UNISOL

Third Quarter of FY2026
Earnings Presentation

UNISOL Holdings Corporation
(Sec. Code: 7128)

November 9th, 2026

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1 Third Quarter of FY2026 Consolidated Financial Results

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Key Points

- **vs FY2025 Q3**
  - Net Sales： ＋６.２％～ Decline in revenue for IoT, increase for Machinery & Tools
  - Gross Profit： ＋９.２％～ Profit declines in Construction Machinery and IoT, increase in Machinery & Tools and Construction Products
  - Operating Profit： ＋２５.４％～ Profit increase in Construction Products, decline in Construction Machinery and IoT
  - Net Profit： ＋４０.１％～ Increase led by growth in operating profit levels

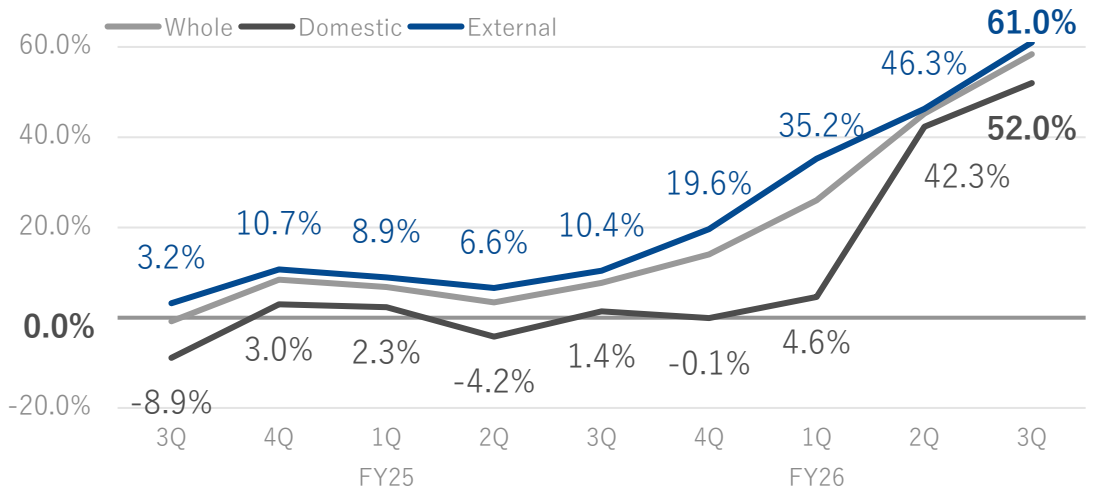
- **Progress Rate vs Forecast for the Full year of FY2026**
  - Net Sales： ７５.５％
  - Gross Profit： ７５.７％
  - Operating Profit： ７４.３％
  - Net Profit： ９２.９％

- **Balance Sheet（vs FY2025 Q4）**
  - Cash and Deposit：▲４.７ Billion～ Dividend, Acquisition of MT Food Systems, Acquisition of own shares
  - ST and LT Loan：＋０.５ Billion～ Consolidation of MT Food Systems
  - Equity Capital Ratio：▲０.７pts（６２.１％→ ６１.４％）

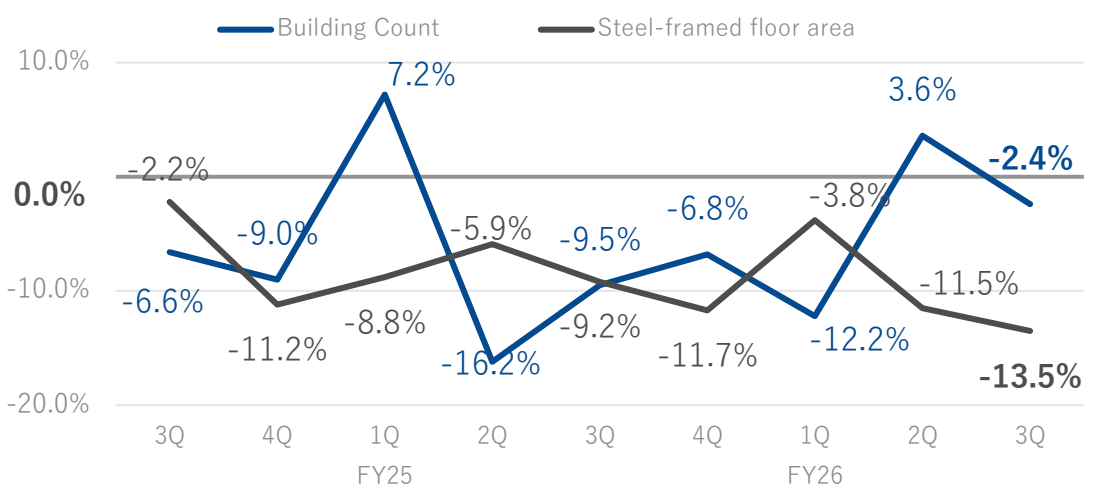
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Market Environment

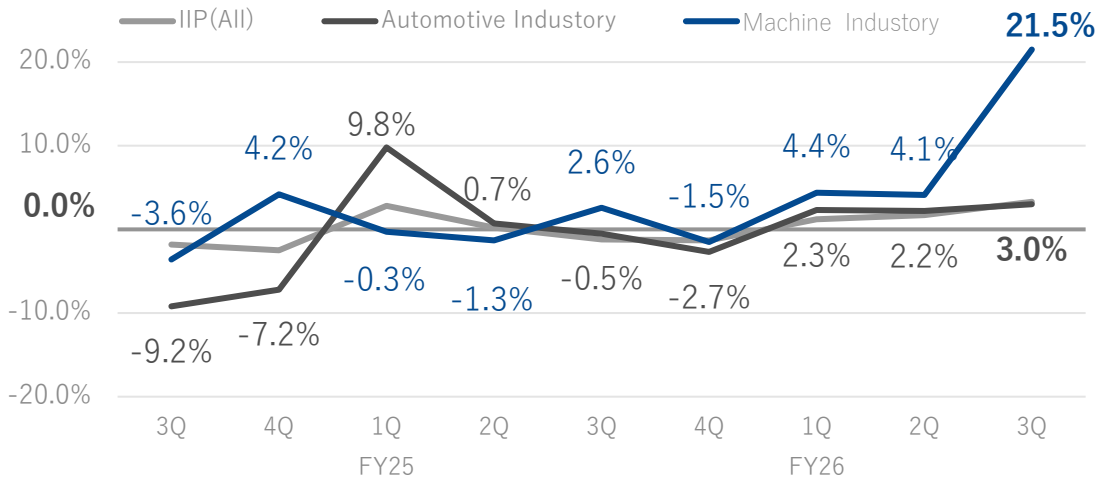
Machine Tool Orders (YoY)



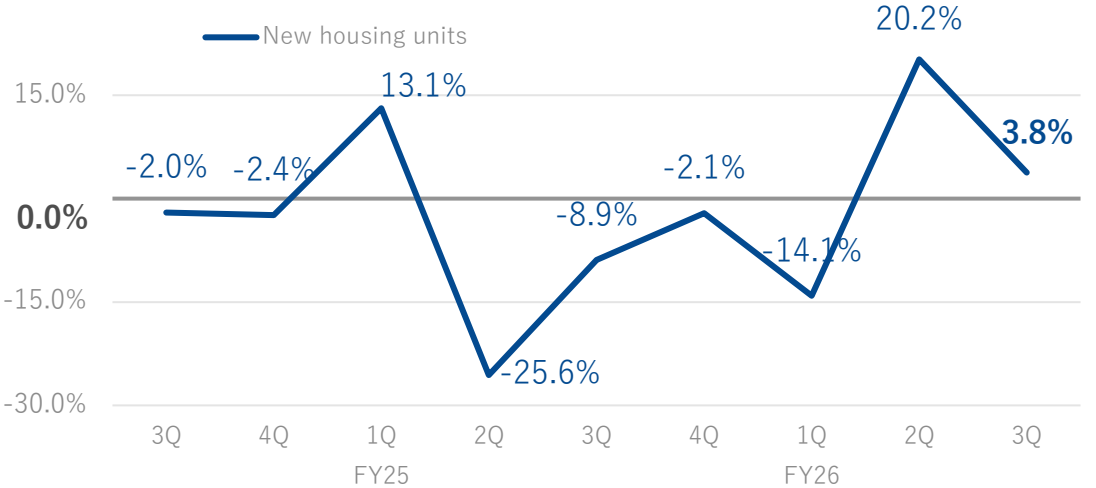
Construction Starts Statistics Floor Area (YoY)



Index of Industrial Production (Seasonally adjusted, YoY)



Statistical Survey of Construction Starts (YoY)



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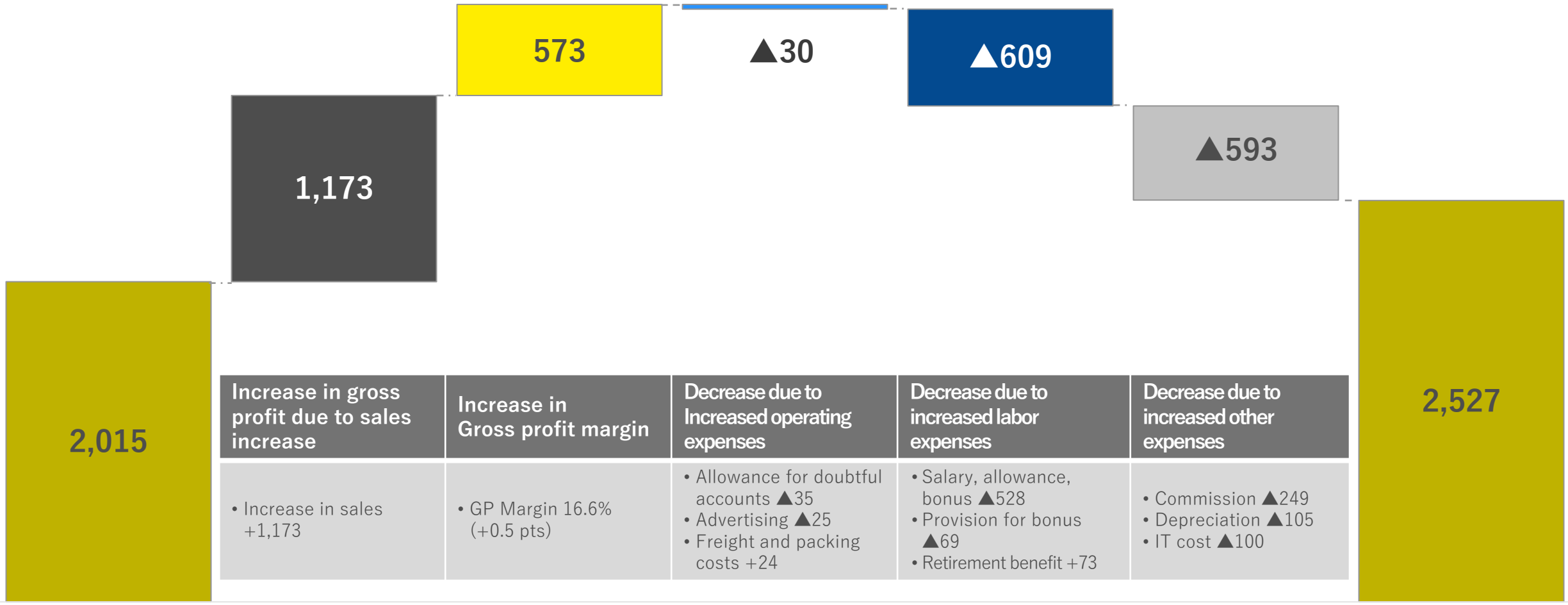
Consolidated Income Statement (YoY)

