (+10.9%) |
| (Operating margin) | (10.4%) | (10.4%) | (-0.0pt) | |

【Revenue and Gross Profit (Gross Margin) by Segment】

(incl. internal businesses among consolidated companies)

(Unit : Billion Yen)

| | FY March 2025 Q3 (Apr-Dec) | | FY March 2026 Q3 (Apr-Dec) | | YoY | |
|------------------|-------------------------------|--------------------------------|-------------------------------|--------------------------------|----------------|--------------------------------|
| | Revenue | Gross Profit (Gross Margin) | Revenue | Gross Profit (Gross Margin) | Revenue | Gross Profit (Gross Margin) |
| System services | 15.7 | 4.4 (27.9%) | 16.8 | 4.5 (27.1%) | +1.1 (+6.9%) | +0.2 (+3.7%) (-0.8pt) - |
| Support services | 33.9 | 9.4 (27.6%) | 34.7 | 8.8 (25.3%) | +0.8 (+2.3%) | -0.6 (-6.2%) (-2.3pt) - |
| Outsourcing | 18.8 | 3.2 (17.3%) | 20.0 | 3.6 (17.8%) | +1.2 (+6.4%) | +0.3 (+9.4%) (+0.5pt) - |
| Other services | 7.9 | 1.4 (17.7%) | 8.1 | 1.4 (17.1%) | +0.2 (+2.5%) | -0.0 (-1.0%) (-0.6pt) - |
| Software | 13.1 | 1.5 (11.2%) | 17.3 | 2.9 (16.6%) | +4.2 (+32.5%) | +1.4 (+96.3%) (+5.4pt) - |
| Hardware | 31.2 | 5.4 (17.4%) | 37.2 | 6.9 (18.7%) | +6.0 (+19.2%) | +1.5 (+27.8%) (+1.3pt) - |
| Total | 120.6 | 25.3 (21.0%) | 134.1 | 28.1 (20.9%) | +13.5 (+11.2%) | +2.8 (+11.0%) (-0.0pt) - |

(*) The numbers in this page are described in compliance with the J-GAAP.





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