



# Presentation Materials for the Fiscal Year Ended March 31, 2026

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May 8, 2026

## TIS Inc.

Note : This document has been translated from the Japanese original for reference purposes only. In the event of any discrepancy between this translated document and the Japanese original, the original shall prevail.

## Fiscal 2026 : Financial Highlights

- Sales and operating income increased year on year, exceeding the revised forecast.
- Operating margin improved by 0.7 percentage points to 12.8%.
- Orders received and order backlog continued to grow steadily.

## Fiscal 2027: Performance Forecast

- Forecasting higher sales and higher income even while continuing growth investment and increasing investment in compensation.
- Incorporates extraordinary income expected from the sale of investment securities in line with the Company's policy.

## Return to Shareholders

- Year-end dividend increased by ¥4 in fiscal 2026, resulting in an annual dividend of ¥80 per share, reflecting business growth that exceeded the forecast.
- Annual dividend of ¥90 per share planned for fiscal 2027, up ¥10.  
Treasury stock repurchase of up to ¥50 billion underway based on the resolution dated March 10.

- 1 Fiscal 2026: Financial Highlights**
- 2 Fiscal 2027: Performance Forecast**
- 3 Return to Shareholders**
- 4 Progress on Medium-Term Management Plan (2024-2026)**
- 5 Strategic Direction for Future Growth**
- 6 Reference Materials**

- All statements described in these materials are based on information available to management regarding the TIS INTEC Group—that is, TIS and the subsidiaries under its umbrella—as of the presentation date and certain assumptions deemed reasonable at this time. These statements do not constitute a promise by the Company to achieve such forward-looking statements. Actual results may differ significantly from the forecasts due to various factors.
- Amounts for each three-month quarter are calculated by subtracting data for the respective period from the cumulative total.
- Segment sales include intersegment sales. [Excluding page 53,54]



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# Fiscal 2026: Performance Highlights (YOY change)

- Sales and operating income increased, driven by business expansion through effectively capturing clients' IT investment demand, including digital transformation needs, and expanding service offerings. However, net income declined due to a deterioration in net extraordinary income/loss.

[Millions of yen]	Fiscal 2025	Fiscal 2026	YOY change	
Net Sales	571,687	<b>596,479</b>	+24,792	[+4.3%]
Operating Income	69,047	<b>76,229</b>	+7,181	[+10.4%]
Operating Margin	12.1%	<b>12.8%</b>	+0.7P	-
Net Income Attributable to Owners of the Parent Company	50,012	<b>46,624</b>	-3,388	[-6.8%]
Net Income to Net Sales Ratio	8.7%	<b>7.8%</b>	-0.9P	-
Net Income per Share [Yen]	215.00	<b>204.91</b>	-10.09	[-4.7%]
ROE	15.3%	<b>14.0%</b>	-1.3P	-

- Non-operating income: ¥2,612 million (YOY change -¥7 million)  
→ Dividend income ¥966 million  
Interest income ¥599 million, etc.
- Non-operating expenses: ¥2,330 million (YOY change +¥1,165 million)  
→ Share of loss of entities accounted for using equity method ¥749 million  
Interest expenses ¥602 million, etc.

- Extraordinary income: ¥5,118 million (YOY change -¥4,451 million)  
→ Gain on sale of investment securities ¥4,374 million, etc.
- Extraordinary loss: ¥12,677 million (YOY change +¥6,750 million)  
→ Provision for loss on litigation ¥7,434 million  
Impairment losses ¥2,827 million, etc.

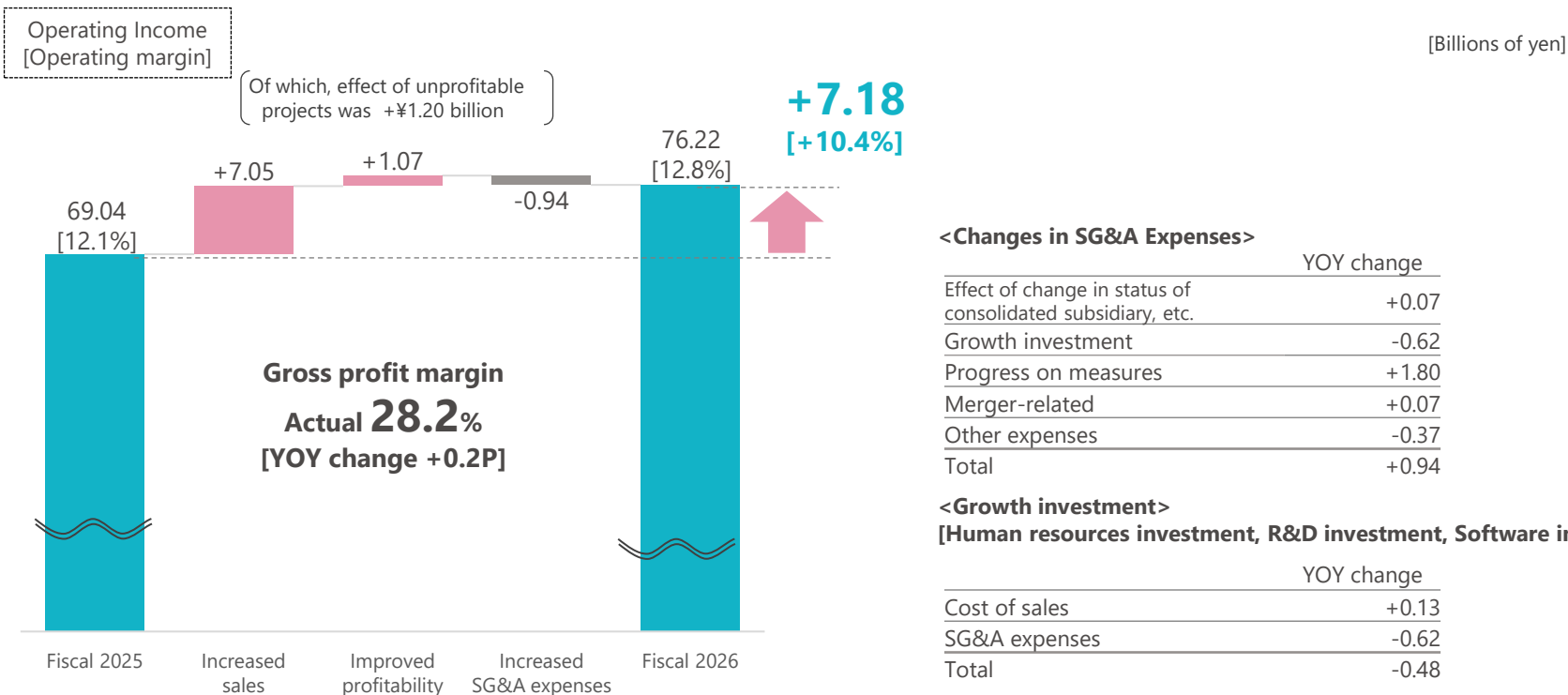
## Fiscal 2026: Performance Highlights (vs. Forecast)

- Sales and operating income exceeded the revised forecast, driven by growing IT investment demand from a broad range of clients.

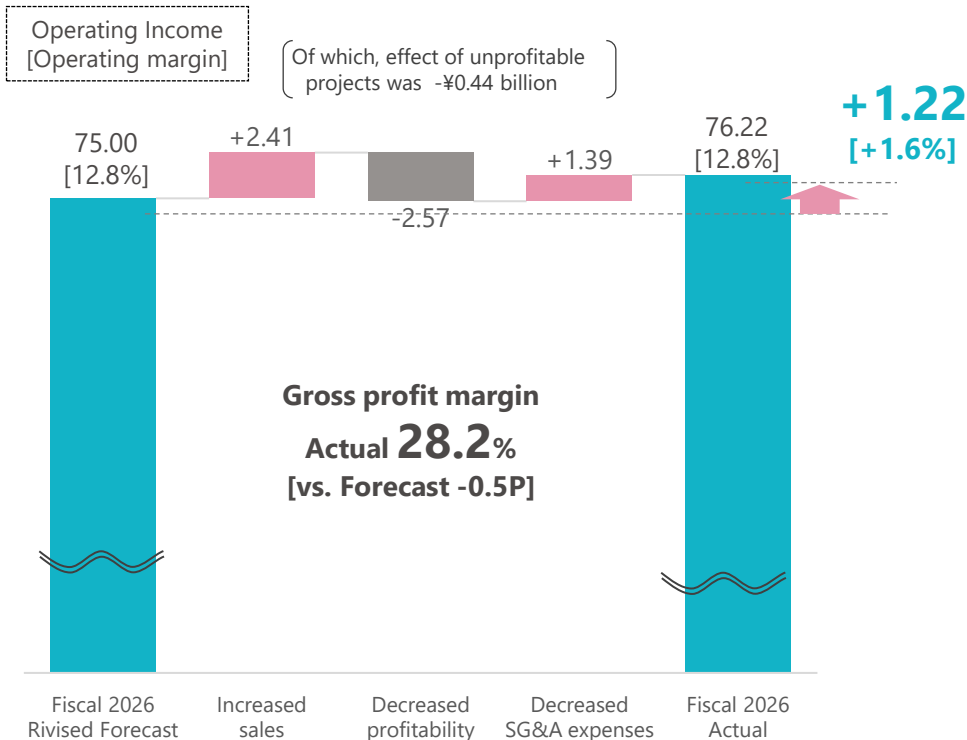
[Millions of yen]	Fiscal 2026 Revised Forecast	Fiscal 2026 Actual	Vs. Forecast	
Net Sales	588,000	<b>596,479</b>	+8,479	[+1.4%]
Operating Income	75,000	<b>76,229</b>	+1,229	[+1.6%]
Operating Margin	12.8%	<b>12.8%</b>	+0.0P	-
Net Income Attributable to Owners of the Parent Company	50,000	<b>46,624</b>	-3,375	[-6.8%]
Net Income to Net Sales Ratio	8.5%	<b>7.8%</b>	-0.7P	-
Net Income per Share [Yen]	220.70	<b>204.91</b>	-15.79	[-7.2%]
ROE	14.8%	<b>14.0%</b>	-0.8P	-

## Analysis of Changes in Operating Income by Factor (YOY change)

- Despite growth investments and an additional ¥2.5 billion in compensation-related investment year on year, operating income increased due to profit growth from higher sales and a decrease in unprofitable projects. Gross profit margin improved to 28.2%.



## Analysis of Changes in Operating Income by Factors (vs. Forecast)



[Billions of yen]

### <Changes in SG&A Expenses>

	vs. Forecast
Effect of change in status of consolidated subsidiary, etc.	+0.06
Growth investment	-0.28
Progress on measures	-1.09
Merger-related	-0.42
Other expenses	+0.34
<b>Total</b>	<b>-1.39</b>

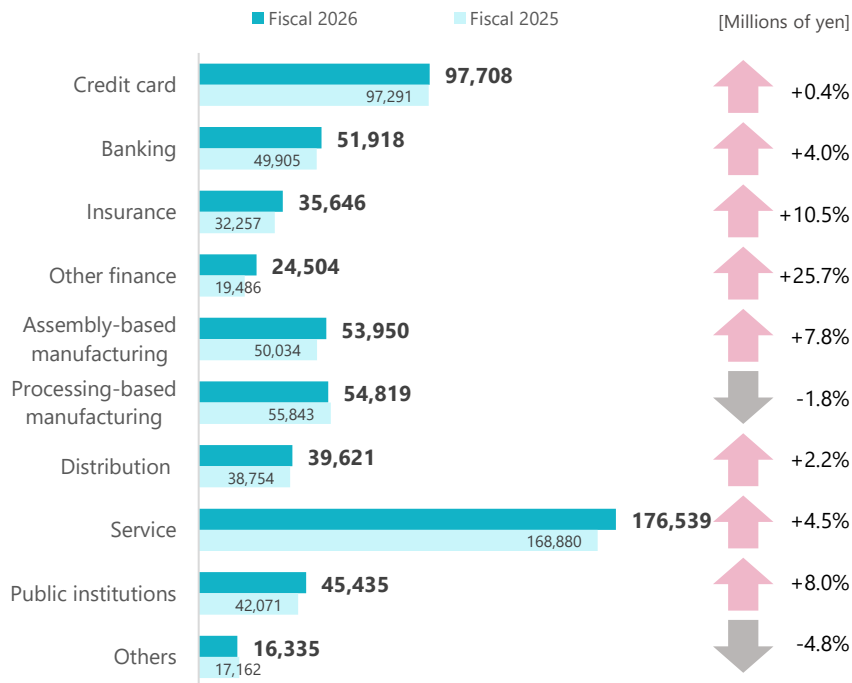
### <Growth investment>

[Human resources investment, R&D investment, Software investment]

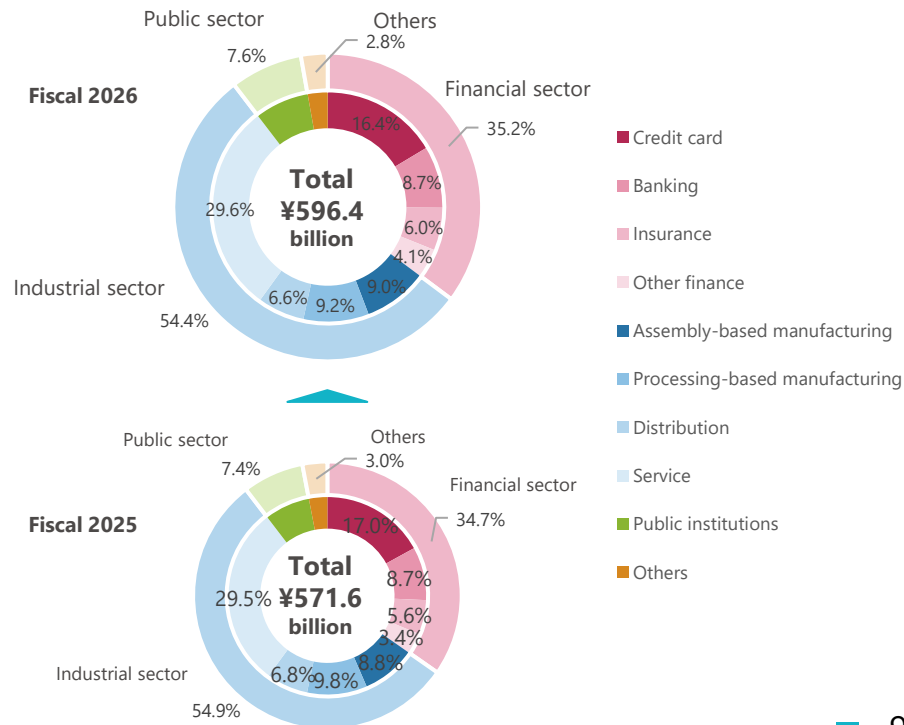
	vs. Forecast
Cost of sales	-0.36
SG&A expenses	-0.28
<b>Total</b>	<b>-0.64</b>

- Finance performed strongly, particularly in other finance (including leasing) and insurance. Industrial was driven by services and assembly-based manufacturing. Public also delivered strong growth.