(JPY Million)	FY2025Q3	**FY2026Q3**	YoY (±)	YoY (%)	**Full Year Forecast**	Progress Rate
Net Sales	117,219	**124,502**	7,282	6.2%	**165,000**	75.5%
Gross Profit	18,884	**20,631**	1,746	9.2%	**27,260**	75.7%
Gross Profit Ratio	16.1%	**16.6%**	-	0.5 pts	**16.5%**	-
SG&A Expenses	16,869	**18,104**	1,234	7.3%	**23,860**	75.9%
Operating Profit	2,015	**2,527**	511	25.4%	**3,400**	74.3%
Ordinary Profit	2,534	**3,143**	608	24.0%	**4,100**	76.7%
Extraordinary Profit	159	**73**	▲86	-	-	-
Extraordinary Loss	124	**22**	▲101	-	-	-
Profit attributable to owners of the parent	1,392	**1,950**	558	40.1%	**2,100**	92.9%

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Operating Profit Analysis (YoY, by factors)

(JPY Million)



Increase in gross profit due to sales increase	Increase in Gross profit margin	Decrease due to Increased operating expenses	Decrease due to increased labor expenses	Decrease due to increased other expenses
• Increase in sales +1,173	• GP Margin 16.6% (+0.5 pts)	• Allowance for doubtful accounts ▲35 • Advertising ▲25 • Freight and packing costs +24	• Salary, allowance, bonus ▲528 • Provision for bonus ▲69 • Retirement benefit +73	• Commission ▲249 • Depreciation ▲105 • IT cost ▲100

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Consolidated Balance Sheet

(JPY Million)	As of Dec. 31, 2025	As of Sep. 30, 2026	±	
Total Asset	117,020	**117,350**	329	
Total current asset	82,534	**81,029**	▲1,505	Account Receivable ▲2,167, Inventory ＋2,550 Advances Payments ＋2,101
・Cash and Deposit	29,760	**24,997**	▲4,763	
Total fixed asset	34,485	**36,320**	1,835	
• Tangible fixed assets	24,808	**25,018**	209	Assets for rent ＋141, Right-of-Use Asset＋77
• Intangible fixed assets	1,682	**2,902**	1,219	Goodwill ＋1,344
• Investments and others	7,994	**8,400**	405	Investment Securities ＋533
Total liabilities	43,144	**43,810**	665	
Total current liabilities	40,706	**41,037**	330	Contract Liability ＋777, Provision for Bonuses ＋740 Account Payable ▲1,194
Total fixed liabilities	2,437	**2,772**	334	L/T loan ＋376
Total net assets	73,876	**73,540**	▲335	
Equity capital	72,686	**72,060**	▲626	
• Shareholder’s equity	69,225	**67,626**	▲1,599	Own Shares ▲1,105　Retained Earnings ▲503
Equity Capital Ratio	62.1%	**61.4%**	▲0.7 pts	

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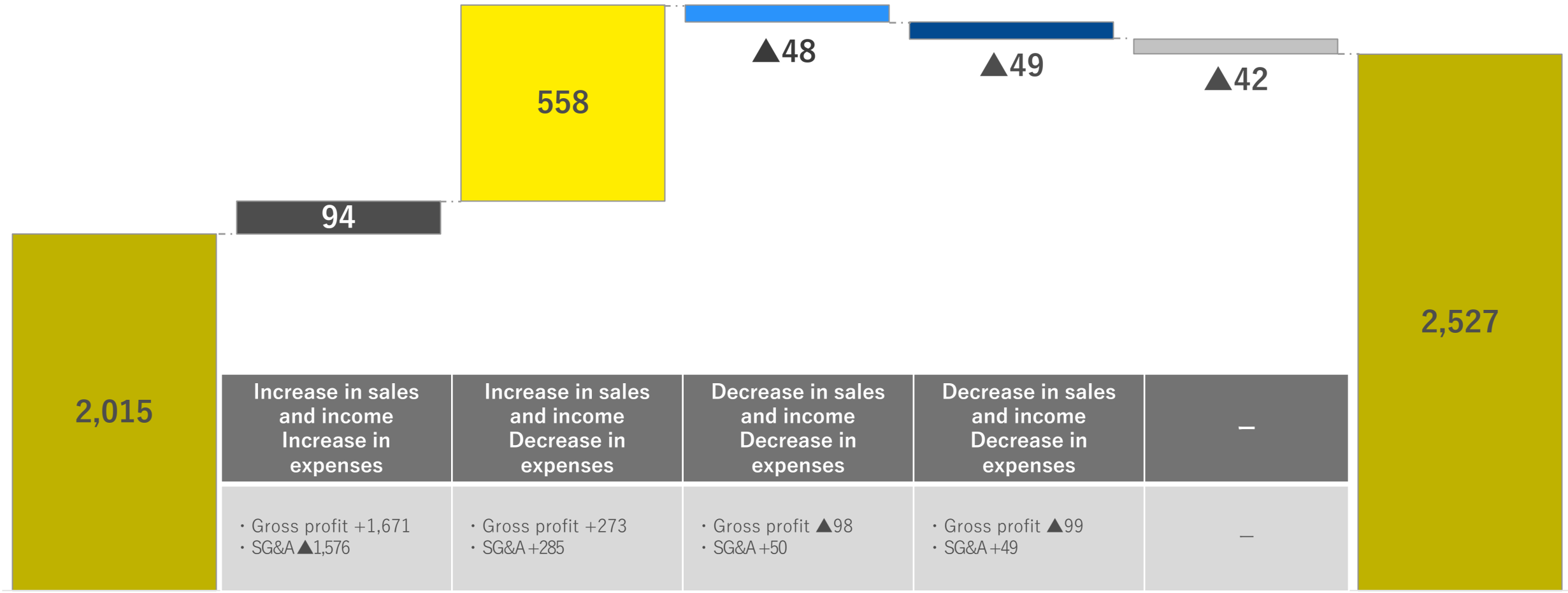
Consolidated Income Statement (YoY, by segments)

(JPY Million)	FY2025Q3		FY2026Q3		YoY (±)	YoY (%)	Full Year Forecast	Progress Rate
Net Sales (Composition)	117,219	100.0%	**124,502**	100.0%	7,282	6.2%	**165,000**	75.5%
Machinery & Tools Segment	76,178	65.0%	**83,862**	67.4%	7,683	10.1%	**110,200**	76.1%
Construction Products Segment	31,227	26.6%	**31,603**	25.4%	375	1.2%	**42,500**	74.4%
Construction Machinery Segment	6,809	5.8%	**6,493**	5.2%	▲316	▲4.6%	**8,750**	74.2%
IoT Solution Segment	3,003	2.6%	**2,543**	2.0%	▲459	▲15.3%	**3,550**	71.7%
Gross Profit (vs Net Sales)	18,884	16.1%	**20,631**	16.6%	1,746	9.2%	**27,260**	75.7%
Machinery & Tools Segment	11,464	15.1%	**13,136**	15.7%	1,671	14.6%	**17,180**	76.5%
Construction Products Segment	5,744	18.4%	**6,017**	19.0%	273	4.8%	**7,950**	75.7%
Construction Machinery Segment	687	10.1%	**589**	9.1%	▲98	▲14.3%	**900**	65.5%
IoT Solution Segment	987	32.9%	**888**	34.9%	▲99	▲10.0%	**1,230**	72.2%
Operating Profit (vs Net Sales)	2,015	1.7%	**2,527**	2.0%	511	25.4%	**3,400**	74.3%
Machinery & Tools Segment	1,197	1.6%	**1,291**	1.5%	94	7.9%	**1,675**	77.1%
Construction Products Segment	551	1.8%	**1,110**	3.5%	558	101.2%	**1,350**	82.2%
Construction Machinery Segment	188	2.8%	**140**	2.2%	▲48	▲25.6%	**255**	55.0%
IoT Solution Segment	196	6.5%	**146**	5.7%	▲49	▲25.4%	**220**	66.5%
Consolidation Adjustment	▲118	-	**▲160**	-	▲42	-	**▲100**	-

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Operating Profit Analysis (YoY, by segments)

(JPY Million)



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Business Segments

UNISOL Holdings

UNISOL Business Partners — A shared services company

Segments	Machinery & Tools		Construction Products	Construction Machinery	IoT Solution
Responsible Companies	UNISOL		Furusato Industries*1	Maruka	Security Design
Business Fields • Subsidiaries	Industrial Machinery	• Kitakyu Machine and Tools • Gifu Shoji	Building Products*1	Construction Machinery • Japan Rental	IoT Solution
	Machinery & Tools				
	Global	• North America (USA*2, Mexico*2, ITI*3) • China (Shanghai*2, Guangzhou*2) • Southeast Asia (Thailand*2, Vietnam*2, Malaysia*2, Indonesia*2, USI*3)	Piping Products		
	Engineering	• Kan Manufactory*1 • TS Precision*1 • Sonoruka Engineering*1	Housing Products		
	Food	• ArPlus*1 • MT Food Systems*3			

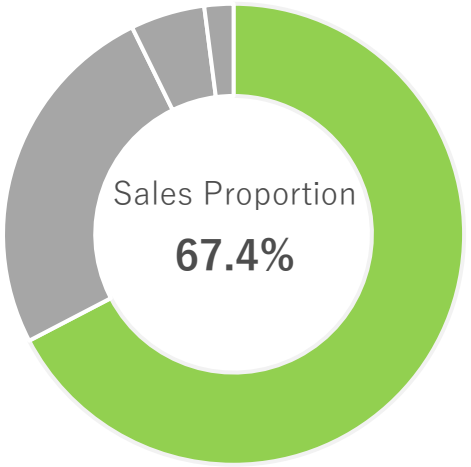
*1: Domestic subsidiaries or business fields with manufacturing capabilities
*2: Overseas subsidiaries
*3: Overseas subsidiaries or business fields with engineering capabilities

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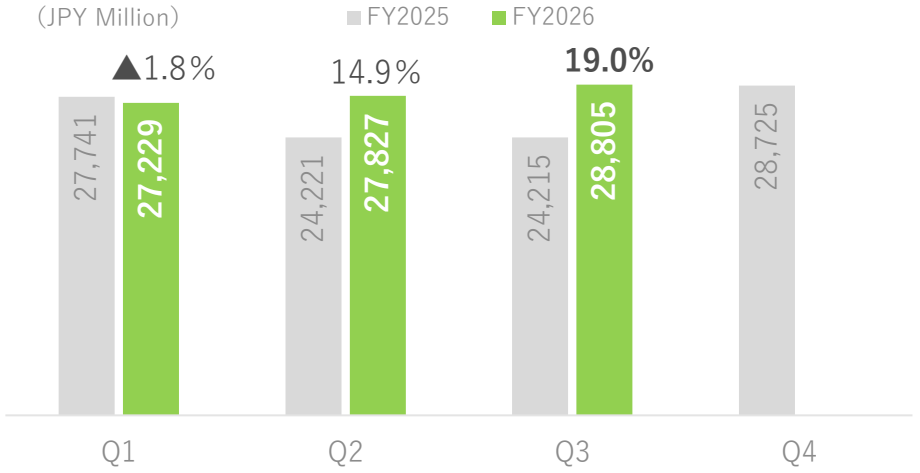
Machinery & Tools Segment

(JPY Million)

