

3Q FY12/26 Earnings Presentation

Rigaku Holdings Corporation
November 11, 2026

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The Company’s fiscal year ends on December 31. The Company adopted International Financial Reporting Standards (“IFRS”) from the year ended December 31, 2023, using a transition date of January 1, 2022.

This material contains non-IFRS financial measures of the Company, including R&D Ratio, CAPEX ratio and Free Cash Flow. These non-IFRS financial measures should not be considered in isolation or as a substitute for the most directly comparable financial measures presented in accordance with IFRS or accounting principles generally accepted in other jurisdictions, including J-GAAP and U.S. GAAP. The Company’s use, definition and calculation of its non-IFRS measures may differ significantly from, and therefore may not be directly comparable to, similarly titled measures of other companies.
Please refer to the calculation tables in the Appendix for details.

This material also contains financial and operating data prepared on a management accounting basis, such as revenue and operating profit by product categories and revenue by end markets. This information is not prepared in accordance with J-GAAP or IFRS and is unaudited.
This material contains statements as of the date stated on this material (or any other date separately specified herein), and the Company neither adopts a policy of, nor assumes any responsibility for, keeping such information updated. Therefore, future prospects will not necessarily coincide with actual results. Information regarding companies other than the Company contained in this material is extracted from publicly available information, and the Company has not verified and cannot guarantee the accuracy or adequacy of such Information.

Amounts in this document are rounded down to the nearest hundred million yen, and percentage figures are rounded to one decimal place.

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Agenda

1. 3Q FY12/26 Consolidated Financial Results

2. Semiconductor Process Control Instruments Business Update

3. FY12/26 Earnings Forecast

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3Q FY12/26 Consolidated Financial Results

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Highlights of 3Q FY12/26 Consolidated Financial Results

Overall

- 3Q orders remained strong, growing 66% YoY, while revenue rose 13% YoY.
- 1-3Q orders grew 39% YoY, and revenue grew 2% YoY. The pipeline also grew 21% YoY.
- Although we recorded losses of ¥1.36bn from special factors in 3Q, the operating profit margin improved 2.9ppt (9.3ppt excluding special factors).
- In 4Q we aim to capture increased volume, higher pricing, and new-product benefits to widen margins further.

Multipurpose Analytical Instruments

- 3Q orders significantly rose by 39% YoY, with all regions apart from China showing double-digit growth and a clear recovery taking hold. Revenue grew 4% YoY. Operating profit margin improved 4.3ppt.
- 1-3Q orders grew 16% YoY, with growth in all regions, including Japan up 26% and the Americas up 32%.
- We will convert robust order intake into a revenue recovery.

Semiconductor Process Control Instruments

- 3Q orders rose 189% YoY, and near-term order forecasts remain extremely strong. Revenue grew 29% YoY.
- 1-3Q orders grew 117% YoY and revenue grew 21% YoY. Both are ahead of forecast.
- We aim for YoY growth in 4Q revenue to a record high on memory expansion demand and North American IDM demand recovery, along with contributions from new products including JEP.

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3Q FY12/26 Consolidated Financial Results Summary (YoY)

(¥bn)	3Q FY12/25	3Q FY12/26	YoY
Revenue	18.7	**21.1**	+12.7%
Gross Profit	9.7	**12.4**	+27.4%
Operating Profit	0.8	**1.5**	+84.2%
Operating Profit Margin (%)	4.5%	**7.4%**	+2.9ppt
Profit Before Tax	0.6	**1.2**	+94.8%
Profit[1]	0.4	**0.8**	+72.0%
Basic EPS(¥)	2.18	**3.76**	-
EBITDA	2.1	**3.7**	+71.8%
EBITDA margin (%)	11.7%	**17.8%**	+6.1ppt

- Orders increased 66% YoY
- Revenue increased across all categories
- Gross profit margins improved in every category, rising 6.8ppt YoY on a consolidated basis
- Operating profit also increased
- We recorded a ¥0.6bn allowance for doubtful accounts in the US and a ¥0.75bn impairment charge at our EMEA subsidiary MILabs as special factors
- Strategic investment spending is largely in line with plan, and by reaching our full-year revenue target as planned we expect the impact of strategic investments on our margin to be roughly flat, as originally planned. We expect gross profit margin to improve in 4Q.

Note:
1. Read as Profit attributable to owners of the parent entity, for interim or quarterly profit, as applicable

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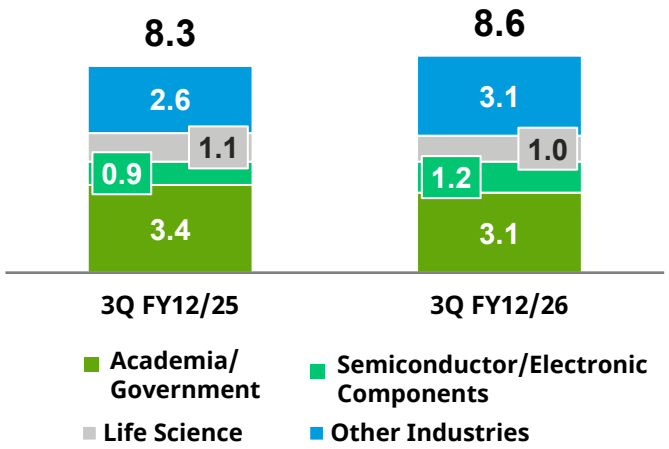
3Q FY12/26 Performance Summary by Category

Multipurpose Analytical Instruments

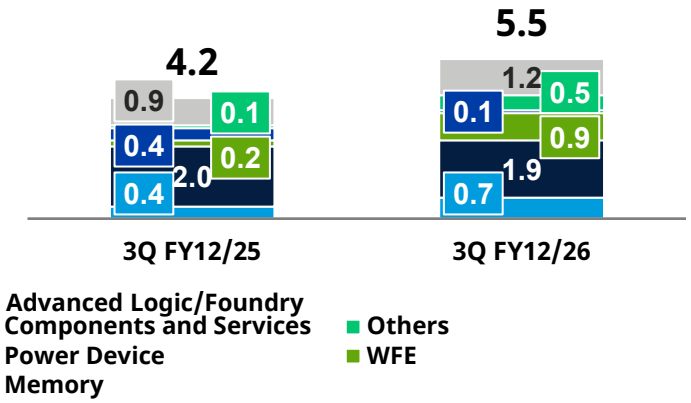
(¥bn)	3Q FY12/25	3Q FY12/26	YoY
Revenue	8.3	**8.6**	+4.4%
Operating Profit	0.4	**0.8**	+87.2%
Operating Profit Margin (%)	5.4%	**9.7%**	+4.3ppt



- While the decline in revenue from the academia sector due to the impact of Trump policies since last year remains, total revenue has reversed to a growth trend as our shift toward industry yielded results.
- Operating profit margin also improved 4.3ppt through pricing initiatives and a better sales mix
- In addition, we are steadily launching strategic products for the industrial sector

Semiconductor Process Control Instruments

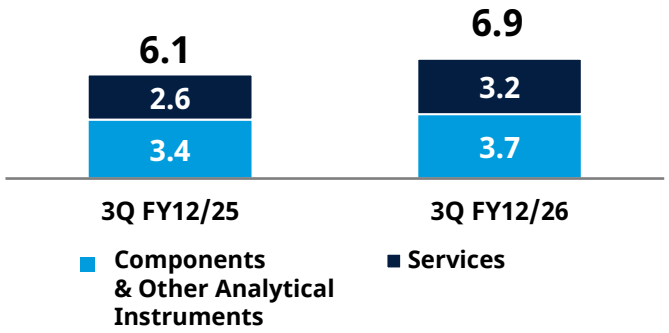
3Q FY12/25	3Q FY12/26	YoY
4.2	**5.5**	+29.4%
-0.0	**0.7**	-
-1.9%	**14.0%**	+15.9ppt



- Orders rose 189% YoY amid ongoing robust demand
- WFE and Components and Services sales grew
- Advanced Logic/Foundry and Memory also continue to perform well
- Operating profit also improved with higher revenue

Components and Services

3Q FY12/25	3Q FY12/26	YoY
6.1	**6.9**	+12.4%
1.1	**0.1**	-91.2%
19.0%	**1.5%**	-17.5ppt



- Services revenue rose 20%. Growth was smooth thanks to an expanding installed base overseas, price hikes, and the impact of sales expansion initiatives.
- Components and other analytical instruments revenue rose 6.5%, driven by growth in X-ray tubes and related products.
- Operating profit margin improved by 2.2ppt, excluding special factors

Note: We recorded a ¥0.6bn allowance for doubtful accounts in the US and a ¥0.75bn impairment charge at our EMEA subsidiary MILabs as special factors.

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1-3Q FY12/26 Consolidated Financial Results Summary (YoY)

(¥bn)	1-3Q FY12/25	1-3Q FY12/26	YoY
Revenue	59.4	**60.6**	+2.0%
Gross Profit	32.4	**34.0**	+5.0%
Operating Profit[(1)]	6.5	**4.1**	-37.0%
Operating Profit Margin (%)	11.0%	**6.8%**	-4.2ppt
Profit Before Tax	6.0	**3.3**	-45.8%
Profit[(2)]	4.2	**2.4**	-42.0%
Basic EPS(¥)	18.81	**10.95**	-
EBITDA	10.3	**9.1**	-11.5%
EBITDA margin (%)	17.3%	**15.1%**	-2.3ppt

- Orders increased 39% YoY
- Revenue increased, with growth in Semiconductor Process Control Instruments offsetting the decline in Multipurpose Analytical Instruments
- Gross profit margin improved in every category, rising 1.6ppt YoY on a consolidated basis
- Gross profit returned to growth, but operating profit fell YoY due to higher R&D and labor expenses in line with ongoing strategic investment plans, as well as special factors.

Note: 1. We recorded a ¥0.65bn allowance for doubtful accounts in the US and a ¥0.75bn impairment charge at our EMEA subsidiary MILabs as special factors. 2. Read as Profit attributable to owners of the parent entity, for interim or quarterly profit, as applicable.

