Financial Results Briefing

The Second Quarter of Fiscal Year Ending March 31, 2027

November 13, 2026

GEECHS Inc.

TSE Standard Market: 7060

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Financial Results Briefing

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Financial Results Briefing

Corporate Profile

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About GEECHS

Updating Japan through DX and AX

Driving DX & AX with GEECHS Talents database

Make the biggest impression in the 21st century

As a strategic partner, we harness IT, DX, and AX to upgrade Japan’s traditional business practices and legacy systems to global standards—and beyond. Armed with powerful assets built over the years—including our extensive network of digital freelancers, global talent, and newly upskilled professionals—we directly address the transformation challenges of Japanese corporations. Striving for constant evolution towards “incomplete perfection,” we are committed to continuously upgrading Japanese society and driving new economic growth.

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Group Corporate Profile

Company name	GEECHS Inc. (TSE Standard Market: 7060)
President and CEO	Naruhito Sonehara
Established	August 23, 2007
Head office	Shibuya Scramble Square, 2-24-12 Shibuya, Shibuya-ku, Tokyo, JAPAN
Capital	1,112 million yen (as of September 30, 2026)
Business description	IT Human Resources Matching Business, Japan IT Human Resources Matching Business, Overseas Seed Tech Business
Sales volume	JPY 26,375 million (FY2026/3)
Employees (consolidated)	290 (as of September 30, 2026)
Offices	Tokyo Head Office, Hokkaido Branch, Osaka Branch, Hiroshima Branch, Fukuoka Branch, Nagoya Satellite Office, Australia, Philippines

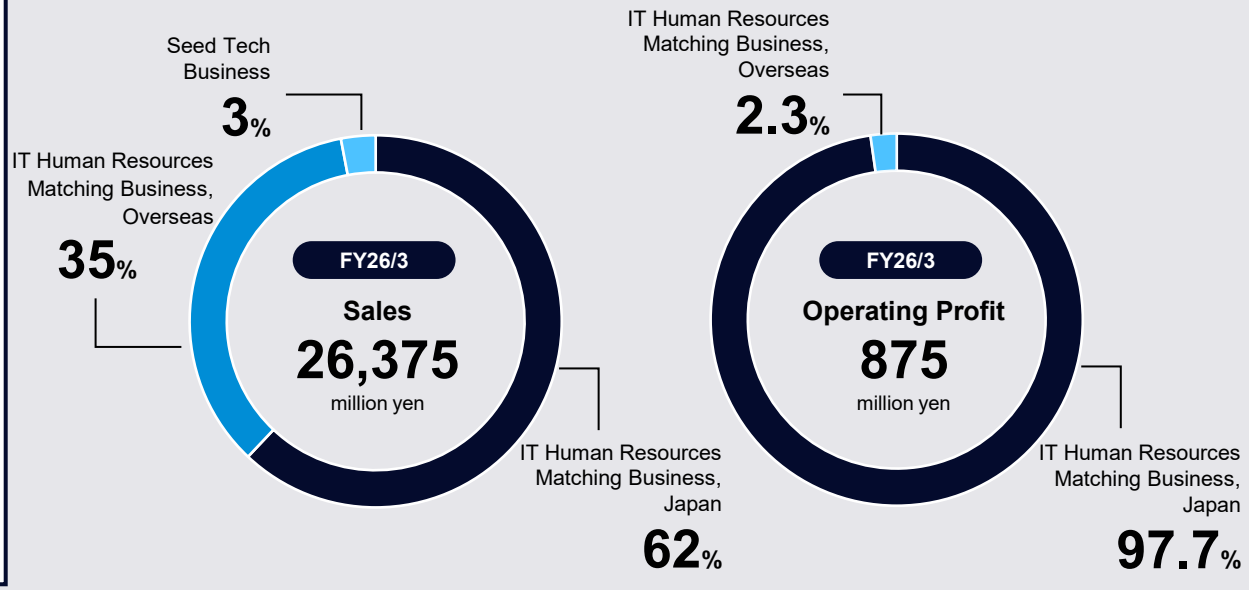
Our Group

GEECHS
IT Human Resources Matching Business, Japan

launch
IT Human Resources Matching Business, Overseas

seedtech
Seed Tech Business

Segmentation



*Segment composition of sales and operating profit for FY2026/3 has been prepared by reclassifying the business of Alive Inc., previously included in the IT Human Resources Matching Business, Japan, into Seed Tech. Seed Tech recorded a segment loss of 2 million yen.

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Domestic Initiatives: Upgrading and Developing IT, DX & AX Talent

- To solve clients' diverse challenges in the AI era, we have built a structure to continuously develop and supply IT, DX and AX talent through the GEECHS Group's in-house training functions.

IT Talent
DX Talent
AX Talent

×

AI Skills & Literacy

+

Business Execution
Problem finding, PM, on-site execution

= AI-native developers who lead from upstream
Adopt AI-driven development as standard and cover everything from requirements definition and design to implementation

= Hands-on change agents working alongside clients
Connect management and the frontline, remove operational bottlenecks, and drive DX

= Architects who redesign systems through AI adoption
Embed AI into business models, operational processes and development environments, and see it through to adoption

GEECHS Proposing IT/AI-savvy talent

Update Guild

Reskilling program for technologies and skills for the AI era

- Held the first FDE development program
- Synergies with our in-house engineer community "Engineer Base"

Seed Tech Developing DX/AX leaders

Corporate AI/DX Training

Customized AI/DX training using clients' own operations

- Plus "Sodatech" e-learning (500+ videos)
- 12,000 cumulative trainees

Seed Tech Consulting service

"Digishoku"

Hands-on DX/AX support

- Fully hands-on service by the Digishoku team
- Customized solutions based on DX, AX and security assessments

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Financial Highlights for FY2027/3 2Q

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Key Messages

FY2027/3 2Q Results

- Sales: 14.26 billion yen (**+10.6%** YoY); operating profit: 450 million yen (**+3.2%** YoY)
- Sales and operating profit reached **104.9%** and **134.9%** of the 1H plan, with the IT Human Resources Matching Business, Overseas driving results.

1H Review

- IT Human Resources Matching Business, Japan: A “period of qualitative transformation,” shifting to AI and upstream projects and offering an FDE* development program.
- IT Human Resources Matching Business, Overseas: Strong performance continued, with significant sales and profit growth driven by targeted industries and selective orders.
- Seed Tech: Upfront investment in “Digishoku,” our DX service for SMEs, paid off with a significant increase in clients.

Full-year Plan

- 1H results exceeded our plan, and we continue to aim for the full-year plan.

* Forward Deployed Engineer: an engineer who is stationed at or deeply embedded in the client’s front line and solves problems on the spot.

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FY2027/3 2Q : Financial Highlights

- 1H sales were 14.26 billion yen (+10.6% YoY). EBITDA and operating profit also grew significantly, exceeding the 1H plan.
- 2Q sales alone reached a record high of 7.29 billion yen.

(Millions of yen)	FY26/3 1H	FY27/3 1H	FY27/3 2Q	YoY 1H	1H Plan	Achievement Rate	Full-year Plan
Sales	12,891	**14,263**	**7,294**	+10.6 %	**13,600**	104.9 %	28,300
EBITDA	476	**518**	**281**	+9.0 %	**380**	136.6 %	1,090
Operating profit	437	**451**	**247**	+3.2 %	**335**	134.9 %	1,000
Ordinary profit	427	**395**	**231**	-7.5 %	**320**	123.6%	970
Net profit*	343	**243**	**157**	-29.2 %	**208**	117.1 %	630

* Net profit attributable to owners of the parent

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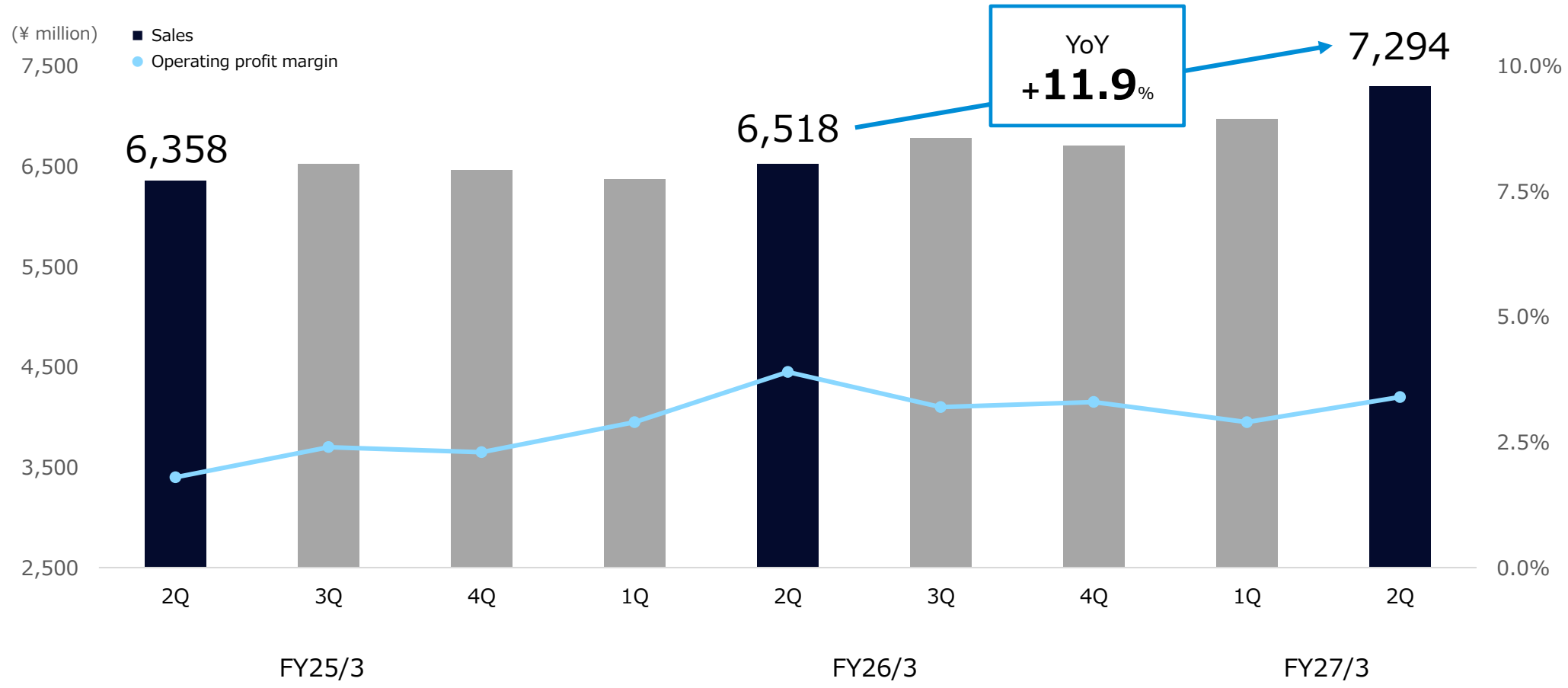
FY2027/3 2Q : Financial Highlights (Sales, Operating Profit Margin)

- Sales: Up 770 million yen YoY, exceeding 7.2 billion yen in a single quarter for the first time.
- Operating profit margin: 3.4%, down 0.5pt YoY, due to the higher sales share of the IT Human Resources Matching Business, Overseas.