### Net Sales by Client Sector



### Net Sales Breakdown by Client Sector



## Sales and Income by Key Business Segment (YOY change)

[Millions of yen]		Fiscal 2025	Fiscal 2026	YOY change		Overview
Offering Service Business	Net Sales	145,515	<b>160,574</b>	+15,059	[+10.3%]	Sales and operating income increased despite higher upfront investment in payment and a tapering off of renewal demand for tax accountant office systems and other products. Growth was driven by project wins in payment, infrastructure, enterprise, and other areas, fewer unprofitable projects, and overseas business.
	Operating Income	9,937	<b>10,442</b>	+505	[+5.1%]	
	Operating Margin	6.8%	<b>6.5%</b>	-0.3P	-	
Business Process Management	Net Sales	42,646	<b>44,092</b>	+1,445	[+3.4%]	Sales and operating income increased, driven by project wins in the DX business and other areas, as well as ongoing cost control.
	Operating Income	5,326	<b>6,397</b>	+1,071	[+20.1%]	
	Operating Margin	12.5%	<b>14.5%</b>	+2.0P	-	
Financial IT Business	Net Sales	100,252	<b>98,730</b>	-1,521	[-1.5%]	Sales declined but operating income increased, despite the peaking out of large-scale development projects and the completion of operations services for certain clients, as high-value-added businesses such as modernization-related projects improved profitability.
	Operating Income	12,321	<b>12,729</b>	+408	[+3.3%]	
	Operating Margin	12.3%	<b>12.9%</b>	+0.6P	-	
Industrial IT Business	Net Sales	128,120	<b>133,396</b>	+5,276	[+4.1%]	Sales and operating income increased, driven by expanded IT investment across services, manufacturing, distribution, and other industries, as well as fewer unprofitable projects.
	Operating Income	19,330	<b>22,507</b>	+3,177	[+16.4%]	
	Operating Margin	15.1%	<b>16.9%</b>	+1.8P	-	
Regional IT Solutions	Net Sales	177,425	<b>184,238</b>	+6,812	[+3.8%]	Sales and operating income increased despite lower profitability on some public-sector projects due to changes in conditions, supported by broader IT investment demand from healthcare and other industrial clients and lower one-off expenses recorded in the previous fiscal year.
	Operating Income	21,576	<b>23,328</b>	+1,752	[+8.1%]	
	Operating Margin	12.2%	<b>12.7%</b>	+0.5P	-	

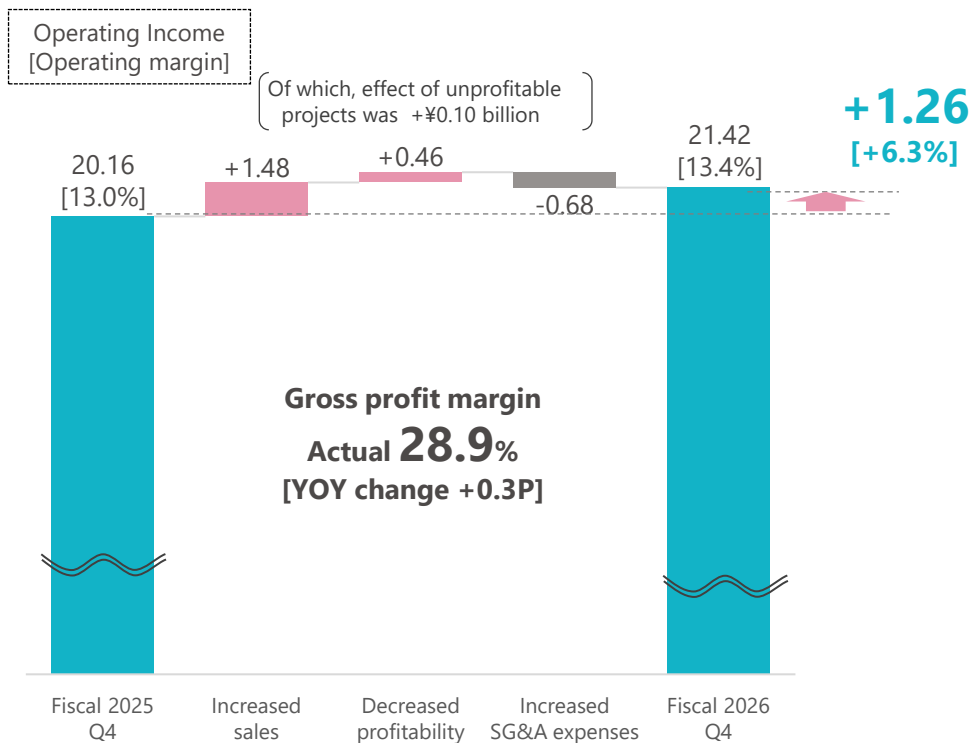
## Sales and Income by Key Business Segments (vs. Forecast)

[Millions of yen]		Fiscal 2026 Revised Forecast	Fiscal 2026 Actual	Vs. Forecast		Overview
Offering Service Business	Net Sales	153,500	<b>160,574</b>	+7,074	[+4.6%]	Sales and operating income exceeded the revised forecast, driven by expanded IT investment, particularly in the enterprise domain. Overseas business also contributed to sales growth.
	Operating Income	10,250	<b>10,442</b>	+192	[+1.9%]	
	Operating Margin	6.7%	<b>6.5%</b>	-0.2P	-	
Business Process Management	Net Sales	44,000	<b>44,092</b>	+92	[+0.2%]	Sales were in line with the forecast, while operating income exceeded the forecast, reflecting steady project wins in the DX business and other areas as anticipated.
	Operating Income	6,200	<b>6,397</b>	+197	[+3.2%]	
	Operating Margin	14.1%	<b>14.5%</b>	+0.4P	-	
Financial IT Business	Net Sales	99,000	<b>98,730</b>	-269	[-0.3%]	Sales were generally in line with the forecast, while operating income exceeded the forecast, driven by progress in modernization-related and other high-value-added businesses.
	Operating Income	12,550	<b>12,729</b>	+179	[+1.4%]	
	Operating Margin	12.7%	<b>12.9%</b>	+0.2P	-	
Industrial IT Business	Net Sales	132,500	<b>133,396</b>	+896	[+0.7%]	Sales and operating income exceeded the forecast, driven by stronger-than-expected IT investment across a wide range of industries, including services, manufacturing, and distribution.
	Operating Income	21,900	<b>22,507</b>	+607	[+2.8%]	
	Operating Margin	16.5%	<b>16.9%</b>	+0.4P	-	
Regional IT Solutions	Net Sales	182,000	<b>184,238</b>	+2,238	[+1.2%]	Sales exceeded the forecast, driven by stronger-than-expected demand for broad-based IT investment from healthcare and other industrial clients. However, operating income fell short of the forecast due to lower profitability on public-sector projects resulting from changes in conditions.
	Operating Income	23,750	<b>23,328</b>	-421	[-1.8%]	
	Operating Margin	13.0%	<b>12.7%</b>	-0.3P	-	

## Performance Highlights / Sales and Income by Key Business Segment

[Millions of yen]	Fiscal 2025 Q4	Fiscal 2026 Q4	YOY change	
Net Sales	155,125	<b>160,227</b>	+5,102	[+3.3%]
Operating Income	20,163	<b>21,426</b>	+1,262	[+6.3%]
Operating Margin	13.0%	<b>13.4%</b>	+0.4P	-
Net Income Attributable to Owners of the Parent Company	15,538	<b>8,427</b>	-7,110	[-45.8%]
Net Income to Net Sales Ratio	10.0%	<b>5.3%</b>	-4.7P	-
<b>Key Business Segments</b>				
Offering Service Business	Net Sales	38,909	<b>44,329</b>	+5,420 [+13.9%]
	Operating Income	2,538	<b>2,624</b>	+85 [+3.4%]
	Operating Margin	6.5%	<b>5.9%</b>	-0.6P -
Business Process Management	Net Sales	11,124	<b>11,376</b>	+251 [+2.3%]
	Operating Income	1,563	<b>1,764</b>	+201 [+12.9%]
	Operating Margin	14.1%	<b>15.5%</b>	+1.4P -
Financial IT Business	Net Sales	25,649	<b>25,390</b>	-259 [-1.0%]
	Operating Income	3,208	<b>3,136</b>	-72 [-2.3%]
	Operating Margin	12.5%	<b>12.4%</b>	-0.1P -
Industrial IT Business	Net Sales	34,600	<b>35,545</b>	+945 [+2.7%]
	Operating Income	5,202	<b>5,879</b>	+676 [+13.0%]
	Operating Margin	15.0%	<b>16.5%</b>	+1.5P -
Regional IT Solutions	Net Sales	50,424	<b>50,678</b>	+253 [+0.5%]
	Operating Income	7,578	<b>7,750</b>	+172 [+2.3%]
	Operating Margin	15.0%	<b>15.3%</b>	+0.3P -

## Analysis of Changes in Operating Income by Factor (YOY change)



[Billions of yen]

### <Changes in SG&A Expenses>

	YOY change
Effect of change in status of consolidated subsidiary, etc.	+0.06
Growth investment	-0.37
Progress on measures	+0.69
Merger-related	+0.06
Other expenses	+0.24
<b>Total</b>	<b>+0.68</b>

### <Growth investment>

[Human resources investment, R&D investment, Software investment]

	YOY change
Cost of sales	-0.11
SG&A expenses	-0.37
<b>Total</b>	<b>-0.48</b>

## Order Status (Orders received during fiscal year)

- Full-year orders received increased year on year, driven by software development.
- Software development orders in Offering Services Business, Business Process Management, and Financial IT Business grew at solid double-digit rates year on year, while those in Industrial IT Business declined slightly.

[Millions of yen]		Fiscal 2025	Fiscal 2026	YOY change	
Orders received		577,091	<b>605,805</b>	+28,713	[+5.0%]
Software development		295,838	<b>315,223</b>	+19,384	[+6.6%]
<b>Key Business Segments</b>					
Offering Service Business	Orders received	136,740	<b>144,181</b>	+7,440	[+5.4%]
	Software development	53,632	<b>60,223</b>	+6,591	[+12.3%]
Business Process Management	Orders received	40,922	<b>43,454</b>	+2,531	[+6.2%]
	Software development	13,395	<b>15,251</b>	+1,855	[+13.9%]
Financial IT Business	Orders received	93,787	<b>100,593</b>	+6,806	[+7.3%]
	Software development	48,637	<b>54,697</b>	+6,059	[+12.5%]
Industrial IT Business	Orders received	133,659	<b>135,186</b>	+1,527	[+1.1%]
	Software development	92,404	<b>91,987</b>	-417	[-0.5%]
Regional IT Solutions	Orders received	171,983	<b>182,390</b>	+10,406	[+6.1%]
	Software development	87,768	<b>93,063</b>	+5,294	[+6.0%]

## Order Status

[Millions of yen]		Fiscal 2025 Q4	Fiscal 2026 Q4	YOY change	
Orders received		194,217	<b>214,701</b>	+20,484	[+10.5%]
Software development		87,705	<b>101,215</b>	+13,510	[+15.4%]
<b>Key Business Segments</b>					
Offering Service Business	Orders received	50,523	<b>54,141</b>	+3,618	[+7.2%]
	Software development	16,156	<b>18,375</b>	+2,218	[+13.7%]
Business Process Management	Orders received	11,150	<b>12,048</b>	+898	[+8.1%]
	Software development	3,967	<b>4,737</b>	+769	[+19.4%]
Financial IT Business	Orders received	34,084	<b>39,421</b>	+5,336	[+15.7%]
	Software development	14,393	<b>16,896</b>	+2,502	[+17.4%]
Industrial IT Business	Orders received	42,908	<b>47,023</b>	+4,115	[+9.6%]
	Software development	27,292	<b>30,360</b>	+3,068	[+11.2%]
Regional IT Solutions	Orders received	55,550	<b>62,066</b>	+6,515	[+11.7%]
	Software development	25,895	<b>30,845</b>	+4,950	[+19.1%]

## Order Status (Order backlog at year-end)

- Order backlog at fiscal year-end increased year on year, driven by software development.
- Software development backlog grew steadily in Regional IT Solutions Business and Offering Services Business.

[Millions of yen]		Fiscal 2025	Fiscal 2026	YOY change	
Order backlog		197,590	<b>210,769</b>	+13,179	[+6.7%]
Software development		107,993	<b>117,201</b>	+9,208	[+8.5%]
<b>Key Business Segments</b>					
Offering Service Business	Order backlog	48,954	<b>50,000</b>	+1,045	[+2.1%]
	Software development	18,383	<b>20,749</b>	+2,365	[+12.9%]
Business Process Management	Order backlog	7,943	<b>8,594</b>	+650	[+8.2%]
	Software development	7,526	<b>8,139</b>	+613	[+8.1%]
Financial IT Business	Order backlog	40,822	<b>44,474</b>	+3,652	[+8.9%]
	Software development	21,433	<b>22,484</b>	+1,050	[+4.9%]
Industrial IT Business	Order backlog	43,033	<b>45,428</b>	+2,394	[+5.6%]
	Software development	29,427	<b>29,946</b>	+519	[+1.8%]
Regional IT Solutions	Order backlog	56,835	<b>62,272</b>	+5,436	[+9.6%]
	Software development	31,222	<b>35,882</b>	+4,659	[+14.9%]

## Balance Sheets and Cash Flow Status

- Maintained a sound financial base while optimizing the capital structure through the acquisition of treasury stock. Free cash flow increased due to growth in operating cash flow.

### Balance Sheets

[Millions of yen]	As of March 31, 2025	As of March 31, 2026	YOY change	Key Factors for YOY Change
Current assets	319,080	<b>295,295</b>	-23,785	Securities. -28,487 Cash and deposits +3,222
Non-current assets	238,970	<b>256,211</b>	+17,241	Property, plant and equipment +7,883 Intangible assets -2,052
<b>Total Assets</b>	<b>558,051</b>	<b>551,507</b>	<b>-6,544</b>	
Current liabilities	153,210	<b>164,190</b>	+10,980	Contract liabilities +9,897 Provision for loss on litigation +7,434
Non-current liabilities	48,775	<b>49,589</b>	+813	Long-term borrowings -1,272
<b>Total Liabilities</b>	<b>201,986</b>	<b>213,780</b>	<b>+11,793</b>	
Shareholders' equity	326,709	<b>300,304</b>	-26,404	Treasury stock -19,325 Capital surplus -8,178
Others	29,355	<b>37,422</b>	+8,066	
<b>Total Net Assets</b>	<b>356,064</b>	<b>337,726</b>	<b>-18,337</b>	
Equity ratio	<b>61.5%</b>	<b>58.9%</b>	-2.6P	
Interest-bearing debt	<b>37,012</b>	<b>34,824</b>	<b>-2,187</b>	















### Cash Flows

[Millions of yen]	Fiscal 2025	Fiscal 2026	YOY change	Key Factors for YOY Change
Cash flow from operating activities	63,748	<b>81,447</b>	+17,698	Income before income taxes -5,194 Decrease (increase) in trade receivables +13,027
Cash flow from investing activities	-17,741	<b>-30,920</b>	-13,178	Purchase of investment securities +4,227 Proceeds from sale of investment securities -12,294
Free cash flow	46,006	<b>50,527</b>	+4,520	
Cash flow from financing activities	-27,791	<b>-78,362</b>	-50,571	Purchase of treasury stock -48,064
Cash and cash equivalents at the end of the term	121,288	<b>93,733</b>	-27,554	



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- IT investment continues to expand over the long term, supported in part by wider use of AI, while changes in the business environment warrant continued close monitoring.