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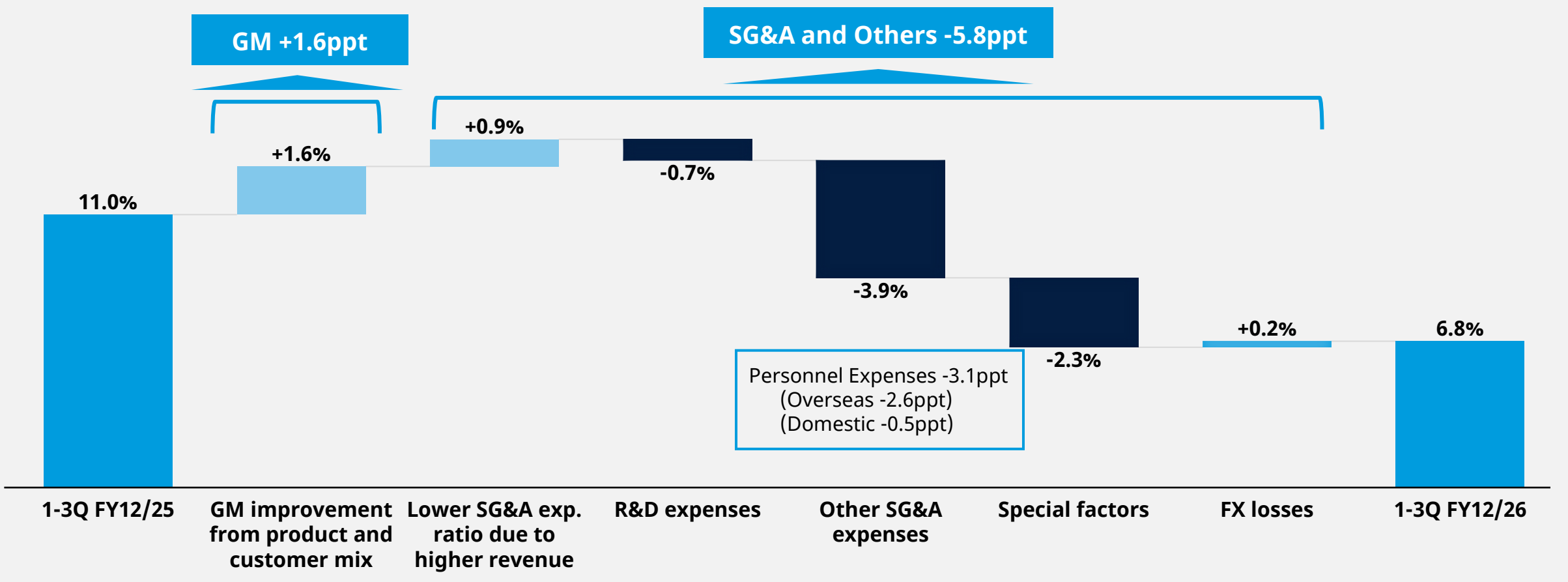
1-3Q FY12/26 Analysis of Consolidated Operating Profit (YoY)

Operating Profit Margin 6.8% (down by 4.2ppt YoY)

- Gross margin improved across all categories, led by Multipurpose Analytical Instruments
- Ongoing strategic investments led to R&D and SG&A accounting for a larger share of expenses, offset in part by higher revenue



Note: We recorded a ¥0.65bn allowance for doubtful accounts in the US and a ¥0.75bn impairment charge at our EMEA subsidiary MILabs as special factors

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Semiconductor Process Control Instruments Business Update

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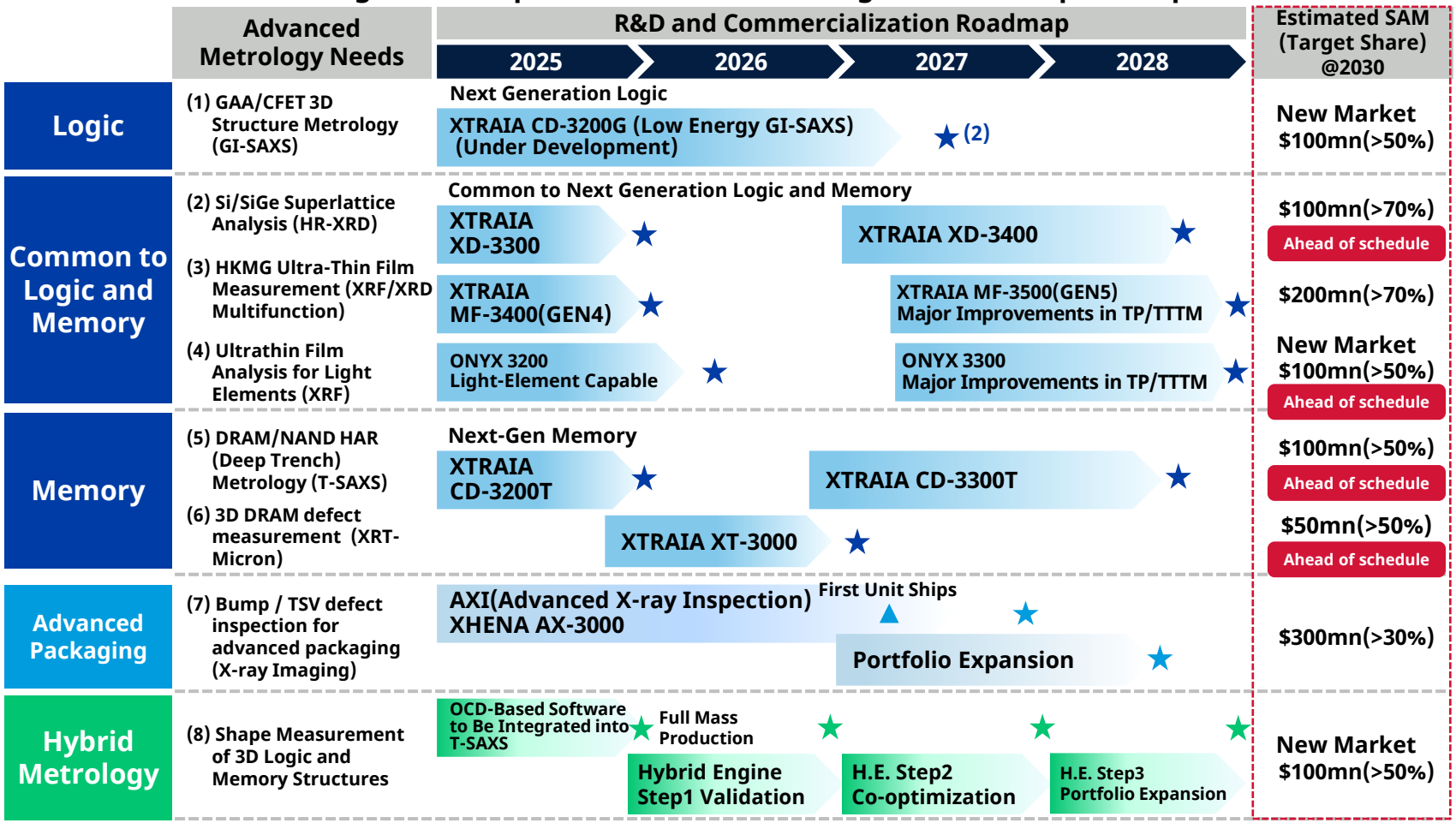
Strategic Product Roadmap for Next-Gen Semiconductors: Update

Market and Objectives

- Starting in 2025, we brought a suite of new products to market for next-generation semiconductors. The Joint Evaluation Program (JEP) is proceeding smoothly toward POR(1) status, and we expect some projected sales to be ahead of schedule.
- Successful new product market entry has clarified customer needs and the market environment. We are now accelerating development of future-generation products to further strengthen our competitive position.



Key Updates

(1) We expect the market to take off in 2027. We will ship the first unit with Onto software onboard and establish it as the de facto choice.

(2) POR(1) with a majority of customers, aiming to achieve projected 2030 revenue in 2028.Development of XD-3400 underway as future-gen tech.

(3) GEN4 to supplant GEN3 market from 2027. MF-3500 (GEN5) development with an eye on the 2030 market.

(4) Aluminum ultrathin film measurement is steadily penetrating the market as USP(3), on track to reach projected 2030 revenue target in 2027.

(5) Memory mass-production line adoption begins. Projected 2030 revenue target in range in 2028. Next-generation 3300T in development.

(6) 3D DRAM market expansion with fab-ready systems; 2030 revenue target pulled forward to 2027

(7) First Rigaku inspection system, the AX-3000, to be launched as a USP(3) for TSV void inspection.

(8) Joint development of the CD-SAXS-OCD Hybrid Engine commenced with Onto. We are accelerating development to target memory mass-production line applications in 1Q FY12/27.