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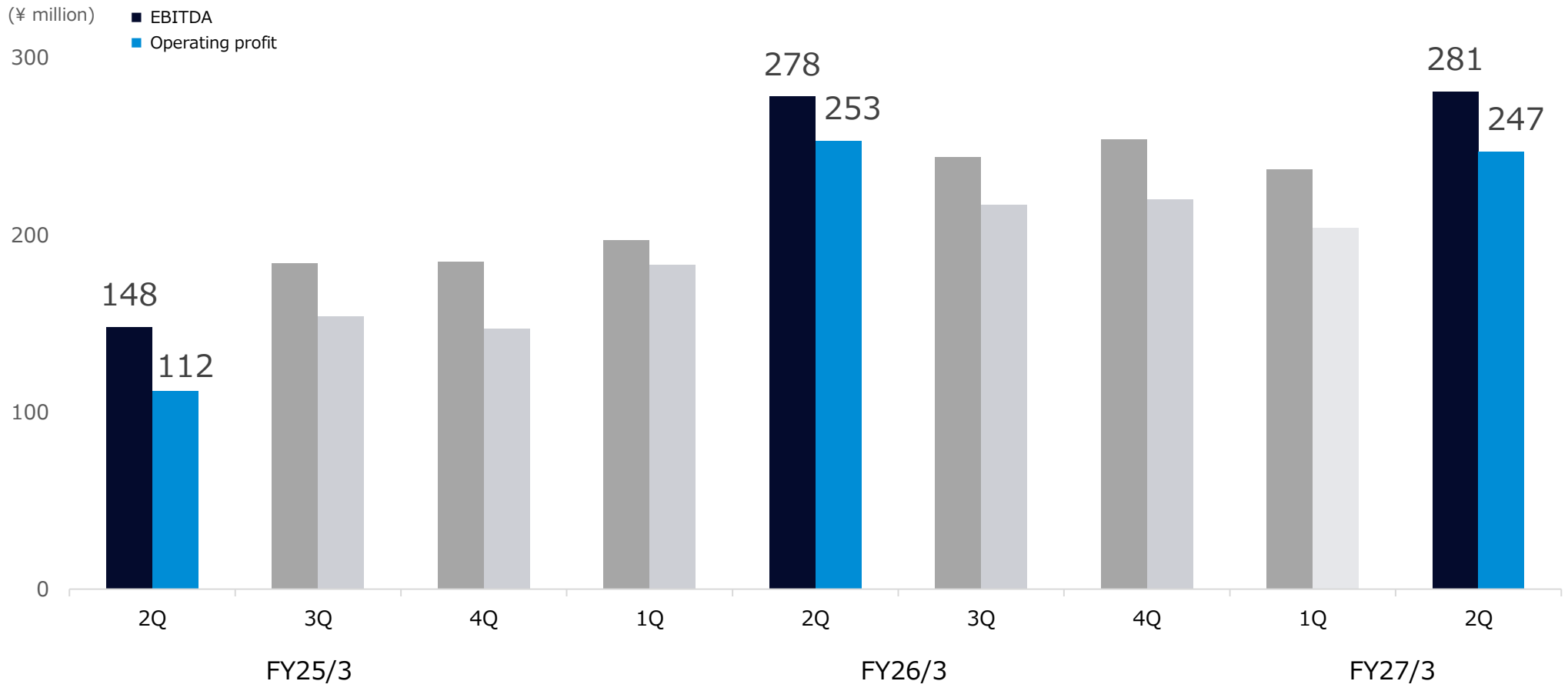
FY2027/3 2Q : Financial Highlights (EBITDA, Operating Profit)

- EBITDA and operating profit: Exceeded 200 million yen for five consecutive quarters, growing steadily while maintaining quarterly profitability.



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FY2027/3 2Q : Financial Highlights by Segment

- IT HR Matching Business, Japan: Person-months flat YoY while the share of upstream projects such as AI rose. Broadly on plan.
- IT HR Matching Business, Overseas: Staffing growth and selective high-margin orders achieved the full-year segment profit plan in 1H.
- Seed Tech: “Digishoku” grew significantly with more clients; hiring of new consultants is progressing.

(Millions of yen)		FY26/3 1H	FY27/3 1H	FY27/3 2Q	YoY 1H	Full-year Plan	Progress Rate
IT HR Matching Business, Japan	Sales	8,065	**8,214**	**4,069**	+1.8 %	**17,300**	47.5 %
	Profit	681	**703**	**343**	+3.4 %	**1,550**	45.4 %
IT HR Matching Business, Overseas	Sales	4,427	**5,692**	**3,031**	+28.6 %	**10,000**	56.9 %
	(AUD million)	*47*	***51***	***26***	*+8.8 %*	***90***	*56.9 %*
	Profit	21	**63**	**35**	+197.9 %	**60**	105.6 %
	(AUD million)	*0.2*	***0.5***	***0.3***	*+152.1 %*	***0.5***	*113.9 %*
Seed Tech	Sales	433	**393**	**208**	-9.3 %	**1,000**	39.4 %
	Profit	26	**-18**	**7**	–	**20**	–
Group-wide Expenses and Adjustment Costs		-291	**-296**	**-138**	–	**-630**	–

* Results for 2Q FY26/3 have been prepared by reclassifying the business of Alive Inc., previously included in the IT Human Resources Matching Business, Japan, into Seed Tech.

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Financial Results by Segment

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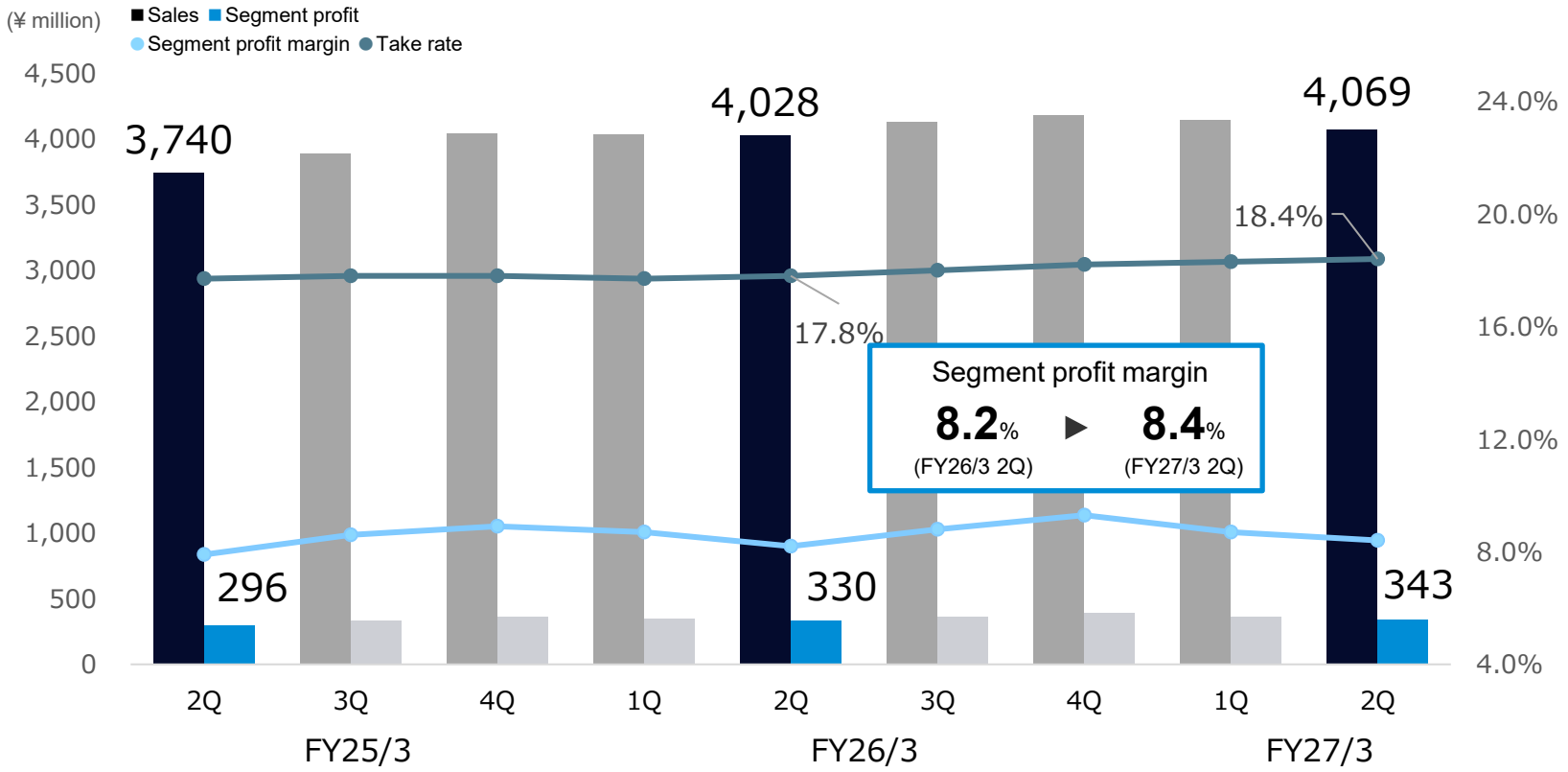
IT Human Resources Matching Business, Japan (Sales, Segment Profit and Advertising Expense Ratio)

- 2Q progressed as planned. Advancing IT freelancers' skill transformation and database quality through the FDE development program and other initiatives.
- Take rate rose to 18.4% on a higher share of high-priced upstream projects (AI, PM, etc.).
- Strengthening our recruitment service to meet clients' permanent hiring needs.



2Q		(YoY)
Sales	4,069	million yen (+1.0%)
Segment Profit	343	million yen (+4.0%)
Advertising Expense Ratio	1.3	%

1H		(YoY)
Sales	8,214	million yen (+1.8%)
Segment Profit	703	million yen (+3.4%)
Advertising Expense Ratio	1.3	%

* Take rate is calculated by dividing gross profit (total transaction volume less compensation paid to IT freelancers) by the total transaction volume.
* Results for 1Q–4Q FY26/3 are retroactively adjusted for the former Alive Inc.