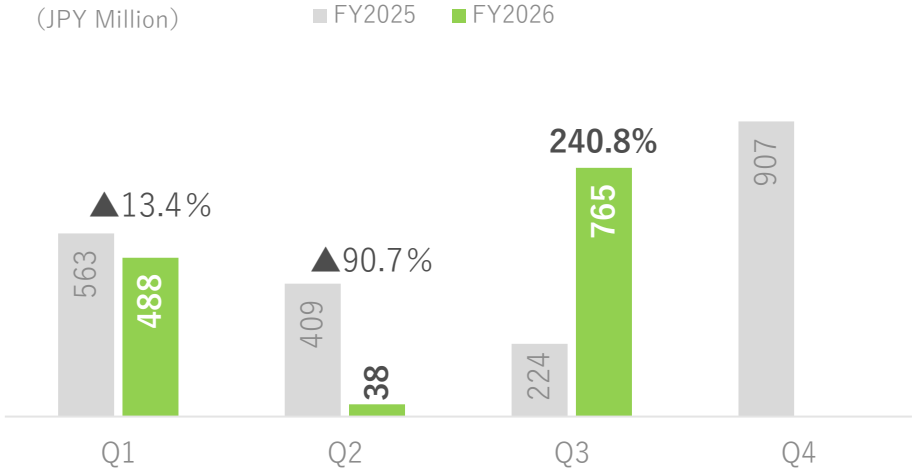
	Net Sales	YoY(±)	YoY (%)	Gross Profit	YoY (%)	Operating Profit	YoY (%)
Total	**83,862**	**7,683**	**10.1%**	**13,136**	**14.6%**	**1,291**	**7.9%**
Industrial Machinery	22,477	773	3.6%				
Machinery & Tools	38,451	2,332	6.5%				
Global	19,887	2,598	15.0%				
Engineering	2,171	477	28.2%				
Food	2,307	1,195	107.5%				



Net sales quarterly transition



Operating profit quarterly transition

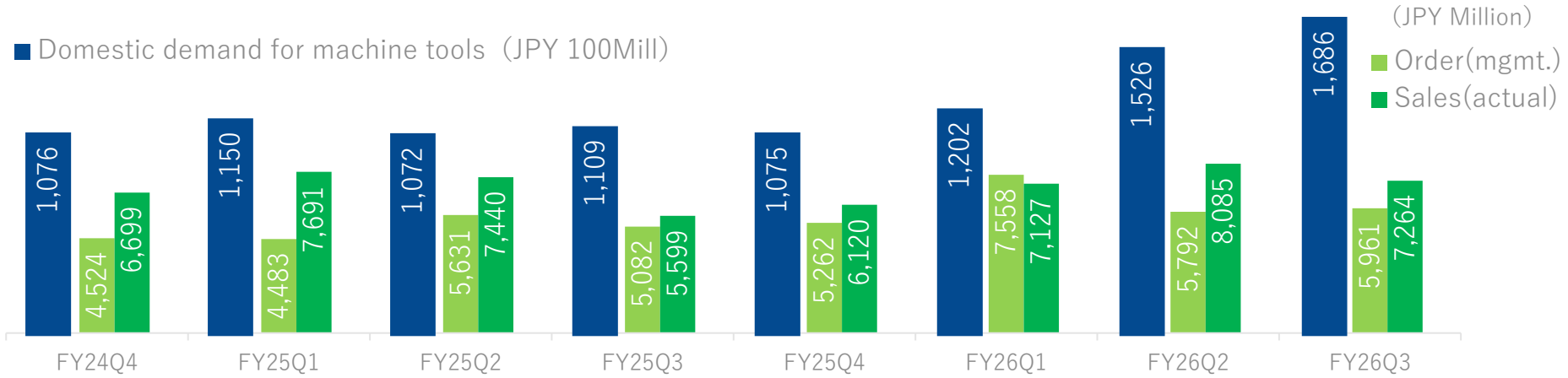


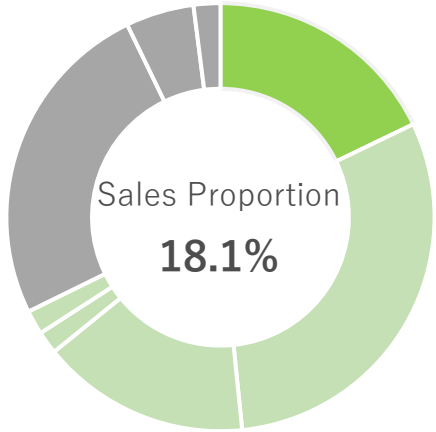
The sale of Machinery including industrial machinery and industrial robots, **the sale of Tools** including peripheral tools for machinery and consumables, and **Machinery manufacturing** including food processing machinery and cleaning machines in Japan, North American and Asian markets

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Machinery & Tools Segment Industrial Machinery

Domestic demand for machine tools (JMTBA) / Order Volume & Revenue Trends





- The domestic orders in the “Machine Tool Orders Statistics” for 2026Q3 are 168 bill. Yen, 52.0%

(JPY Million)	Net Sales	YoY (±)	YoY (%)	
Industrial Machinery	22,477	773	3.6%	

- Well performed due to the increased demand for investment in HEV-related equipment from our primary customer base in the domestic automotive industry
- Regardless of the industry or sector, there is a strong appetite for investment in labor-saving and automation equipment; however, it takes 6 to 12 months from order to revenue recognition
- Secured new orders for labor-saving products such as ultra-large AGVs and collborative robots, which are strategically focused on
- Private exhibitions for major clienst have been begun, number of business inquiries are on rise

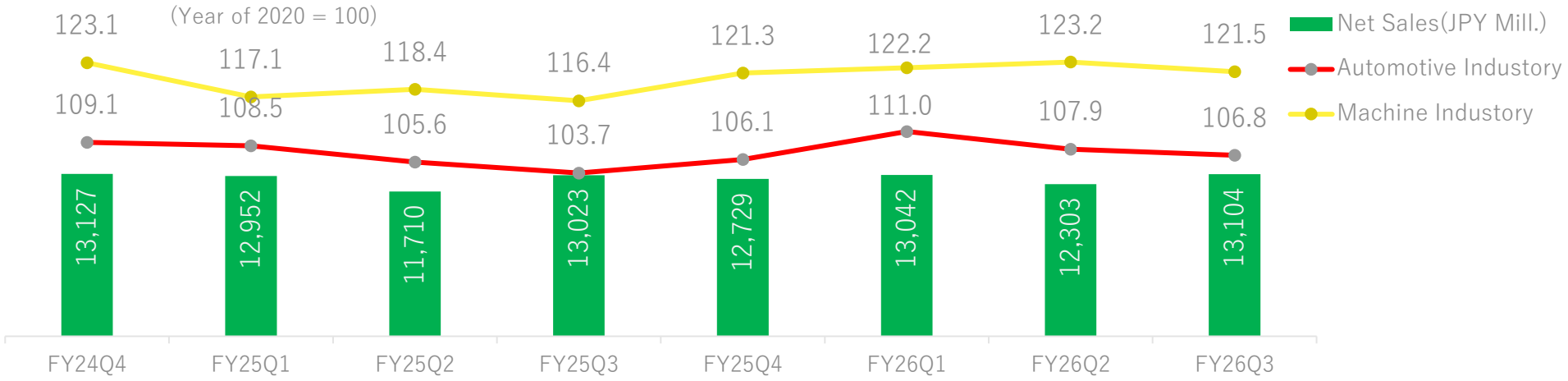
Business Area

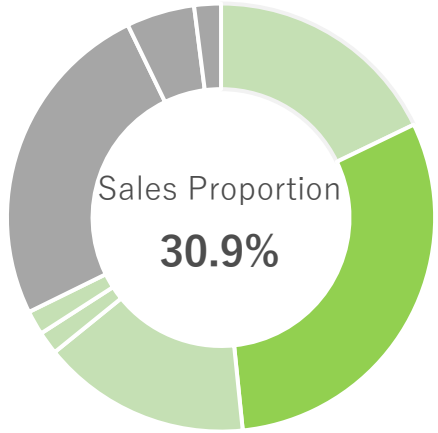
Offering a wide range of machinery from machine tools to industrial machinery, providing optimal solutions for production sites through a direct-sales. Centered around the Industrial Machinery B.U. of UNISOL, the group includes 2 direct-sales tool subsidiaries

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Machinery & Tools Segment Machinery & Tools

Index of Industrial Production (Automotive・Machine) / Revenue Trends





- Index of Industrial Production: Stable in Automotive sector

(JPY Million)	Net Sales	YoY (±)	YoY (%)	
Machinery & Tools	38,451	2,332	6.5%	
・Tools	9.0%			• Maintained solid performance demand from semiconductor manufacturing, shipbuilding, and aerospace industries • Revenue increased driven by the expanded sales of PB products and the price adjustments of cemented carbide tools due to difficulties in resource procurement
・Machinery	▲1.1%			• While orders are rising, +26% vs 25Q3, due to increased capital investment by small and medium-sized manufacturers, revenue declined slightly due to extended lead time led by strong machinery demand and trend of products becoming higher value-added

Business Area

Supporting manufacturing extensively with a product lineup of approx. 1 mill. items with a wholesale system, including machine processing systems such as machine tools and cutting tools/tooling, embedded devices like robots and motors, equipment like compressors, material handling, and general-purpose tools

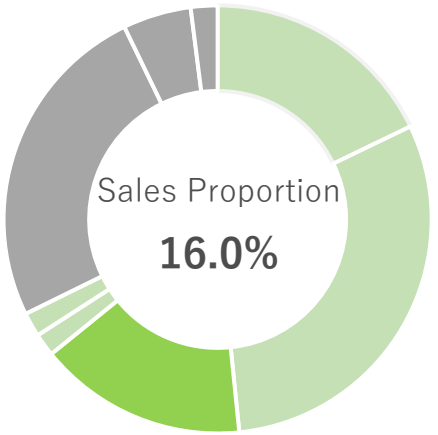
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Machinery & Tools Segment Global

(JPY Million)

	Net Sales	YoY (±)	YoY (%)	
Global	19,887	2,598	15.0%	
North America	14,154 13.7%			• Sales of machine tools to U.S. companies were strong in industries such as aerospace and healthcare, while demand for injection molding machines trended toward a modest recovery • To Japanese companies maintained solid performance due to demand related to HEV capital investments in U.S., capital investment demand remains sluggish due to USMCA in Mexico focused on capturing demand driven by automation
Southeast Asia	6,391 37.2%			
・Thailand	2,764 26.7%			• Sales increased due to the revenue recognition of major projects ordered, the strong performance of the service division, and MTFS consolidation. Focusing on realizing synergies with MTFS
・Indonesia	1,171 39.9%			• Under ongoing currency depreciation and inflation, sales of industrial machinery and inspection equipment increased across the auto and motorcycle industries. In addition, sales increased due to large-scale equipment exports from Japan
・Malaysia	1,047 12.5%			• Solid performance due to strong domestic demand and stable consumer spending. Sales increased in auto and home appliance industries, and the service division. Secured orders for Chinese-made machine tools launched handling recently
・Vietnam	884 145.5%			• Expanded sales of machine tools to state-owned enterprises and the semiconductor industries. In addition, sales increased due to large-scale exports for food manufacturers from Japan. Expansion of local maintenance service contributed to margin improvement
China	1,636 53.9%			• While demand for capital investment by Japanese automotive manufacturers remains sluggish, sales of melting furnaces and components related to data centers remained solid. Focused on sourcing and selling Chinese-made products

*Above net sales include export sales from other segments to the above regions and countries, and sales of MTFS, HQ in Thailand



Business Area

A Comprehensive support system leverages our robust global network, which includes bases and group companies in North America and Asia, to provide integrated assistance from procurement to sales and services, thereby comprehensively supporting the value chain in our overseas business

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Machinery & Tools Segment Engineering and Food

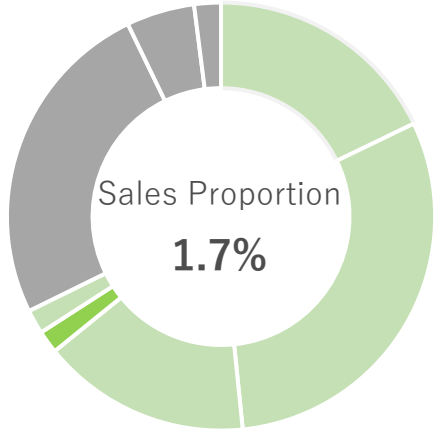
Engineering

Business Area	Promoting the transformation from traditional 'product selling' to 'experience selling,' offering a unique solution by combining its accumulated product knowledge and in-depth field expertise to address challenges faced by the manufacturing industry today, such as labor shortages and changes in the labor market