Note: 1. Process of Record (standard equipment officially adopted in customer mass production processes) 2. ★: Product standardization and commencement of mass production at Rigaku 3. Unique Selling Proposition

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FY12/26 Earnings Forecast

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FY12/26 Consolidated Earnings Forecast - Unchanged

(¥bn)	FY12/25	FY12/26[1]	YoY
Revenue	94.1	**101.0**	+7.2%
Operating Profit	16.7	**19.4**	+16.1%
Operating Profit Margin (%)	17.7%	**19.3%**	+1.6ppt
Profit Before Tax	15.9	**18.4**	+15.2%
Profit[3]	11.4	**12.5**	+9.6%
Basic EPS(¥)	50.19	**55.27**	-
EBITDA	21.8	**25.3**	+15.9%
EBITDA margin (%)	23.2%	**25.1%**	+1.9ppt

Key Changes as of 3Q

- Multipurpose Analytical Instruments: Strong order intake, but sales recovery continues to lag
- Semiconductor Process Control Instruments: Momentum even stronger than in 2Q
- Components and Services: Turned positive in 3Q; full-year revenue slightly above forecast
- Gross margin improved but special factors[2] also arose in 3Q
- We expect full-year orders to grow around 30% YoY

Current Full-Year Outlook

- Revenue: We continue to expect upside
- Operating profit: In 4Q we expect to reach our guidance target excluding special factors with a final push in Multipurpose Analytical Instruments and cost controls apart from R&D expenses

Notes:
1. Dollar sensitivity: around ¥0.2bn for revenue and ¥0.04bn for operating profit. EUR sensitivity: around ¥0.07bn for revenue and ¥0.03bn for operating profit.
2. We recorded a ¥0.65bn allowance for doubtful accounts in the US and a ¥0.75bn impairment charge at our EMEA subsidiary MILabs.
3. Read as profit attributable to owners of the parent

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Strategic Direction for FY12/27

- **We expect end-December 2026 order backlog to be up >30% YoY, improving visibility on next year's earnings growth**
- **Market conditions improving in every category**

	Environmental Awareness	Strategy and Outlook
Multipurpose Analytical Instruments	**■ Shift toward industry is progressing** • Revenue from industry customers to expand to >60% of the total in FY12/26 • FY12/26 full-year orders expected to grow by double digits YoY, giving us solid confidence in next year's growth	**■ Strongly driving faster growth in industry** • To drive the next stage of growth in our industry business, we are concentrating development and sales resources on semiconductors and electronic components and on automation and autonomy needs. Shifting to higher value-added products will also widen margins.
Semiconductor Process Control Instruments	**■ AI semiconductor demand broadening across applications** • Demand for AI semiconductors, once centered on HBM, has recently broadened to logic, DRAM, flash, and advanced packaging, and FY12/26 full-year orders are expected to rise 70% YoY	**■ Turning strong orders into >30% growth** • Strong growth from customers' new fab start-ups and expanded strategic products • Focusing on the measures needed to expand supply capacity
Components and Services	**■ Business environment favors stable growth** • Services growing on an expanding installed base • Revenue from components and other analytical instruments stabilizing, excluding special factors	**■ Concerns cleared, back on a growth path** • Pursuing expansion in each business on a stable earnings base • No further special factors expected in FY12/27; customer EUV inventory should be depleted during next year

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Conclusion

Semiconductor Process Control Instruments entering full-scale growth stage

- AI semiconductor investment set to continue over medium to long term, with technological advances expanding business opportunities and adoption of X-ray technology accelerating
- Our roadmap now anticipates several products reaching revenue targets ahead of schedule; FY12/26 orders on track for record high
- >¥30bn business entering full-scale expansion phase, growing by 30% annually

Greater certainty on Rigaku’s medium- to long-term growth

- Semiconductor Process Control Instruments set to account for >50% of FY12/26 operating profit, becoming Rigaku’s core earnings pillar
- Clear path to growth in Multipurpose Analytical Instruments, increasing certainty on medium- to long-term earnings growth

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Appendix

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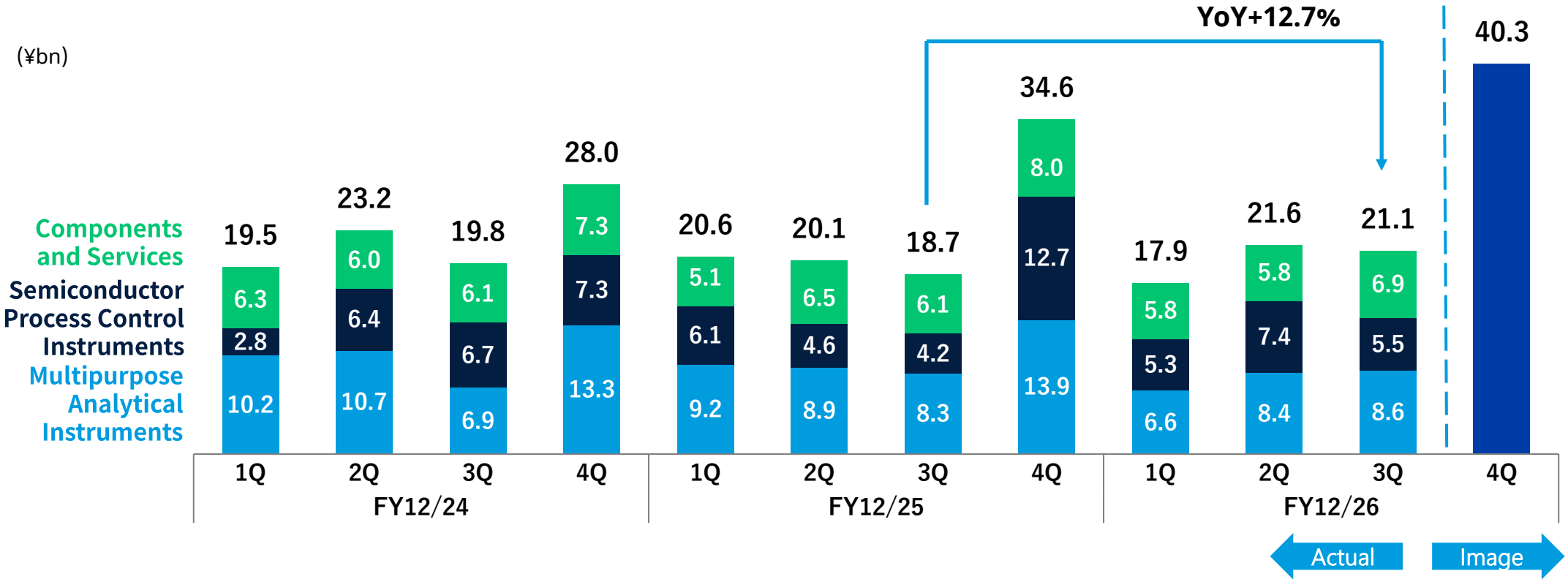
Quarterly Revenue Trend

- 3Q revenue was flat QoQ due to delays in some cases, but the YoY recovery trend held. Multipurpose Analytical Instruments posted higher revenue both YoY and QoQ, reflecting solid orders. Semiconductor Process Control Instrument revenue remained roughly on track with our forecast and above the previous year, with projects concentrated in the fourth quarter as expected at the start of FY12/26.
- Progress toward significant revenue growth in 4Q is steady, driven by strong demand for the Semiconductor Process Control Instruments business along with ongoing solid order momentum in the Multipurpose Analytical Instruments business.



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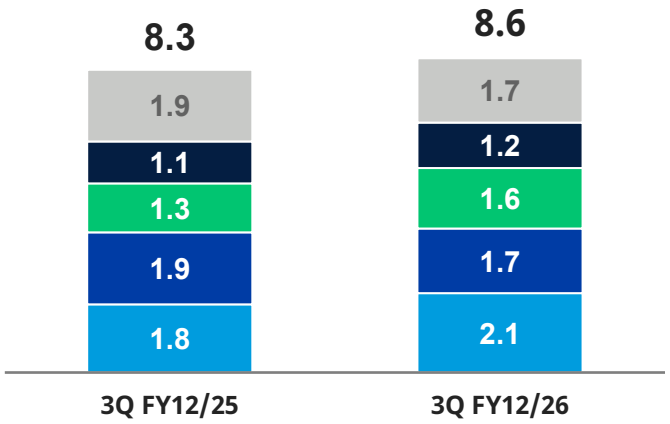
3Q FY12/26 Performance Summary by Category (by Region)

Multipurpose Analytical Instruments

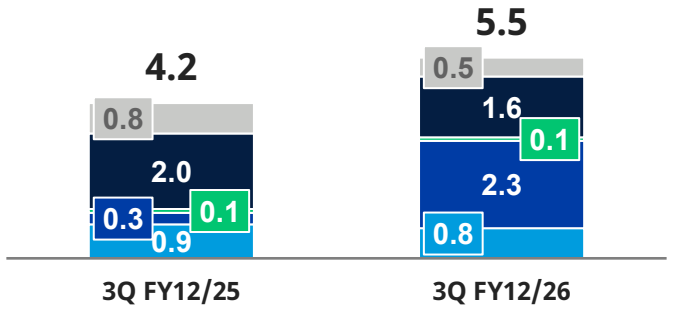
(¥bn)	3Q FY12/25	3Q FY12/26	YoY
Revenue	8.3	**8.6**	+4.4%
Operating Profit	0.4	**0.8**	+87.2%
Operating Profit Margin (%)	5.4%	**9.7%**	+4.3ppt



- Japan: Industry shift progressing well
- Americas: Revenue decline narrowed QoQ
- China: Tax-exemption procedures were delayed, shifting revenue into 4Q
- EMEA: Recovery YoY

Semiconductor Process Control Instruments

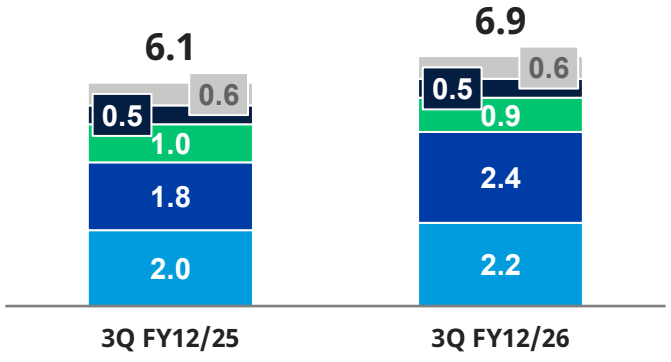
3Q FY12/25	3Q FY12/26	YoY
4.2	**5.5**	+29.4%
-0.0	**0.7**	-
-1.9%	**14.0%**	+15.9ppt



- Growth at North American IDMs and semiconductor manufacturers
- Memory (DRAM) strength keeps Asia at high levels

Components and Services

3Q FY12/25	3Q FY12/26	YoY
6.1	**6.9**	+12.4%
1.1	**0.1**	-91.2%
19.0%	**1.5%**	-17.5ppt



- Revenue in the Americas and Japan up with X-ray tube expansion and strong services business