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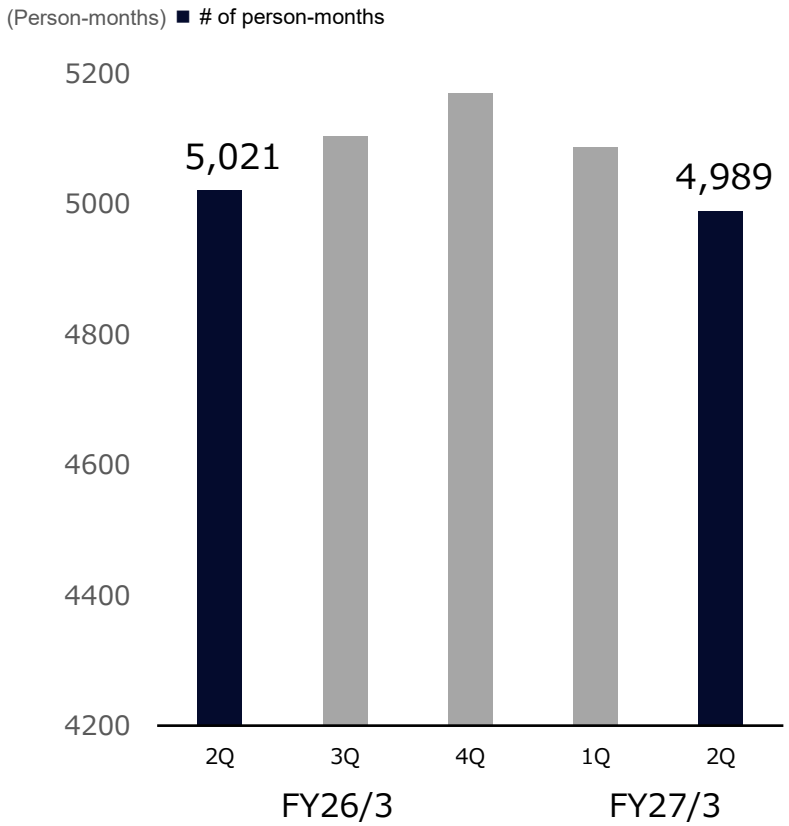
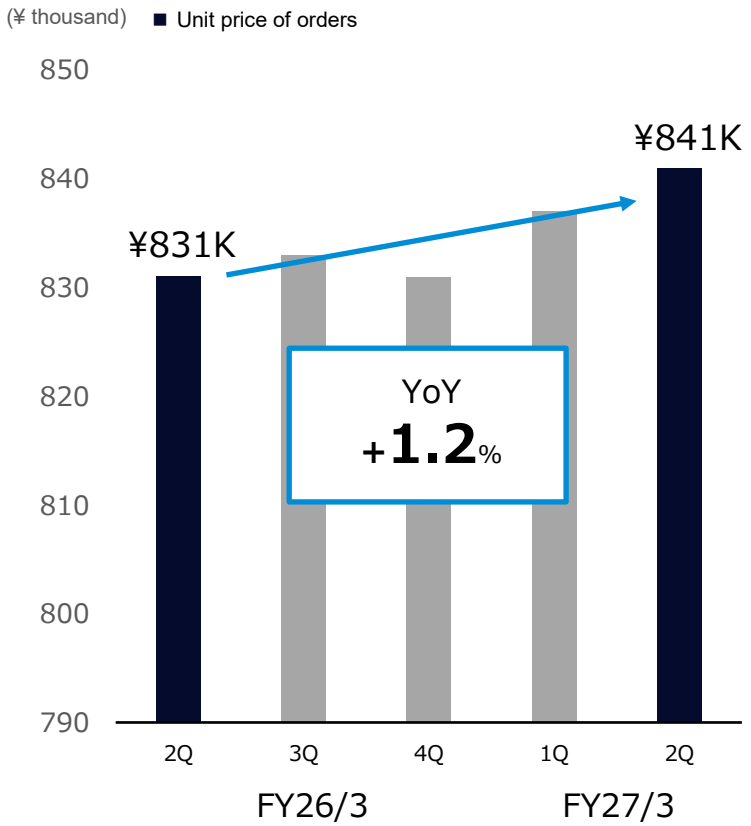
IT Human Resources Matching Business, Japan (Person-months, Unit Price of Orders)

- As expected, total person-months declined due to shifting market needs, but stronger matching for AI and upstream projects significantly raised the average unit price of orders.
- We aim to increase person-months by expanding into regions outside the Tokyo metropolitan area, where talent shortages are acute, and opening new offices.





2Q (YoY)

Number of person-months: **4,989** (-0.6%)

Unit Price of Orders: **841** thousand yen (+1.2%)

1H (YoY)

Number of person-months: **10,076** (+0.5%)

Unit Price of Orders: **839** thousand yen (+1.0%)

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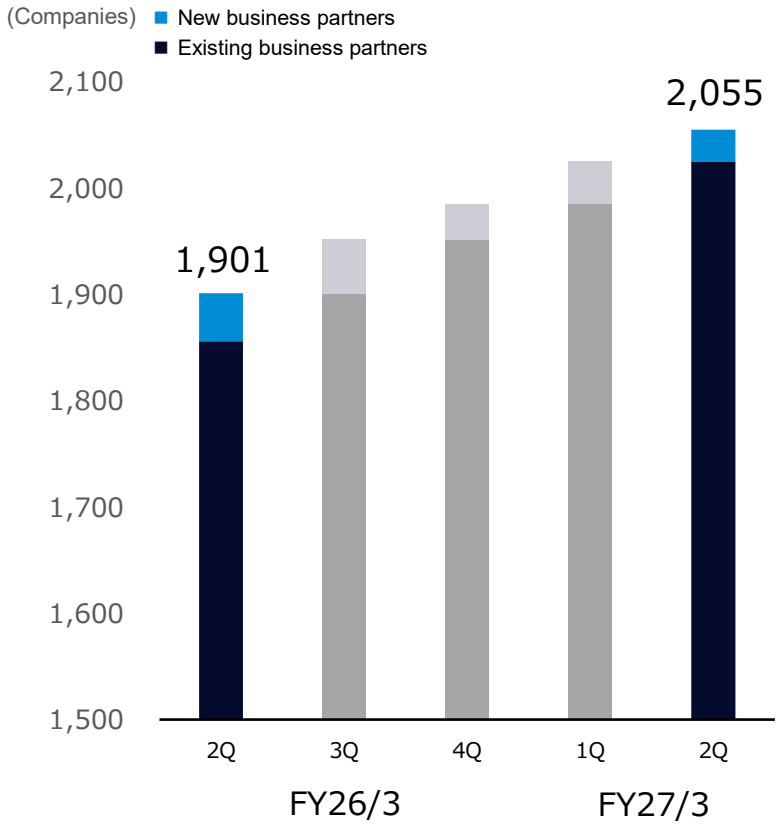
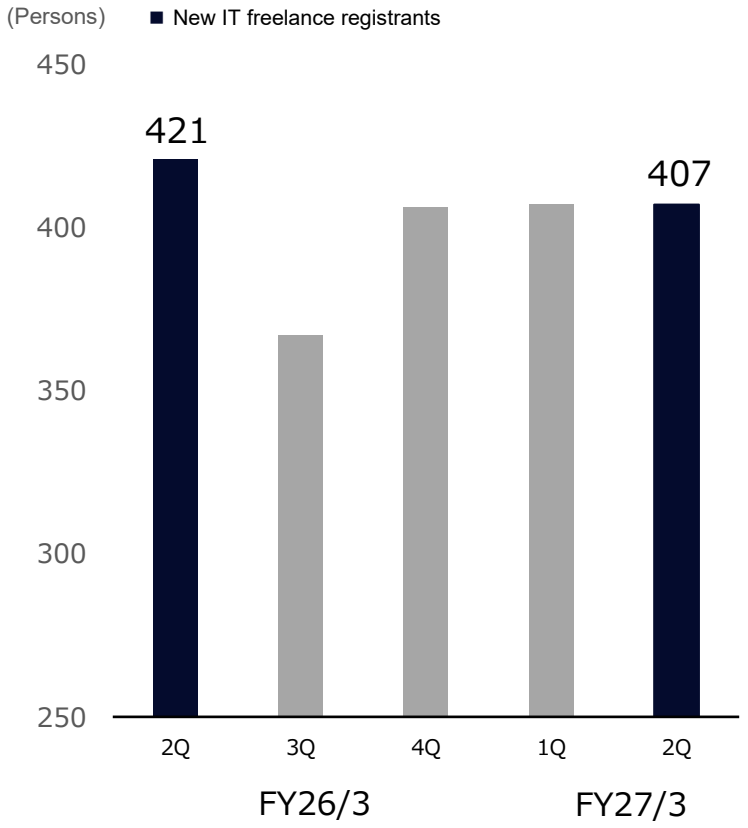
IT Human Resources Matching Business, Japan (New Business Partners, New IT Freelance Registrants)

- The number of new business partners increased by 30, bringing the cumulative total to 2,055 companies.
- New IT freelance registrants totaled 407. Through seminars and events on AI and FDE, we are focusing on acquiring highly skilled talent in high market demand.





2Q

Number of New Business Partners: **30**

Number of New IT Freelance Registrants: **407**

1H

Number of New Business Partners: **70**

Number of New IT Freelance Registrants: **814**

* Number of existing client companies: Number of companies with which business commenced from the fiscal year ended March 31, 2017, onwards.

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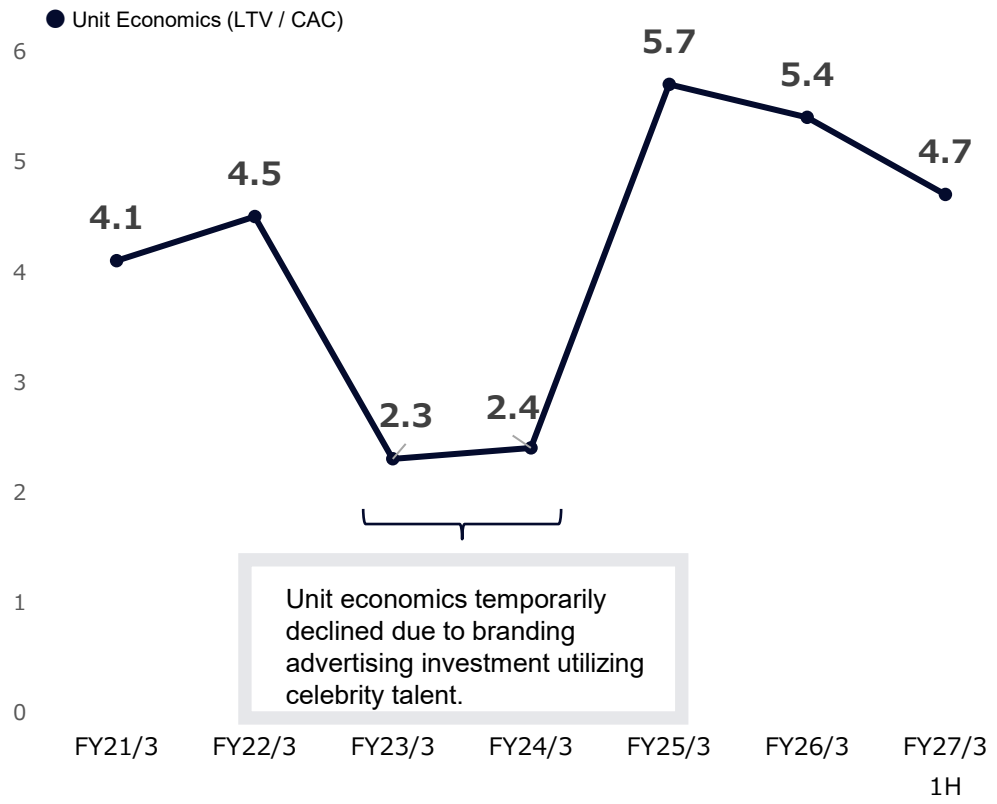
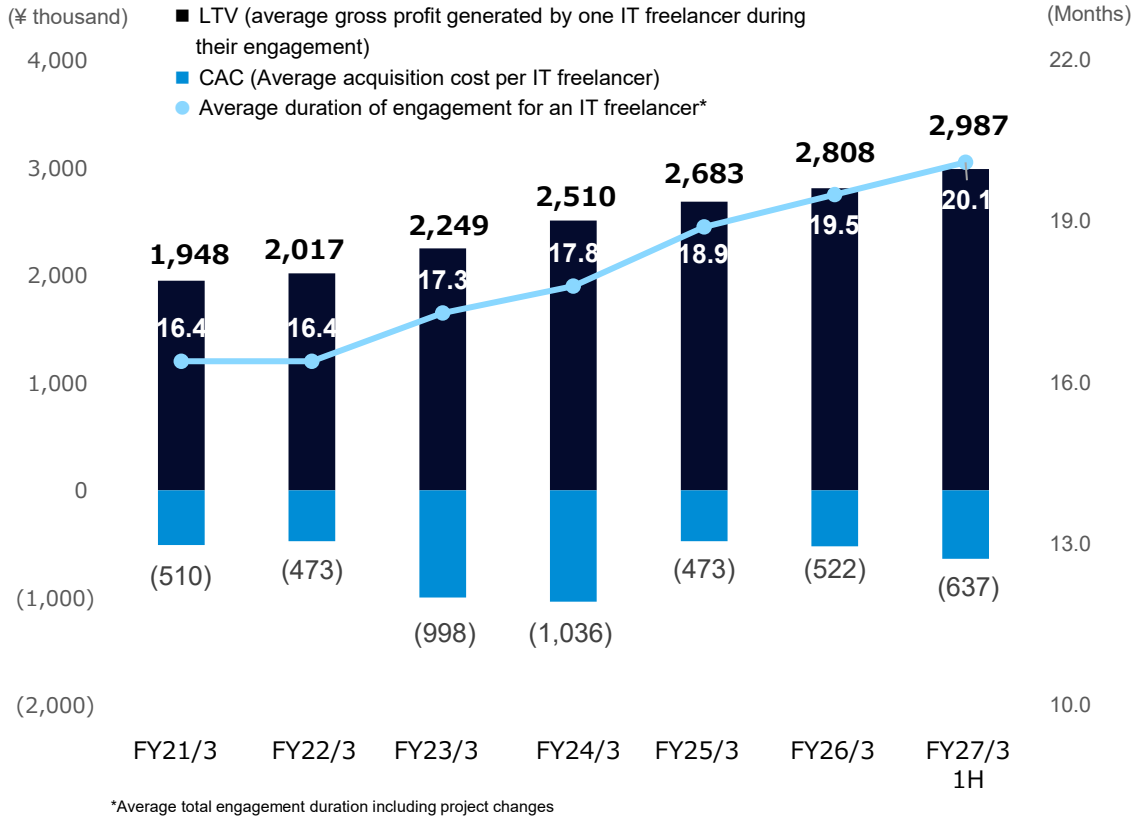
IT Human Resources Matching Business, Japan (Profitability of IT Freelancers)