		To date	From now
<b>Offering Service Business</b>	<ul style="list-style-type: none"> <li>The cashless payments market continued to expand, while the basis of competition shifted toward sophistication and profitability. Touchpoints with clients are becoming increasingly important.</li> <li>The advance of embedded finance is driving the wider social implementation of digital finance. Interest in stablecoins and Web3 also remains high.</li> <li>Cybersecurity is a critical issue directly linked to business continuity, requiring continued investment.</li> <li>The ASEAN economy is expected to remain resilient despite political instability, with high expectations for digital economy agreements.</li> </ul>		 
<b>Business Process Management</b>	<ul style="list-style-type: none"> <li>Demand for business process redesign and sophistication continued amid labor shortages. The advanced BPO/BPM market, incorporating AI and DX, remained solid.</li> <li>Demand is rising for value-added services combining consulting and AI utilization, as well as BPaaS, while simple outsourcing continues to shrink and pricing pressure remains strong.</li> </ul>		 
<b>Financial IT Business</b>	<ul style="list-style-type: none"> <li>Against the backdrop of changes in the interest rate environment, financial institutions continued to make IT investments both to strengthen competitiveness and profitability and to address regulatory requirements and enhance security. Modernization demand, including for core systems, also remained solid.</li> <li>As AI adoption expands, it is becoming increasingly important to establish implementations linked to existing systems. With payment methods diversifying, investment in external service integration and end-to-end business processes is also becoming more important.</li> </ul>		 
<b>Industrial IT Business</b>	<ul style="list-style-type: none"> <li>Geopolitical risks, raw material prices, foreign exchange rates, and rising wages and prices continue to affect cost structures, particularly in manufacturing. The importance of passing on costs, improving operational efficiency, and making prompt, data-driven management decisions remains high.</li> <li>Against the backdrop of the government's growth policies, appetite for investment in areas such as DX/GX, modernization, ERP renewals, and smart factories remains solid.</li> <li>In the restaurant, service, and retail sectors, demand continues to recover, while labor shortages and wage-hike pressure persist. IT utilization and overseas expansion are key to securing profits.</li> </ul>		 
<b>Regional IT Solutions</b>	<ul style="list-style-type: none"> <li>In the finance and insurance sectors, investment expanded in next-generation systems and digital channel enhancement. Business efficiency improvement and digital transformation also remain important for regional financial institutions.</li> <li>In the securities sector, IT investment remained solid, driven by regulatory compliance and security enhancement needs.</li> <li>For life and non-life insurers, enhancing IT infrastructure and strengthening client touchpoints are key issues. The Group is working to expand its inner share by participating in strategic business areas.</li> <li>Amid ongoing system standardization initiatives, municipalities are showing growing interest in business DX, data utilization, and enhanced resident services.</li> <li>In the healthcare field, IT demand continues for standardization, system integration, and data infrastructure development, supported by medical DX.</li> </ul>		 

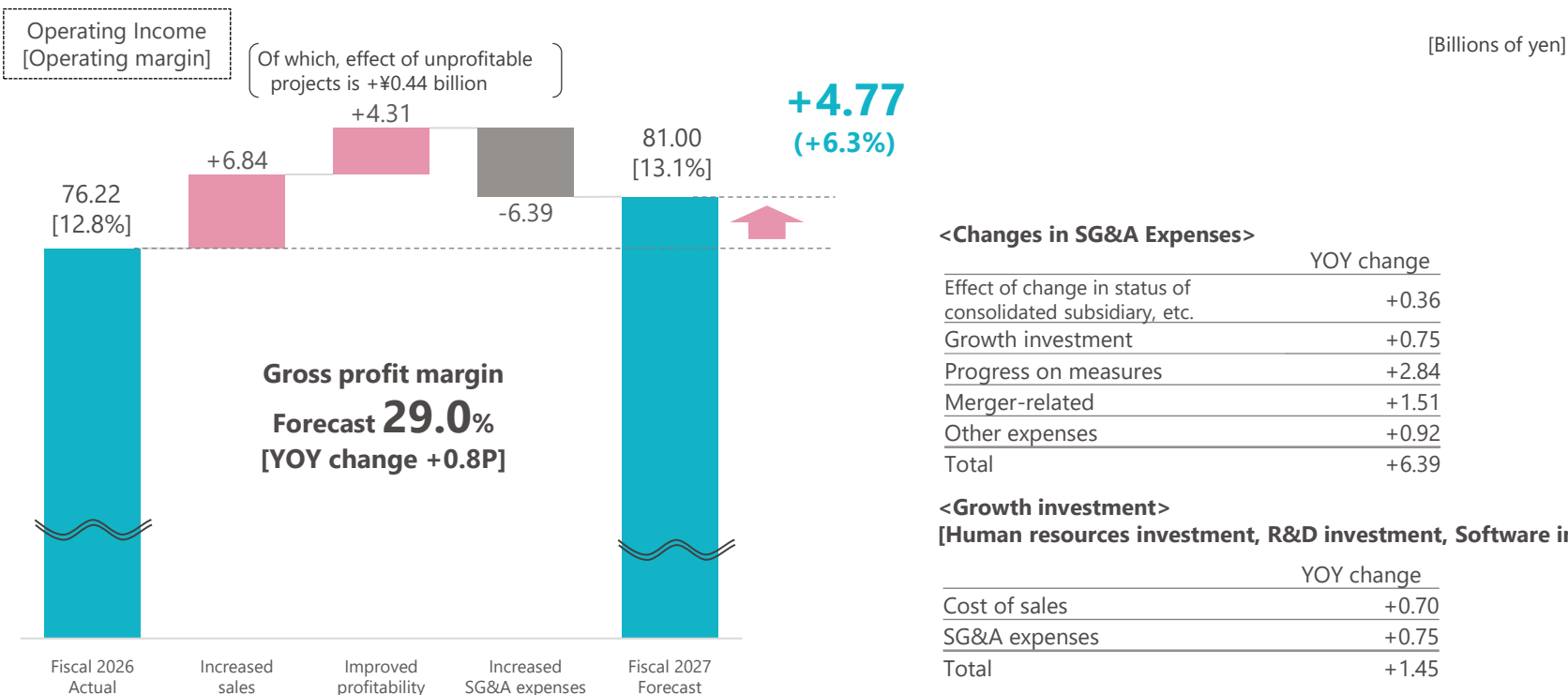
- The Group plans higher sales and operating income through business expansion and continued investments toward achieving the Medium-Term Management Plan (2024–2026).
- Net income is expected to rise significantly, reflecting an estimated ¥5 billion extraordinary gain under the investment securities disposal policy. EPS CAGR of 10% and ROE of over 16%, key management indicators under the plan, are also expected to be achieved.

[Millions of yen]	Fiscal 2026 Actual	Fiscal 2027 Forecast	YOY change	
Net Sales	596,479	<b>620,000</b>	+23,520	[+3.9%]
Operating Income	76,229	<b>81,000</b>	+4,770	[+6.3%]
Operating Margin	12.8%	<b>13.1%</b>	+0.3P	-
Net Income Attributable to Owners of the Parent Company	46,624	<b>57,000</b>	+10,375	[+22.3%]
Net Income to Net Sales Ratio	7.8%	<b>9.2%</b>	+1.4P	-
Net Income per Share [Yen]	204.91	<b>271.70</b>	+66.79	[+32.6%]
ROE	14.0%	<b>17.5%</b>	+3.5P	-

\* ROE in the fiscal 2027 forecast is an estimated value.

## Analysis of Changes in Operating Income by Factor (Forecast)

- Despite continued growth investments, including an additional ¥4.0 billion in compensation-related investment year on year, operating income is expected to increase, driven by high-value-added businesses and productivity improvements.



## Sales and Income by Key Business Segment (Forecast)

[Millions of yen]		Fiscal 2026 Actual	Fiscal 2027 Forecast	YOY change		Overview
Offering Service Business	Net Sales	160,574	<b>164,100</b>	+3,525	[+2.2%]	Sales and operating income are expected to increase, supported by IT investment demand, particularly in payment and infrastructure-related areas. The Group aims to improve profitability in overseas operations through structural reforms and other measures.
	Operating Income	10,442	<b>11,250</b>	+807	[+7.7%]	
	Operating Margin	6.5%	<b>6.9%</b>	+0.4P	-	
Business Process Management	Net Sales	44,092	<b>44,300</b>	+207	[+0.5%]	Sales increased, mainly reflecting growth in the DX business, which is positioned as a focus area. Meanwhile, operating income declined, reflecting increased investment in growth areas.
	Operating Income	6,397	<b>6,250</b>	-147	[-2.3%]	
	Operating Margin	14.5%	<b>14.1%</b>	-0.4P	-	
Financial IT Business	Net Sales	98,730	<b>108,500</b>	+9,769	[+9.9%]	Sales and operating income are expected to increase, supported by expanded business with existing clients and the capture of demand from new clients, including modernization-related demand.
	Operating Income	12,729	<b>14,900</b>	+2,170	[+17.0%]	
	Operating Margin	12.9%	<b>13.7%</b>	+0.8P	-	
Industrial IT Business	Net Sales	133,396	<b>137,000</b>	+3,603	[+2.7%]	Sales and operating income are expected to increase, supported by deeper engagement with existing clients, stronger industry-specific capabilities, service expansion, and the capture of ERP-related IT investment demand.
	Operating Income	22,507	<b>23,100</b>	+592	[+2.6%]	
	Operating Margin	16.9%	<b>16.9%</b>	+0.0P	-	
Regional IT Solutions	Net Sales	184,238	<b>191,000</b>	+6,761	[+3.7%]	Sales and operating income are expected to increase, reflecting growing demand for network-related services, the capture of broad-based IT investment demand from clients in the industrial and financial sectors, and control of unprofitable projects.
	Operating Income	23,328	<b>25,000</b>	+1,671	[+7.2%]	
	Operating Margin	12.7%	<b>13.1%</b>	+0.4P	-	

**1 Fiscal 2026: Financial Highlights**

**2 Fiscal 2027: Performance Forecast**



**3 Return to Shareholders**

**4 Progress on Medium-Term Management Plan (2024-2026)**

**5 Strategic Direction for Future Growth**

**6 Reference Materials**

## Basic Policy on Return to Shareholders

- Aim to improve capital efficiency by promoting appropriate capital structure based on balance between promoting growth investment, securing financial soundness, and strengthening return to shareholders.



### Promote growth investment

- Total growth investment of **about ¥100 billion** over three years
- Robust investment to optimize business portfolio
- Will pursue sustainable creation of returns exceeding cost of capital and broaden equity spread

### Strengthen return to shareholders

- **Total return ratio target: approximately 50%**
- Continue to enrich dividends per share
- In principle, treasury stock holdings will be limited to around 5% of total shares outstanding, with any excess cancelled

### Maintain financial health

- Allow a D/E ratio of up to 0.5, while **optimizing the capital structure** in line with improved cash generation capability
- Maintain “A rating” \* A+ as of November 19, 2025
- Maintain cash and deposits, together with commitment lines, at a level equivalent to approximately two months of monthly sales

Total return ratio  
**50%\***

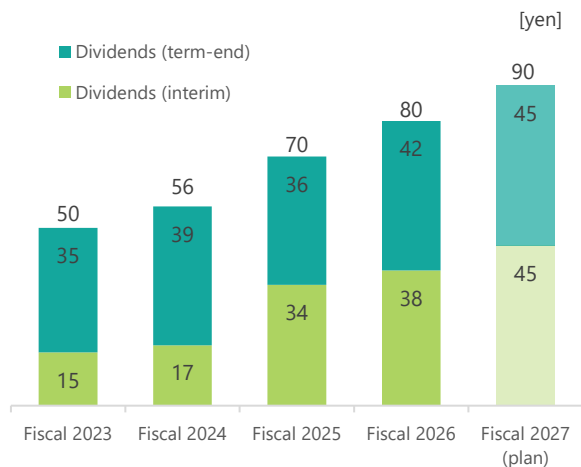
Dividends per share  
**Constantly enrich  
the dividend**

Upper limit  
on treasury stock holdings  
**at 5%**

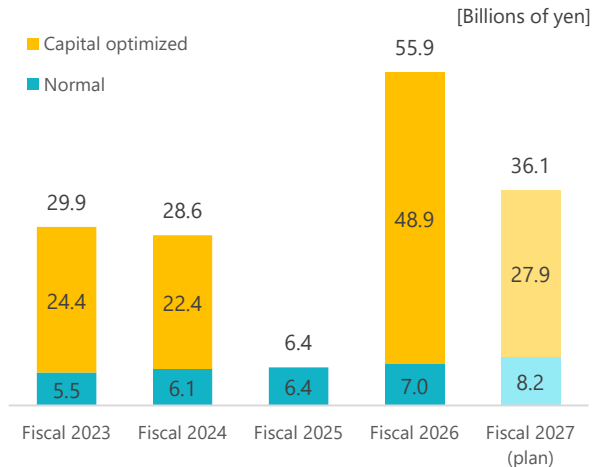
# Status/Targets for Return to Shareholders

- In fiscal 2026, the year-end dividend was increased by ¥4 per share compared with the forecast, bringing the annual dividend to ¥80 per share. This marked the 14th consecutive year of dividend increases.
- For fiscal 2027, an annual dividend of ¥90 per share is planned, up ¥10 year on year. Of the ¥50.0 billion treasury stock acquisition resolved on March 10, 2026, ¥13.9 billion was acquired in fiscal 2026, with the remaining ¥36.1 billion planned for acquisition in fiscal 2027.

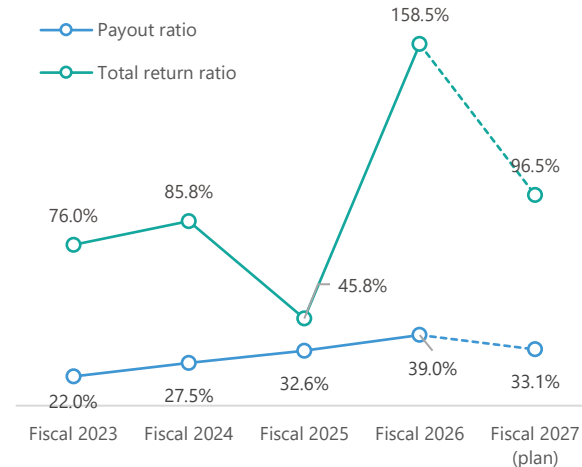
## Dividends per Share



## Total Amount of Treasury Stock Acquired



## Payout Ratio and Total Return Ratio



### Dividend Payout Ratio and Total Return Ratio Trends Based on the Shareholder Return Policy

	Fiscal 2023	Fiscal 2024	Fiscal 2025	Fiscal 2026	Fiscal 2027
Payout ratio (adj.) <sup>*1</sup>	30.3%	30.7%	35.7%	35.3%	35.0%
Total Return Ratio(adj.) <sup>*1,2</sup>	44.0%	44.9%	49.8%	49.0%	50.0%

<sup>\*1</sup> Calculated based on profit from operating activities after income taxes and profit attributable to non-controlling interests.