Japan Americas EMEA Asia (excl. China) China

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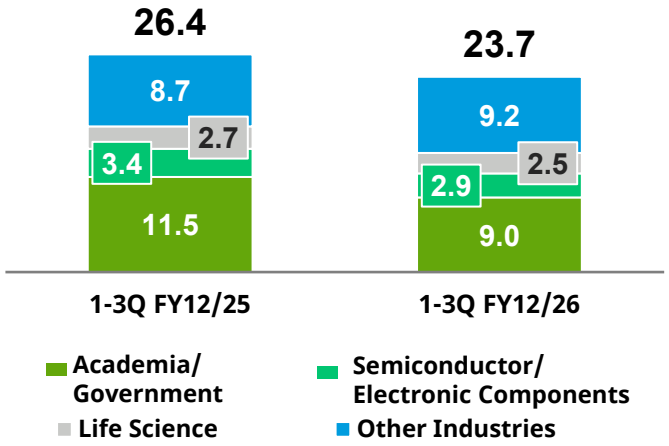
1-3Q FY12/26 Performance Summary by Category

Multipurpose Analytical Instruments

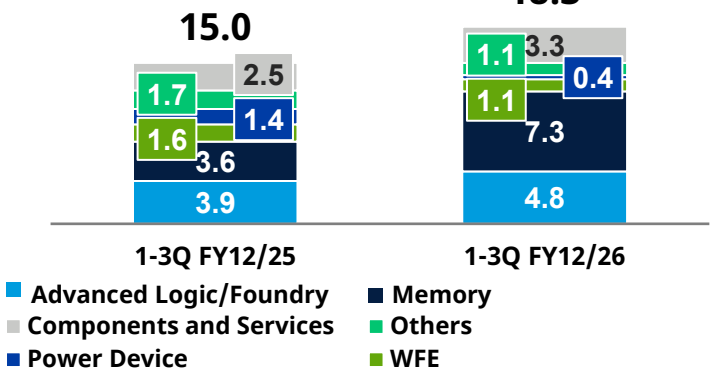
(¥bn)	1-3Q FY12/25	1-3Q FY12/26	YoY
Revenue	26.4	**23.7**	-10.3%
Operating Profit	3.0	**0.8**	-71.1%
Operating Profit Margin (%)	11.5%	**3.7%**	-7.8ppt



- The decline in revenue from the academia sector due to the impact of Trump policies since last year has persisted longer than expected.
- Gross margin improved 1.8ppt YoY on pricing policy and mix improvements.

Semiconductor Process Control Instruments

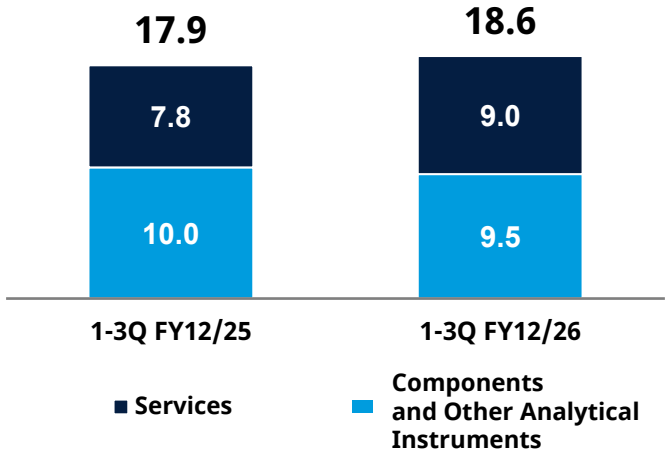
1-3Q FY12/25	1-3Q FY12/26	YoY
15.0	**18.3**	+21.4%
2.3	**2.7**	+16.4%
15.7%	**15.1%**	-0.6ppt



- Orders rose 117% YoY amid ongoing robust demand
- Significant sales growth in Advanced Logic/Foundry and Memory
- SG&A expenses rose with continued strategic investment, resulting in higher operating profit but a slightly lower margin.

Components and Services

1-3Q FY12/25	1-3Q FY12/26	YoY
17.9	**18.6**	+4.0%
3.2	**1.7**	-47.1%
18.3%	**9.3%**	-9.0ppt



- Services revenue grew 15%, driven by pricing and sales expansion initiatives
- Revenue and gross margin both increased YoY overall, but operating profit declined due to continued strategic investment and the impact of special factors

Note: We recorded a ¥0.65bn allowance for doubtful accounts in the US and a ¥0.75bn impairment charge at our EMEA subsidiary MILabs as special factors

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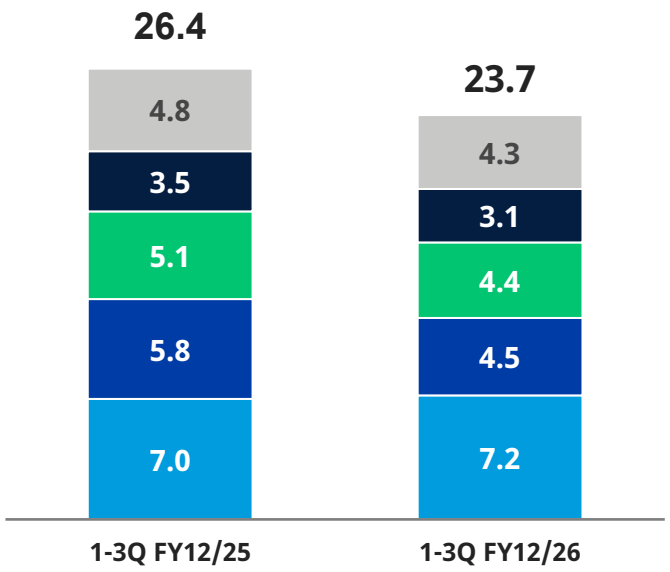
1-3Q FY12/26 Performance Summary by Category (by Region)

Multipurpose Analytical Instruments

(¥bn)	1-3Q FY12/25	1-3Q FY12/26	YoY
Revenue	26.4	**23.7**	-10.3%
Operating Profit	3.0	**0.8**	-71.1%
Operating Profit Margin (%)	11.5%	**3.7%**	-7.8ppt



Semiconductor Process Control Instruments

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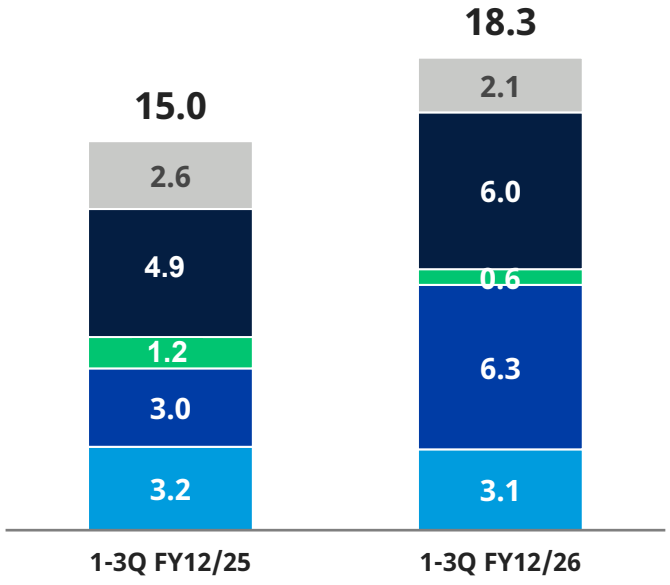

Components and Services

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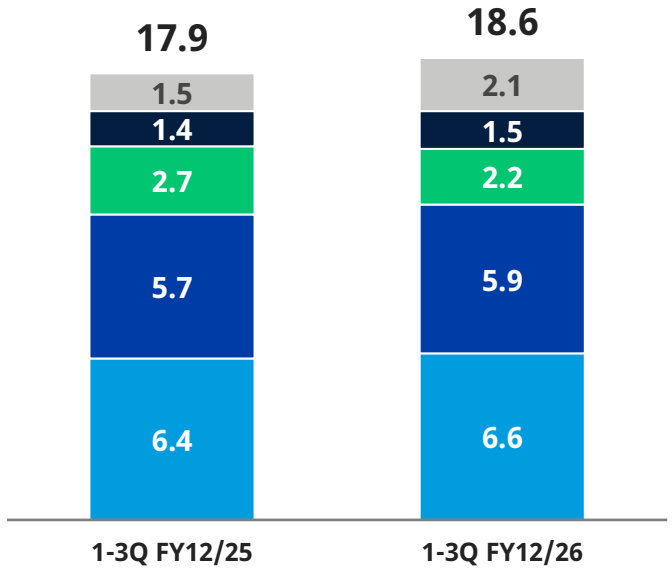



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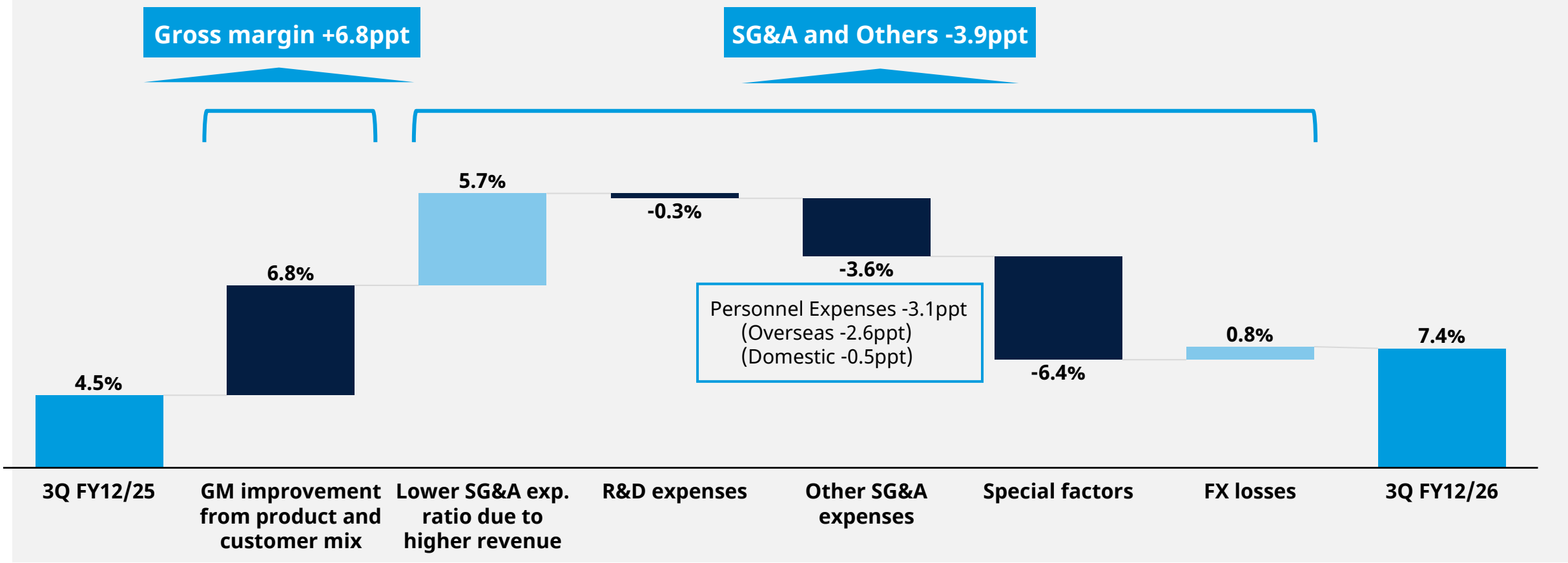
3Q FY12/26 Analysis of Consolidated Operating Profit (YoY)