- Unit economics stood at 4.7, down 0.7 from the end of the previous fiscal year. Meanwhile, high engagement with IT freelancers pushed the average duration of engagement beyond 20 months, and LTV reached a record high.





*Average total engagement duration including project changes

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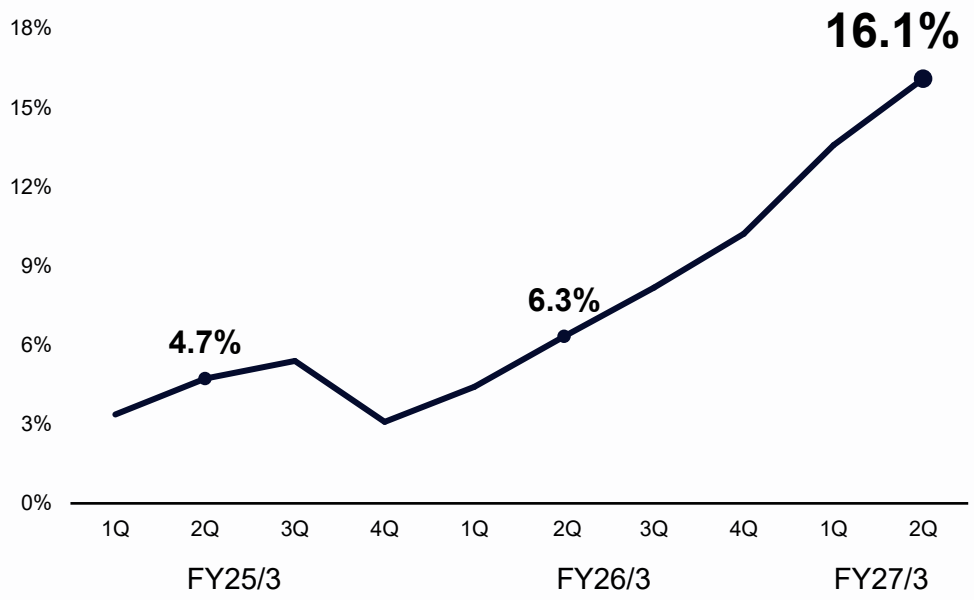
IT Human Resources Matching Business, Japan (AI Projects, AI-proficient Talent)

- The share of AI projects* rose to 16.1% from 13.6% in 1Q.
- Talent capable of handling upstream and advanced AI projects, including FDEs, exceeds 12% of engaged freelancers. We are enhancing the quality of our database through reskilling programs and other initiatives.

Share of AI projects



Share of upstream / highly AI-proficient talent

Engaged

12.5%

Engaged freelancers (Sept. 2026)

Database

12.2%

Freelancers surveyed: 3,300

* AI projects: project data containing keywords related to AI development, e.g., features using AI, generative AI, LLMs or machine learning, and related design, development, implementation and improvement projects.

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IT Human Resources Matching Business, Japan
GEECHS FDE Skill Definitions (Five Skill Axes × Six Levels)

Five skill axes × six levels. Talent at Lv.4 or above on all five axes = “FDE talent.”

A	B	C	D	E
Technical Skills	**AX Literacy**	**PM Skills**	**Consulting Skills**	**Industry Understanding**
Development, implementation & infra execution	Driving AI-centered transformation	Owning outcomes from problems to business value	Problem finding, proposals & consensus building	Depth & speed of industry understanding
Criteria Needs direction / Self-driven / Leads	**Criteria** Knows / Uses / Spreads to the org	**Criteria** Task mgmt / Planning / Driving change	**Criteria** As told / Proposes / Moves management	**Criteria** Knows terms / Insider peer / Shapes future

Six levels common to all axes

Lv.1	Lv.2	Lv.3	Lv.4	Lv.5	Lv.6
Assist	**Autonomous**	**Design**	**Lead**	**Strategy**	**Executive**
Works under direction	Completes own scope alone	Judges and designs alone	Leads all	Sets org & investment direction	Moves company or industry
			FDE passing line		

* Level descriptions summarize the six-level definitions; actual assessments are more detailed.

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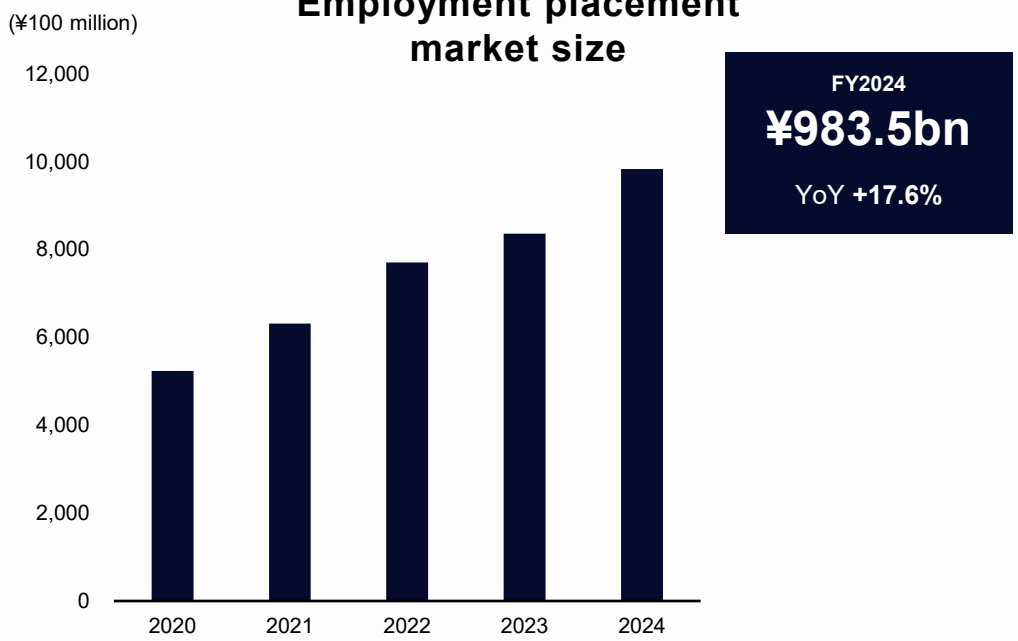
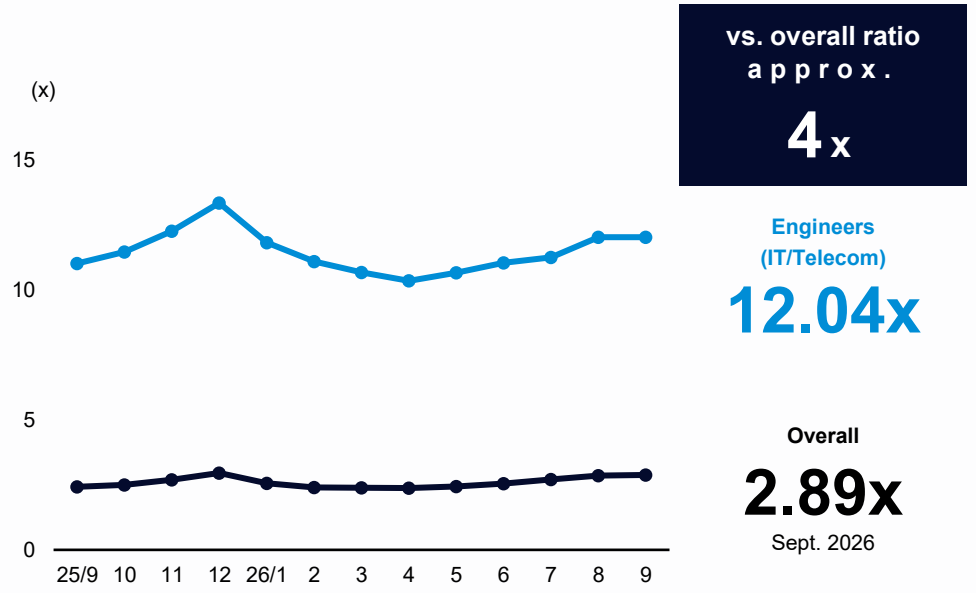
IT Human Resources Matching Business, Japan (Strengthening Recruitment Service)

- The employment placement market continues to grow, exceeding 980 billion yen in FY2024. The job-to-applicant ratio for IT engineers remains above 12x, about four times the overall level.
- IT freelancers are increasingly meeting companies' needs for permanent hires. Leveraging our base of 2,055 business partners and a database of over 24,000 professionals, we are also focusing on our recruitment service to improve profit margins.