<sup>\*2</sup> Calculated excluding treasury stock buybacks for capital structure optimization.

- 1 Fiscal 2026: Financial Highlights**
- 2 Fiscal 2027: Performance Forecast**
- 3 Return to Shareholders**
-  **4 Progress on Medium-Term Management Plan (2024-2026)**
- 5 Strategic Direction for Future Growth**
- 6 Reference Materials**

# Efforts for Sustainable Corporate Value Improvement

## (1) Basic Policy

- We will create social and economic value through management hinging on OUR PHILOSOPHY, contribute to a sustainable society and realize sustainable improvement in corporate value.

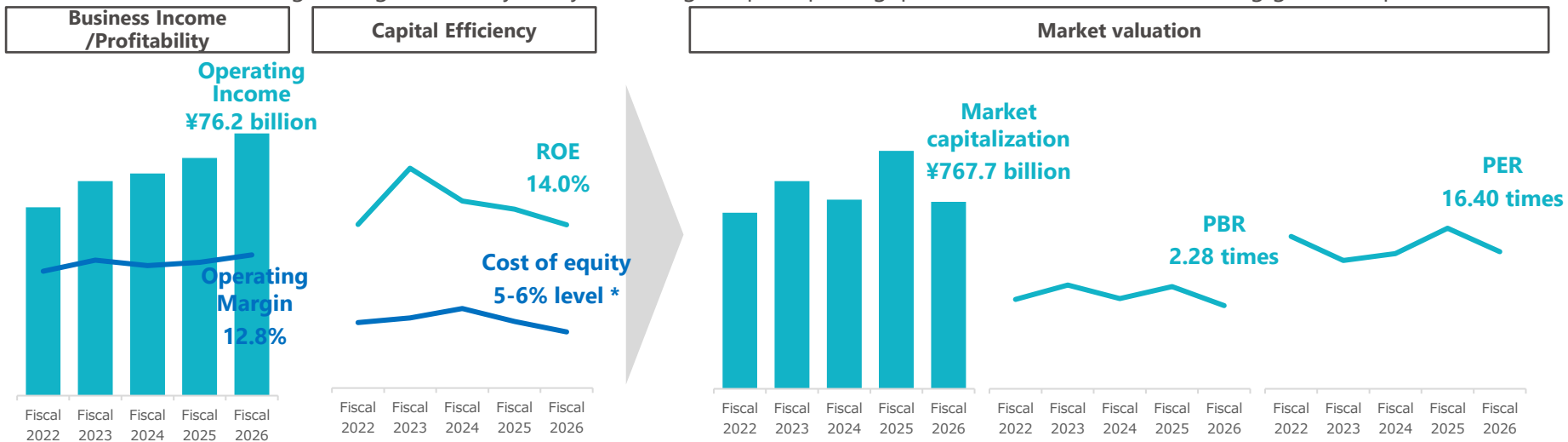
<Overall Picture of Sustainability Management Targeted by TIS INTEC Group>



# Efforts for Sustainable Corporate Value Improvement

## (2) Analysis and Evaluation of Current Status

- Continue to generate returns above the cost of capital through business growth and financial measures. Although IT services sector valuations have adjusted significantly amid speculation over AI evolution, the business environment remains favorable, and the view remains unchanged that the Company's intrinsic value is not appropriately reflected in the market.
- A medium- to long-term growth story is key to closing the perception gap with the market and enhancing growth expectations.



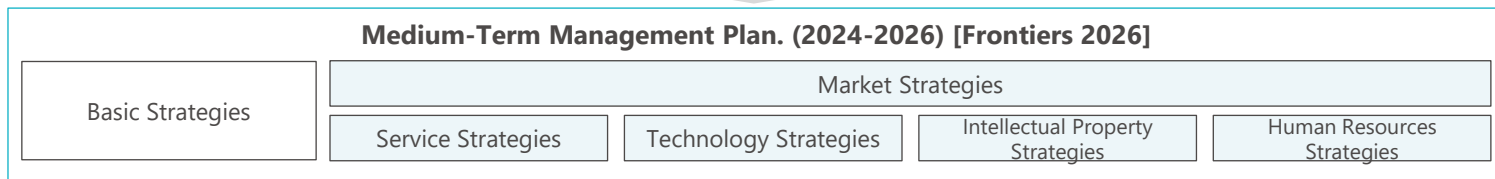
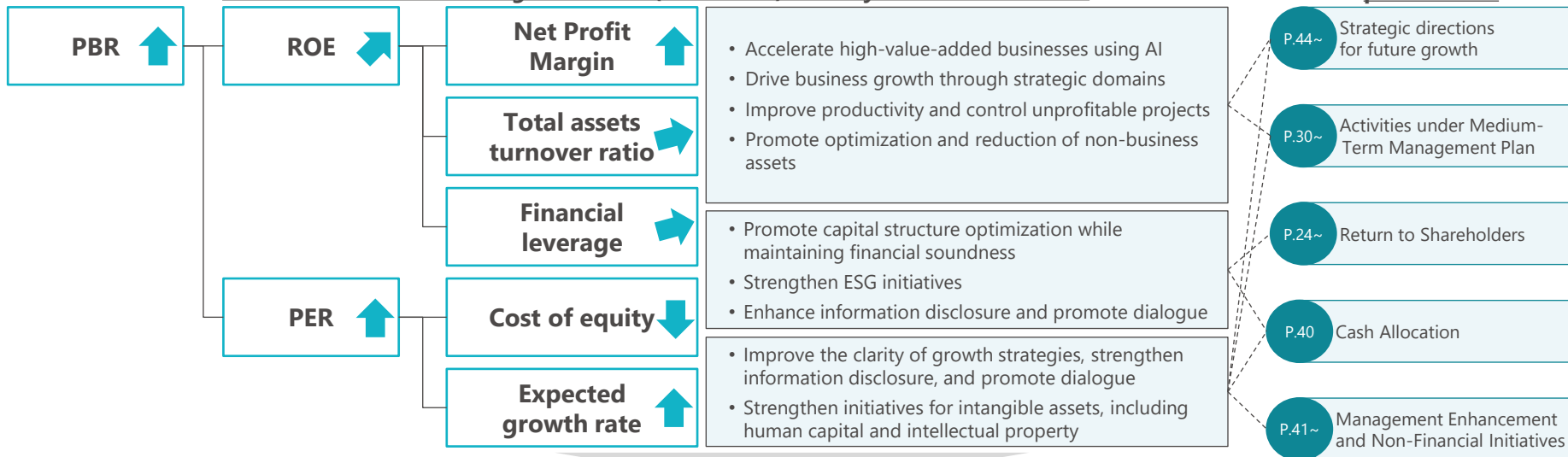
Business Income /Profitability	Achieved sustainable business growth and improved profitability while actively promoting future growth investments, including in human resources.
Capital Efficiency	Improved EPS through the dual pursuit of business and financial measures, while ROE continued to exceed the cost of equity.
Market valuation	To earn market trust, the Company is working to enhance management through proactive information disclosure and constructive dialogue, while promoting understanding of and confidence in its management.

# Efforts for Sustainable Corporate Value Improvement

## (3) Overview of Plans and Efforts

- Aim to further enhance corporate value through the execution of the Medium-Term Management Plan (2024–2026).

### Overview of Corporate Value Improvement Targets under Medium-Term Management Plan (2024-2026) and Key Points of Initiatives



<b>Basic Policy</b>	<h2 style="text-align: center;">Frontiers 2026</h2> <p>We will set <b>frontier development</b> as a fundamental strategy and strive for <b>sustainable growth paralleling higher added value</b>. We will strive to achieve <b>changes in society and for corporate clients</b> by <b>enhancing quality across all value chains</b>, starting with <b>forward-looking market development</b> and <b>business domain expansion</b>.</p>												
<b>Key performance indicators</b>	<b>Human resources growth and added value cycle</b> Operating income per person <b>More than ¥3.5 million</b>	<b>Improved earning power</b> Operating margin <b>13.1%</b> Adjusted operating margin 13.4%*1	<b>Asset (=intellectual property) value creation</b> ROIC/ROE <b>Above 13%/ Above 16%</b>	<b>Winning confidence of society</b> Sales <b>¥620 billion</b>	<b>Meaningful growth</b> EPS CAGR <b>Above 10%</b>								
<b>Priority strategies</b>	<h3 style="text-align: center;">Market Strategies</h3> <ul style="list-style-type: none"> <li>Concentrate investment of management resources into defined growth areas, based on social issues and in-house strengths</li> <li>Balancing efforts to increase added value of services and reinforce technology investment, expand business with sense of speed, especially in ASEAN region</li> </ul> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="363 707 709 764">Service Strategies</th> <th data-bbox="712 707 1058 764">Technology Strategies</th> <th data-bbox="1062 707 1408 764">Intellectual Property Strategies</th> <th data-bbox="1412 707 1752 764">Human Resources Strategies</th> </tr> </thead> <tbody> <tr> <td data-bbox="363 766 709 992"> <ul style="list-style-type: none"> <li>Build a full value chain of services from upstream to business process outsourcing</li> <li>Expand and enhance pure services*3, focusing on four social issues*2</li> </ul> </td> <td data-bbox="712 766 1058 992"> <ul style="list-style-type: none"> <li>Advance knowledge distribution, IT architect development and redeployment structure</li> <li>Promote process redevelopment using AI x automation</li> </ul> </td> <td data-bbox="1062 766 1408 992"> <ul style="list-style-type: none"> <li>Promote greater accumulation and utilization of intellectual property to achieve both higher added value and expanded business scale</li> <li>Accelerate intellectual property creation by strengthening feedback from client contact information</li> </ul> </td> <td data-bbox="1412 766 1752 992"> <ul style="list-style-type: none"> <li>Bolster issue resolution capabilities by increasing the number of consultants to create 700-person structure and by standardizing basic consulting skills</li> <li>Secure and develop top talent and establish structure for flexible redeployment of human resources</li> </ul> </td> </tr> </tbody> </table>					Service Strategies	Technology Strategies	Intellectual Property Strategies	Human Resources Strategies	<ul style="list-style-type: none"> <li>Build a full value chain of services from upstream to business process outsourcing</li> <li>Expand and enhance pure services*3, focusing on four social issues*2</li> </ul>	<ul style="list-style-type: none"> <li>Advance knowledge distribution, IT architect development and redeployment structure</li> <li>Promote process redevelopment using AI x automation</li> </ul>	<ul style="list-style-type: none"> <li>Promote greater accumulation and utilization of intellectual property to achieve both higher added value and expanded business scale</li> <li>Accelerate intellectual property creation by strengthening feedback from client contact information</li> </ul>	<ul style="list-style-type: none"> <li>Bolster issue resolution capabilities by increasing the number of consultants to create 700-person structure and by standardizing basic consulting skills</li> <li>Secure and develop top talent and establish structure for flexible redeployment of human resources</li> </ul>
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\*1 Adjusted operating income margin: Calculated by adding goodwill amortization cost back to operating income.

\*2 Financial inclusion, urban concentration/rural decline, low-carbon/decarbonization, and health concerns. These issues were determined by backcasting from what the world might be like in 2050 and selected on the basis of TIS INTEC Group's ability to contribute to issue resolution.

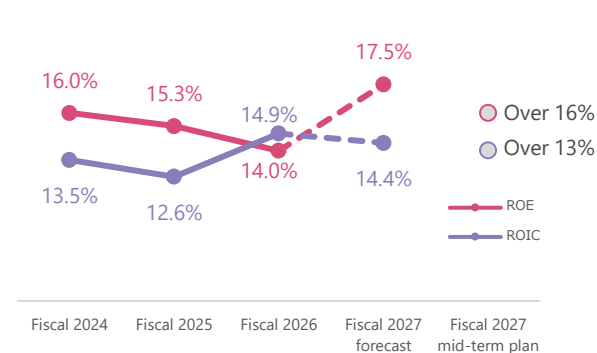
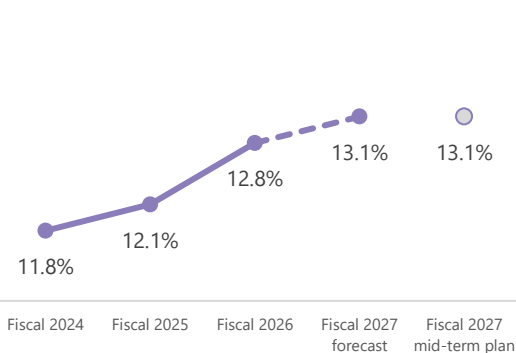
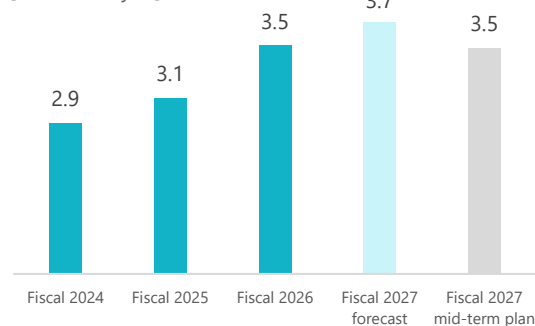
\*3 Type of services essentially offered under uniform specifications applicable to all clients.

# Progress on Key Management Indicators

- On track to achieve the targets set in the Medium-Term Management Plan.

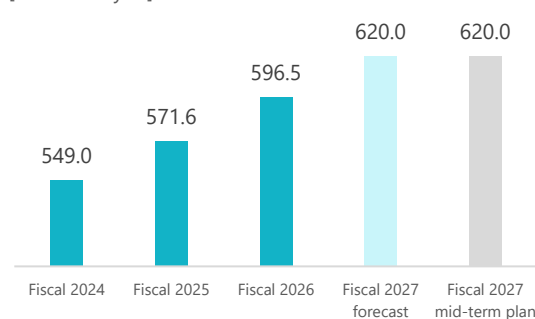
## Operating income per person      Operating Margin      ROIC/ROE

[Millions of yen]



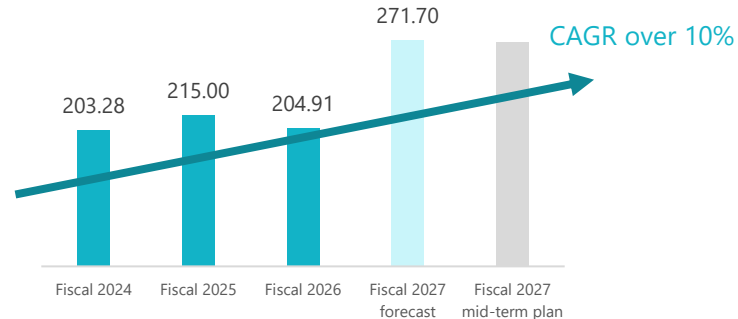
## Net Sales

[Billions of yen]



## EPS

[Yen]



# Progress on the Medium-Term Management Plan (2024–2026): Fiscal 2026 Overview

- Steady progress was made in the second year of the Medium-Term Management Plan. Further efforts are needed to address segment-specific market issues and advance strategies in light of industry restructuring and AI-driven technological innovation.

