



Septeni Holdings Co., Ltd.

Financial Results Briefing for Q2 and H1 FY2026

August 6, 2026

Event Summary

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	Yusuke Shimizu	Director, Group Senior Executive Officer, Chief Product Officer (CPO)
	Tei Go	Group Senior Executive Officer, Chief Strategy Officer (CSO)
	Kei Hatano	Group Senior Executive Officer, Chief Financial Officer (CFO)

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Presentation

Moderator: It is now time to begin the presentation of the financial results briefing of Septeni Holdings Co., Ltd. for the second quarter and first half of FY2026.

Thank you very much for taking time out of your busy schedule to participate in our financial results briefing. At today's meeting, Mr. Kouno, Group President and Chief Executive Officer, will first explain an overview of the financial results and business topics. We will have a question-and-answer session after that. Please allow up to one hour. If there are any problems during the briefing, please contact the IR department address shown on the slide.

Let me now introduce our attendees. Mr. Yuichi Kouno, Representative Director, Group President and Chief Executive Officer. Mr. Yusuke Shimizu, Director, Group Senior Executive Officer, and Chief Product Officer. Mr. Tei Go, Group Senior Executive Officer and Chief Strategy Officer. Mr. Kei Hatano, Group Senior Executive Officer and Chief Financial Officer. Now, Kouno will explain. Please refer to the financial results briefing materials posted on our corporate website. Please go ahead.

Kouno: I am Kouno, Representative Director, Group President and Chief Executive Officer, Septeni Holdings Co., Ltd. I will explain the financial results for the second quarter and first half of FY2026.

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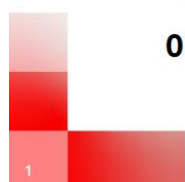
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Download the fact sheet [here](#) (in xlsx format)



The first page is the agenda for today.

First, in the Executive Summary, I would like to cover three main points: an overview of our consolidated financial results for the first half of FY2026, the revisions to our full-year earnings forecasts timely disclosed today along with our financial results, and the progress of our Medium-term Management Plan.

Next, I will explain an overview of the consolidated financial results for the first-half cumulative period and the second-quarter standalone period, followed by performance by business segment.

Finally, I will share details on the upward revision to our full-year earnings forecasts and our progress toward the revised forecast.

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Executive Summary of Q2 FY2026 Financial Results

H1 FY2026 Results

Revenue

Acquiring new clients, along with further expanding transactions with existing clients in the Marketing Communication Segment and Direct Business Segment, leading to **revenue growth of +9.5% YoY**.

Non-GAAP operating profit

Promoting the construction of a lean business foundation, resulting in **significant profit growth of +46.5% YoY**.

Profit attributable to owners of parent

Achieving revenue and profit growth, complemented by strong performance in equity in earnings of affiliates, resulting in **significant profit growth of +120.2% YoY**.

Revision of Full-Year Earnings Forecast

- Revising upward the full-year forecast for profit attributable to owners of parent from ¥5,250 million to **¥6,000 million**, reflecting the effect of reduced corporate tax burden due to the decision to liquidate a subsidiary following the review of business operations in Southeast Asia.

Progress on Medium-term Management Plan

- Acquiring one company and divesting two companies through the promotion of business portfolio management.
- Expecting to achieve quantitative targets through FY2028 ahead of schedule, while considering reviewing quantitative targets for FY2027 onward.

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The second page is the Executive Summary. There are three key points to highlight today.

First, regarding the overview of our first-half cumulative results, revenue increased by 9.5% year-on-year, driven by the further expansion of transactions with existing clients in the Marketing Communication Segment and the Direct Business Segment, as well as the acquisition of new clients.

Furthermore, through continued progress in building a more lean and resilient business foundation, Non-GAAP operating profit grew by 46.5% year-on-year, achieving substantial profit growth.

In addition, profit attributable to owners of parent showed exceptionally strong growth of 120.2% year-on-year, supported not only by higher revenue and operating profit but also by solid performance in share of profit of investments accounted for using equity method.

The second point is the revision to our full-year earnings forecasts. Following the review of business operations in Southeast Asia, we have revised upward our full-year forecast for profit attributable to owners of parent from ¥5,250 million to ¥6,000 million, reflecting the effect of reduced corporate tax burden due to the decision to liquidate a subsidiary.

Finally, regarding the progress of our Medium-term Management Plan: As one of our overall policies for strengthening governance, we advocate the practice of strategic business portfolio management. Under this policy, we executed one acquisition and two divestitures in the first half of 2026.

In line with the upward revision to our earnings forecasts for the current fiscal year, we are currently considering a review of the quantitative targets in our three-year plan announced in February this year.