Operating profit margin 7.4%, up 2.9ppt YoY

- Gross margin improved mainly from high-margin US projects in Semiconductor Process Control Instruments
- We absorbed increases in R&D and SG&A expenses as strategic investments (primarily labor costs for strengthening the Semiconductor Process Control Instruments business and overseas growth investments) through higher sales, and our operating profit margin improved 2.9ppt



Note: We recorded a ¥0.6bn allowance for doubtful accounts in the US and a ¥0.75bn impairment charge at our EMEA subsidiary MILabs as special factors

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Profit & Loss by Product (Management Accounting Basis) (1)

(10億円)/(¥bn)	FY12/25 1Q	2Q	3Q	4Q	Full-year	FY12/26 1Q	2Q	3Q	4Q
多目的分析機器/Multipurpose Analytical Instruments									
売上収益/Revenue	9.2	8.9	8.3	13.9	40.4	6.6	8.4	8.6	-
営業利益/Operating Profit	1.2	1.3	0.4	3.1	6.2	-0.2	0.3	0.8	-
営業利益率/Operating Margin	13.6%	15.0%	5.4%	22.7%	15.4%	-4.0%	3.6%	9.7%	-
半導体プロセス・コントロール機器/Semiconductor Process Control Instruments									
売上収益/Revenue	6.1	4.6	4.2	12.7	27.8	5.3	7.4	5.5	-
営業利益/Operating Profit	1.6	0.8	-0.0	5.6	8.0	0.5	1.4	0.7	-
営業利益率/Operating Margin	26.3%	17.9%	-1.9%	44.7%	29.0%	10.9%	18.9%	14.0%	-
部品・サービス/Components and Services									
売上収益/Revenue	5.1	6.5	6.1	8.0	25.9	5.8	5.8	6.9	-
営業利益/Operating Profit	0.5	1.5	1.1	1.8	5.1	1.0	0.6	0.1	-
営業利益率/Operating Margin	11.2%	23.3%	19.0%	23.2%	19.8%	17.4%	10.5%	1.5%	-
連結合計/Consolidated Total									
売上収益/Revenue	20.6	20.1	18.7	34.6	94.1	17.9	21.6	21.1	-
営業利益/Operating Profit	2.8	2.8	0.8	10.1	16.7	0.6	1.9	1.5	-
営業利益率/Operating Margin	13.8%	14.3%	4.5%	29.2%	17.7%	3.5%	9.0%	7.4%	-

Note: 1. This information is provided for investors' reference and does not take into account impact of corporate headquarter expenses. Therefore, the consolidated operating profit does not equal the sum of each category.

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Revenue Breakdown by Region and End-Market

Revenue by Region

(10億円)/(¥bn)	FY12/25					FY12/26				
	1Q	2Q	3Q	4Q	Full-year	1Q	2Q	3Q	4Q	Full-year
日本/Japan	7.7	4.1	4.8	10.7	27.4	6.9	4.8	5.2	-	-
米州/Americas	4.5	5.9	4.0	8.7	23.4	4.6	5.5	6.5	-	-
欧州/EMEA	2.7	3.8	2.6	4.6	13.8	1.7	2.8	2.7	-	-
アジア(中国以外)/Asia (ex. China)	3.1	3.0	3.7	6.9	16.8	2.0	5.2	3.4	-	-
中国/China	2.3	3.2	3.4	3.5	12.5	2.5	3.1	2.9	-	-
売上収益合計/Total Revenue	**20.6**	**20.1**	**18.7**	**34.6**	**94.1**	**17.9**	**21.6**	**21.1**	**-**	**-**

Revenue by End-Market

(10億円)/(¥bn)	FY12/25					FY12/26				
	1Q	2Q	3Q	4Q	Full-year	1Q	2Q	3Q	4Q	Full-year
半導体・電子部品/ Semiconductor/Electronic Components	7.7	6.1	4.9	14.3	33.3	6.0	8.7	6.9	-	-
ライフサイエンス/Life Science	0.9	0.8	1.3	1.9	5.0	0.8	0.9	1.1	-	-
その他産業/Other Industries	3.4	3.5	3.5	5.1	15.7	3.4	4.1	3.9	-	-
アカデミア&ガバメン ト/ Academia/Governments	4.6	5.9	5.1	9.1	24.8	3.1	3.6	4.5	-	-
サービス/Services	3.7	3.6	3.7	4.1	15.1	4.4	4.1	4.5	-	-
売上収益合計/Total Revenue	**20.6**	**20.1**	**18.7**	**34.6**	**94.1**	**17.9**	**21.6**	**21.1**	**-**	**-**

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Consolidated Quarterly Financial Results

(10億円)/(¥bn)	FY12/25 1Q	2Q	3Q	4Q	Full-year	FY12/26 1Q	2Q	3Q	4Q	予想/FCT Full-year
売上収益/Revenue	20.6	20.1	18.7	34.6	94.1	17.9	21.6	21.1	-	**101.0**
売上総利益[(1)]/Gross Profit[(1)]	11.5	11.1	9.7	20.4	52.8	9.7	11.9	12.4	-	**58.9**
営業利益/Operating Profit	2.8	2.8	0.8	10.1	16.7	0.6	1.9	1.5	-	**19.4**
税引前利益/Profit Before Tax	2.7	2.7	0.6	9.8	15.9	0.4	1.6	1.2	-	**18.4**
当期利益/Net Profit	1.9	1.8	0.4	7.1	11.4	0.3	1.2	0.8	-	**12.5**
基本的EPS（円）/Basic EPS (¥)	8.52	8.23	2.18	31.38	50.19	1.46	5.74	3.76	-	**55.27**
Non-IFRS Indicator										
調整後営業利益/Adjusted Operating Profit	3.3	3.3	1.3	10.6	18.6	1.1	2.4	2.8	-	**21.5**
調整後当期利益/Adjusted Net Profit	2.2	2.1	0.8	7.4	12.7	0.6	1.6	1.9	-	**13.9**
調整後EPS（円）/Adjusted EPS (¥)	-	-	-	-	55.19	-	-	-	-	**61.40**
EBITDA	4.0	4.1	2.1	11.5	21.8	2.0	3.3	3.7	-	**25.3**
調整後EBITDA/Adjusted EBITDA	4.0	4.0	2.1	11.4	21.7	2.0	3.3	3.7	-	**25.3**
対売上収益比率/Adjusted EBITDA Margin	19.6%	20.0%	11.7%	33.0%	23.0%	11.3%	15.5%	17.8%	-	**25.1%**
ROE	-	-	-	-	13.4%	-	-	-	-	**13.5%**
調整後ROE/Adjusted ROE	-	-	-	-	14.9%	-	-	-	-	**15.0%**
研究開発費/R&D Expenses	1.6	1.8	1.8	1.9	7.3	1.7	2.0	1.9	-	**8.5**
設備投資額/CAPEX	0.6	3.4	1.0	1.5	6.6	1.0	1.9	0.7	-	**7.7**
減価償却費/Depreciation	1.2	1.2	1.3	1.3	5.1	1.4	1.4	1.4	-	**5.8**
JPY/USD	151.2	147.5	147.8	149.8	149.8	156.5	158.6	158.9	-	**145.0**
JPY/EURO	159.4	162.2	165.6	169.5	169.5	183.5	184.8	184.2	-	**165.0**

Note:1. Gross profit for 1Q FY12/25 has been restated by reclassifying certain expenses to align with the FY12/26 cost structure. As a result, the figures differ from those originally disclosed. From 2Q FY12/25 onward, the same classification as FY12/26 is applied.

