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Release of the Summary of the Q&A Session from the Financial Results Briefing (Teleconference) for the Three Months Ended August 31, 2026

We would like to express our sincere appreciation for your continued support.

Today, we held our financial results briefing for the Three Months Ended August 31, 2026 via telephone conference. During the briefing, we received and responded to questions from the participants regarding the financial results.

A summary of the questions and answers is provided below.

[Summary of Q&A]

Q1.

Could you explain whether the ongoing campaigns to attract visitors to your housing exhibition centers are leading to business negotiations and contracts?

A1.

The campaigns have successfully attracted a large number of visitors, particularly customers considering purchasing a home.

In addition, many of these visitors do not own land, contributing to very strong order performance in our built-for-sale housing business.

Q2.

What is the current status of property acquisitions and sales in the real estate business? Also, have there been any negative impacts from tax reforms or other regulatory changes?

A2.

Although net sales in the first quarter decreased year on year, we have been able to make appropriate decisions regarding property acquisitions and sales while carefully assessing market conditions and the profitability of individual properties.

We do not believe that tax reforms have had any negative impact on our business.

Going forward, we will continue to acquire high-quality properties, primarily in Tokyo's five central wards, while carefully evaluating their profitability. We will also consider acquiring large-scale properties.

Q3.

Although net sales and profits declined year on year in the first quarter, were the results generally in line with your initial plan? Could you also explain the background and specific factors that contributed to achieving results broadly in line with the plan?

A3.

Net sales declined in the first quarter, partly due to the impact on housing deliveries from the slowdown in orders during the previous fiscal year. Nevertheless, our performance has progressed largely in line with our initial expectations.

We anticipate a recovery in business performance from the second quarter onward. We will work toward achieving our full-year targets, supported by the recovering trend in our custom-built housing business and the strong performance of our built-for-sale housing and renovation businesses.

Q4.

In the built-for-sale housing business, the year-on-year growth rate in the value of housing deliveries was relatively modest compared with that of orders received. How long is the lead time from contract signing to delivery? Also, is it correct to understand that land acquisitions for residential developments are progressing smoothly?

A4.

For completed built-for-sale homes, delivery generally takes place within two months after contract signing. Land acquisitions for residential developments are also progressing according to plan, and we believe we have secured a sufficient pipeline of properties for future sales.

Q5.

Could you explain the specific factors behind the strong performance of the built-for-sale housing business, including the potential effects of rising interest rates, higher rents, and demand brought forward in anticipation of further changes?

A5.

One factor contributing to the strong performance of our built-for-sale housing business is the increasing number of customers choosing completed homes that can be delivered shortly after contract signing, amid rising interest rates.

Our ability to meet the needs of customers seeking to limit the financial burden associated with potential future interest rate increases, together with our ability to appropriately offer attractive residential developments to customers who do not own land, has also supported the strong performance of this business.

Q6.

Could you explain the background and specific factors behind the improvement in profitability of the custom-built housing business despite the decline in net sales?

A6.

We have been working to improve profitability by providing quotations that reflect trends in material prices and other costs, as well as reviewing our product offerings and specifications.

As material prices, labor costs, and other expenses are expected to continue rising, we will strive to secure sustainable profits by appropriately managing both selling prices and costs.