Employment placement market size



Job-to-applicant ratio



* Ministry of Health, Labour and Welfare, "Summary of Employment Placement Business Reports for FY2024 (Preliminary)" (Japanese only)

* PERSOL CAREER "doda Job-to-Applicant Ratio Report" (Sept. 2025 – Sept. 2026)

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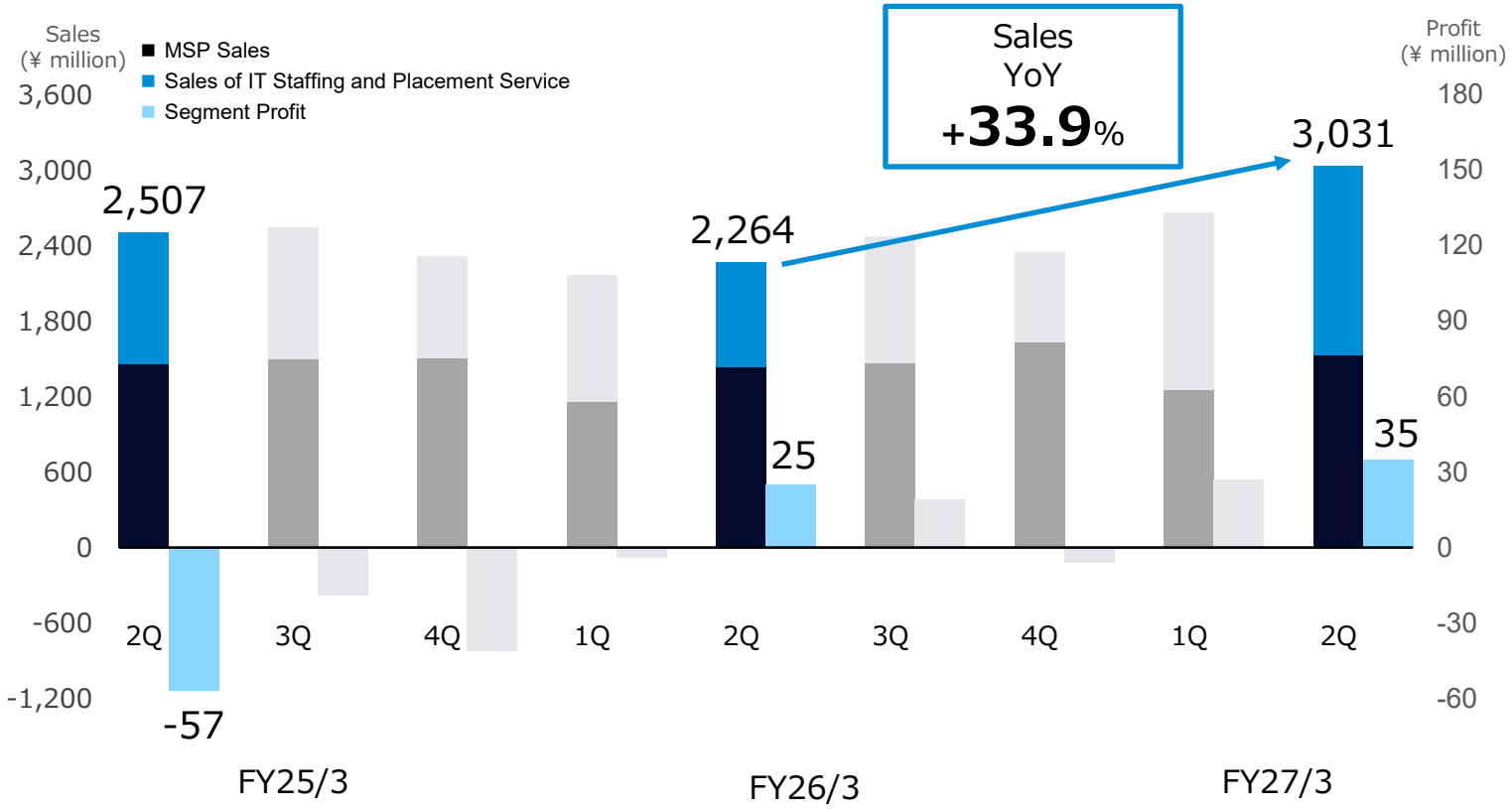
IT Human Resources Matching Business, Overseas (Sales, Segment Profit)

- 1H sales grew significantly to 5.69 billion yen; segment profit expanded to 63 million yen.
- Finance & insurance sales grew. Under the new CEO (appointed Jan. 2026), KPI-driven sales activities are winning new clients.
- 1H gross margin improved in both staffing and MSP, up 0.6pt YoY.



2Q		
Sales	3,031	million yen (+33.9%) (YoY)
Segment Profit	35	million yen (+40.1%) (YoY)

1H		
Sales	5,692	million yen (+28.6%) (YoY)
Segment Profit	63	million yen (+197.9%) (YoY)

* Figures are converted into JPY using the average exchange rate during the period (AUD 1 = 111.17 JPY). The assumed exchange rate is AUD 1 = 110 JPY.

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IT Human Resources Matching Business, Overseas (Target Industries)

- We select high-demand industries and concentrate resources to strengthen sales.
- We are currently focusing on infrastructure and telecom, which offer high margins and strong talent demand.

Talent Demand

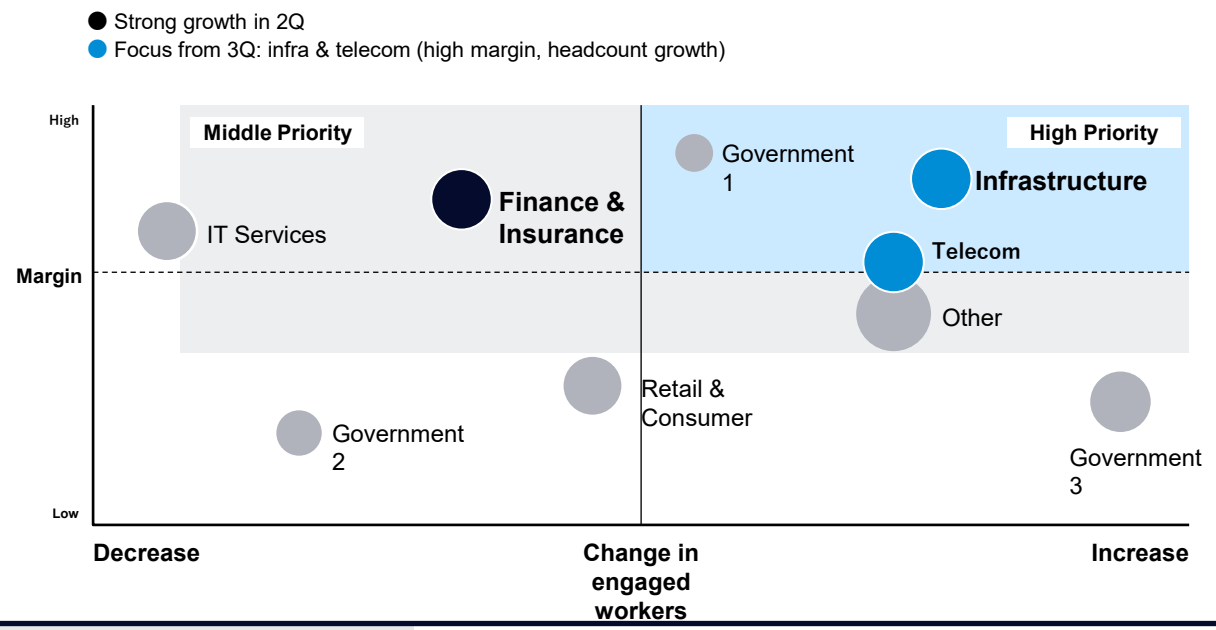
Infrastructure
Engineering job ads
+12–14% YoY (Jul–Sep)*1

Telecom
Rated in shortage for several years*2

Finance & Insurance
Job ads +1.2% YoY (Apr)*1
Still positive in a tough job market

Following market trends, we focus on growing and under-supplied areas

Strategy Focus on Infrastructure & Telecom



*1 SEEK Employment Report (Apr 2026 and Jul–Sep 2026)
*2 Jobs and Skills Australia, "Occupation Shortage List (2026)"

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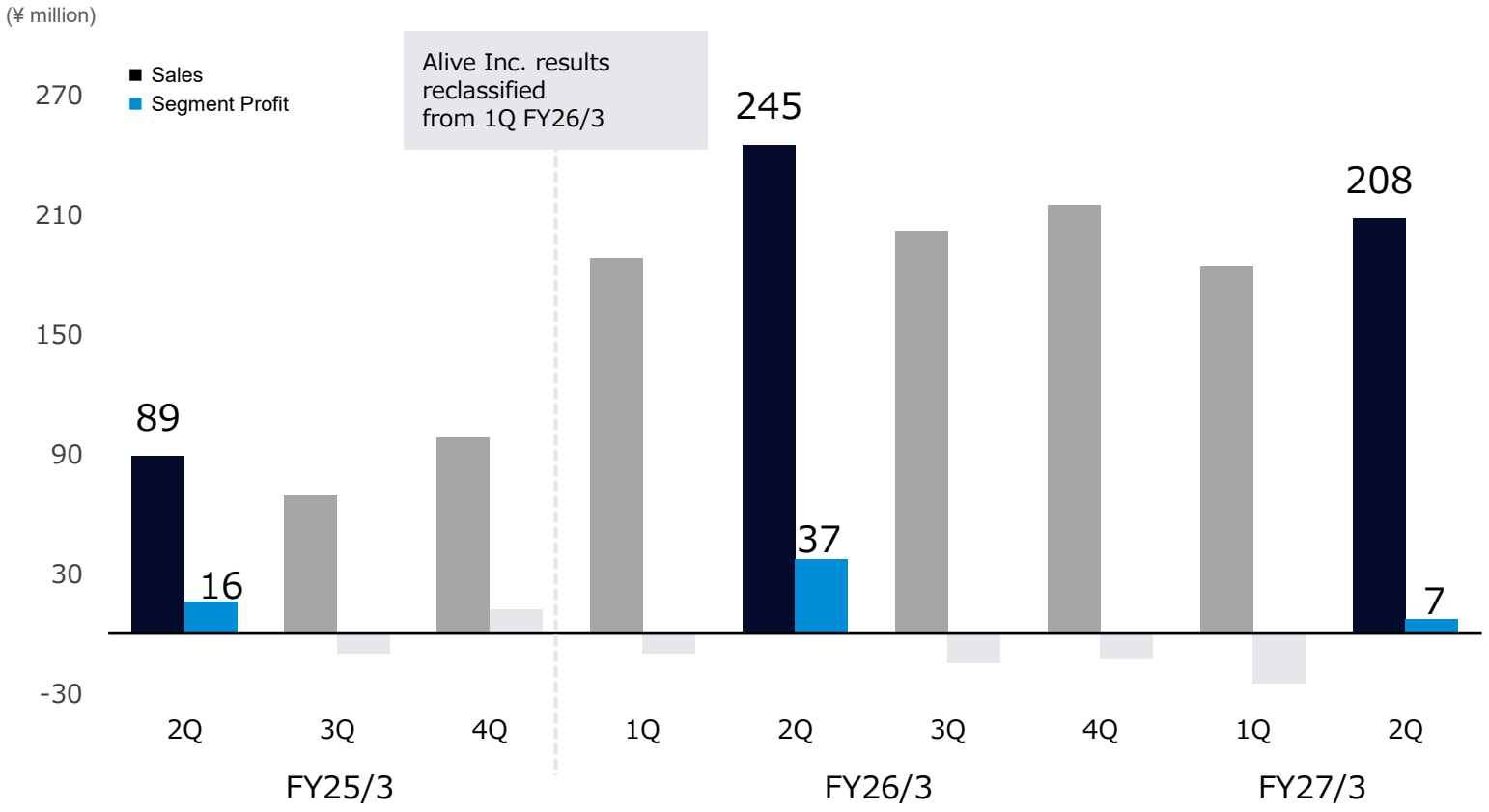
Seed Tech Business (Sales, Segment Profit)

- Sales declined YoY as the weak yen reduced student numbers in the study-abroad business.
- Sales and segment profit were broadly in line with plan, and segment profit turned positive in 2Q. Excluding goodwill and other amortization related to Alive Inc., 1H was also profitable.
- “Digishoku” expanded leads through more trade show exhibits, and client contracts increased significantly.
- Launched “Digishoku Security”, a service that supports SMEs’ cybersecurity measures.



2Q		(YoY)
Sales	208	million yen (-14.9%)
Segment Profit	7	million yen (-80.9%)
Amortization of goodwill, etc. (Alive Inc.)	17	million yen

1H		(YoY)
Sales	393	million yen (-9.3%)
Segment Profit	-18	million yen (–)
Amortization of goodwill, etc. (Alive Inc.)	30	million yen

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Seed Tech Business (About “Digishoku”: DX Service for SMEs)

- Sales and contracts grew significantly with zero mid-term cancellations since launch; average price per client rose via upselling as planned. We significantly increased consultants to strengthen order capacity.
- Repeated trade show exhibits in 1H generated 600+ leads across regions and industries nationwide, pointing to further contract and sales growth.