## Market Strategies On track

- Despite lower profitability in Offering Services Business and Regional IT Solutions due to increased upfront investment in payment and low-margin/unprofitable public-sector projects, overall sales and operating income achieved the upwardly revised forecast, supported by growth in other segments driven by IT investment demand. Both sales and operating income increased year on year.
- In Global Business, business scale expanded steadily, mainly in ASEAN, although profitability remains an issue.

## Service Strategies In progress

- Industry axis: Modernization orders expanded in finance and industrial sectors; projects on track.
- Functional axis: Credit light version rolled out, but orders remained sluggish. Profitability declined due to higher upfront investment in payment.
- Integrate UI/UX, AI, and data analytics to establish a full service value chain.

## Technology Strategies In progress

- AI use in indirect operations has become routine. AI-driven development is being rolled out across projects, aiming to improve development productivity by 50%.
- Progress is on track, but amid changes in the external environment, efforts will be accelerated as a company-wide project to expand AI application areas and create concrete results in higher-value-added businesses.

## Intellectual Property Strategies On track

- Began operation of information platforms and training programs to consolidate client touchpoint data, solution know-how, and problem-solving expertise as intellectual property and create new value.
- Promote initiatives to improve speed and quality by formalizing the tacit knowledge of experienced SEs and increasing project turnover through AI-driven development.

## Human Resources Strategies On track

- Operating income per person reached ¥3.5 million, achieving the Medium-Term Management Plan target one year early, driven by priority measures based on the human capital scenario despite higher compensation investment.
- Job satisfaction reached 59%, exceeding the fiscal 2027 target of 58% ahead of schedule.
- Optimize HR strategy in response to AI-driven changes in development and business processes.

## Medium-Term Management Plan (2024-2026) Basic Policies

### Frontiers 2026

#### Frontier development

We will strive to achieve changes in society and for corporate clients by enhancing quality across all value chains, starting with forward-looking market development and business domain expansion.

Establish position, capabilities and organizational strength as value-creating co-creation partner for society/clients

Win confidence of society

Sustainable growth  
paralleling addition of value

Concentrate Group's collective strength into markets identified through segment management

Meaningful growth

Improved earning power

Hone strengths of Group by driving capabilities of human resources and organization higher and by turning experience into asset that can be effectively utilized

Human resources growth  
and added value cycle

Assets (intellectual  
property) value creation

## Fiscal 2027 Group Management Policy

Sustainable growth in value provided to society and corporate value through sustainability management

Advancing Higher Value Creation in the AI Era with TISI as the Core Company

Expansion of profitability through business structure transformation supported by continued active investment

Business expansion and governance establishment aimed at becoming a top-class IT corporate alliance in ASEAN

Enhancement of added value and efficiency through strengthened human capital and intellectual property utilization

- Aim to continuously enhance corporate value by embedding and deepening management that is conscious of cost of capital and stock price.
- Achieve sustainable growth by enhancing risk management and optimizing priority strategy monitoring, with the aim of becoming "indispensable to social transformation."
- TISI, the new core company responsible for Group-wide value creation, will drive higher added value across the Group in the AI era.
- Strengthen and optimize development measures for consultants, IT architects, advanced sales talent, and all employees, focusing on AI-enabled problem-solving, insight, and integration capabilities.
- Strengthen initiatives to develop new clients and deepen existing client relationships toward becoming an SPB
- Ensure Group-wide control of unprofitable projects
- Generate results through greater use of generative AI in direct and indirect operations
- Target Asia's enormous market potential over the long term, while strengthening relationships with investee partners and promoting joint business development for ASEAN expansion.
- Enhance global governance and management.
- Enable talent with strong expertise to deliver high added value through proactive human capital investment and responses to talent-related issues based on the human capital scenario.
- Further promote IP accumulation and utilization, including IP creation through enhanced feedback from client touchpoints.

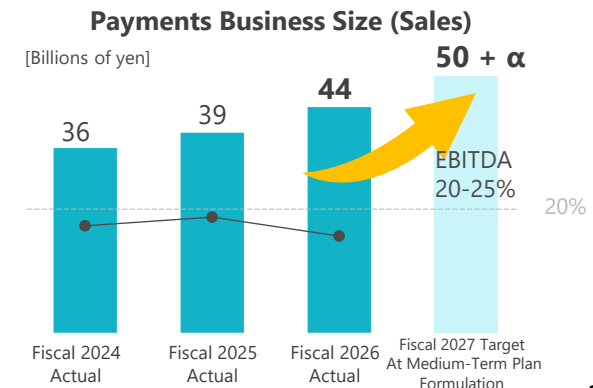
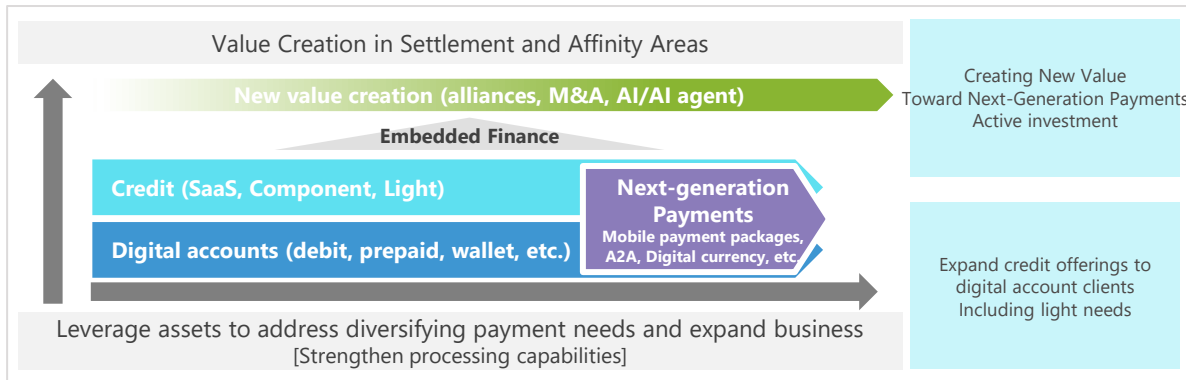
## Service Strategies - Payment Business

- The cashless payments market remained solid, with the SME market in the B2B domain expanding as expected. The financial industry is also becoming increasingly active in the social implementation of next-generation payment methods such as stablecoins. The Group will further evolve PAYCIERGE by incorporating AI into processing services that function as social infrastructure, and will work to create new value.

### Fiscal 2026: Key Initiatives

- Reinvestment needs in the credit domain are becoming more active, with the development structure strengthened to handle multiple large-scale projects in parallel. Focus on sales expansion in the core systems domain (SoR) and AI utilization in RegTech, including fraud detection.
- Strengthen investment in payment services for functional evolution and stable operations amid the expansion of cashless payments.
- Collaboration with business partners is progressing steadily, including DX initiatives for the SME market in the B2B domain with regional banks such as Hiroshima Bank, as well as initiatives to accelerate the commercialization of stablecoins. The Group is also focusing on sales expansion in the sports domain, including arena and stadium payments.

Fiscal 2027: Key Themes	
<b>01 Next-Generation Payments</b>	Accelerate commercialization of stablecoin/tokenization services
<b>02 Credit</b>	Expand core SoR areas
<b>03 Digital Accounts</b>	Acquire more partner regional banks



## Market Strategies - Modernization Business

- Steadily capture robust modernization demand and expand business in line with the plan.
- Enhance solution value and strengthen delivery capabilities, anticipating system renewal demand driven by broader client AI adoption.

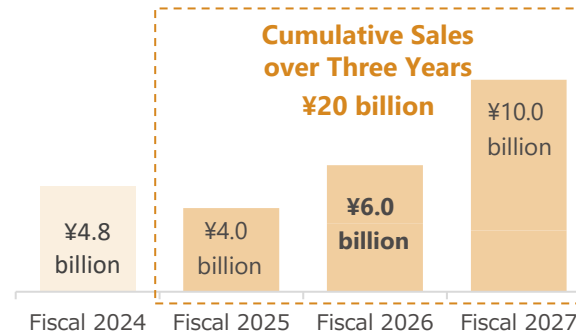
### Fiscal 2026: Key Initiatives

- Drive business centered on dedicated modernization organizations in Financial IT and Industrial IT.** Large-scale projects, particularly in the financial domain, and Group collaboration projects are driving business expansion.
- Develop integrated modernization from front-end to back-end** through collaboration with Pegasystems Corporation; case studies disclosed.
- Use AI to enhance solution value and productivity,** and strengthen delivery capabilities to improve client value.

### Fiscal 2027: Key themes

- Expand the pipeline and build initiatives in priority areas for medium- to long-term growth, while continuously strengthening relationships toward becoming an SPB**
- Strengthen capabilities to steadily advance the modernization business**
- Further enhance solutions using AI**

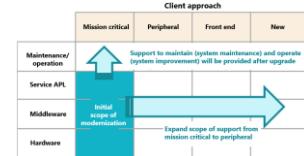
Desired business scale\*



Securing Future stock business\*

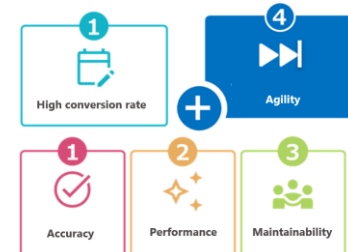
\*Business generating recurring revenue

**Turn into strategic partnership business (SPB)**



Build lasting relationship by using mission critical innovation as hook

Improving advantages

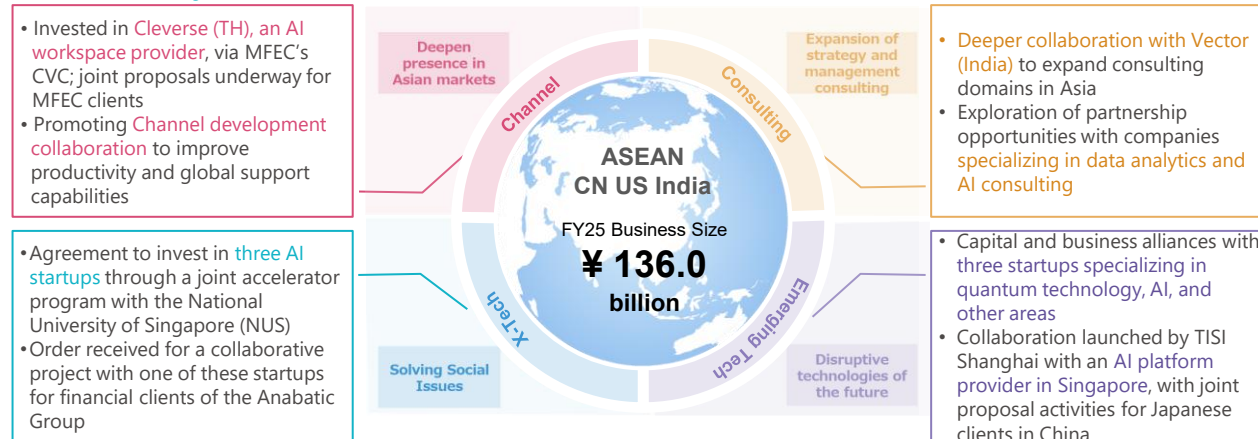


# Activities under Medium-Term Management Plan (Topics):

## Market Strategies - Global Business

- Strengthen global competitiveness through the expansion of global partners and strategic investments. Continue aiming to form an “ASEAN top-class IT alliance” and achieve global consolidated sales of ¥100 billion.

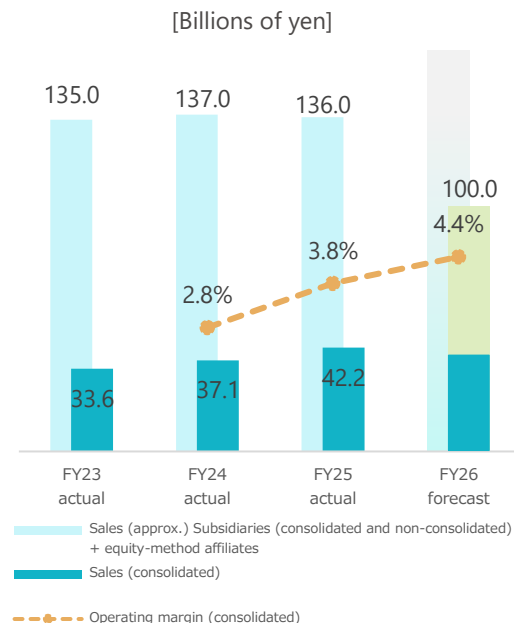
### Fiscal 2026: Key Initiatives



### Fiscal 2027: Key themes

<b>Value-Up on Channel</b>	Business selection and concentration / Shift to higher-value-added AI-enabled services
<b>Expansion of Value Chain</b>	Cross-border expansion with NTQ / Acquisition of consulting capabilities
<b>Diversification of investment targets</b>	Second phase of NUS joint program / Global sourcing centered on North America
<b>Acquire and develop human resources to create new businesses</b>	Acquisition of young entrepreneurial talent through partnerships with top Asian universities

### Global business scale



# Activities under Medium-Term Management Plan (Topics):

## Technology Strategies - Using AI

- AI-driven development processes are progressing as planned toward a 50% productivity improvement by fiscal 2030.
- Accelerate AI utilization across new development, maintenance, and quality management.

### New development

#### AI-driven development platform completed

- ✓ Completed integration of AI tools into the company-wide development platform "AXION"
- ✓ Promote application to code generation and design documentation based on security and governance-conscious processes
- ✓ Confirmed 47% productivity improvement in specific projects

#### Priority Themes for Fiscal 27

Expand application and quantify impact

### Maintenance development

#### Verification of AI utilization in maintenance development started

- ✓ Started verification of project-specific chat using project information (Agentic RAG)
- ✓ Verified use in client projects for inquiries, research, and design
- ✓ Verified quality and productivity improvement in the maintenance phase

#### Priority Themes for Fiscal 27

Accelerate implementation through standardization and Group-wide deployment

### Quality management

#### Initiated quality management enhancement using AI

- ✓ Quality Engineering Department leads AI-enabled project management enhancement
- ✓ Build AI-enabled functions by linking on-site knowledge with product knowledge, including quality (Q), cost (C), schedule (D), and risk (R)
- ✓ Review quality management systems and prepare development guidelines based on AI utilization

#### Priority Themes for Fiscal 27

Strengthen quality management through advanced review and monitoring

- **Promote technology and talent strategies in an integrated manner so that people can lead and take responsibility for completing AI-driven system development**
- **Accelerate implementation and deployment through collaboration with external partners and experts**

## Intellectual Property Strategies

- Aggregate client touchpoints, project track records, and other information as intellectual assets to enhance proposals and provide high-value-added services.
- In fiscal 2026, foundations for utilizing intellectual assets were developed and AI was incorporated. Going forward, the Company will leverage these assets to offer high-value-added proposals linked to client issues and generate Group synergies.