(JPY Million)	Net Sales	YoY (±)	YoY (%)	
Engineering	2,171	477	28.2%	

Solution Sales Dept., Technical Support Dept., & Subsidiaries in Manufacturing

- Focused on targeted account strategies in collaboration with the Industrial Machinery Business Units. As a result, secured orders for automated and specialized machinery
- High demand for supporting the relocation of production processes within the automotive supply chain due to a shortage of engineers



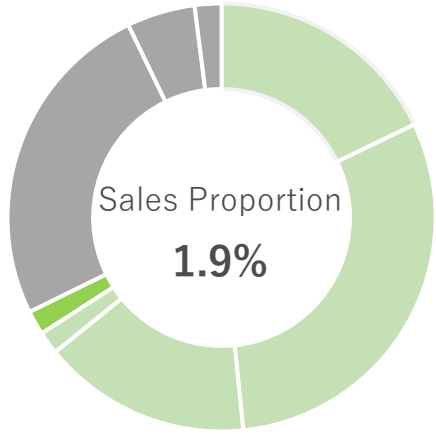
Food

Business Area	The BU's aim is to become the No.1 food machinery trading company in SE Asia, focusing on solving social issues surrounding 'food'. Through a capital partnership with a local Thai company, we have made it possible to offer a total automation system that integrates multiple machines. We propose sustainable business models for Japanese food manufacturers and local food processing companies alike

(JPY Million)	Net Sales	YoY (±)	YoY (%)	
Food	2,307	1,195	107.5%	

FTS Sales Dept., ArPlus, and MTFS* (P/L to be accounted from Q2)

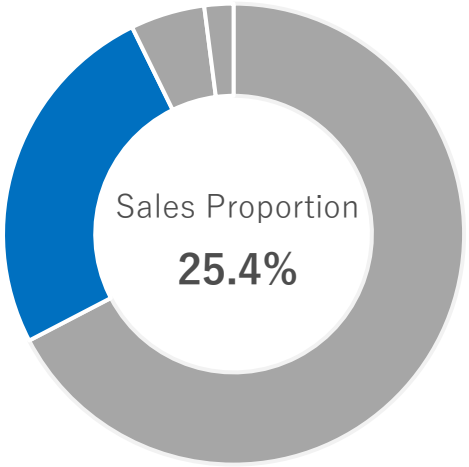
- Secured order for in-house-made bread slicer targeting convenience store vendors as first order as joint project with major food packager
- Secured first order for MTFS-made automated production line targeting a major Japanese pet food manufacturer in Thailand



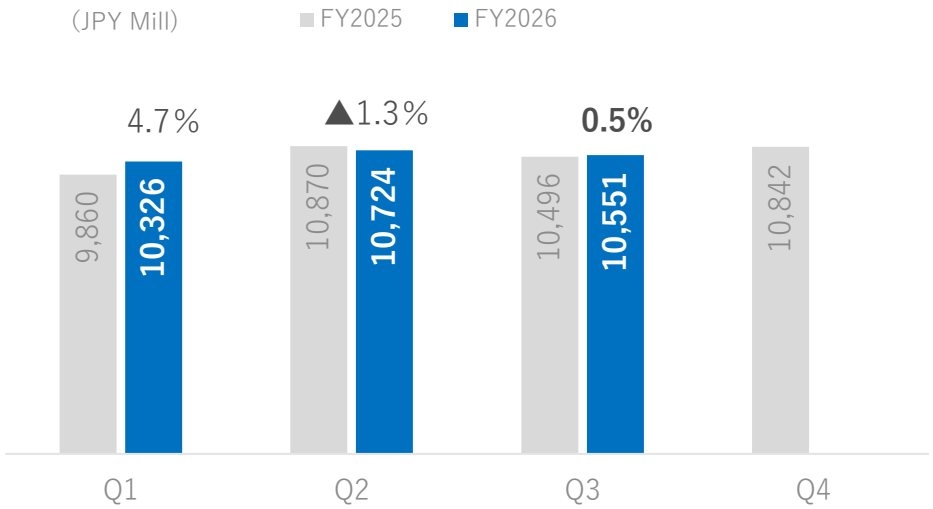
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Construction Products Segment

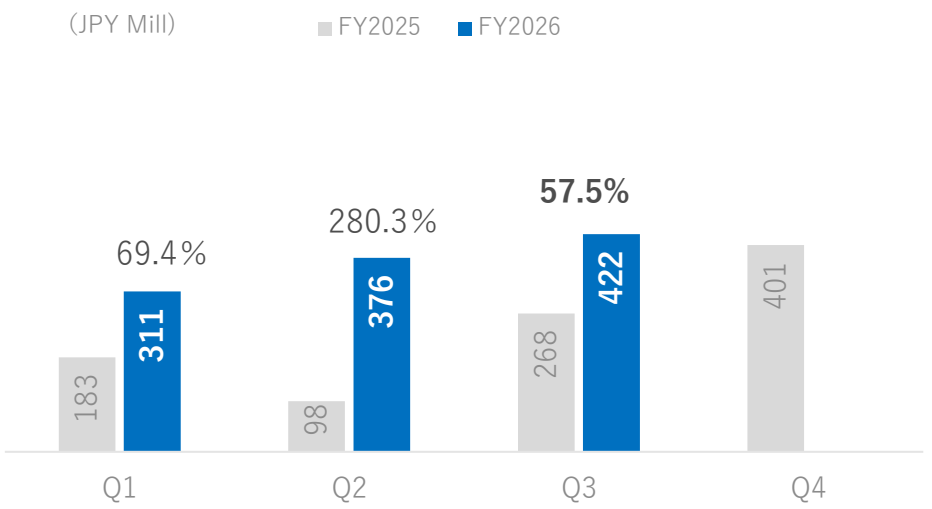
(JPY Million)	Net Sales	YoY(±)	YoY (%)	Gross Profit	YoY (%)	Operating Profit	YoY (%)
Total	**31,603**	**375**	**1.2%**	**6,017**	**4.8%**	**1,110**	**101.2%**
Building products	20,816	229	1.1%				
Piping products	6,113	▲89	▲1.4%				
Housing products	4,733	233	5.2%				



Net sales quarterly transition



Operating profit quarterly transition



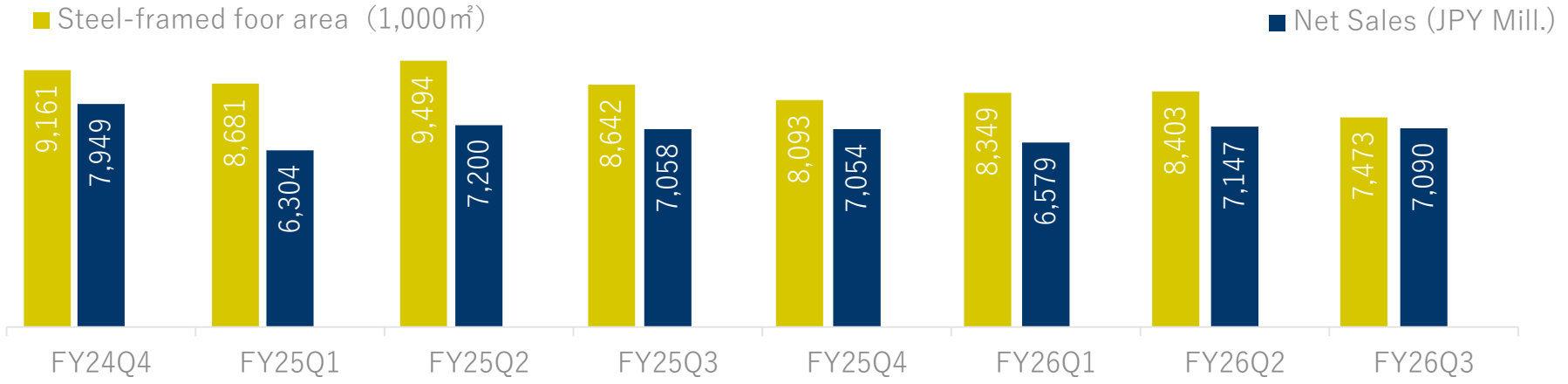
Business Area

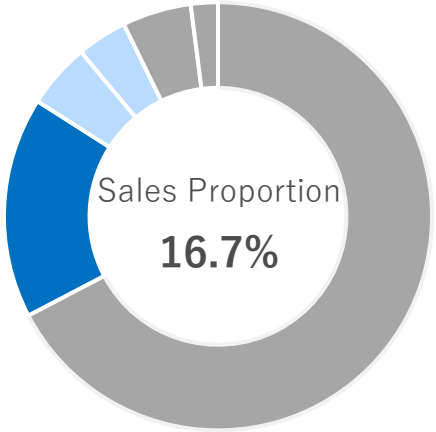
The sale of Steel frame building materials including structural components and bolts used in the construction of steel frame buildings, **the sale of Piping materials** such as pipes and connectors, and **the sale of Housing equipment** such as kitchen equipment, baths and toilets in domestic market

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Construction Products Segment Building Products

Construction Starts Statistics Floor Area（S＋SRC construction）/ Sales Trends





- FY2026Q3, the floor area of steel-frame building construction started decreased by 13.5% YoY, continuing its downward trend

➡ **Sales in this sector amounted to 20.8 bill. yen, representing +1.1% vs FY2025Q3**

(JPY Million)	Net Sales	YoY (±)	YoY (%)	
Building products	20,816	229	1.1%	

- While overall demand remains sluggish, sales increased slightly due to sales of steel detailing CAD as part of new product offerings, large-scale machinery for labor-saving, and sales price revision driven by rising material costs
- Shipping restriction on paint thinner and related materials due to the Middle East conflict have been resolved, with no impact on manufacturing and trading
- Focus on developing original products, such as “LaserKEREN” laser cleaning machine, and creating new products by leveraging owned network

Business Area

Offering a wide range of materials needed by steel fabricators and major housing manufacturers, including our own Full Brace products. We meet the needs of users at our 54 sales offices nationwide

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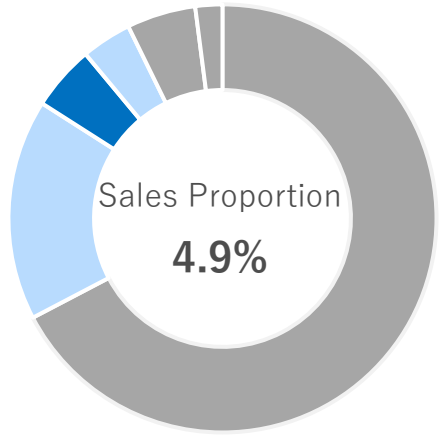
Construction Products Segment Piping Products, Housing Products

■ Piping Products

■ Business Area	Utilizing our network of bases, logistics system, and the scale advantages of centralized purchasing, we provide piping materials cost-effectively and promptly

(JPY Million)	Net Sales	YoY (±)	YoY (%)	
Piping products	6,113	▲89	▲1.4%	

- Number of projects remains consistently low and stable, monitoring future large-scale projects related to semiconductors and electric furnaces. Focus on sales of labor-saving products, such as in-house-made laser welding machines