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The progress of the Medium-term Management Plan will be explained in detail on the following pages.

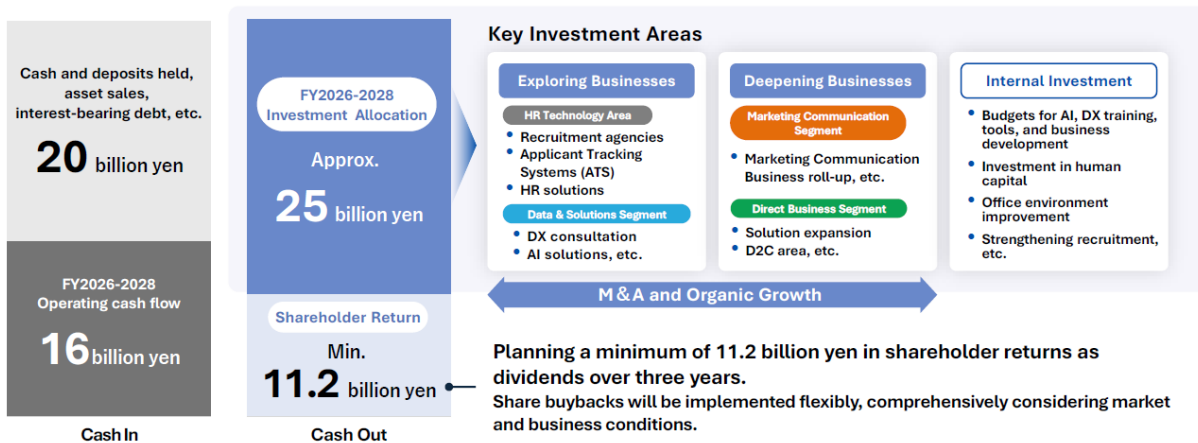
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Capital Allocation (FY2026-2028) (Re-presented)

For growth investment, we plan to actively invest in: expanding our capabilities that contribute to enhancing clients' corporate value for "Exploring Businesses"; strengthening existing businesses competitiveness for "Deepening Businesses"; as well as in internal investment such as AI, human capital, and corporate environment improvements, etc.



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On page 3, I will explain our capital allocation for FY2026 to FY2028.

We believe that we are making steady progress in expanding total cash-in for growth investments, driven by strong business momentum to date and portfolio management such as business divestitures.

Based on the funds generated through these initiatives, we will continue to aim for balancing growth investment and shareholder returns.

Specifically, we will actively seek opportunities for growth investment in three key areas: expanding capabilities that contribute to enhancing corporate value for clients toward "Exploring Businesses," strengthening the competitiveness of existing businesses toward "Deepening Businesses," and internal investments in AI, human capital, and internal infrastructure.

Regarding shareholder returns, while maintaining our current policy and total three-year return amount, we have introduced an interim dividend starting from the current fiscal year to increase return opportunities for our shareholders.

Through proactive capital allocation to growth investments and stable shareholder returns, we will strive for medium- to long-term corporate value enhancement.

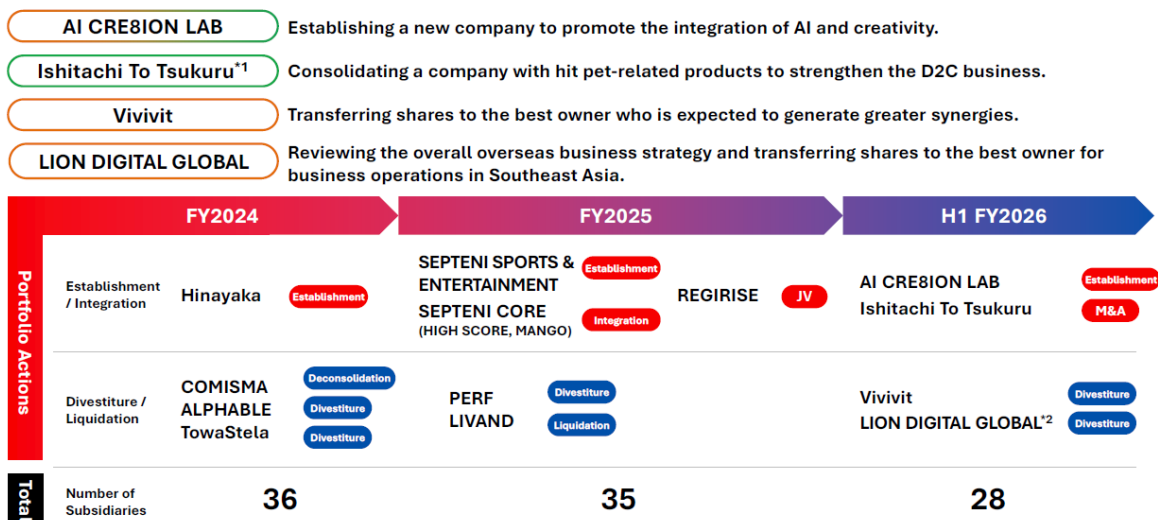
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Promotion of Business Portfolio Management

Continuing monitoring based on business continuity criteria, while concurrently seeding new growth drivers.