### Fiscal 2026: Key Initiatives

- ✓ **Collection and structuring of intellectual assets; development of foundations**  
Promoted foundations to accumulate and utilize information in a structured manner
- ✓ **Enhancement of AI-enabled proposal and decision-making support**  
Built an environment to support faster and more advanced proposal and decision-making through AI incorporation
- ✓ **Development of client-issue-based sales and proposal processes**  
Strengthened an organizational approach to enhance sales and proposal capabilities

### Fiscal 2027: Key themes

- ✓ **Operationalize the intellectual asset platform**  
Use knowledge in sales and management to enhance decision-making and resource allocation
- ✓ **Full-scale deployment of intellectual asset utilization**  
Deploy mechanisms to improve proposal quality and speed
- ✓ **Embed talent development and processes**  
Establish client-issue-based sales processes and strengthen organizational sales capabilities

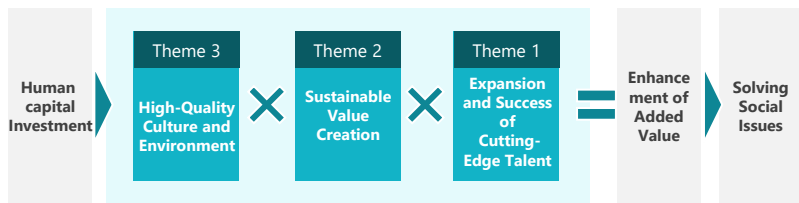
### Target State for Intellectual Asset Utilization



## Human Resources Strategies

- Continue human capital investment based on the human capital scenario. In fiscal 2026, advanced talent was strengthened and the organizational foundation was developed, achieving operating income per person of ¥3.5 million.
- In fiscal 2027, enhance people and organizational capabilities, the source of competitiveness, through AI utilization, and accelerate initiatives to improve value creation capabilities.

### TIS INTEC Group Human Capital Scenario



### Fiscal 2026: Key Initiatives and Results

- Strengthened advanced talent in focus areas
- Continued compensation investment and strengthened management foundation / organizational climate
- Built foundations for strategic AI utilization

#### Fiscal 2026 → Fiscal 2027

- **Advanced talent personnel**
  - Consultants: 589 → **700 or more**
  - IT Architect: 303 → **370 or more**
  - Advanced sales talent: 274 → **360 or more**
- **Job satisfaction: 59%** → **58% or more**
- **Women in management: 13.8%** → **15% or more**

**Enhance people and organizational capabilities through AI to evolve value creation**  
**— Talent that attracts, mobilizes, and inspires empathy in the AI era, and organizational capabilities that support challenge and growth —**

### Fiscal 2027 Key themes

- 01 Accelerate Expansion of Advanced Talent**  
Accelerate the strategic acquisition and development of advanced talent who will drive business results  
— Strengthen talent capable of identifying the essence of issues and leading transformation
- 02 Transform the Talent Portfolio**  
Dramatically enhance the power of people and organizations through AI, and optimize staffing to improve value creation capabilities  
— Dramatically improve productivity and added value through company-wide AI utilization  
— Promote flexible talent management aligned with Group companies
- 03 Enhance the Management Foundation**  
Strengthen the management foundation that fosters growth and challenge through the integration of HR systems at TISI, the core company of the Group, and improve employee engagement  
— Further strengthen organizational capabilities by enhancing management and improving engagement

# Activities under Medium-Term Management Plan (Topics):

## Financial Investment Strategies Cash Allocation

- Continue to actively consider and execute M&A and equity investments, while incorporating AI utilization across business operations. The ¥100 billion growth investment framework remains unchanged from the initial plan..
- Resolved in March 2026 to acquire ¥50 billion in treasury stock to accelerate improvements in shareholder returns and capital efficiency; acquisition already underway.

Progress

Medium-Term Management Plan:  
Latest Three-Year Cumulative Plan

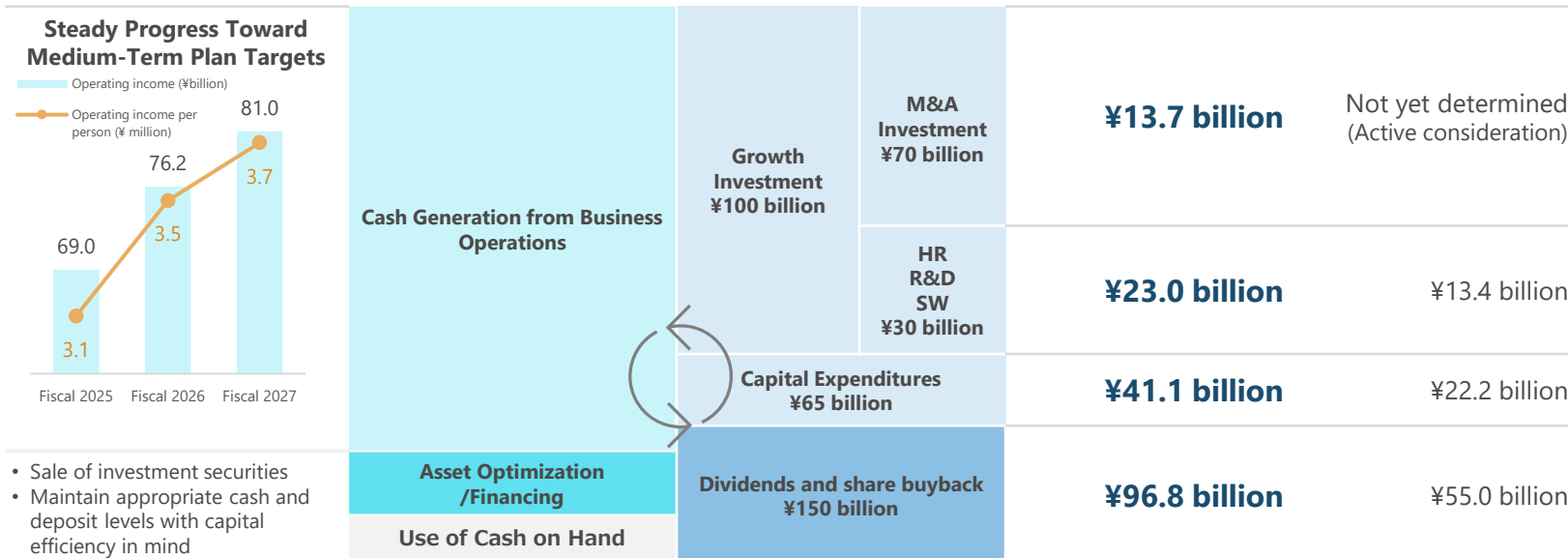
Progress

Cash in

Cash out

Fiscal 2025–Fiscal 2026  
Actual

Fiscal 2027 Plan



## Enhancing Management Capabilities

- Restructure systems and processes to integrate the management and utilization of risks and opportunities, in light of rapid changes in the business and social/ESG environments.
- Begin phased operation in fiscal 2027 and full-scale operation from April 2027, strengthening links to management decisions and next-year measures.

### Fiscal 2026: Rebuilt risk and opportunity management— Integration of sustainability-related issue management and management risk management —



### Fiscal 2026: Key Initiatives in Response to Changes in the Social/ESG Environment

#### Environment (E)

- Promoted early transition to renewable energy-derived electricity at data centers and offices
- ✓ On track to achieve the Medium-Term Management Plan target for GHG emissions reductions (Scope 1+2) one year ahead of schedule
- Updated disclosures based on TCFD

#### Society (S)

- Responded to labor shortages
  - ✓ Expanded the talent foundation in focus areas
  - ✓ Strengthened talent strategies based on AI utilization
  - ✓ Formulated a compensation investment policy
  - ✓ Promoted co-creation with the supply chain

#### Governance (G)

- Organized key issues and decided the transition policy for an Audit & Supervisory Committee structure
- Strengthened and embedded discussions and monitoring of key strategies
- Considered succession plans
- Established a basic policy on AI utilization

# Activities under Medium-Term Management Plan (Topics): Non-Financial Management Indicators

- Further reinforce the growth foundation by enhancing human capital and deepening relationships with stakeholders.

Materiality themes		Perspective/policy on measuring progress	Indicators	Scope <sup>*1</sup>	Fiscal 2025 Results	<b>Fiscal 2026 Results</b>	Fiscal 2027 Targets
1	Create a society in which diverse human resources are engaged and thrive	<b>Demonstrate capabilities of employees</b> Human resources with specialized expertise will be at forefront of frontier development and provide high added value	Job satisfaction	B	56%	<b>59%</b>	58%
			Number of consultants	B	545 persons	<b>589 persons</b>	700 persons
			Number of female employees in management positions	B	12.9%	<b>13.8%</b>	15%
2	Create a society in which diverse human resources are engaged and thrive	<b>Provide value to society</b> Aim to integrate business and sustainability so that promoting business aligned to strategic domains itself creates social value	Strategic domain ratio	A	51%	<b>52%</b>	52%
			Operating income per person	A	¥3.1 million	<b>¥3.5 million</b>	¥3.7 million
			Growth investment	A	Annual ¥19.5 billion	<b>Annual ¥17.2 billion</b>	Three-year total ¥100.0 billion
3	Create a safe society through high-quality services	<b>Quality demanded by society</b> Realize management attitude/practices supporting accumulation/distribution of intellectual property, and create appealing quality	Client/service satisfaction	C	58.5%	<b>60.6%</b>	59%
			Business partner satisfaction	D	74%	<b>77%</b>	81%
4	Enhance corporate governance and earn the trust of society	<b>Company chosen by society</b> Constantly reinforce internal controls on groupwide basis, and contribute to decarbonized society and recycling-oriented society	GHG emissions (Scope 1+2) [Compared with fiscal 2020]	A	65% reduction	<b>82% reduction (preliminary)</b>	70% reduction
			Renewable energy utilization rate (Offices and data centers)	B	Introduced 64%	<b>Introduced 78% (preliminary)</b>	Fiscal 2031: 100% introduction

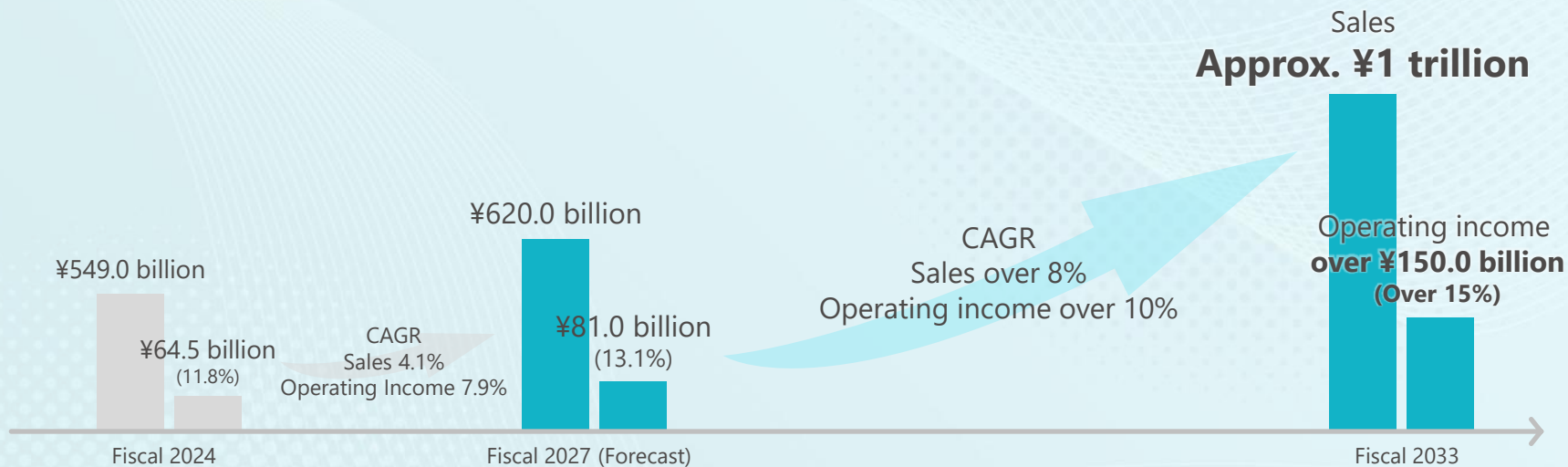
\*1 A: Consolidated / B: Consolidated (domestic) / C: TIS, INTEC, AGREX, QUALICA, AJS, TIS Solutions Link / D: TIS, INTEC

- 1 **Fiscal 2026: Financial Highlights**
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# Toward Our Vision through Business Growth

- Aims to achieve consolidated sales of approximately ¥1 trillion and operating income of over ¥150 billion in fiscal 2033 by strengthening the Group-wide value chain centered on TISI and advancing growth strategies for the AI era.



Medium-Term  
Management Plan  
(2024-2026)

- **Strengthening the Group Value Chain**

- Pursue the maximization of Group-wide value creation with TISI at the core
- Strengthen client-facing value creation through the establishment of TISI Solutions

- **Advancing Growth Strategies for the AI Era**

- Transform earnings quality through AI-driven development
- Expand recurring revenue through Vertical AI services
- Diversify earnings models through strategic investments in priority areas

Group  
**VISION**  
2032

# Materiality Review in Response to Changes in the Business Environment

- In light of changes in the business environment and the Group's characteristics, we have reviewed our materiality and positioned it as a source of competitive advantage for the sustainable enhancement of corporate value.

## Changes in the Business Environment

- Progress in industry and capital restructuring / convergence across industries
- Intensifying competition for talent
- Shift in the source of added value driven by AI

## Direction of Growth Strategies

- Strengthening SPB and IOS / developing CCB and SIS

## Characteristics of the Group

- Enterprise Solutions Business
- Extensive track record in mission-critical domains

## TIS INTEC Group's New Materiality

Even in an era of accelerating AI, it is people who identify the issues facing clients and society, develop technological capabilities, and build trust.  
 By placing people at the center of our management, we will maximize their potential.  
 We will continue to build an organization where everyone can learn, take on challenges, and create meaningful results.

<b>Foundation for Value Creation</b>	Clients	Client base that expands value through co-creation and enables transformation at scale	<b>Delivery Capabilities</b>	System Development	Capabilities to reliably design and develop highly complex systems
	Talent	Talent capabilities needed in the AI era: engaging deeply with clients, mobilizing action, and fostering empathy		Quality	Capabilities that ensure trusted quality and stable operations
<b>Problem-Solving Capabilities</b>	Solutions	Solutions that deliver repeatable outcomes	<b>Organizational Capabilities</b>	Growth Opportunities	Environment that supports challenge and growth
	Technology	Technology foundation that supports robust quality and transformation		Management Foundation	Organization that continuously learns through dialogue

Disclosed on March 10, 2026  
(reposted)

## We view the AI revolution as a growth opportunity and accelerate growth through integrated management across the TIS INTEC Group.