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3Q FY12/26 Consolidated B/S & Cash Flow

B/S

(10億円)/(¥bn)	FY12/25 Year-end	3Q FY12/26	Changes
流動資産/Current Assets	76.2	77.7	1.4
現預金/Cash and Cash Equivalents	24.2	26.4	2.1
棚卸資産/Inventories	20.8	29.0	8.1
営業債権、その他流動資産など/Trade Receivables, Other Current Assets, etc.	31.1	22.2	-8.9
非流動資産/Non-Current Assets	108.9	108.2	-0.6
有形固定資産/Property, Plant & Equipment	22.6	23.9	1.3
のれん、無形資産など/Goodwill, Intangible Assets, etc.	86.3	84.3	-1.9
資産合計/Total Assets	**185.2**	**186.0**	**0.8**

(10億円)/(¥bn)	FY12/25 Year-end	3Q FY12/26	Changes
負債/Liabilities	**96.8**	**99.1**	**2.3**
有利子負債/Interest-Bearing Debt	62.1	66.6	4.5
その他負債/Other Liabilities	34.6	32.4	-2.2
資本合計/Total Equity	**88.3**	**86.9**	**-1.4**
負債・資本合計/Total Liabilities and Equity	**185.2**	**186.0**	**0.8**

Cash Flow

(10億円)/(¥bn)	3Q FY12/25 YTD	3Q FY12/26 YTD	Changes
営業キャッシュ・フロー/Operating Cash-Flow	5.2	6.0	0.7
投資キャッシュ・フロー/Investing Cash-Flow	-5.0	-3.8	1.2
フリーキャッシュ・フロー/Free Cash-Flow	0.2	2.2	2.0
財務キャッシュ・フロー/Financing Cash-Flow	-5.9	0.1	6.0
為替換算差異/Impact on Exchange Rate	-0.8	-0.1	0.7
ネットキャッシュ・フロー/Net Cash-Flow	-6.6	2.1	8.8

Key Indicators

	FY12/25 Year-end	3Q FY12/26	Changes
ネットデット÷調整後EBITDA(1)/Net Debt / Adjusted EBITDA (1)	1.7x	2.0x	-
自己資本比率/Equity Ratio	47.7%	46.7%	-

Note:
1. Figures as of the 3Q FY12/26 are calculated using LTM total adjusted EBITDA

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Reconciliation of Adjusted Items (1/2)

(10億円)/(JPY Bn)	FY25					FY26			
EBITDA	1Q	2Q	3Q	4Q	Full-year	1Q	2Q	3Q	4Q
税引前利益/Profit Before Taxes	**2.7**	**2.7**	**0.6**	**9.8**	**15.9**	**0.4**	**1.6**	**1.2**	**-**
減価償却費及び償却費/Depreciation and Amortization	1.2	1.2	1.3	1.3	5.1	1.4	1.4	1.4	-
支払利息/Interest Expenses	0.2	0.2	0.2	0.3	1.1	0.2	0.3	0.3	-
受取利息及び配当金/Interest and Dividend Income	-0.1	-0.1	-0.1	-0.0	-0.4	-0.0	-0.0	-0.1	-
減損損失/Impairment Losses	-	-	-	0.0	0.0	-	-	0.7	-
EBITDA	**4.0**	**4.1**	**2.1**	**11.5**	**21.8**	**2.0**	**3.3**	**3.7**	**-**
利益率/Margin	19.6%	20.4%	11.7%	33.2%	23.2%	11.3%	15.5%	17.8%	-

調整後EBITDA	1Q	2Q	3Q	4Q	Full-year	1Q	2Q	3Q	4Q
EBITDA	**4.0**	**4.1**	**2.1**	**11.5**	**21.8**	**2.0**	**3.3**	**3.7**	**-**
コンサルティング・フィー/Business Consulting Fee	-	-	-	-	-	-	-	-	-
中国免除申請関連費用/China-related exemption application costs	-	-0.0	-	-0.0	-0.1	-	-	-	-
調整項目計/Total Adjustments	**-**	**-0.0**	**-**	**-0.0**	**-0.1**	**-**	-	-	-
調整後EBITDA/Adjusted EBITDA	**4.0**	**4.0**	**2.1**	**11.4**	**21.7**	**2.0**	**3.3**	**3.7**	**-**
利益率/Margin	19.6%	20.0%	11.7%	33.0%	23.0%	11.3%	15.5%	17.8%	-

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Reconciliation of Adjusted Items (2/2)

(10億円)/(JPY Bn)	FY25					FY26			
調整後営業利益/Adjusted Operating Profit	1Q	2Q	3Q	4Q	Full-year	1Q	2Q	3Q	4Q
営業利益/Operating Profit	**2.8**	**2.8**	**0.8**	**10.1**	**16.7**	**0.6**	**1.9**	**1.5**	-
PPA償却費/PPA Amortization	0.5	0.5	0.5	0.5	2.0	0.5	0.5	0.5	-
コンサルティング・フィー/Business Consulting Fee	-	-	-	-	-	-	-	-	-
中国免除申請関連費用/China-related exemption application costs	-	-0.0	-	-0.0	-0.1	-	-	-	-
減損損失/Impairment Losses	-	-	-	0.0	0.0	-	-	0.7	-
調整項目計/Total Adjustments	**0.5**	**0.4**	**0.5**	**0.4**	**1.9**	**0.5**	**0.5**	**1.2**	-
調整後営業利益/Adjusted Operating Profit	**3.3**	**3.3**	**1.3**	**10.6**	**18.6**	**1.1**	**2.4**	**2.8**	-
利益率/Margin	16.3%	16.5%	7.2%	30.6%	19.8%	6.4%	11.4%	13.4%	-

調整後当期利益/Adjusted Profit	1Q	2Q	3Q	4Q	Full-year	1Q	2Q	3Q	4Q
当期利益/Profit	**1.9**	**1.8**	**0.4**	**7.1**	**11.4**	**0.3**	**1.2**	**0.8**	-
PPA償却費/PPA Amortization	0.5	0.5	0.5	0.5	2.0	0.5	0.5	0.5	-
コンサルティング・フィー/Business Consulting Fee	-	-	-	-	-	-	-	-	-
中国免除申請関連費用/China-related exemption application costs	-	-0.0	-	-0.0	-0.1	-	-	-	-
減損損失/Impairment Losses	-	-	-	0.0	0.0	-	-	0.7	-
調整項目計/Total Adjustments	**0.5**	**0.4**	**0.5**	**0.4**	**1.9**	**0.5**	**0.5**	**1.2**	-
調整項目に対する税金等調整/Tax Adjustments to Total Adjusted Items	-0.1	-0.1	-0.1	-0.1	-0.6	-0.1	-0.1	-0.1	-
調整後当期利益/Adjusted Profit	**2.2**	**2.1**	**0.8**	**7.4**	**12.7**	**0.6**	**1.6**	**1.9**	-
利益率/Margin	11.0%	10.7%	4.5%	21.5%	13.5%	3.8%	7.6%	9.3%	-

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Rigaku at a Glance

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Company Highlights

Company at a Glance

- A global leader in advanced X-ray technology with 75 years of innovation history
- Achieving industry-leading profitability through strong R&D capabilities
- Delivering high EBITDA margins and sustained growth, driven by >20% growth in semiconductor process control

Financial Profiles with Best-in-Class Growth and Margin (2025/12)

Revenue
¥94.1bn

EBITDA(2)
¥21.8bn
(Margin: 23.2%)

Semiconductor Process Control Instruments Revenue CAGR(1)
21%

Overseas Revenue Ratio(3)
71%

Semiconductor FEOL X-Ray Metrology Market Share(6)
Global No.1

X-ray Diffraction (XRD) Market Share(4)(5)
Global No.2
Domestic No.1

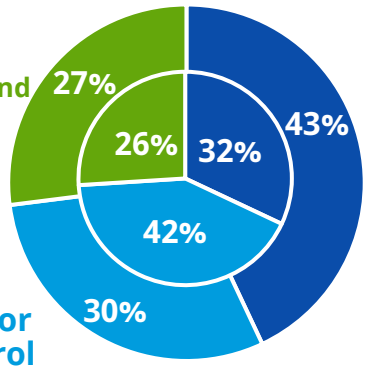
Note:
1. CAGR for the 3-year period from FY12/22 to FY12/25
2. EBITDA=Profit before income taxes + depreciation & amortization +impairment losses – interest income & dividends received + interest expenses
3. Calculated based on revenue from overseas customers and distributors
4. Strategic Directions International, Inc. "SDi Global Assessment Report 2025"
5. R&D Co., Ltd. "Scientific Instrument Yearbook 2025"
6. Yole Intelligence "2026 Yole Group Japan Visits - The Semiconductor Industry Trends"

Operating Platform for Diversified End Markets (2025/12)

Revenue (Outer) and Operating Profit (Inner) by Business



Components and Services



Multipurpose Analytical Instruments





Semiconductor Process Control Instruments

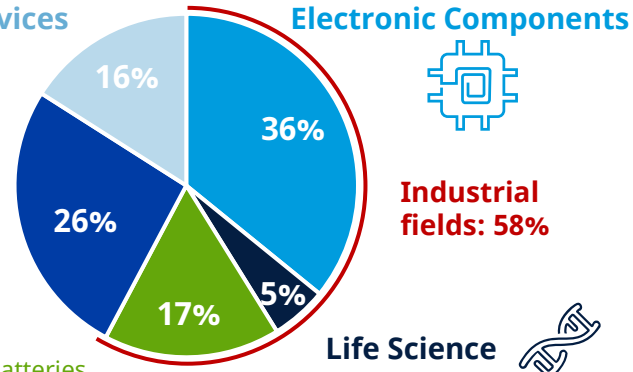
Revenue by End-Markets



Academia/ Government



Other (metals, batteries, petrochemicals, ceramics, security)



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Rigaku's Competitive Edge

In-house Developed Core Components

X-ray Generators

Pioneer rotating target technology to achieve strong X-ray brightness



Optical Components

Advanced multilayer optics for X-ray and EUV



Rigaku's Ability to Maximize Performance Through Best Combination

Analytical Software

AI analysis which visualizes complex structures for metrology



X-ray Detectors

In-house production of semiconductor for high-sensitivity X-ray detectors



Advantages of In-house Manufacturing

High-performance Equipment

High-speed measurement, high resolution & energy saving

Shortened Development Cycle

Scale Advantage

Technology Resources

- Highly skilled X-ray technicians



# of Researchers & Developers(1) Approx. 300

- Building Global Barriers to Entry with Our Patent Portfolio(2)



Patent rights	Trademark rights	Foreign filing rate
784	**350**	**>90%**
19 countries and regions	**15** countries and regions	compared to filings in Japan

Note:
1. Approximate # of research and development personnel engaged in basic research & product development
2. As of July 2026

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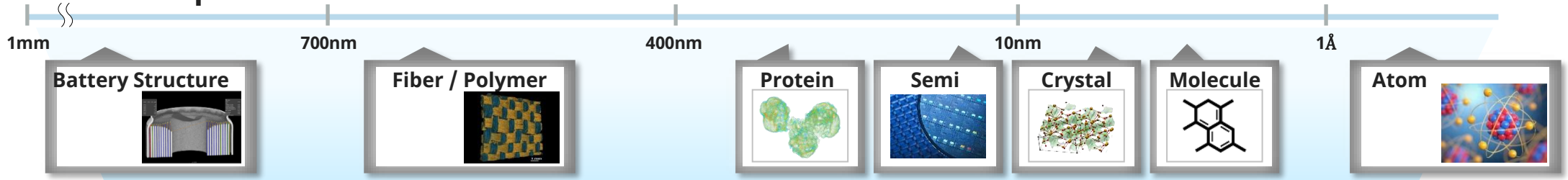
Seeing the Unseen: Rigaku's X-Ray Solutions