^{*1} Tentative English company name ^{*2} Including group companies of LION DIGITAL GLOBAL

On page 4, I will explain the progress of our business portfolio management.

Looking back at the first half of the current fiscal year, this was a period during which we maintained rigorous monitoring in line with our business continuity criteria, while simultaneously sowing seeds for new growth.

As specific actions, we established AI CRE8ION LAB, a new company to promote the integration of AI and creativity, and acquired Ishitachi To Tsukuru to enhance the D2C domain.

On the other hand, for two companies—Vivivit and LION DIGITAL GLOBAL—we executed share transfers to best owners from whom greater synergy effects are expected.

Through such strategic portfolio rebalancing, the number of consolidated subsidiaries has been streamlined to 28 at present, steadily driving efficiency in corporate operations and restructuring into a lean organizational structure.

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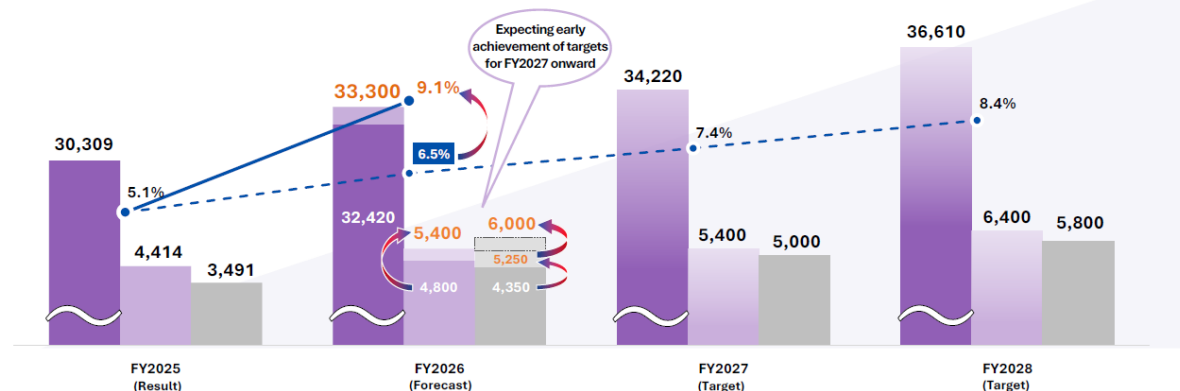
Progress Toward FY2028 Quantitative Targets

Making progress at a pace exceeding the three-year quantitative targets disclosed in February 2026, driven by top-line expansion, productivity improvements, and the promotion of business portfolio management.

Aiming to continuously achieve new record-high results, while considering revising targets upward for FY2027 onward.

■ Revenue (¥mn) ■ Non-GAAP operating profit (¥mn) ■ Profit attributable to owners of parent (¥mn) — ROE

*For FY2026: Representing initial earnings forecast with white data labels and revised earnings forecast with orange data labels (ROE is an estimated figure)



On page 5, I will explain our progress toward the quantitative targets through FY2028.

Regarding our progress to date, top-line growth, productivity improvements, and proactive business portfolio management have yielded positive results, putting us on track to progress at a pace significantly exceeding the three-year quantitative targets announced in February 2026.

In light of this situation, we continue to aim to continuously update our record-high performance under the current three-year quantitative targets, while considering a review toward setting even higher targets for FY2027 and beyond.

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H1 FY2026 (Jan-Jun) Highlights

- Achieving record-high first-half results across all major financial line items.*¹
- Delivering double-digit net sales growth that outpaced the estimated market growth rate*², along with significant growth in Non-GAAP operating profit of +46.5% YoY.
- Making steady progress against the revised full-year forecasts.

