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November 12, 2026

To Whom It May Concern

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President and Representative Director: Yasuhisa Fukuda
(Securities Code: 9069, Tokyo Stock Exchange Prime Market)
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Notice Regarding Recording of Extraordinary Income for the Second Quarter of the Fiscal Year Ending March 31, 2027, Differences Between Consolidated Earnings Forecasts and Actual Results, Revision of Full-Year Consolidated Earnings Forecasts, and Notice Regarding Dividends of Surplus (Interim Dividend and Dividend Increase) and Revision of Year-End Dividend Forecast (Dividend Increase)

In light of factors including differences between the consolidated earnings forecasts for the second quarter of the fiscal year ending March 31, 2027, announced on May 13, 2026, and the actual results announced today, the Company resolved at the Board of Directors meeting held today to revise its full-year consolidated earnings forecasts, and also resolved on dividends of surplus (interim dividend) with a record date of September 30, 2026, and a revision of the year-end dividend forecast. In addition, the Company recorded extraordinary income in the interim consolidated accounting period under review, as described below.

Details

1. Recording of extraordinary income

The Company recorded the following extraordinary income in the second quarter of the fiscal year ending March 31, 2027.

(1) Gain on bargain purchase of ¥7,392 million associated with the acquisition of shares of Umios Logistics Corporation

(2) Gain on bargain purchase of ¥2,239 million for the current fiscal year associated with the series of acquisitions of shares of MARUWN CORPORATION

(3) Gain on sale of investment securities of ¥2,049 million associated with the sale of strategic shareholdings by MARUWN CORPORATION, a consolidated subsidiary

2. Differences between consolidated earnings forecasts and actual results, and revision of full-year consolidated earnings forecasts

(1) Differences between consolidated earnings forecasts and actual results for the second quarter of the fiscal year ending March 31, 2027

(April 1, 2026 to September 30, 2026)

	Operating revenues	Operating profit	Ordinary profit	Profit attributable to owners of parent	Profit per share
Previous forecast (A)	Million yen 490,000	Million yen 17,900	Million yen 16,200	Million yen 10,300	Yen 61.52
Actual results (B)	501,885	21,623	20,212	22,604	134.76
Change (B-A)	11,885	3,723	4,012	12,304	-
Rate of change (%)	2.4	20.8	24.8	119.5	-
(Ref.) Results for the same period of the previous year (interim period of the fiscal year ended March 31, 2026)	436,893	16,199	15,389	8,721	50.99

(2) Revision of full-year consolidated earnings forecasts for the fiscal year ending March 31, 2027 (April 1, 2026 to March 31, 2027)

	Operating revenues	Operating profit	Ordinary profit	Profit attributable to owners of parent	Profit per share
Previous forecast (A)	Million yen 1,020,000	Million yen 43,000	Million yen 39,300	Million yen 23,400	Yen 139.77
Revised forecast (B)	1,040,000	45,000	42,000	33,300	198.53
Change (B-A)	20,000	2,000	2,700	9,900	-
Rate of change (%)	2.0	4.7	6.9	42.3	-
(Ref.) Results for the previous fiscal year (FY ended March 2026)	899,620	36,996	35,242	19,320	113.68

(3) Reasons for the differences and revision

Consolidated results for the second quarter of the fiscal year ending March 31, 2027, remained solid, owing to factors such as Group-wide efforts to expand sales and revise fees and prices, as well as earnings contributions from M&A. In addition, the Company recorded the extraordinary income described in 1. above. As a result, operating revenues, operating profit, ordinary profit, and profit attributable to owners of parent all exceeded the previous forecasts.

The full-year consolidated earnings forecasts have been revised as shown above, based on the consolidated results for the interim consolidated accounting period under review and current conditions. The increase in profit attributable to owners of parent is mainly due to the recording of the extraordinary income described above.

3. Dividends of surplus

(1) Details of the decision on dividends of surplus (interim dividend)

	Amount determined	Most recent dividend forecast (Announced May 13, 2026)	Results for the previous fiscal year (Fiscal year ended March 31, 2026)
Record date	September 30, 2026	Same as left	September 30, 2025
Dividend per share	¥30.00	¥28.00	¥25.00
Total dividends	¥5,130 million	-	¥4,383 million
Effective date	December 1, 2026	-	December 2, 2025
Source of dividends	Retained earnings	-	Retained earnings

(2) Details of revision of year-end dividend forecast

	Dividend per share		
Record date	End of second quarter (interim)	Year-end	Total (annual)
Previous forecast (May 13, 2026)	¥28.00	¥28.00	¥56.00
Revised forecast		¥30.00	¥60.00
Results for the current fiscal year	¥30.00		
Results for the previous fiscal year (FY ended March 2026)	¥25.00	¥25.00	¥50.00

(3) Reasons

The Company's basic policy is to pay dividends that take business performance into account, in addition to stable dividends, in order to enhance returns to shareholders while securing the internal reserves necessary for future business development and strengthening its management structure, with a consolidated payout ratio of 40% as a target. In calculating the current dividend amount, the Company has taken into account the level of profit excluding the impact of the gain on bargain purchase.

Based on this basic policy, and in consideration of the favorable consolidated results for the interim consolidated accounting period under review, the interim dividend for the fiscal year ending March 31, 2027, will be ¥30 per share, an increase of ¥2 from the ¥28

per share announced on May 13, 2026. The year-end dividend forecast has also been increased by ¥2 from ¥28 per share to ¥30 per share. As a result, the annual dividend forecast is expected to be ¥60 per share (interim: ¥30, year-end: ¥30).

End