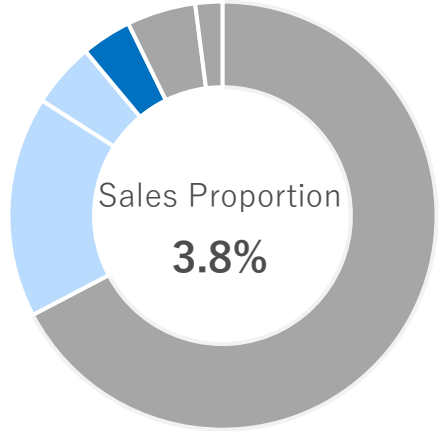


■ Housing Products

■ Business Area	Offering a wide range of products, from residential equipment such as unit baths, system kitchens, and toilets, to air conditioning systems, building materials, and exteriors, and provide services from sales to installation

(JPY Million)	Net Sales	YoY (±)	YoY (%)	
Housing products	4,733	233	5.2%	

- While renovation demand remains sluggish and primarily reflecting the impact of selling price revisions, sales increased slightly
- Secured new business accounts with property management companies and forcus on recruiting personnel to increase transaction with installation

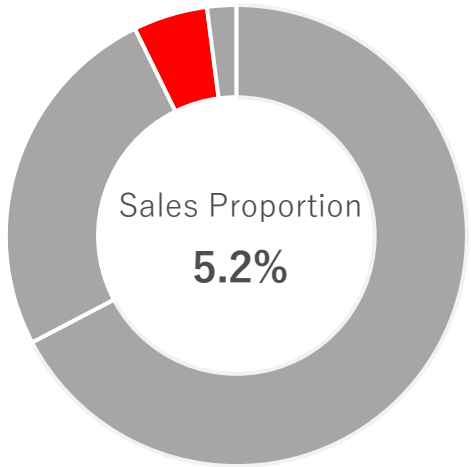


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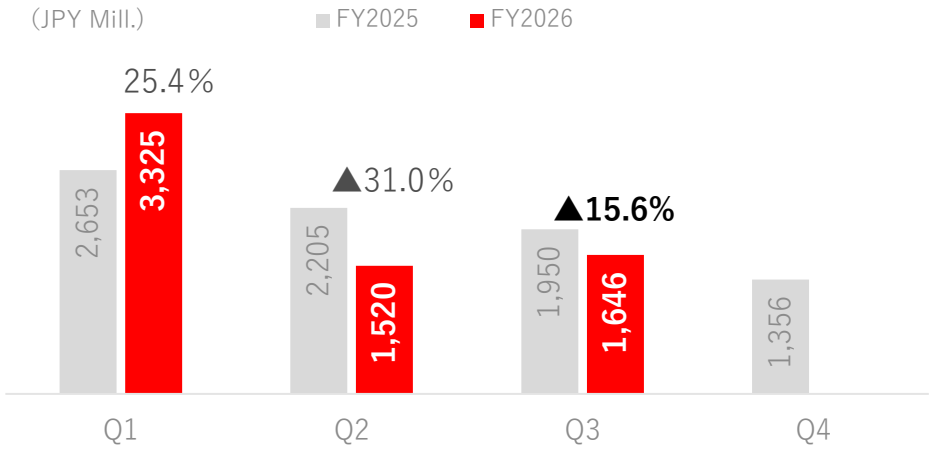
Construction Machinery Segment

(JPY Million)	Net Sales	YoY(±)	YoY (%)	Gross Profit	YoY (%)	Operating Profit	YoY (%)
Total	6,493	▲316	▲4.6%	589	▲14.3%	140	▲25.6%

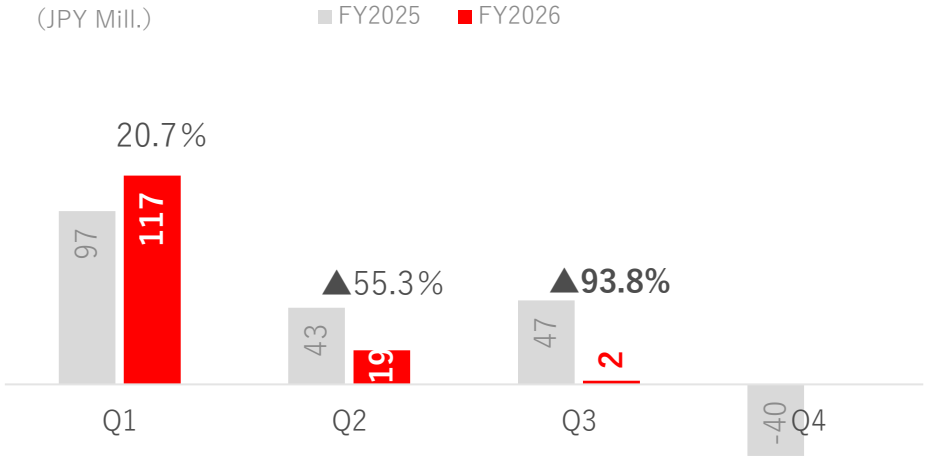
- While both sales and gross profit increased in used machinery business, sales of new machinery business, suc as crawler crane and foundation machinery, declined following a temporary surge in demand ahead of selling price revisions in both volume and manetar. As a result, both sales and gross profit decreased
- Secured first orders for overseas products towards the port sector as new target
- Focus on achieving budget targets by managing revenue recognition for order backlogs and expanding used machinery sales



Net sales quarterly transition



Operating profit quarterly transition



Business Area

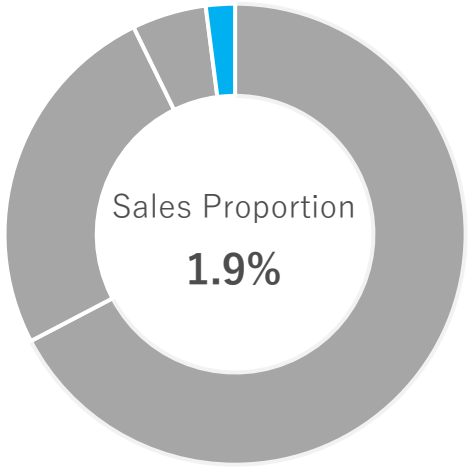
The sale and rental of cranes, excavators, equipment for foundation work, and other construction machinery as well as second-hand machineries for the civil engineering and construction industry and the sign-erecting industry in domestic market

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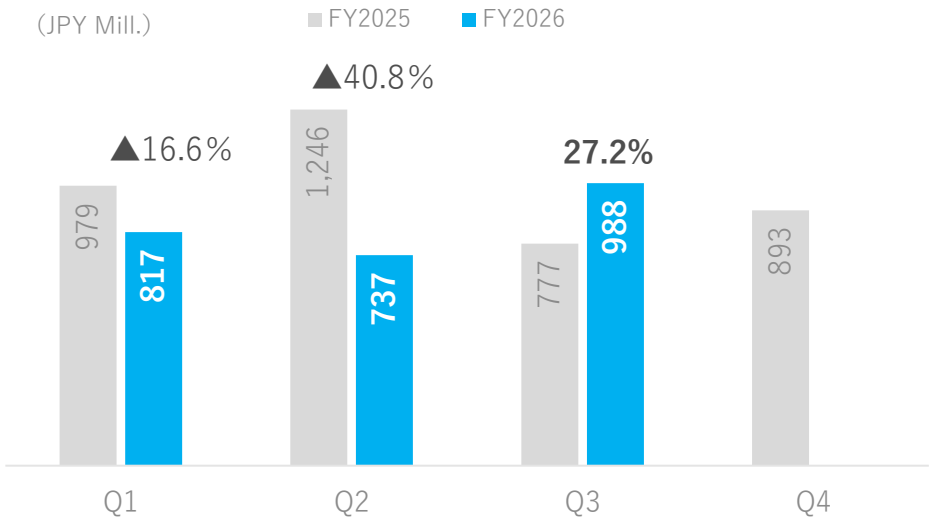
IoT Solution Segment

(JPY Million)	Net Sales	YoY(±)	YoY (%)	Gross Profit	YoY (%)	Operating Profit	YoY (%)
Total	2,543	▲459	▲15.3%	888	▲10.0%	146	▲25.4%

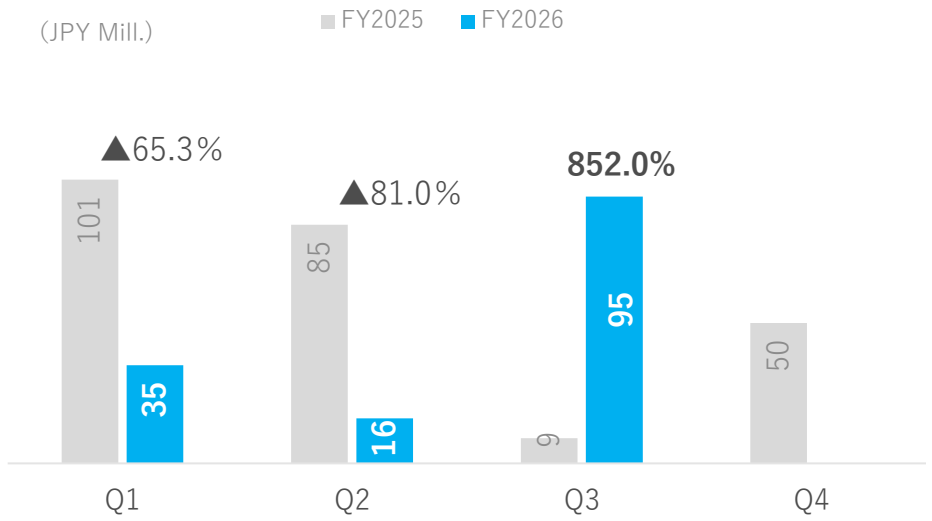
- In wholesale business for security cameras, revenue decreased YoY due to temporary suspensions for large clients, a drop after pre-price hike demand at end of FY2025
- In project business, while significant revenue decline due to the impact from large project acquired FY2025, progressed revenue recognition for previously delayed access control systems in logistics centers and offices
- Focus will be on ensuring steady revenue recognition for existing orders in project business, while expanding into new business sectors and developing new solution products



Net sales quarterly transition



Operating profit quarterly transition



Business Area

Surveillance device focused business provides security camera and entrance management systems, automated guided vehicles (AGVs) and other types of autonomous mobile robot, cloud-based services, etc., to the building management industry, the security sector and public facilities in domestic market

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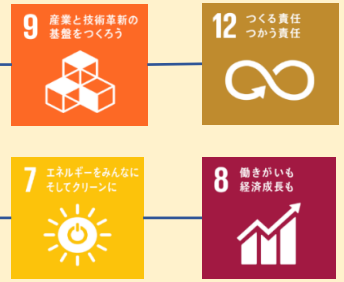
2 Medium-Term Management Plan “UNISOL”

（FY2022-2026）

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Progress of Priority Measures

Establish "management base" to support sustainable growth

Basic Strategy	Priority Measures	Progress
【Cultivation】 Differentiate us from others in existing businesses	Integration synergy 4 collaborative pillars S/T 5 strategic fields L/T	Synergies 0.59 bill yen (FY2026)
	Deepen platform strategy	
【Challenge】 Develop new business field	Create new solutions through integration of group functions	1.0 bill yen (FY2026 Target)
	Deal with smart factory business and smart farm business	Growth Investment 5.3 bill yen ・Acquisition of TSP ・Investment in Eureka ・Investment in ARUM ・Investment in Mowito Robotics ・Acquisition of MTFS ・Investment in Frinks AI
【Sustainability】 Strengthen our SDGs initiatives		Human Capital Investment , Social Contribution 1.0 bill yen ・Shareholding association RS, Trust-type ESOP ・Reform of the personnel system ・Joint research between industry, government and academia ・Environmental Education ・Satoyama conservation project

【Synergy Maximization】
- Office integration
- Embedding group philosophy
- Unification of HR system
- Establishment of UNISOL Business Partners
- Establishment of UNISOL