- **Rigaku Established Metrology Solutions for Diverse Analytical Needs Amid the Increasing Inspection / Metrology Needs in Miniature Space**



X-ray Metrology

Micro / nano Measurements: X-ray Diffraction, X-ray Reflectometry, Small Angle X-ray Scattering
Sub-nanoscale resolution

3D Capability: X-Ray Imaging, X-ray CT
Non-destructive analysis with X-ray transmission

Element Identification X-ray Fluorescence
Composition analysis with X-ray fluorescence

Rigaku

X-ray Diffraction



XRTmicron



MiniFlex



SmartLab

X-ray Imaging / X-ray CT



CT Lab HR160



CT Lab HV

X-ray Fluorescence



ZSX Primus IV



Qualana

X-ray Fluorescence / X-ray Diffraction /



WaferX 310

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Key Products by End Market (Multipurpose Analytical Instruments)

Academia/Government

Basic Research & Materials Analysis

✓ X-ray Diffraction (XRD)



Universities and Research Institutions



SmartLab



MiniFlex

Semiconductor/Electronic Components

(Semiconductor)
Composition analysis & reliability evaluation

✓ Thermal analysis / X-ray fluorescence (XRF)



Semiconductor /Thin films



ZSX Primus IV



CT Lab HV



Battery

(Batteries)
Crystal structure and nanostructure analysis

✓ X-ray Diffraction (XRD)
✓ X-ray fluorescence (XRF)
✓ Small-angle X-ray scattering (SAXS)



SmartLab



ZSX Primus IV

Life Science

Pharmaceuticals & biomolecular structure analysis

✓ X-ray Diffraction (XRD)
✓ Electron Density Topography



Pharmaceuticals



XtaLAB Synergy-ED



MoleQlyze

Other Industry

Raw material composition & quality control

✓ X-ray fluorescence (XRF)
✓ X-ray Diffraction (XRD)



Metals



Oil and Natural Gas



Ceramics



ZSX Primus IV



MiniFlex

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Key Products Across the Semiconductor Manufacturing Process

Rigaku's Products Offer Advanced Inspection / Metrology Solutions Essential for Manufacturing Cutting-edge Semiconductors

Thin Film / Resist Thickness Measurement



WaferX 310
Thickness / Composition



XTRAIA MF-3400
Film thickness / Density / Composition / Crystallinity



XTRAIA XD-3300
Film thickness/ Density / Crystallinity



ONYX 3200
Film thickness / Composition

- Includes composition and crystallinity measurement
- Expanding needs for sub-nano measurements due to thinner films and multilayering

Surface Contamination Inspection

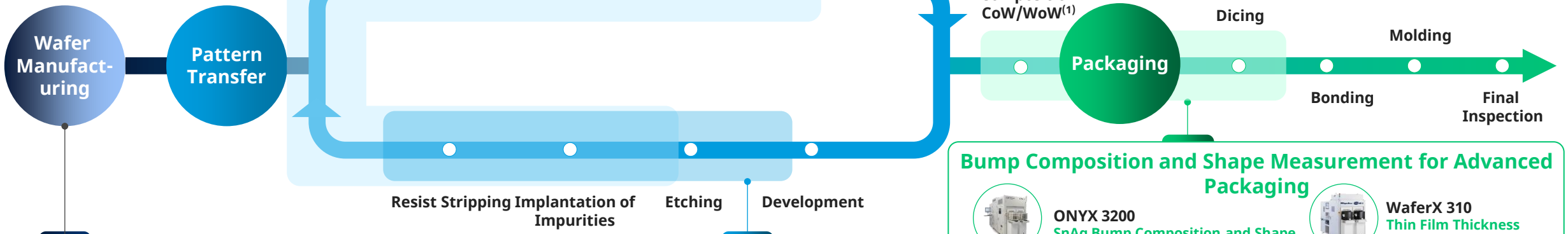


TXRF310 Fab



TXRF-V310

- Inspects surface contamination in every phase of the front-end process



New — Developing New Product

Multipurpose Analytical Instruments



Film Thickness and Resist / Hard Mask Shape Analysis



XTRAIA CD-3010G
Nano Shape



XTRAIA CD-3200T
Nano Shape

- Enables non-destructive evaluation of GAA structures and deep hole shape measurement for advanced memory

Bump Composition and Shape Measurement for Advanced Packaging

ONYX 3200
SnAg Bump Composition and Shape

WaferX 310
Thin Film Thickness and Composition

- Inspection for contamination, foreign material, and defects
- Thickness and composition measurement of bumps, wiring, and electrodes, that increases with chiplet integration
- TSV(2) defect inspection
- Compatible with advanced solutions like CoWoS and HBM

Note:
1. CoW = Chip on Wafer, WoW = Wafer on Wafer
2. TSV = Through Silicon Via

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Rigaku's Long-Term Strategy: Three Pillars of Growth

- **Establish solutions to meet cutting-edge inspection / metrology demand for each application, and aim for medium- to long-term growth through the promotion of the "Lab to Fab" strategy**

	Pillar 1 Leveraging Fundamental Strengths	Pillar 2 Driving "Lab to Fab" Business Model in Semiconductors	Pillar 3 Expanding Deployment of "Lab to Fab" Strategy
	Multipurpose Analytical Instruments	Semiconductor Process Control Instruments	Multipurpose Analytical Instruments
	Increasing Demand for Leading-edge X-ray Solutions in Multi-purpose Analytical Instruments	X-ray Technology Essential for Advancement of Semiconductor Industry	Creating New Markets by Developing Novel Applications
Base Strategy	▪ Leverage Rigaku's Exceptional X-ray Core Technology and Strong Customer Base to Address Diversifying and Advancing R&D Needs of Customers ▪ Expanding Global Market Share through Active Investment in Overseas Commercial Infrastructure	▪ Drive the "Lab to Fab" Strategy and Solidify Rigaku's Firm Position as the Global Leader in the Semiconductor X-ray Metrology Field ▪ Expand Business Domains by Providing New Solutions that Address the Miniaturization and Multi-layering Trends in the Semiconductor Industry	▪ Expand the "Lab to Fab" Strategy into Innovation-driven Industrial Sectors and Accelerate the Transformation of Multipurpose Analytical Instruments for Fabrication Use
Focus Area	▪ Enhancement of Global Supply Chain ▪ Expansion of the Service Business	▪ Providing Solutions Aligned with Semiconductor Advanced Technology Trends ▪ Expanding Business Areas through Complementing Optical and CD Measurements (Hybrid Metrology) ▪ Enter the Advanced Packaging Inspection Market	▪ Power Device (Next-generation Compound Semiconductors) ▪ Battery (All / Semi-solid-state Batteries) ▪ Life Science (Biopharmaceuticals)

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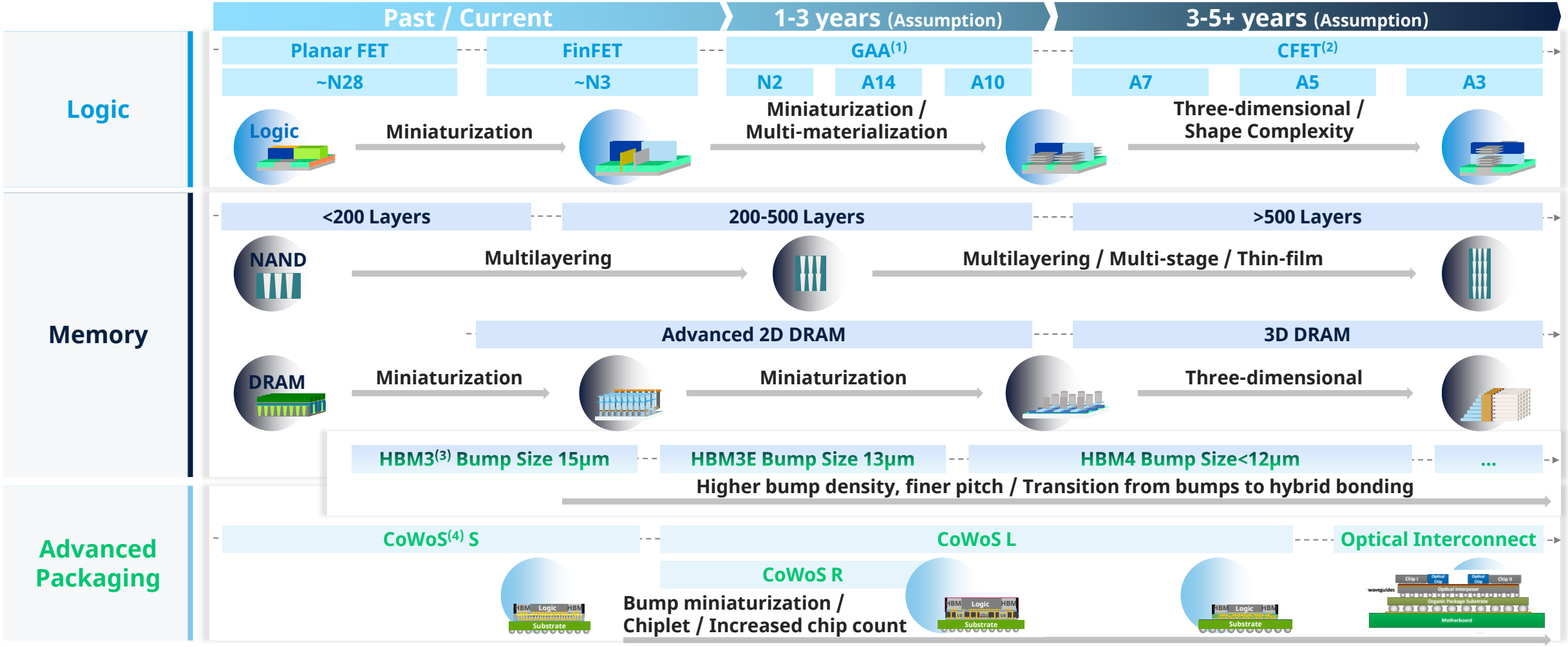
Inspection / Metrology Needs from Advanced Semiconductor Manufacturing