### Our View of the Business Environment

- The AI revolution will expand IT demand
- Core systems, operations, and data will need to be redesigned for the AI era
- IT will further evolve into core infrastructure for corporate competitiveness

#### New Challenges Faced by Many Companies

- Legacy modernization
- Beyond AI PoCs
- AI adoption at scale
- Data, governance, and security
- Foundation model selection

#### Challenges that Slers are uniquely positioned to solve

### Value We Provide

- **End-to-end support** from mission-critical core system development to operation
- **Optimal integration** spanning modernization to advanced technologies, backed by broad expertise and technological capabilities as an independent provider
- **Measurable improvements** in clients' efficiency and competitiveness through deep industry, business, and IT expertise

#### Value Created by Our Core Competencies

Eliminating transformation uncertainty across the client business lifecycle  
Creating sustainable competitive advantage through client co-creation and enabling AI adoption in society

AI-driven development dramatically expands our delivery capabilities and evolves our revenue model, allowing us to deliver greater value to clients.

Mission-critical system modernization powered by our proprietary modernization technologies

Industry-specific AI agents powered by proprietary know-how and technologies built over many years

M&A to accelerate growth

#### Value Aligned with Changing Client Needs

##### AI Platform Preparation Phase

###### Becoming AI-ready

Consultants with expertise in IT, business, and industry lead problem-solving and implementation

##### Knowledge Asset Phase

###### Operating with AI

Providing industry-specific AI agents powered by our engineers' client-level tacit industry and business knowledge

##### Operational Transformation Phase

###### Embedding and evolving AI

Evolving and upgrading client operations through problem-solving, adoption, and feedback loops driven by front-line engineers

##### Business Transformation Phase

###### Co-creating businesses for a new era

Co-creating new businesses for a new era through our next-generation businesses, including stablecoins and healthcare

# Business Environment in the AI Era and the Group's Approach

- Clients' DX investments have already shifted their focus toward business transformation, with AI further enhancing execution speed and quality. Toward the next Medium-Term Management Plan, we will further strengthen our client base in mission-critical domains and advance initiatives to capture growth opportunities arising from this shift.

## Client Transformation in the AI Era

Allocate the majority of digital investments to AI-ready renewal projects

Drive business transformation and system renewal based on human-AI collaboration

Generate investment capacity by improving productivity and profitability

Improve the speed and quality of business expansion

## Our Group Strategy to Drive Transformation

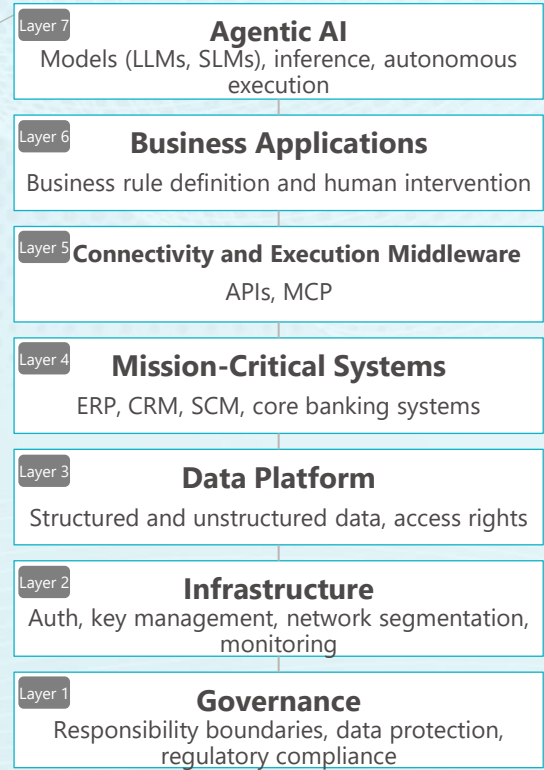
Consulting × Modernization supports AI readiness from concept to implementation

Business-specific agentic AI transforms client operations

AI-driven development accelerates the cycle from IT investment to implementation

Establish a trusted position across layers by leveraging industry expertise and strengths in mission-critical domains

- Leading Clients Forward -



- Beyond Enhancing Digital Competitiveness -

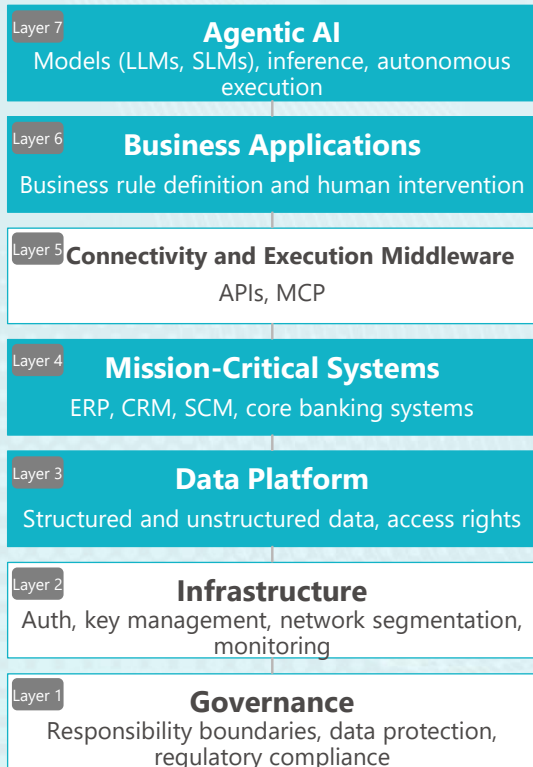
**Starting from mission-critical domains, the Group will support AI transformation across client layers and lead clients and society toward sustainable growth.**

# Toward Establishing the Group's Competitive Advantage

## — Mission-Critical Domains × Agentic AI

- Agentic AI requires integration with business data and mission-critical domains to deliver value. By leveraging the client base expanded in mission-critical domains under the current Medium-Term Management Plan and delivering integrated support for the use of Agentic AI, the Group aims to establish a distinctive competitive advantage.

AI-Embedded Business and System Integration Model



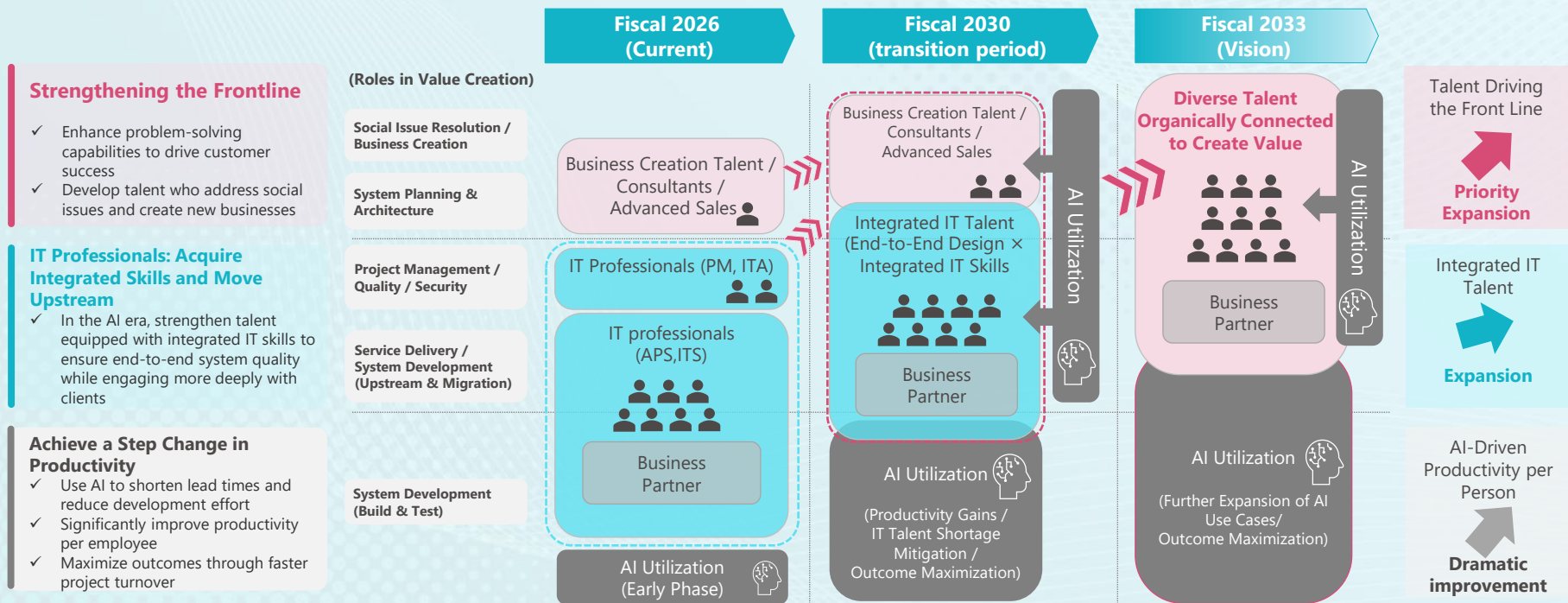
<b>Focus</b>	<b>Transform the client base and technology assets built through SI into sources of competitive advantage</b>
	<b>Services</b> For card business operators, one of the Group's strengths Launch services supporting international brand operations, including fraud detection AI Go beyond individual AI agents to aim to provide services with end-to-end business process orchestration capabilities
<b>Top priority</b>	<b>Consulting</b> Launch the new brand "IntegriA" to strengthen the value chain Reliably integrate AI, data, people, and processes to enable effective AI utilization
	Progressively laying the groundwork for the next Medium-Term Management Plan, including an Anthropic reseller agreement and process mining for business process optimization
<b>Core Domains</b>	<b>Secure mission-critical domains at the core of AI readiness and drive our own transformation through AI-driven development</b>
	<b>Expanding modernization projects</b> in the financial and industrial sectors
<b>AI-Driven</b>	<b>Steadily building a track record of productivity improvements</b> toward Fiscal 2030 using GitHub Copilot and Claude Code
<b>[Results]</b>	<b>External Design → Development</b> <b>47%Up</b>
	<b>Development → Unit Testing</b> <b>57%Up</b>

Going forward, with TISI at the core, the Group will combine its strengths to expand the value it provides across all layers. ■ 48

# Toward Establishing the Group's Competitive Advantage

## — Strengthening Human Capital to Drive Value Creation

- Promote AI utilization across the workforce to shorten project lead times and dramatically improve productivity per employee, driving top-line growth through higher project turnover while addressing the structural shortage of IT talent.
- Accelerate strategic investment in talent with integrated IT skills that serve as a source of competitive advantage in the AI era, and strong problem-solving and business-creation capabilities, to achieve sustainable growth in corporate value.



# Key Strategies for the Next Medium-Term Management Plan (2027–2029)

- The next Medium-Term Management Plan will advance qualitative earnings transformation through AI-driven development, recurring revenue expansion through Vertical AI services, and revenue model diversification through strategic investment in priority areas. Through these structural shifts, the Group aims to drive sustainable growth in corporate value.

## Opportunities for Clients

- Establish a competitive advantage through simultaneous renewal of business operations and systems
- Create new revenue opportunities by turning accumulated data and know-how into value through AI
- Redirect AI-generated resources into investment to achieve non-linear growth

## Threats to Clients

- Unclear priorities for AI adoption and deployment
- Urgent need to make aging mission-critical domains AI-ready
- Erosion of competitive advantage as AI-enabled competitors emerge

To address both client opportunities and threats, the Group will promote three market strategies grounded in mission-critical domains and business expertise.

## Qualitative Transformation of Earnings through AI-Driven Development

- Increase project turnover and expand project volume through AI-driven development
- Provide seamless services from upstream consulting to modernization to increase project value and repeat business

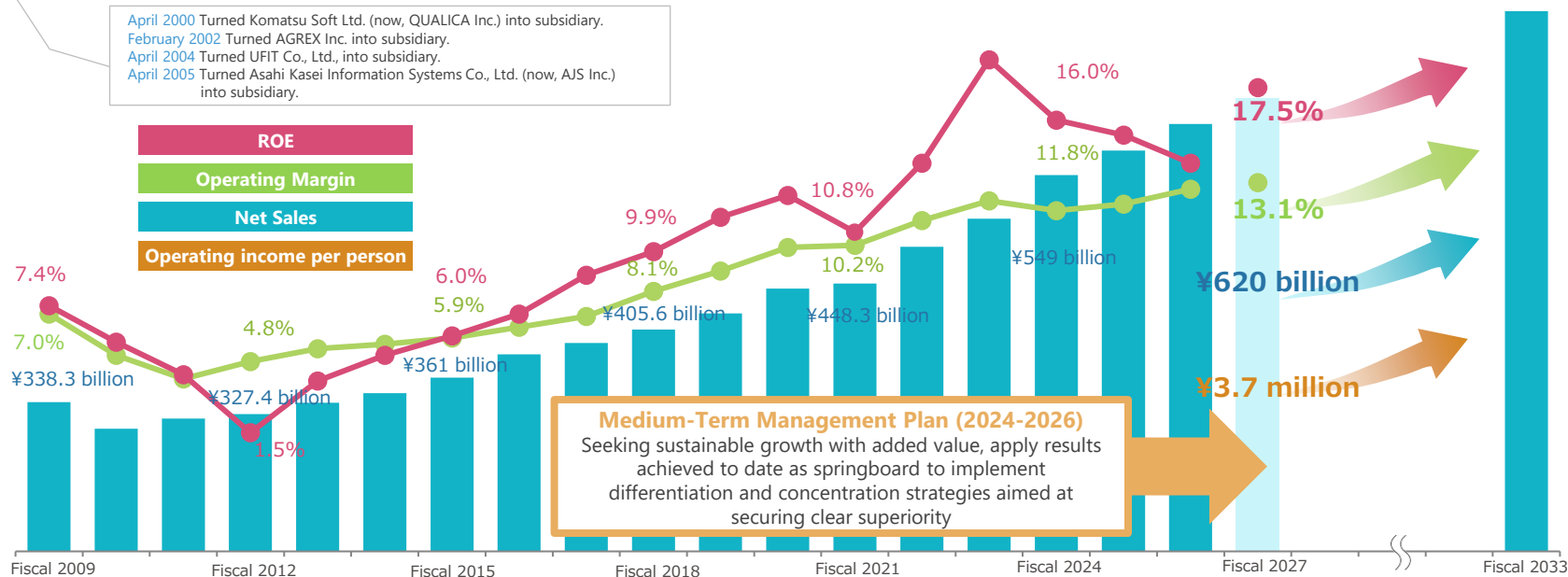
## Expansion of Recurring Revenue through Vertical AI Services

- Provide outcome-based agentic AI that orchestrates entire business processes based on core systems and business expertise, thereby expanding recurring revenue