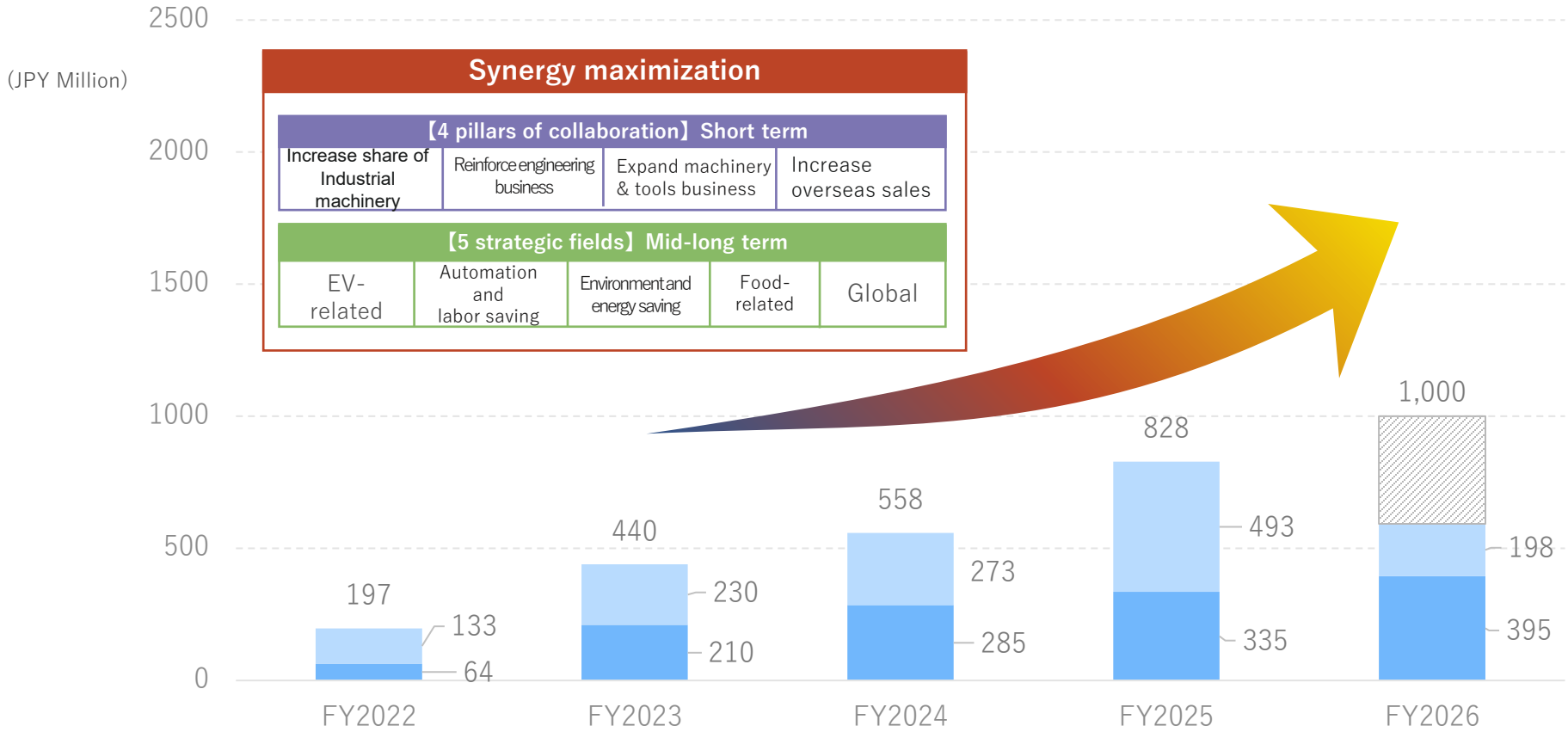
【Development of New Areas】
- Implementation of Extra-large sized AGV and Collaborative Robots
- Development of Wood-braces
- Redefinition of Engineering Business
- Food Machinery Business in Southeast Asia

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Synergy

FY2026 3Q Results： 593 million yen

- **Share-up of Industrial machinery**： **197 million yen** ~ The sale to customers in the construction materials segment
- **Tools and Equipment Sales** ： **186 million yen** ~ Expanding the sales to industrial machinery users
- **Sustainable Cost Reduction** ： **93 million yen** ~ Office integration, etc.



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【Cultivation】Private Exhibition “UNISOL FAIR”

- **Held private exhibitions at automotive manufacturer and major supplier plant sites**
- **Accelerate synergies between the Industrial Machinery Business Unit（former Maruka Corporation）and Machinery & Tools Business Unit（former G-NET）**

Industial Machinery Business Unit

【Features & Strengths】

- **Customer Base**: automotive OEMs, major automotive suppliers
- **Relationships**: direct relationships with production engineering, maintenance, and manufacturing divisions
- **Deep Customer Trust**: extensive expertise built on years of large industrial machinery sales

・Hosting events on-site at customer plants
・Possessing direct sales channels

×

Machinery & Tools Business Unit

【Features & Strengths】

- **Product Lineup**: approx. 1million items, from cutting tool to material handling equipment, etc.
- **Uniqueness**: lineup of high-value-added private-brand products
- **Planning Capabilities**: extensive exhibition hosting experience supported by a proven track record

・Extensive Product Lineup
・Exhibition Hosting Expertise

Key Results from Private Exhibition

1,000+

- **Number of Attendees**
  Total across 4 host companies. Attracted numerous busy plant engineers and key decision-makers

86%

- **Attendee Satisfaction**
  Live machinery demos pleased attendees and revealed new needs through direct customer discussions

30%

- **Sales Inquiry Rate**
  Approx. 30% move to next steps, such as visiting for PR, requesting estimates, and discussing specifications

Strategic Outlook



- **Roll out to 30 Major Target Clients**
  Plan to roll out exhibitions to target clients across the customer base of the Industrial Machinery Business Unit
- **Evolving Solution Proposals**
  Evolve exhibitions into solution-driven proposals for total production processes
- **Improving Profitability**
  Establishing sales channels through introduction of PB products, eco-friendly and automation machinery

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【Challenge】MTFS Awarded “APEA 2026”

Announced on 7 Sep. 2026

- **MT Food Systems, MTFS, awarded the "Fast Enterprise Award" at APEA 2026**
- **Accelerating growth to be the No. 1 Food Machinery Trading Company in Southeast Asia by the integration of High-quality automation machinery provided by Japanese manufacturers × Customer base in Southeast Asia**

APEA 2026 「Fast Enterprise Award」 summary

- **Program**: Asia Pacific Enterprise Award 2026, across 16 asian countries/regions
- **Organizer**: Enterprise Asia, Researched 100,000+ companies across Asia
- **Ceremony date/venue**: August 21, 2026 / Bangkok, Thailand
- **Winner**: MTFS, one of 3 recipients in the Fast Enterprise Category
- **Criteria**: $2M+ revenue, demonstrating rapid growth in market share, earnings, and brand recognition
- **Past awards**: 2 to 3 companies selected annually from over 100 nominations in Thailand

Atomosphere of the Awards Ceremony +

【Ceremony】



【Representative speech】



【MTFS】



Company Overview : MT Food Systems Co., LTD.

Location	Bangkok, Thailand	**Representative**	Mr. Chej Mektaveekul
Established	28 February 2012	**Share Capital**	THB 10million
Employees	55		
Consolidation	Completed acquisition of 52% of shares（24 February 24 2026）		
Business	Food processing machinery import & sales, automation systems integration, machinery maintenance & support		
Strengths	In-house R&D function, advanced technical capabilities for automation solutions		
Costomer Base	Maintains longstanding, strong business relationships with leading food manufacturers in Thailand and Vietnam		

Creation of Synergies ~ Food Business Unit × MTFS

- **Strategic field in MTMP**: Automation, Labor saving, Global, Food-related
- Expansion of sales in SE Asia for high-quality Japanese food automation machinery and advanced AI visual inspection systems **via cross selling**
- By leveraging mutual strengths of **customer base** comprising local and Japanese manufacturers in SE Asia, and MTFS's **in-house R&D function, along with design and engineering expertise** for machinery and production process automation
- Capturing automation business **to address social challenges in SE Asia** such as decline of young workers, labor shortage, rising labor costs

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3 New Medium-Term Management Plan “UNISOL II”

(Originally Published: 9 July 2026, Revised: 9 November 2026)

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Direction of “UNISOL II” Based on Challenges

Fundamental direction

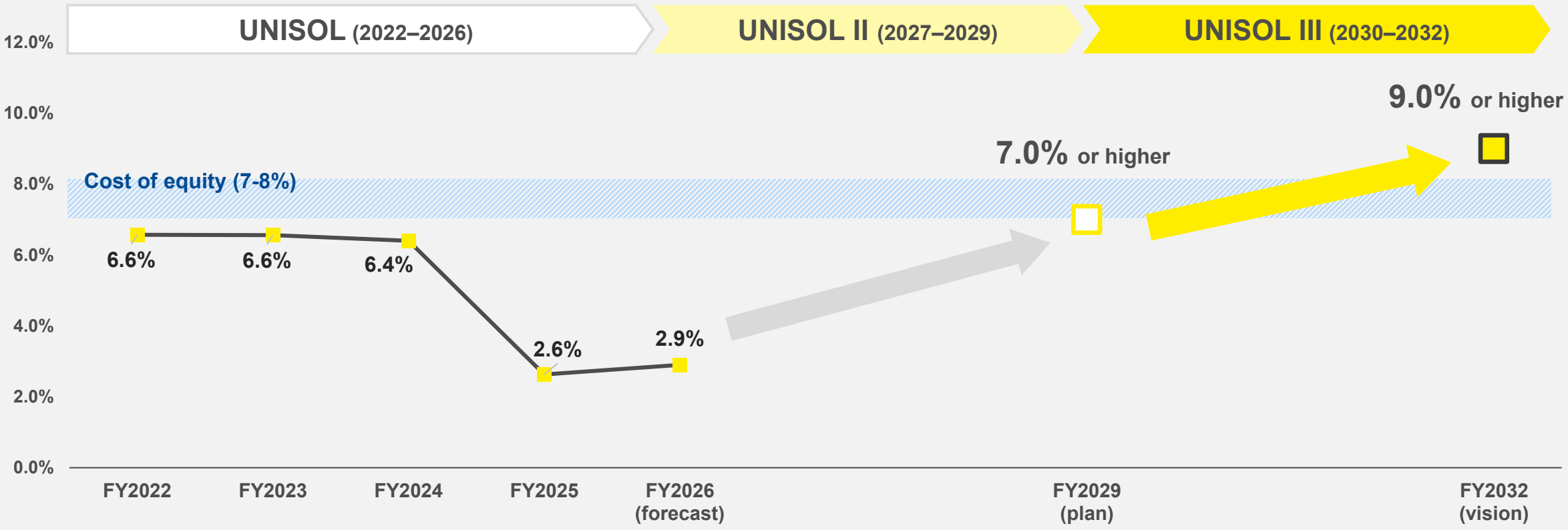
1	Formulation of highly achievable business plans	• The formulation process for the MTMP was changed to a bottom-up approach, with front-line perspectives deeply woven into measures and targets • Formulation of plans by accumulating business strategies that emphasize profitability and efficiency based business base cultivated over many years
2	Optimization of the business portfolio	• Implementing selective focus strategies to address market contraction and intensifying competition, strengthening existing businesses through structural reforms such as reorganization of business and operational bases • Allocating resources to high-growth, high-profit potential businesses to establish a foundation for future revenue streams
3	Balance sheet management with a commitment to achieving ROE targets	• Formulation of capital allocation strategies, calculated backward from ROE targets, to realize capital profitability with an awareness of the cost of capital • Improvement in asset turnover through the transition to a "high-margin, high-volume" model and reallocation of resources through productivity enhancement
4	Accelerate and maximize synergy effects post-integration	• Leverage the results of reorganization and integration carried out under the current MTMP to maximize synergies • Accelerate the proposal of solutions directly addressing customer challenges by integrating our sales network and manufacturing expertise

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Quantitative Targets (ROE)

- Seeking structural transformation that enables achievement of ROE exceeding cost of equity, set ROE target of at least 7.0% in new MTMP as a milestone toward capital efficiency with ROE of at least 8.0%.