- **The semiconductor manufacturing process has reached a turning point as increasingly fine structures and multilayer designs have made high-precision measurement and inspection technologies even more essential**



Note:
1. GAA = Gate All Around 2. CFET = Complementary FET 3. HBM3 = High Bandwidth Memory, Third Generation 4. CoWoS = Chip-on-Wafer-on-Substrate

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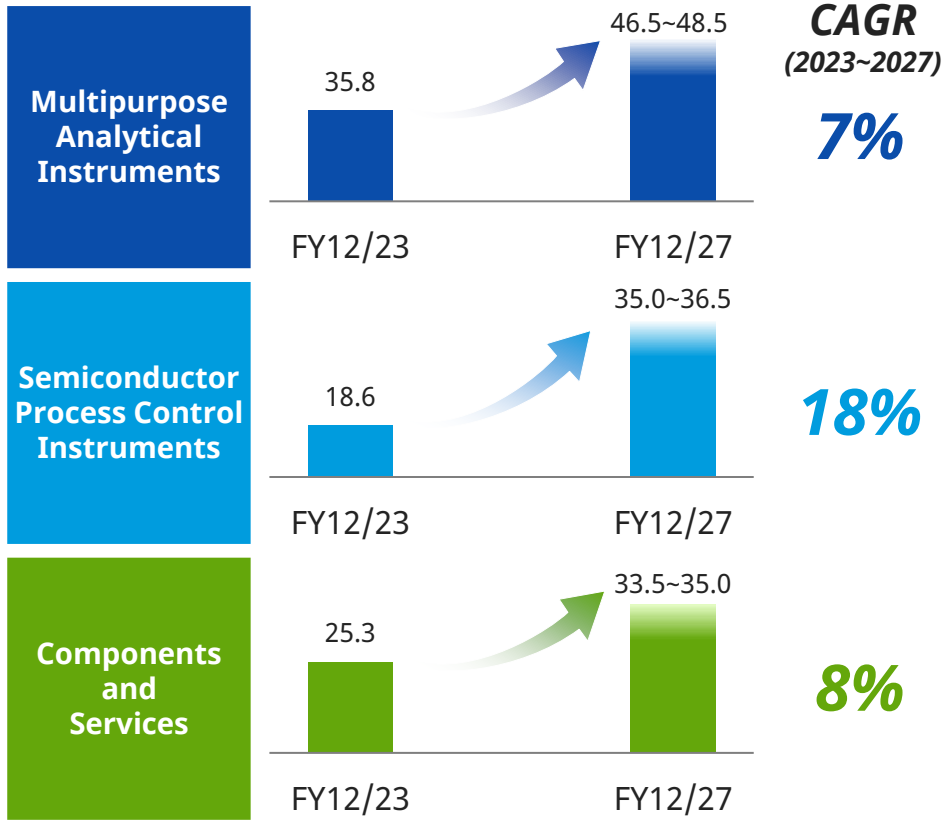
Mid-Term Value Creation Plan

■ **Target revenue CAGR of around 10% driven by strong growth in Semiconductor Process Control Instruments**

Overall Medium-term Goals (Company-wide)

	Plan Base Year (FY12/23)	FY12/25 (Actual)	FY12/26 (Forecast)	Medium-term Goals (FY12/27)
Revenue (YoY)	¥79.8bn 27.4%	¥94.1bn 3.9%	¥101.0bn 7.2%	¥115~120bn(1) (CAGR around 10%)
Adj. EBITDA(2) (Adj. EBITDA Margin)	¥20.2bn 25.3%	¥21.7bn 23.0%	¥25.3bn 25.1%	¥31.5~32.5bn Around 27%
Adj. Operating Profit(3) (Adj. OP Margin)	¥18.3bn 22.9%	¥18.6bn 19.8%	¥21.5bn 21.3%	¥26.5~27.5bn Around 23%
Shareholder Return	-	¥18.8/share	¥19.0/share	Dividend Payout Ratio Around 30%
R&D Ratio(4)	6.5%	7.8%	8.5%	Around 9%
CAPEX Ratio(5)	3.5%	7.1%	7.7%	Around 5%(6)
Headcount(7)	1,994	2,226	2,351	2,500~2,600

Revenue Growth Target by Product Category (¥bn)



4. R&D Ratio = R&D Expenses / Revenue
5. Capex Ratio = Capex / Revenue Capex is calculated as the amount of capex excluding right-of-use assets
6. The Capex Ratio for the Medium-term Goal in FY12/27 does not include in its numerator the portion of capex for any investment in large-scale plant upgrading and expansion after Yamanashi Plant, which is not planned as of the date of this Medium-term Business Plan.
7. Headcount is presented as the sum of total employees at the fiscal year-end plus the average number of temporary employees throughout the fiscal year

Note: 1. The Revenue range for the Medium-term Goal in FY12/27 is set within 5% of the amount of Revenue goal in FY12/27 (the Adj. EBITDA, Adj. Operating Profit and Headcount ranges for the Medium-term Goals in FY12/27 are also set in a similar manner). The YoY Growth Rate of Revenue for the Medium-term Goal in FY12/27 means CAGR of Revenue in the four-year period through FY12/27 in comparison to FY12/23, with the revenue forecast for each fiscal year from FY12/25 to FY12/27 calculated, applying the assumed exchange rates of 145 yen per dollar and 156 yen per euro
2. Adjusted EBITDA=Profit before income taxes + Depreciation & amortization + Impairment losses − Interest income & dividends received + Interest expenses + One time costs
3. Adjusted Operating Profit = Operating profit + PPA Amortization + Impairment losses + One time costs

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Glossary

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Glossary (1/3)

Terms	Description
AXI	• Advanced X-Ray Inspection is a non-destructive and automated method that uses X-rays to inspect internal defects (such as voids, cracks, and misalignments) in electronic components, semiconductors, and industrial products
CFET	• Complementary FET (CFET) is a next generation semiconductor technology which vertically integrates N- and P-type FETs. It enables continued scaling beyond the current mainstream technologies such as FinFET and GAA
CoWoS	• Chip-on-Wafer-on-Substrate is a 2.5D packaging technology developed by TSMC for high-performance computing. It integrates multiple chips on a silicon interposer mounted on a substrate, enabling high-speed, high-bandwidth data processing in a compact package.
DicifferX WAXS Edition	• An advanced X-ray analysis device that precisely and rapidly measures atomic and molecular structures, crystal phases, and molecular orientations in materials such as polymer films, fibers, and thin films within just a few seconds
Electron Density Topography	• A technique for visualizing the distribution of electrons (electron density) within a crystal, enabling detailed analysis of the material's atomic structure and chemical bonding
EUV	• Abbreviation for "Extreme Ultraviolet", which refers to an exposure technology that uses extreme ultraviolet light of ~13.5nm, used as a light source in advanced semiconductor lithography
GAA	• Abbreviation for "gate-all-around" transistor technology, which refers to a modified transistor structure where the gate contacts the channel from all sides and enables continued scaling
GaN	• A compound semiconductor material composed of gallium (Ga) and nitrogen (N)

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Glossary (2/3)

Terms	Description
JEP	• JEP stands for Joint Evaluation Program, under which equipment is installed at a customer site for joint performance evaluation before purchase. Upon purchase, it is reclassified from fixed assets to cost of sales.
Qualana	• An advanced X-ray analysis device offering high-precision micro and wide-area mapping without positional deviation. It sensitively detects even light elements and, with Rigaku's proprietary FP program, supports flexible quantitative thin-film analysis
SiC	• A compound semiconductor material consisting of silicon (Si) and carbon (C)
SiGe	• An alloy semiconductor material composed of silicon (Si) and germanium (Ge)
TFXRD	• An X-ray diffraction (XRD) system designed for high-precision characterization of thin-film properties in the semiconductor industry. It supports thin-film measurements on large-diameter 200 mm and 300 mm wafers and is widely used for applications ranging from R&D to manufacturing process monitoring
T-SAXS	• Transmission Small-Angle X-ray Scattering. A non-destructive technique that uses X-rays transmitted through a material and analyzes their scattering patterns to characterize nanoscale structures within the material. It is used to examine fine structural features inside semiconductor components in detail.
WFE	• Abbreviation for "Wafer Fab Equipment". Semiconductor manufacturing equipment used in the processes of creating electronic circuitry and inspecting the conditions on wafers
X-ray CT	• X-ray CT enables non-destructive 3D imaging of internal structures by scanning density distributions

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Glossary (3/3)

Terms	Description
XRD (Diffraction)	• X-Ray Diffraction (XRD) - a technique for obtaining information on the crystal structure of a sample from the diffraction pattern that occurs when a crystal sample is irradiated with X-rays.
XRF (Fluorescence)	• X-Ray Fluorescence (XRF) - a technique for qualitative and quantitative analysis of elements using fluorescent X-rays, which are generated when a substance is irradiated with X-rays.
XRTmicron	• High-resolution, high-speed X-ray topography system with a high-brightness source and dedicated optics. Non-destructive, fully automated detection of crystal defects in Si, SiC, GaN, and other single-crystal materials which enhances yield in semiconductor manufacturing
XtaLAB Synergy ED	• It is an electron diffraction system combining Rigaku's single-crystal X-ray structure analysis and JEOL's transmission electron microscope technologies. It enables structural analysis of submicron crystals which includes materials previously difficult to measure
ZSX Primus III NEXT	• A top-loading scanning X-ray analytical system and the successor to the ZSX Primus III+, a versatile model widely used for production control
ZSX Primus IV	• A wavelength-dispersive X-ray analytical system that uses a powerful 4 kW X-ray source for detailed elemental analysis of materials

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