## Diversification of Revenue Models through Strategic Investment in Priority Areas

- Looking beyond AI, advance revenue-sharing businesses in the payments and healthcare domains

# Seeking Further Improvement in Corporate Value



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## Sales by Key Business Segment and Operating Activity

\*For external clients

[Millions of yen]	Fiscal 2025	Fiscal 2026	YOY change	
Offering Service Business	131,667	<b>144,593</b>	+12,926	[+9.8%]
Software development	51,836	<b>58,266</b>	+6,430	[+12.4%]
Operating/cloud services	42,228	<b>46,156</b>	+3,928	[+9.3%]
Product/software sales	37,602	<b>40,170</b>	+2,567	[+6.8%]
Business Process Management	40,521	<b>42,803</b>	+2,282	[+5.6%]
Software development	13,129	<b>14,638</b>	+1,509	[+11.5%]
Operating/cloud services	25,804	<b>26,589</b>	+785	[+3.0%]
Product/software sales	1,587	<b>1,575</b>	-12	[-0.8%]
Financial IT Business	98,918	<b>96,941</b>	-1,977	[-2.0%]
Software development	51,942	<b>53,646</b>	+1,703	[+3.3%]
Operating/cloud services	41,938	<b>39,108</b>	-2,829	[-6.7%]
Product/software sales	5,037	<b>4,185</b>	-851	[-16.9%]
Industrial IT Business	127,634	<b>132,791</b>	+5,156	[+4.0%]
Software development	86,042	<b>91,467</b>	+5,424	[+6.3%]
Operating/cloud services	24,624	<b>25,529</b>	+904	[+3.7%]
Product/software sales	16,967	<b>15,794</b>	-1,172	[-6.9%]
Regional IT Solutions	170,437	<b>176,953</b>	+6,516	[+3.8%]
Software development	86,714	<b>88,403</b>	+1,688	[+1.9%]
Operating/cloud services	58,370	<b>61,902</b>	+3,531	[+6.1%]
Product/software sales	25,352	<b>26,647</b>	+1,295	[+5.1%]
Others	2,507	<b>2,396</b>	-111	[-4.4%]
Total	571,687	<b>596,479</b>	+24,792	[+4.3%]
Software development	289,665	<b>306,423</b>	+16,757	[+5.8%]
Operating/cloud services	192,966	<b>199,286</b>	+6,319	[+3.3%]
Product/software sales	86,546	<b>88,373</b>	+1,826	[+2.1%]
Others	2,507	<b>2,396</b>	-111	[-4.4%]

## Sales by Key Business Segment and Operating Activity

\*For external clients

[Millions of yen]		Fiscal 2025 Q4	Fiscal 2026 Q4	YOY change	
Offering Service Business		35,286	<b>39,243</b>	+3,956	[+11.2%]
Software development		14,232	<b>15,832</b>	+1,600	[+11.2%]
Operating/cloud services		10,919	<b>12,434</b>	+1,514	[+13.9%]
Product/software sales		10,135	<b>10,977</b>	+841	[+8.3%]
Business Process Management		10,568	<b>11,066</b>	+498	[+4.7%]
Software development		3,558	<b>3,907</b>	+349	[+9.8%]
Operating/cloud services		6,555	<b>6,705</b>	+149	[+2.3%]
Product/software sales		454	<b>453</b>	-1	[-0.2%]
Financial IT Business		25,304	<b>24,877</b>	-426	[-1.7%]
Software development		13,770	<b>13,488</b>	-281	[-2.0%]
Operating/cloud services		10,233	<b>10,375</b>	+142	[+1.4%]
Product/software sales		1,301	<b>1,013</b>	-287	[-22.1%]
Industrial IT Business		34,515	<b>35,390</b>	+874	[+2.5%]
Software development		22,519	<b>23,473</b>	+953	[+4.2%]
Operating/cloud services		6,185	<b>6,463</b>	+278	[+4.5%]
Product/software sales		5,811	<b>5,453</b>	-358	[-6.2%]
Regional IT Solutions		48,863	<b>49,064</b>	+200	[+0.4%]
Software development		23,440	<b>23,936</b>	+496	[+2.1%]
Operating/cloud services		14,833	<b>15,840</b>	+1,007	[+6.8%]
Product/software sales		10,589	<b>9,286</b>	-1,303	[-12.3%]
Others	Others	586	<b>585</b>	-1	[-0.2%]
Total		155,125	<b>160,227</b>	+5,102	[+3.3%]
	Software development	77,520	<b>80,638</b>	+3,118	[+4.0%]
	Operating/cloud services	48,726	<b>51,820</b>	+3,093	[+6.3%]
	Product/software sales	28,292	<b>27,183</b>	-1,108	[-3.9%]
	Others	586	<b>585</b>	-1	[-0.2%]

## Sales and Income by Key Business Segments (Forecast)

[Millions of yen]		Fiscal 2026 H1	Fiscal 2027 H1	YOY change	
Net Sales		288,525	<b>300,000</b>	+11,474	[+4.0%]
Operating Income		35,553	<b>36,500</b>	+946	[+2.7%]
Operating Margin		12.3%	<b>12.2%</b>	-0.1P	-
Net Income Attributable to Owners of the Parent Company		23,726	<b>26,000</b>	+2,273	[+9.6%]
Net Income to Net Sales Ratio		8.2%	<b>8.7%</b>	+0.5P	-
<b>Key Business Segments</b>					
Offering Service Business	Net Sales	76,070	<b>78,400</b>	+2,329	[+3.1%]
	Operating Income	4,667	<b>4,450</b>	-217	[-4.7%]
	Operating Margin	6.1%	<b>5.7%</b>	-0.4P	-
Business Process Management	Net Sales	21,725	<b>21,700</b>	-25	[-0.1%]
	Operating Income	2,966	<b>2,800</b>	-166	[-5.6%]
	Operating Margin	13.7%	<b>12.9%</b>	-0.8P	-
Financial IT Business	Net Sales	48,078	<b>53,000</b>	+4,921	[+10.2%]
	Operating Income	6,162	<b>7,000</b>	+837	[+13.6%]
	Operating Margin	12.8%	<b>13.2%</b>	+0.4P	-
Industrial IT Business	Net Sales	65,152	<b>66,500</b>	+1,347	[+2.1%]
	Operating Income	10,624	<b>10,700</b>	+75	[+0.7%]
	Operating Margin	16.3%	<b>16.1%</b>	-0.2P	-
Regional IT Solutions	Net Sales	89,425	<b>92,500</b>	+3,074	[+3.4%]
	Operating Income	10,795	<b>11,300</b>	+504	[+4.7%]
	Operating Margin	12.1%	<b>12.2%</b>	+0.1P	-

# Fiscal 2027 Second Half:

## Sales and Income by Key Business Segment (Forecast)

[Millions of yen]	Fiscal 2026 H2	Fiscal 2027 H2	YOY change		
Net Sales	307,953	<b>320,000</b>	+12,046	[+3.9%]	
Operating Income	40,675	<b>44,500</b>	+3,824	[+9.4%]	
Operating Margin	13.2%	<b>13.9%</b>	+0.7P	-	
Net Income Attributable to Owners of the Parent Company	22,897	<b>31,000</b>	+8,102	[+35.4%]	
Net Income to Net Sales Ratio	7.4%	<b>9.7%</b>	+2.3P	-	
<b>Key Business Segments</b>					
Offering Service Business	Net Sales	84,503	<b>85,700</b>	+1,196	[+1.4%]
	Operating Income	5,774	<b>6,800</b>	+1,025	[+17.8%]
	Operating Margin	6.8%	<b>7.9%</b>	+1.1P	-
Business Process Management	Net Sales	22,367	<b>22,600</b>	+232	[+1.0%]
	Operating Income	3,431	<b>3,450</b>	+18	[+0.5%]
	Operating Margin	15.3%	<b>15.3%</b>	+0.0P	-
Financial IT Business	Net Sales	50,652	<b>55,500</b>	+4,847	[+9.6%]
	Operating Income	6,567	<b>7,900</b>	+1,332	[+20.3%]
	Operating Margin	13.0%	<b>14.2%</b>	+1.2P	-
Industrial IT Business	Net Sales	68,244	<b>70,500</b>	+2,255	[+3.3%]
	Operating Income	11,883	<b>12,400</b>	+516	[+4.3%]
	Operating Margin	17.4%	<b>17.6%</b>	+0.2P	-
Regional IT Solutions	Net Sales	94,812	<b>98,500</b>	+3,687	[+3.9%]
	Operating Income	12,533	<b>13,700</b>	+1,166	[+9.3%]
	Operating Margin	13.2%	<b>13.9%</b>	+0.7P	-

# Trends in Sales and Income by Key Business Segments

[Millions of yen]		Fiscal 2024 Actual	Fiscal 2025 Actual	Fiscal 2026 Actual	Fiscal 2027 Forecast	Fiscal 2027 Medium-term Management plan
Offering Service Business	Net Sales	130,759	145,515	160,574	<b>164,100</b>	163,000
	Operating Income	7,659	9,937	10,442	<b>11,250</b>	14,500
	Operating Margin	5.9%	6.8%	6.5%	<b>6.9%</b>	8.9%
Business Process Management	Net Sales	41,953	42,646	44,092	<b>44,300</b>	46,000
	Operating Income	4,551	5,326	6,397	<b>6,250</b>	5,200
	Operating Margin	10.8%	12.5%	14.5%	<b>14.1%</b>	11.3%
Financial IT Business	Net Sales	106,304	100,252	98,730	<b>108,500</b>	103,500
	Operating Income	15,185	12,321	12,729	<b>14,900</b>	13,500
	Operating Margin	14.3%	12.3%	12.9%	<b>13.7%</b>	13.0%
Industrial IT Business	Net Sales	121,896	128,120	133,396	<b>137,000</b>	141,000
	Operating Income	18,287	19,330	22,507	<b>23,100</b>	22,500
	Operating Margin	15.0%	15.1%	16.9%	<b>16.9%</b>	16.0%
Regional IT Solutions	Net Sales	172,376	177,425	184,238	<b>191,000</b>	191,000
	Operating Income	18,497	21,576	23,328	<b>25,000</b>	25,000
	Operating Margin	10.7%	12.2%	12.7%	<b>13.1%</b>	13.1%

## Offering Service Business

### Definition

Configures services through **own investment** based on **best practices** accumulated groupwide and provides **knowledge-intensive IT services**.

## Business Process Management

### Definition

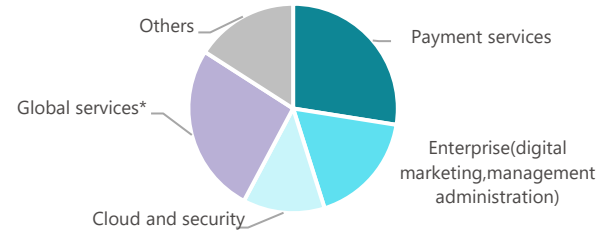
Applies such strengths as IT expertise, business know-how and skilled human resources to realize and provide **higher-level, more-efficient outsourcing solutions** targeting business process-related

## Financial IT Business

### Definition

**Considers business and IT strategies together and leverages both**, and supports business progress using expert business and operating know-how specific to the finance industry.

### [Supplement] Business Composition of Offering Service Businesses



\*Partial transactions are amounted on other segments

## Industrial IT Business

### Definition

**Considers business and IT strategies together and leverages both**, and supports business progress using expert business and operating know-how specific to industry sectors other than finance.

## Regional IT Solutions

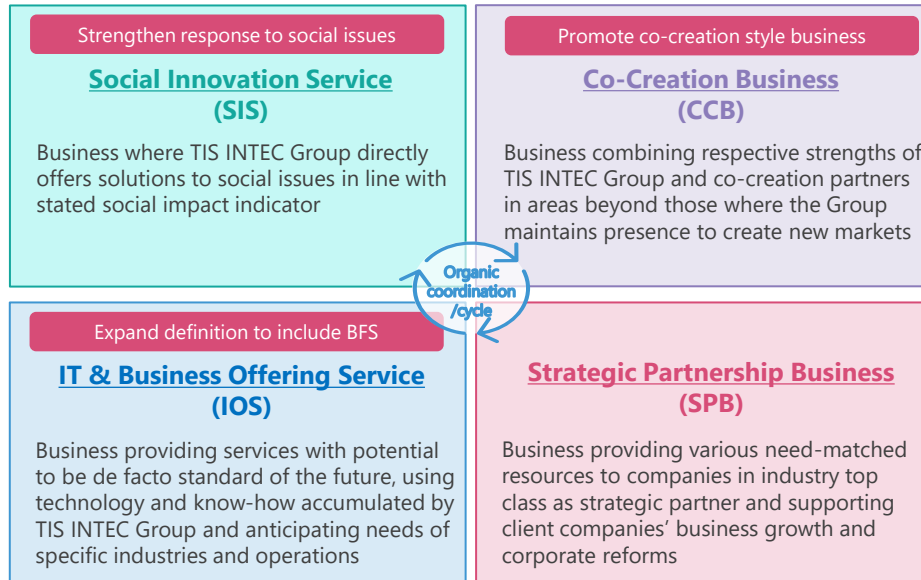
### Definition

**Provides** IT professional services **extensively, across regions and client sites**, and **collects and develops** this know-how **as the source of solutions** to support efforts to address issues and promote business activities.

- We partially revised strategic domains, based on long-term business direction, with the aim of developing business pursuits hinging on social issue resolution and co-creation and commercializing services that go beyond IT alone.

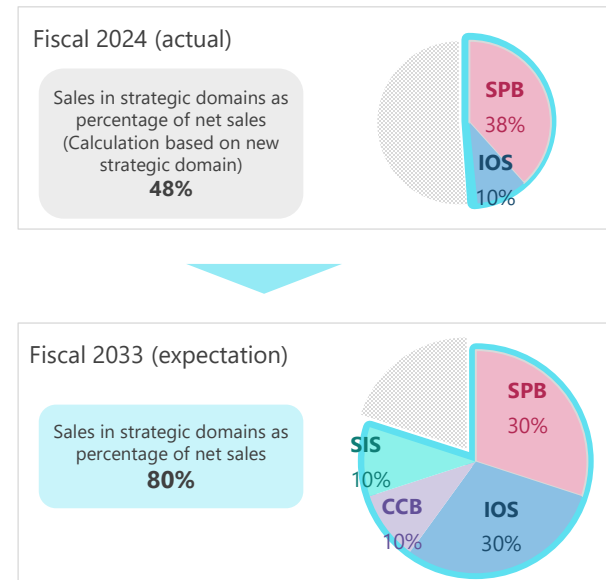
## Redefined Strategic Domains under Group Vision 2032

- ✓ Since 2017, when Group Vision 2026 was prepared, very clearly highlighted social role that TIS INTEC Group must fulfill and best business approach to take over next 10 years, shaping new priority business areas.



## Strategic Domains: Desired Composition

- ✓ SPB and IOS domains domains will be much bigger, new CCB and SIS domains will have grown to certain size, and business portfolio will be well-balanced mix of diverse business models.



Make society's wishes come true through IT.



**TIS INTEC**  
Group