Changes in actual and projected ROE



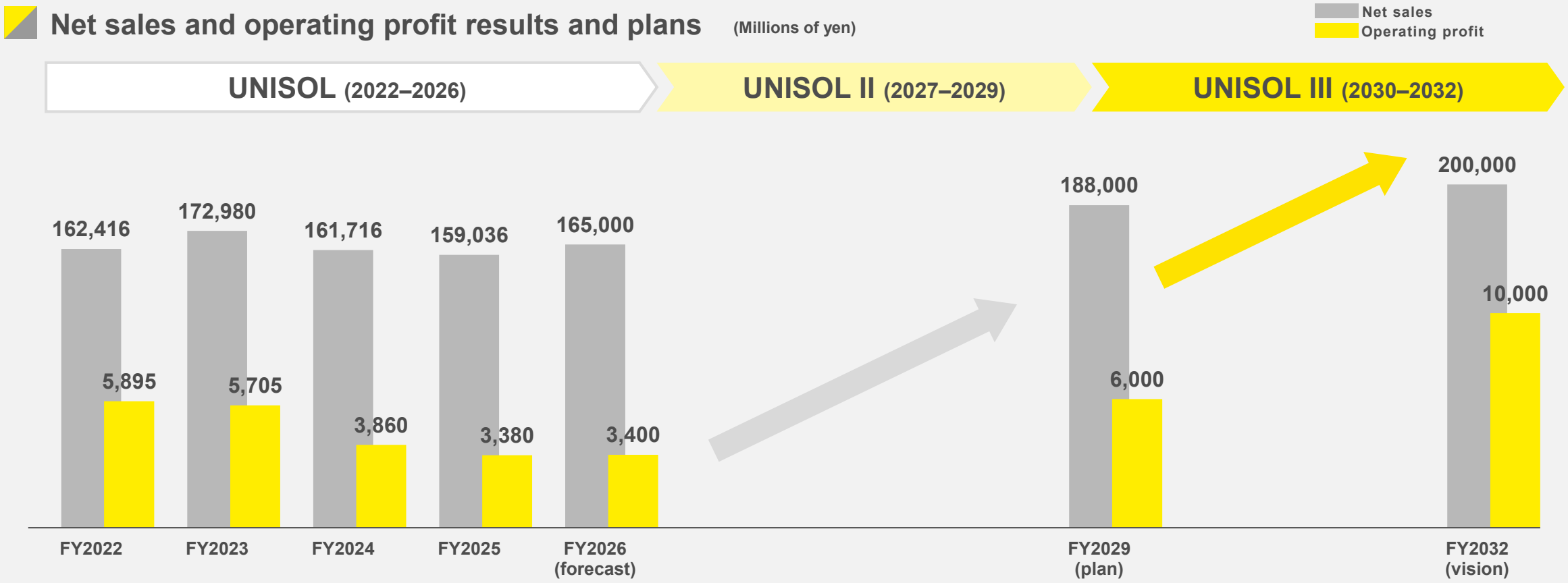
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Quantitative Targets (Net Sales/Operating Profit)

- For operating profit, aim to renew the record high of ¥5,895 million reached in FY2022, immediately after the integration.
- Rather than simply volume expansion, promote initiatives aligned with transition to a corporate structure that supports sustainable growth.

Net sales and operating profit results and plans

(Millions of yen)



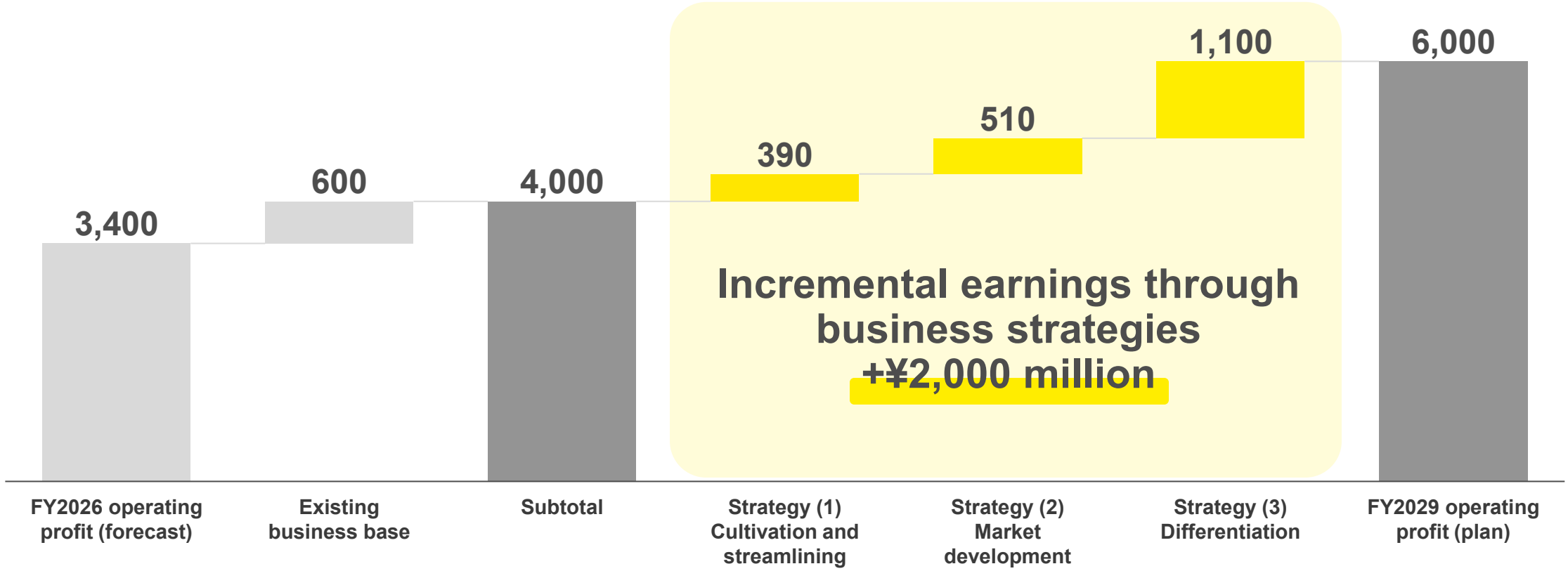
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Roadmap for Achieving Operating Profit Target

- Aim to achieve the operating profit target by adding incremental earnings generated through the business strategies of the new MTMP to earnings from the existing business base.

Roadmap to achieve the final fiscal year operating profit target

(Millions of yen)



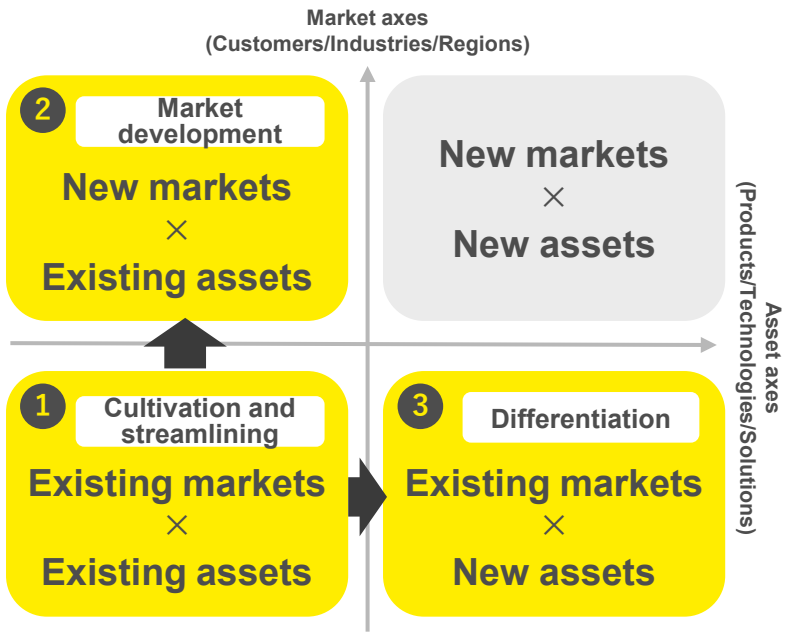
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Business Strategy Direction under the New MTMP

- In our business strategy, following the three themes of (1) Cultivation and streamlining, (2) Market development, and (3) Differentiation, we will build an earnings base that is resilient to the external environment and improve productivity and profitability.

Business strategy direction under the New MTMP

Business strategy themes



	Strategic theme	Strategic direction	Connection with positioning of new MTMP	Operating profit incrementation target
①	Cultivation of existing markets and streamlining of business models	● Further explore existing market while streamlining operations through revision of operating structure, etc.	● Build earnings base resilient to the external environment (increase share of existing markets) ● Increase profitability	＋¥390 million
②	Development of untapped strategic areas and industries	● Utilize our assets to develop business in new sales areas and industries that have not been fully tapped (E.g.: Southeast Asian market in the food business, non-automobile market, etc.)	● Build earnings base resilient to the external environment (expansion into new markets)	＋¥510 million
③	Differentiation through increased added value of provided products and solutions	● Achieve differentiation from other companies by reinforcing our assets (products, technologies, solutions, etc.) and combining them with assets within the Group	● Increase profitability by transitioning to high added-value solutions	＋¥1,100 million

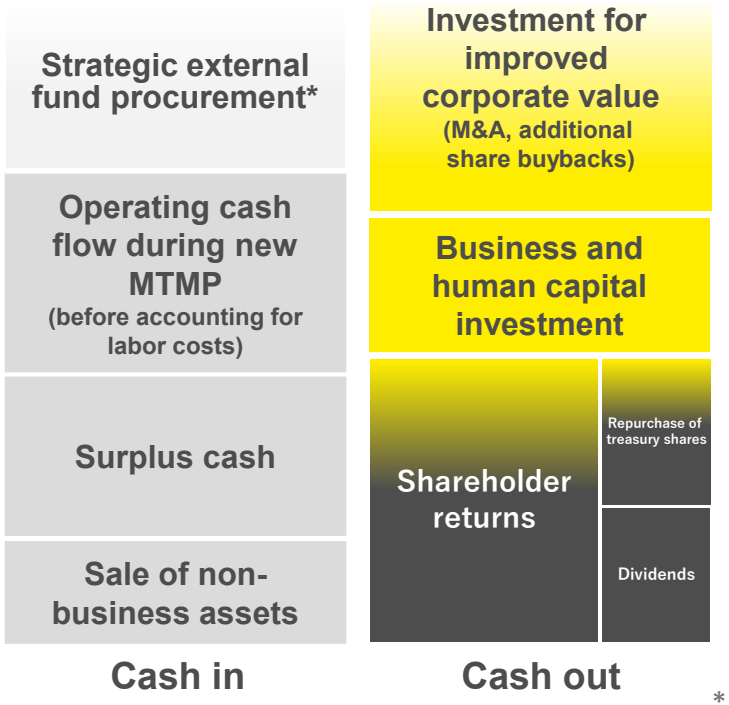
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Cash Allocation Policy

- Utilizing inflow, such as operating cash flow generated through business strategies as well as strategic external fund procurement, allocate up to ¥42 billion in cash to investment (M&A and additional share buybacks) that improve corporate value, business and human capital investment, and shareholder returns

Cash allocation policy

¥42 billion scale (maximum)



Investment for improved corporate value
(M&A, additional share buybacks)

- Determine application most appropriate for improving corporate value, and direct cash either toward M&A or share buyback. (Preference given to M&A, but if no deal satisfying internal criteria can be realized, then apply cash to share buyback.)
- For M&A investment, raise external capital as needed depending on size of deal