2H FY26/3 vs. 1H FY27/3

Sales

3.5x

Avg. price of active contracts

1.8x

End of FY26/3 vs. end of 1H FY27/3

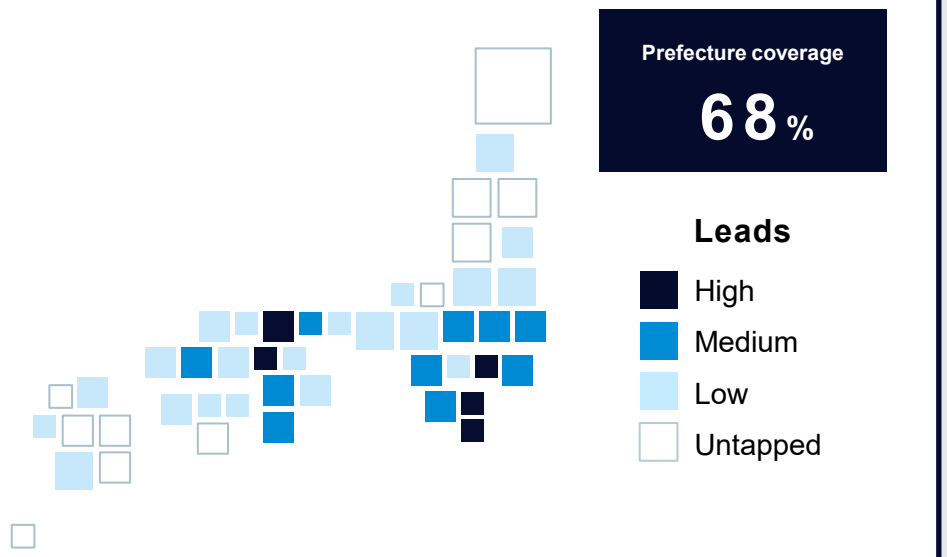
Contracts

2.4x

Consultants

3.0x

Lead distribution by area



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Seed Tech Business (Launching “Digishoku Security”)

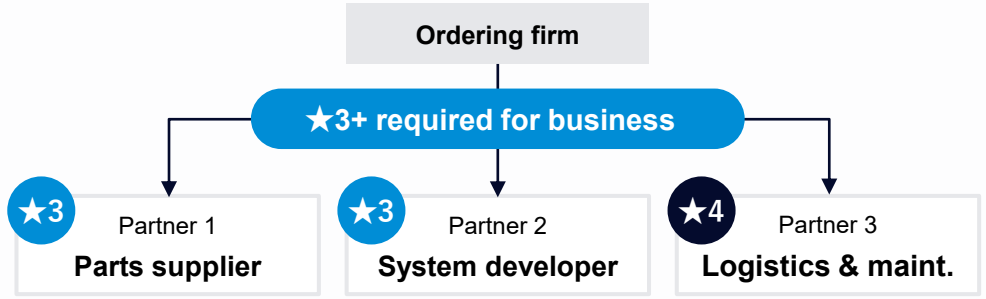
- Supply-chain cyberattacks have recently caused cases where an attack on a business partner halted the ordering company’s operations. Security measures that cover business partners have become an issue.
- METI and the Cabinet Secretariat have established the “SCS Evaluation System,” which rates security levels by the number of stars (★). Operated by IPA, it is scheduled to start at the end of FY2026 (March 2027).

Background

1. Partner demands rise
More ordering firms expected to require ★3+ from FY2027

2. Limits of in-house prep
SMEs lack IT staff and expertise

3. Launch of Digishoku Security
From expert advice to hands-on work



Attacks on partners that halted ordering firms

2022
A parts maker’s infection halted a client’s auto plants nationwide

2024
Personal data of municipalities and companies leaked via a printing contractor

2025
Misuse of a contractor’s account halted other firms’ online stores

SCS evaluation levels (METI / IPA)

★3 **Self-assessment + expert review**
Basic level required to counter common cyberattacks

★4 **Third-party assessment + technical verification**
Review by an assessment body and actual vulnerability testing

Us **Support from expert consultation to remediation**
Clients: SMEs required to meet ★3

* METI, “Interim Summary on Establishing a Security Measures Evaluation System for Strengthening Supply Chains” and “Policy on Establishing the Security Measures Evaluation System for Strengthening Supply Chains”, IPA, “Details of the SCS Evaluation System” (Japanese only)

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Seed Tech Business (Scope of Digishoku Security)

- End-to-end support, from finding weaknesses to expert consultation and remediation.

Function	What it does	Digishoku Security	Company A	Company B	Company C	Public support
Entry points (ASM) Attack surface management	**Find entry points exposed to attackers** Identify internet-facing servers and admin panels	●	●	●	—	—
Vulnerability assessment Versions vs. known vulnerabilities	**Find outdated software & known flaws** Check software in use against published vulnerabilities	●	●	●	—	—
Leak monitoring Dark web / credentials	**Find leaked IDs and passwords** Check leaked data for employee information	●	●	△ Premium plan	●	—
Reporting & advice Reports / advisory	**Expert reports & monthly consultation** Expert-reviewed reports and a monthly meeting	●	△ Automated reports	△ Alerts / help desk	△ Weekly reports	△ Improvement plan
SCS Evaluation ★3 National evaluation system	**Prepare for the standard partners require** Preparation for the national system starting March 2027	●	—	—	—	●
Remediation Hands-on fixes	**Fix the weaknesses found** Our staff handle configuration fixes and tool deployment	●*	—	—	—	△ Tool deployment

Many services only find weaknesses; we also provide monthly expert consultation and remediation

△ = Partial / premium plan only. Companies A–C are domestic security services; public support is a government pilot program.
* Remediation is available when used together with Digishoku.

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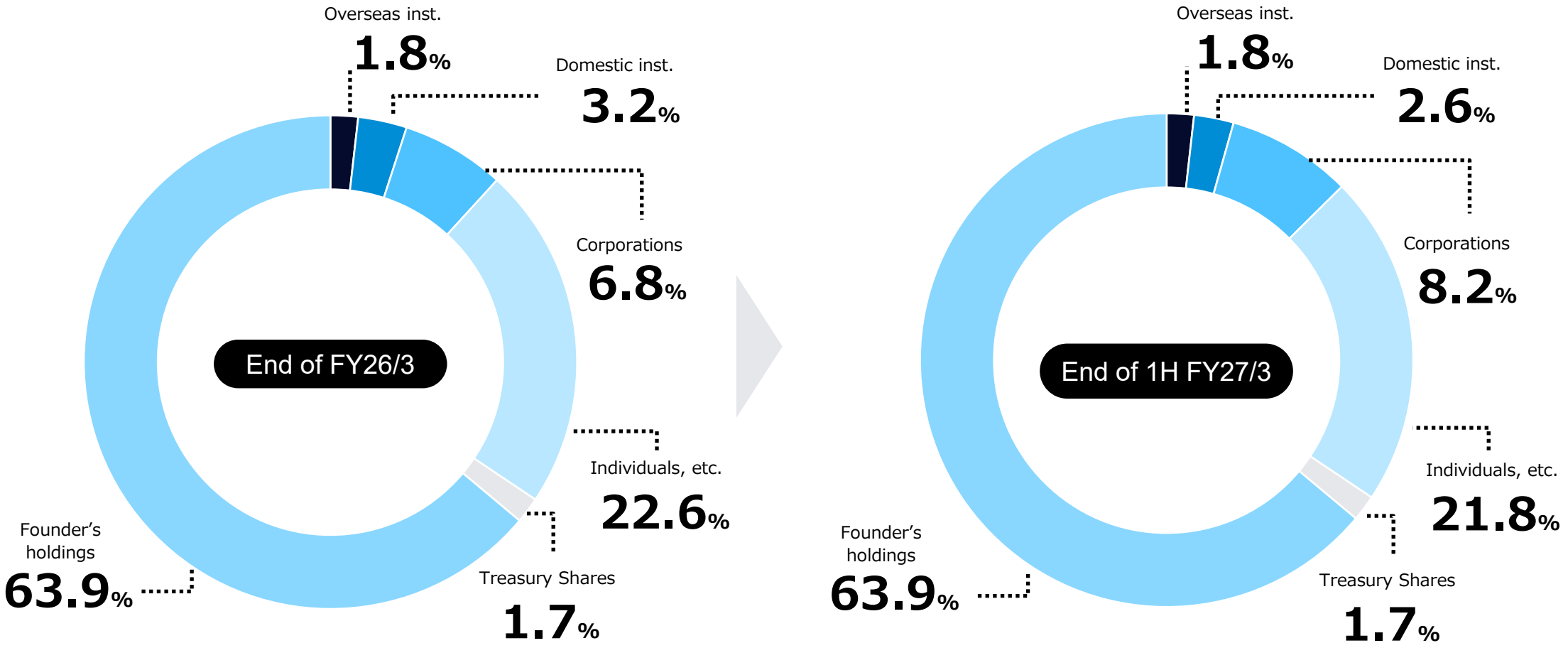
Shareholder Composition

- The shareholding ratio of corporations increased to 8.2%.



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Consolidated Balance Sheet & Cash Flow Statement

- Interest-bearing debt decreased through repayment of borrowings and bonds, and the equity ratio rose to 40.3% from 38.7% at the end of the previous fiscal year.

Balance Sheet

(Millions of yen)	End of FY26/3	End of 2Q FY27/3	Change
Current assets	6,972	6,752	-220
Cash and deposits	3,747	3,369	-378
A/R & contract assets	3,113	3,268	155
Fixed assets	879	801	-78
Tangible fixed assets	97	71	-25
Goodwill	246	228	-18
Customer-related assets	332	320	-12
Investment securities	25	22	-3
Total assets	7,852	7,553	-298
Liabilities	4,797	4,484	-312
Accounts payable	1,263	1,209	-54
Borrowings & bonds	1,861	1,583	-277
Net assets	3,054	3,068	14
Total liab. & net assets	7,852	7,553	-298

* Changes are calculated in yen, divided by one million, and truncated to the first decimal place.

Cash Flow Statement

(Millions of yen)	FY26/3 2Q	FY27/3 2Q	Change
Operating CF	390	190	-199
Profit before income taxes	504	395	-108
Depreciation (incl. goodwill amortization)	38	57	18
Gain on reversal of stock options	-76	–	76
Change in receivables & contract assets	-164	-80	83
Income tax paid	-6	-188	-181
Investing CF	50	-3	-54
FCF	441	186	-254
Financing CF	-329	-515	-185
Changes in borrowings	-21	-285	-263
Purchase of treasury shares	-48	–	48
Dividends paid	-103	-202	-99
Purchase of subsidiary shares (no change in scope)	-103	–	103

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Appendix

4

GEECHS

GEECHS Group

GEECHS

[geek × tech]

An organization that contributes to Japan’s second economic growth by realizing advanced human × AI symbiosis across all industries in Japan and updating companies’ organizations and businesses.

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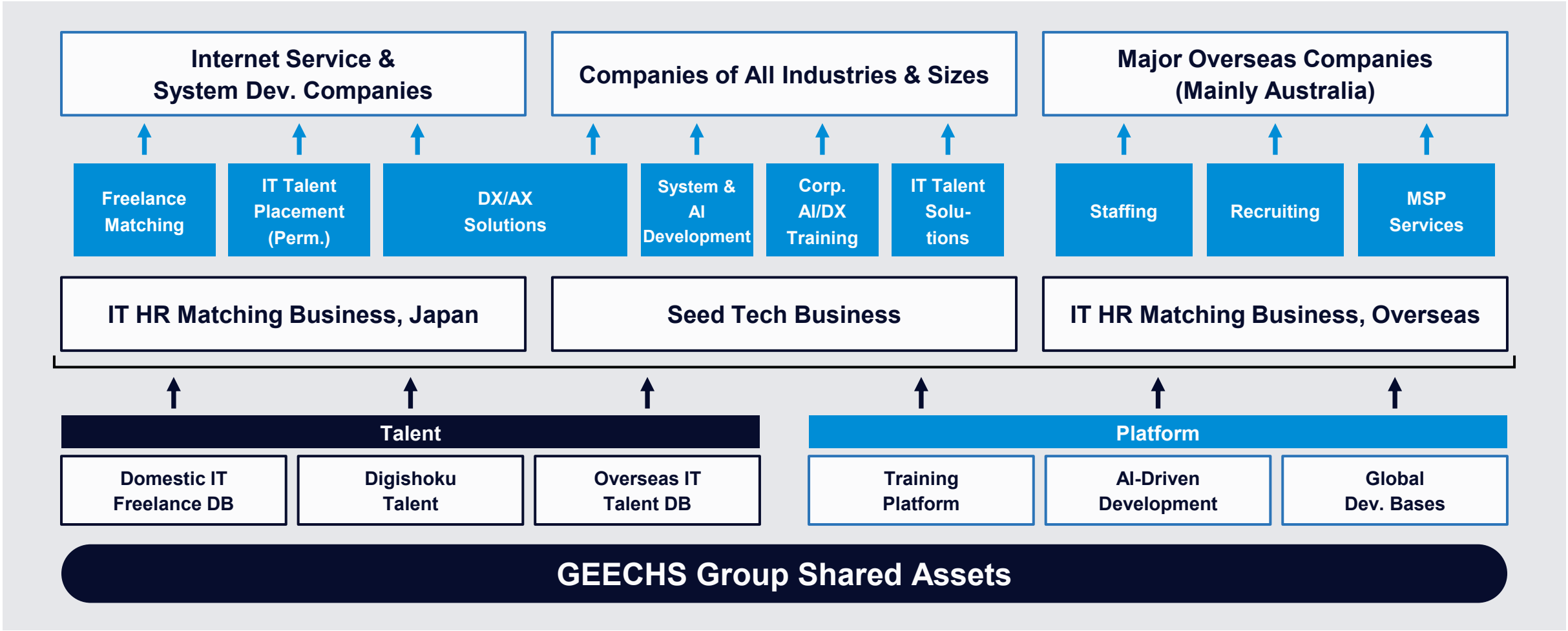
GEECHS Group Business Overview

■ We deploy diverse services built on our unique shared assets to solve clients' IT, DX, and AX challenges.



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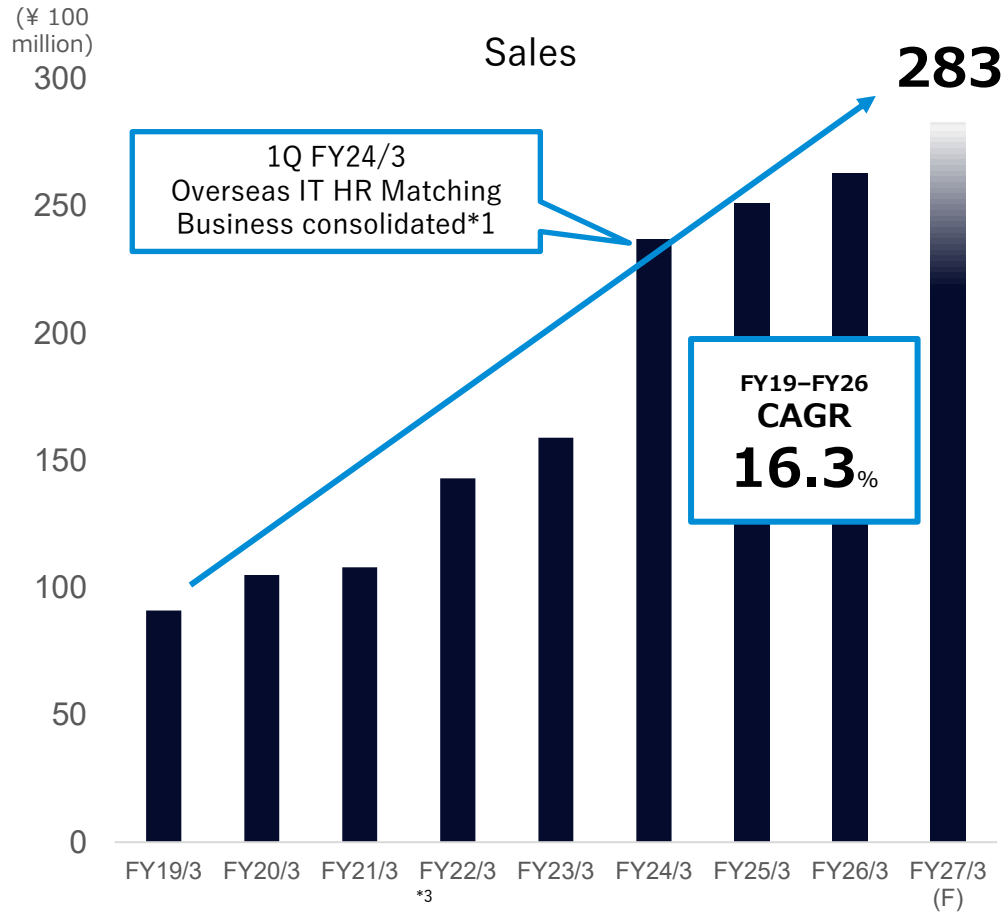
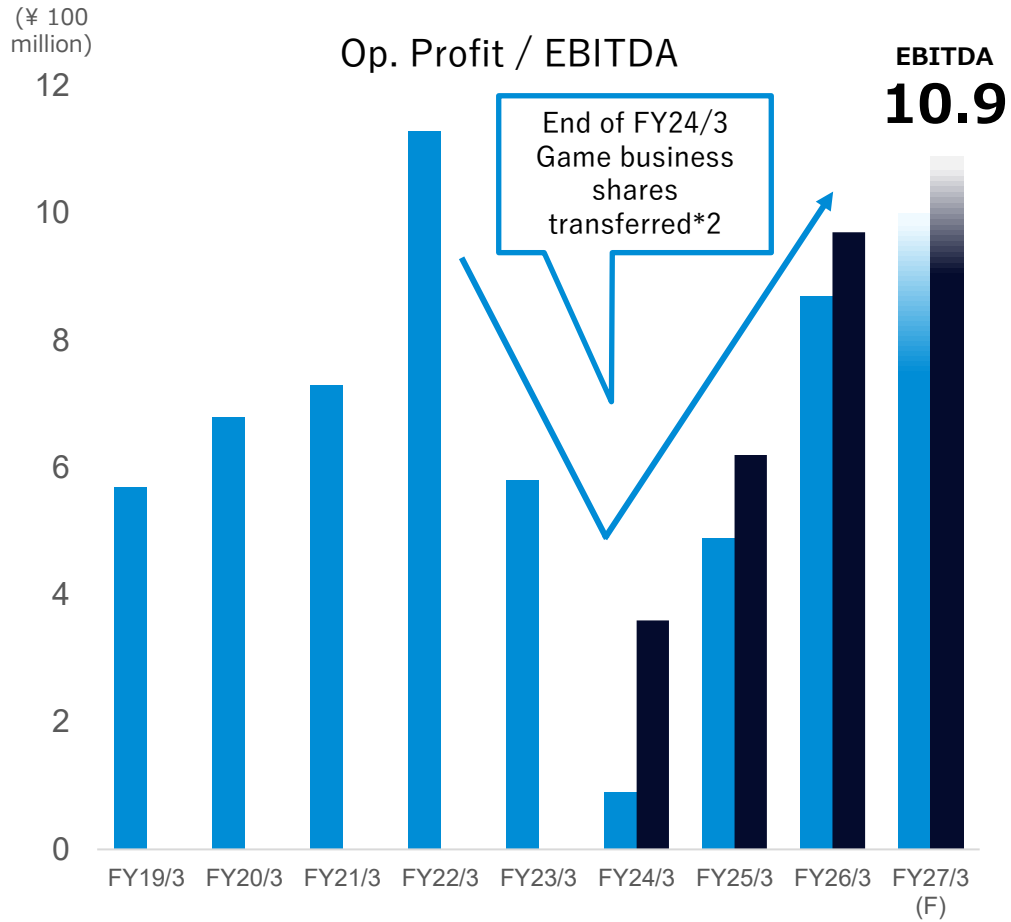
Performance Trend since IPO (Sales, Operating Profit, EBITDA)

- Steady growth since our March 2019 IPO; we will keep expanding, centered on IT talent in Japan and overseas.
- Exited the loss-making game business (sold) in March 2024; operating profit recovered in FY2025/3 and keeps rising. We aim for Group-wide growth with the post-M&A recovery of the Overseas business and Seed Tech as a growth driver.





*1 Started consolidation of the IT Human Resources Matching Business, Overseas from 1Q FY24/3.
*2 Shares were transferred at the end of March 2024 and excluded from consolidation from FY24/3.
*3 Since the revenue recognition standard was changed from FY22/3, sales figures for FY21/3 and before were prepared based on transaction volume.

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GEECHS Social Impact Flow

Input

Financial Capital
- Growth investment backed by strong CAGR in business performance

Human Capital
- Cross-border management skills
- Female/foreign ratio

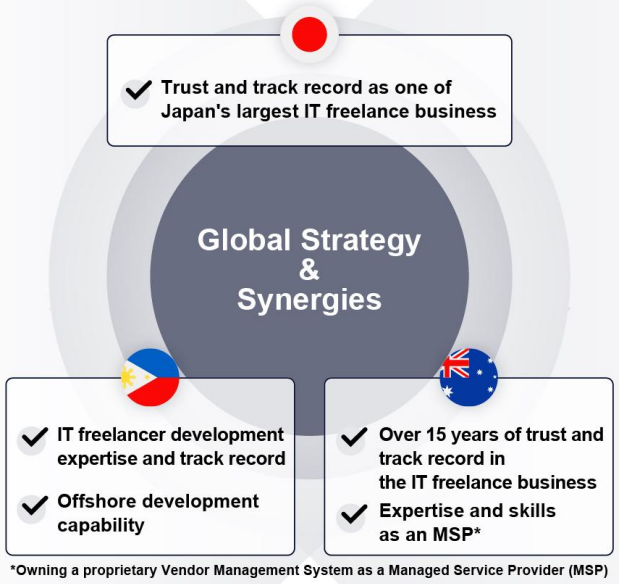
Intellectual Capital
- Technology investment
- Patents and licenses
- Accumulation of skill and expertise

Natural Capital
- Offshore development office
- In-house base system

Social and Relationship Capital
- IT freelancer
- Relations with client companies
- External partners

Group Synergies Through Business Activities

Evolution of the IT freelance sharing business through the integration of know-how and resources between countries



*Owning a proprietary Vendor Management System as a Managed Service Provider (MSP)

MATERIALITY 04	Strengthening corporate governance
MATERIALITY 05	Formation and expansion of partnerships
MATERIALITY 06	Addressing Climate Change

Output

Creating a new "normal" way of working

MATERIALITY 01
Sharing and streamlining of technology resources

Domestic market: GEECHS
Overseas market: launch

MATERIALITY 02
Growth and reskilling of DX/IT freelancers

Domestic market: ソダテク
Overseas market: Seed Tech School

MATERIALITY 03
Developing an environment where freelancers can work with peace of mind

フリノベ Freelance x Innovation

Outcome

Make the biggest impression in the 21st century

- Bringing growth to the IT industry in Japan and overseas
- Improving economies in developing countries and local areas by creating jobs
- Contributing to social development through growth and creation of IT freelancers
- Expanding industry and employment opportunities through cross-border collaboration



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IT Human Resources Matching Business, Japan

A platform for IT talent utilization through human–AI co-creation

Registered IT Freelancers
24,000+

Client Companies
4,000

GEECHS - AI

Strength

- Leveraging GEECHS AI
- Deeply understanding client needs with HR-level precision
- Providing close support for IT freelancers such as reskilling and mentoring

IT Freelance Agent

GEECHS JOB

Matches the best freelance talent using one of Japan's largest databases of highly skilled engineers.