Business and human capital investment

- Allocate as investment contributing to sustained, stronger and more efficient business infrastructure and human capital investment

Repurchase of treasury shares and optimal utilization of acquired shares

- Consider the use of acquired shares for M&A and human capital investment, alongside share cancellation

Ordinary dividends and special dividends

- Take proactive shareholder return approach to optimize equity capital
- Implement through such measures as ordinary dividends (100% payout ratio)

Growth investments
About ¥16-22 billion
(including the utilization of treasury shares)

Shareholder returns
About ¥26 billion

* Assume external financing will involve borrowing at a level that maintains financial soundness (up to about ¥20 billion)

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M&A Strategy under New MTMP

- New MTMP also positions M&A as instrumental strategy to reinforce business foundation and secure growth engines

M&A strategy

1. Set internal criteria (hurdle rate) from capital cost perspective and carefully examine each M&A opportunity to ensure investment contribute to enhanced corporate value
2. Take flexible approach to external financing (up to ¥20 billion) matched to scale of M&A deal at a level that maintains financial soundness
3. Use experience gained through past M&A deals as basis and work with business units and outside experts to execute deals from a post-merger integration perspective rather than focus on acquisition itself as end goal
4. From perspective of portfolio optimization, consider divestitures as well as acquisitions as strategic options

Investment Themes	Purpose	Areas of M&A Interest
Add high value and address social issues (shift to solution-oriented business model)	To acquire technology for automating and reducing labor requirements at customer sites. To drive structural shift from low-margin product selling to high-margin service selling by leveraging existing customer network —a Group strength—to fuel cross-selling opportunities	AI, IoT, physical AI (robotics, etc.), and engineering, etc.
Stabilize business portfolio (reduce volatility)	To expand areas of existing core industries, such as automobiles and semiconductors, that are less susceptible to business cycle fluctuations, and build robust earnings base unaffected by external conditions	Food sector, etc.
Expand business in growth areas	To acquire locations and sales channels in rapidly growing North American market. Also, to facilitate flexible approach to high-profit deals, even in domestic market, that meet hurdle rate, with goal being to achieve larger market share	Global opportunities (such as North American market) as well as domestic opportunities that satisfy investment strategy criteria

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Shareholder Return Policy-1

- During new MTMP, seek to maintain equity at appropriate level and therefore set minimum DOE (dividend on equity ratio) at 3.5% for ordinary dividends, with payout ratio at 100%
- Anticipate total shareholder returns amounting to about ¥26 billion. With a view to implementing capital policies early, begin executing any measures that can be carried out ahead of schedule in FY2026

Shareholder return policy

	Current	Shareholder return policy and anticipated total returns under new MTMP	
Ordinary dividends	DOE of 3.5% or more	Set minimum DOE target at 3.5% with payout ratio at 100%	about ¥10 billion
Special dividends	Flexible application of additional shareholder returns in accordance with profit levels and financial conditions	(No change)	about ¥1.5 billion (*1)
Repurchase of treasury shares	Flexible application of additional shareholder returns in accordance with profit levels and financial conditions	(No change)	about ¥14.5 billion (*2)

Total amount

¥26 billion

scale (*3)

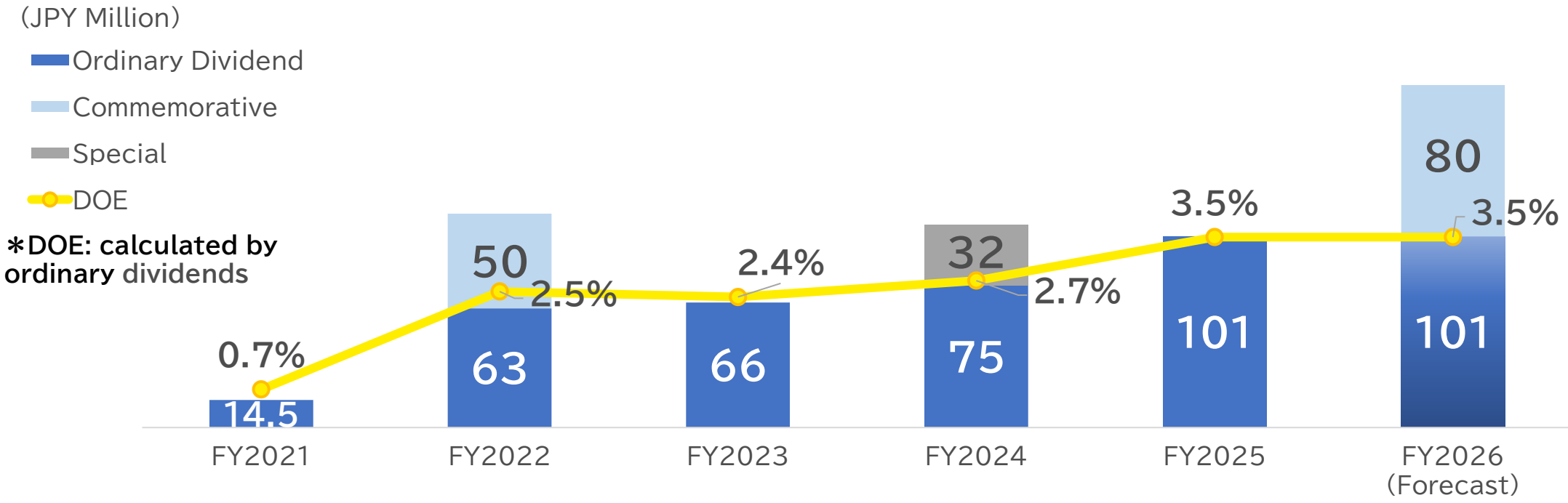
*1: Estimated based on the number of dividend-eligible shares as of December 31, 2025, taking into account the repurchase of treasury shares already executed and scheduled to be executed during the fiscal year ending December 31, 2026
*2: Take flexible approach to executing additional repurchase of treasury shares if M&A deals with established criteria are not successful and surplus funds accumulate or remain idle
*3: Includes capital policies implemented in FY2026 ahead of schedule

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Shareholder Return Policy-2

Reflecting PR on Nov 9, 2026

- **Implementation of shareholder return policy under the new MTBP (¥26 billion scale) ahead of schedule within this fiscal year (as previously announced)**
  - ① Commemorative dividend (announced on 9 Jul 2026)
    - To celebrate the 80th anniversary of the companies' foundation, an increase in dividends.
    - Dividend forecast for the FY2026: 181 yen (total / per share)
  - ② Acquisition of own shares (announced on 9 Nov 2026)
    - Execute market purchases of up to ¥15 billion between August 2026 and July 2027 (Increased from the initially planned maximum of ¥2 billion)



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4 IR Activities

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IR Activities（1/2）

■ Video Content

- **Corporate Site**

Financial Results Briefing (semi-annual)
https://www.unisol-gr.com/ir/library/video/

Business Introduction
https://www.unisol-gr.com/group/video02/



- **YouTube**

CPA Hineken's Stock Investment Channel
Listed Company IR Video Channel (quarterly)
https://www.unisol-gr.com/ir/library/video/



■ SNS

- **IR Official X account**

Increase Followers at the Nikkei IR Fair
Daily updates on stock price and events

https://x.com/Unisol_HD_IR



■ Advertising

- **Radio**

From Jan. 2026, renewed CM to introduce new company name is on air just before "Market Press" as the 9AM time signal commercial

https://www.unisol-gr.com/group/advertising/



- **YouTube**

Expressed our slogan “Unlocking ‘Aha!’ moments, one after another,” through the video

On Air： Jan – Dec 2027
Media： YouTube

https://www.unisol-gr.com/group/advertising/



- **Yahoo! Finance**

An introduction to the shareholder benefit program that offers up to 10,000 yen worth of original Quo Cards based on the number of shares held and the holding period

https://finance.yahoo.co.jp/quote/7128.T/incentive



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IR Activities（2/2）

■ Media Appearances

New !

- **NIKKEI Radio ~ Finance & Investment Media**

  Our president appeared on Radio NIKKEI's program. He passionately talked topics ranging from his personal background to our company's business activities and future growth strategies aired on 30 September 2026

  https://www.radionikkei.jp/ifudodo/20260930.html



- **Stock information website**

  Our president was featured on 5 August 5, 2026

  https://www.youtube.com/watch?v=col791hPUN8



■ Research Coverage Report (Quarterly)

Update !

- **Shared Research**

  Promoting expanded reach to domestic and international investors through the issuance of objective reports

  https://sharedresearch.jp/ja/companies/7128#top



■ Integral Report FY2025

- Release the latest integrated report
- Introducing strategies of each segments and our “UNIQUE SOLUTIONS”

  https://www.unisol-gr.com/ir/library/integrated-report/



＜Highlighted Contents in the Report＞

【Top Message】 The Way Forward
- Becoming a unique presence with the combined strength of our group

【Feature 1】 UNIQUE SOLUTIONS
- Showcasing Unique Solution cases that exemplify ‘Unlocking “Aha!” moments, one after another‘

【Feature 2】 The Americas as a Growth Engine
- A focus on overseas operations driving global sales, introducing our local subsidiaries in the Americas

【Feature 3】 UNISOL from an External Perspective
- Interviews with clients and partner organizations offering an objective view on what makes UNISOL uniqueness

【Feature 4】 New MTMP Development Project – Leaders’ Roundtable
- Drawing UNISOL’s future map from a “bottom-up” perspective

【Segment Information】
- Featuring messages from executives in charge and future outlooks across 4 segments: Machinery & Tools, Construction Products, Construction Machinery, and IoT Solutions

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IR Activities Participation in the Nikkei/TSE IR Fair 2026

- **“Nikkei/TSE IR Fair 2026” is a largest event for retail investors in Japan**
- **Participated for the second consecutive year to cultivate long-term retail investor engagement and support**
- **Conducted briefing sessions on business strategy and shareholder return policy （total 12 sessions）**

Overview



Event period：August 28 (Fri) – 29 (Sat), 2026
Venue： Tokyo Big Sight, South Exhibition Halls
Organizer：Nikkei Inc./Japan Exchange Gr., Inc.
Presenter：Chairperson, President, PR Division
Total visitors：27,221 (2day total)

Survey Results

327 — **Number of survey responses:** investors visited our booth expressed exceeded expectations. We gained an opportunity to deepen understanding of our business and strategy to them

80%+ — **Satisfaction with company presentations:** Over 80% of investors gained deeper understanding; the chairman and president's presentations were highly interesting

86% — **Shift in visitors Intent to purchase our shares:** While 65% of investors were not familiar with UNISOL, 86% expressed interest in purchasing shares after the presentation

Atomosphere of the event

【Our booth】



【Presentation】



【Radio appearance】



Basic policy on engagement with retail investors

- **Continuously create opportunities for engagement with retail investors**
  Leadership will continuously provide opportunities to explain strategy and business performance while directly dialogue with retail investors
- **Cultivate long-term retail investor engagement and ongoing support**
  Expand our long-term retail shareholder base by fostering empathy with our corporate philosophy and understanding of the MTMP

Stay tuned !

Participation in the Fair in Osaka on 23 Jan. 2027 has been decided!!

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UNISOL

「その手があったか」を、次々と。

Caution regarding Forward-looking Statements and Original Language

This document contains forward-looking statements based on information available to the company at the time of disclosure and certain assumptions that management believes to be reasonable. The company makes no assurances as to the actual results and/or other outcomes, which may differ substantially from those expressed or implied by such forward-looking statements due to various factors including the timing at which the changes in economic conditions in key markets, both in and outside of Japan, and exchange rate movements. The company will provide timely disclosure of any material changes, events, or other relevant issues. The company has no responsibility for any possible damages arising from the use of information on this material, nor does the Company have any obligation to update these statements This document is an English language translation of the materials originally written in Japanese. In case of discrepancies, the Japanese version is authoritative and universally valid.

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