AI Solution Provider

Delivers customized AI solutions combining our AI Planners with elite freelancers.

Training Features

- FDE development program
- Seminars

1. **Proven Track Record as IT Freelance Agent**
   With years of experience as a leading IT freelance agency, we maintain strong relationships with top-tier enterprise clients. Over 24,000 selected, highly skilled IT freelancers are registered.

2. **AI Solutions Powered by AI-Driven Development**
   We provide problem-solving solutions that combine our AI Planners with engineers skilled in AI-driven development, strongly accelerating clients' DX/AX initiatives.

3. **Helping IT Freelancers Raise Their Market Value**
   We offer an FDE development program for registered IT freelancers and hold seminars with partner companies. Aiming to build a community unique to GEECHS, we actively support IT freelancers in raising their market value.

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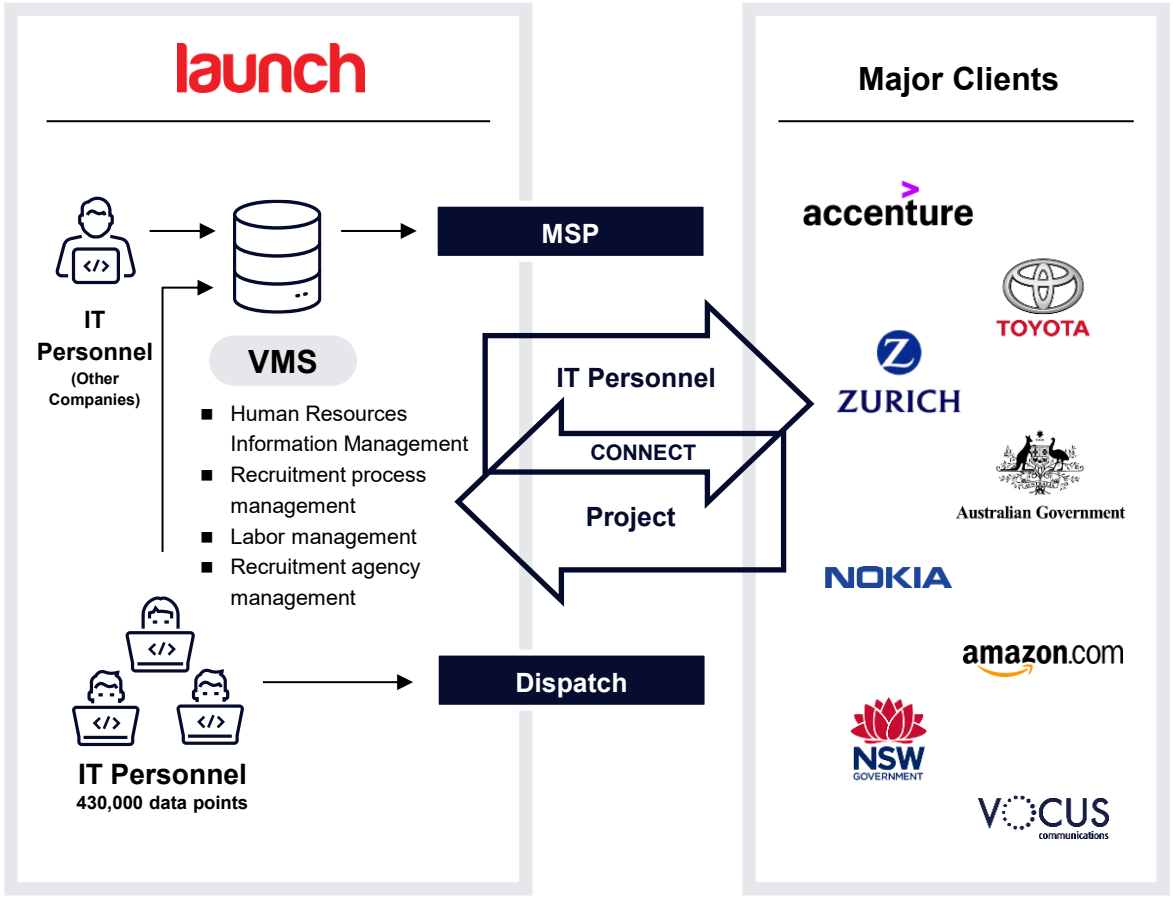
IT Human Resources Matching Business, Overseas (Launch Group)

Supporting clients' entire talent acquisition with our IT talent database × proprietary VMS



* MSP: Managed Services Providers
* VMS: Vendor Management System
A comprehensive talent management solution that handles the entire process from marketing to contract for client talent acquisition

1. Australian IT Staffing Service Pioneer

Established in 2006, trusted IT human resources service provider with a proven track record. Over 50% of our clients have maintained continuous business relationships with us for more than 5 years.

2. A Rich and Highly Specialized IT Talent Database

With a database of over 430,000 IT professionals, we manage more than 7,500 person-months of IT talent annually. Our talent pool spans a wide range of IT fields, including infrastructure & cloud, software development, and security.

3. Expansion of IT Staffing, Recruitment, and MSP Services

In addition to IT staffing and recruitment, we offer comprehensive support throughout the entire talent acquisition process through MSP services, establishing long-term contractual relationships and building a strong client base. Through our proprietary VMS, we address the challenges of managing casual employment and onsite talent, ensuring stable and efficient service delivery.

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Seed Tech Business

Expanding in three directions—development, education and talent—with “Digishoku” as the entry point

Digishoku

(Practical DX)

Connecting management and the frontline: ready-to-work digital professionals

A DX/AX right hand for every company.

Zero churn

Dev System & AI Dev.

For systemization & AI needs

20% fewer man-hours via AI

Edu Corporate AI/DX Training

For needs to upskill employees digitally

12,000 cumulative trainees

Talent IT Talent Solutions

For dev & ops talent shortages

20+ years with a major telecom group

1. DX/AX Solutions

“Digishoku” professionals join client companies as DX leads, driving DX and digitalization tailored to their actual situation and challenges.

2. System & AI Development

Building everything from business systems to generative AI applications with AI-driven development. Leveraging our bases in Japan and Cebu, we flexibly form development teams to fit budgets and needs.

3. Corporate AI/DX Training

Training in AI use, DX fundamentals, programming and more. Programs are custom-designed for practical use in actual work, with a management structure that sustains and boosts learner motivation.

4. IT Talent Solutions

Providing IT talent such as PM/PMO, development SEs and technical sales, from individuals to full teams, tailored to client needs.

Taking the world forward with technology

Nurturing IT teams and digital talent from seed

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Performance Highlights

Fiscal Year-End		FY2023/3	FY2024/3	FY2025/3	FY2026/3	FY2027/3 1H	FY2027/3 Plan
Sales	(¥ thousand)	15,997,838	23,739,835	25,162,448	26,375,627	14,263,241	28,300,000
EBITDA	(¥ thousand)	651,393	362,120	625,903	975,351	518,997	1,090,000
Operating profit	(¥ thousand)	589,410	90,859	495,539	875,689	451,847	1,000,000
Ordinary profit	(¥ thousand)	567,920	82,483	494,535	842,813	395,654	970,000
Profit attributable to owners of the parent	(¥ thousand)	244,215	-1,473,379	49,795	643,001	243,470	630,000
Comprehensive income	(¥ thousand)	239,739	-1,516,051	-104,464	654,333	247,201	–
Capital	(¥ thousand)	1,109,972	1,112,183	1,112,363	1,112,414	1,112,414	–
Net assets	(¥ thousand)	4,687,486	3,070,641	2,871,147	3,054,682	3,068,919	–
Total assets	(¥ thousand)	8,999,379	7,174,136	7,374,904	7,852,040	7,553,296	–
Net assets per share	(Yen)	441.05	272.09	267.71	299.19	–	–
Earnings per share (EPS)	(Yen)	23.20	-142.75	4.82	62.73	23.96	62.01
Equity ratio	(%)	47.7	39.2	37.5	38.7	40.3	–
Return on equity	(%)	5.6	-41.5	1.8	22.2	–	–
Cash flow from operating activities	(¥ thousand)	688,038	-3,827	46,813	744,100	190,542	–
Cash flow from investing activities	(¥ thousand)	-1,560,893	317,149	-418,942	79,287	-3,581	–
Cash flow from financing activities	(¥ thousand)	1,274,450	-330,211	226,952	-692,155	-515,197	–
Cash and cash equivalents at end of period	(¥ thousand)	3,755,033	3,749,726	3,606,612	3,747,062	3,369,054	–
Employees	(Persons)	444	268	290	300	290	–

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Performance Highlights (Quarterly Basis)

(Millions of yen)	FY2025/3				FY2026/3				FY2027/3	
	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q
Sales	5,825	6,358	6,521	6,457	6,373	6,518	6,776	6,707	6,968	7,294
Gross profit	829	890	911	940	946	997	1,003	1,014	1,039	1,072
Gross profit margin	14.2%	14.0%	14.0%	14.6%	14.8%	15.3%	14.8%	15.1%	14.9%	14.7%
SG&A expenses	748	777	756	793	762	743	786	793	834	825
Operating profit	80	112	154	147	183	253	217	220	204	247
Operating profit margin	1.4%	1.8%	2.4%	2.3%	2.9%	3.9%	3.2%	3.3%	2.9%	3.4%
EBITDA	107	148	184	185	197	278	244	254	237	281
Ordinary profit	84	115	148	146	180	246	206	209	164	231
Profit attributable to owners of the parent	58	105	96	-211	114	229	147	151	86	157

Supplemental Data (IT Human Resources Matching Business, Japan)

Fiscal Year-End		FY2026/3					FY2027/3	
		1Q	2Q	3Q	4Q	Full-year	1Q	2Q
Sales	(¥ thousand)	4,037,496	4,028,281	4,129,514	4,176,312	16,371,604	4,144,639	4,069,445
Ad expense	(¥ thousand)	47,835	49,090	49,396	52,634	198,956	54,087	53,420
Ad expense ratio	(%)	1.2%	1.2%	1.2%	1.3%	1.2%	1.3%	1.3%
Segment Profit	(¥ thousand)	350,714	330,380	364,025	389,500	1,434,620	360,325	343,591
Segment profit margin	(%)	8.7%	8.2%	8.8%	9.3%	8.8%	8.7%	8.4%
Person-months	(Person-months)	5,003	5,021	5,104	5,170	20,298	5,087	4,989
Unit price of orders	(¥ thousand)	830	831	833	831	831	837	841
New business partners	(Companies)	58	45	51	33	187	40	30
Take rate	(%)	17.7%	17.8%	18.0%	18.2%	17.9%	18.3%	18.4%
New IT freelance registrants	(Persons)	417	421	367	406	1,611	407	407

* Results for FY26/3 exclude the business of Alive Inc., previously included in the IT Human Resources Matching Business, Japan.

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