(¥millions, unless otherwise stated)	Value	YoY	Progress toward earnings forecast
Revenue	16,653	+9.5%	50.0%
Non-GAAP operating profit	3,026	+46.5%	56.0%
Profit attributable to owners of parent	4,087	+120.2%	68.1%
Earnings per share (EPS)	¥19.76	+¥10.81	-
Net sales	87,873	+16.6%	-
[Reference] Revenue to net sales ratio	19.0%	-1.2Pt	-

*¹ Comparing figures prior to FY2023 with simple combined totals for January–June. *² Assuming high single-digit growth

Now, I will proceed with the detailed explanation. The first item on the agenda is the overview of the consolidated financial results for the first half of FY2026.

Page 7 presents the consolidated financial highlights for the first-half cumulative period.

For the first-half cumulative period of the current fiscal year, we were able to update record-high results for a first half across major financial metrics.

First, revenue came in at approximately ¥16.7 billion, representing an increase of 9.5% year-on-year, and Non-GAAP operating profit reached approximately ¥3.0 billion, achieving substantial profit growth of 46.5% year-on-year.

In addition to these results, supported by strong performance in share of profit of investments accounted for using equity method and other factors, profit attributable to owners of parent expanded significantly to approximately ¥4.1 billion, nearly 2.2 times the level of the same period of the previous fiscal year.

Furthermore, net sales also demonstrated double-digit growth that outperformed expected market growth rates, reaching approximately ¥87.9 billion, up 16.6% year-on-year.

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H1 FY2026 (Jan-Jun) Highlights (By business segment)

Marketing Communication

Achieving revenue growth and significant profit growth, strongly driven by the expansion of existing clients in addition to the acquisition of new clients.

Direct Business

Achieving revenue growth and significant profit growth, driven by the expansion of existing clients.

Data & Solutions

Achieving growth in both revenue and profit by expanding the service lineup and optimizing headcount.

	(¥millions, unless otherwise stated)	H1 FY2025	H1 FY2026	YoY	Progress toward revised forecast
Marketing Communication	Revenue	10,903	12,078	+10.8%	50.3%
	Non-GAAP operating profit	2,779	3,656	+31.6%	52.2%
	[Reference] Net sales	64,101	75,992	+18.5%	-
Direct Business	Revenue	3,169	3,523	+11.2%	51.8%
	Non-GAAP operating profit	607	833	+37.4%	59.5%
	[Reference] Net sales	10,841	11,890	+9.7%	-
Data & Solutions	Revenue	1,551	1,659	+6.9%	46.1%
	Non-GAAP operating profit	250	298	+19.2%	46.5%

Page 8 shows the financial highlights by segment.

In the Marketing Communication Segment, revenue increased and profit grew substantially, driven significantly by expanding existing clients in addition to acquiring new ones.

The Direct Business Segment also delivered higher revenue and substantial profit growth, centered on expanding existing clients.

In the Data & Solutions Segment, revenue and profit both increased by expanding the service lineup and optimizing workforce size, with overall strong momentum continuing.

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H1 FY2026 (Jan-Jun) Consolidated Income Statement

— Achieving double-digit growth in net sales, alongside **significant Non-GAAP operating profit growth of +46.5% YoY** driven by building a lean business structure.

Delivering **significant growth in profit attributable to owners of parent of +120.2% YoY**, supported by contributions such as equity in earnings of affiliates.

(¥millions, unless otherwise stated)	H1 2026				H1 2025		
	Value	Ratio to net sales	Ratio to revenue	YoY	Value	Ratio to net sales	Ratio to revenue
Revenue	16,653	19.0%	100.0%	+9.5%	15,207	20.2%	100.0%
Gross profit	12,716	14.5%	76.4%	+10.1%	11,549	15.3%	75.9%
SG&A expenses	9,735	11.1%	58.5%	+2.2%	9,522	12.6%	62.6%
Non-GAAP operating profit	3,026	3.4%	18.2%	+46.5%	2,065	2.7%	13.6%
Operating profit	3,167	3.6%	19.0%	+56.4%	2,024	2.7%	13.3%
Equity in earnings of affiliates, etc.	1,160	1.3%	7.0%	+66.4%	697	0.9%	4.6%
Profit attributable to owners of parent	4,087	4.7%	24.5%	+120.2%	1,856	2.5%	12.2%
[Reference] Net sales	87,873	100.0%	—	+16.6%	75,389	100.0%	—

Page 9 shows our consolidated income statement for the first half.

In addition to double-digit growth in net sales, all profit levels significantly exceeded the previous year's results.

Revenue reached ¥16.65 billion, up 9.5% year-on-year. Additionally, supported by building a lean business structure, Non-GAAP operating profit reached ¥3.03 billion, achieving substantial profit growth of 46.5% year-on-year.

Profit attributable to owners of parent stood at ¥4.09 billion, approximately 2.2 times the level of the same period of the previous fiscal year, delivering an exceptionally strong performance.

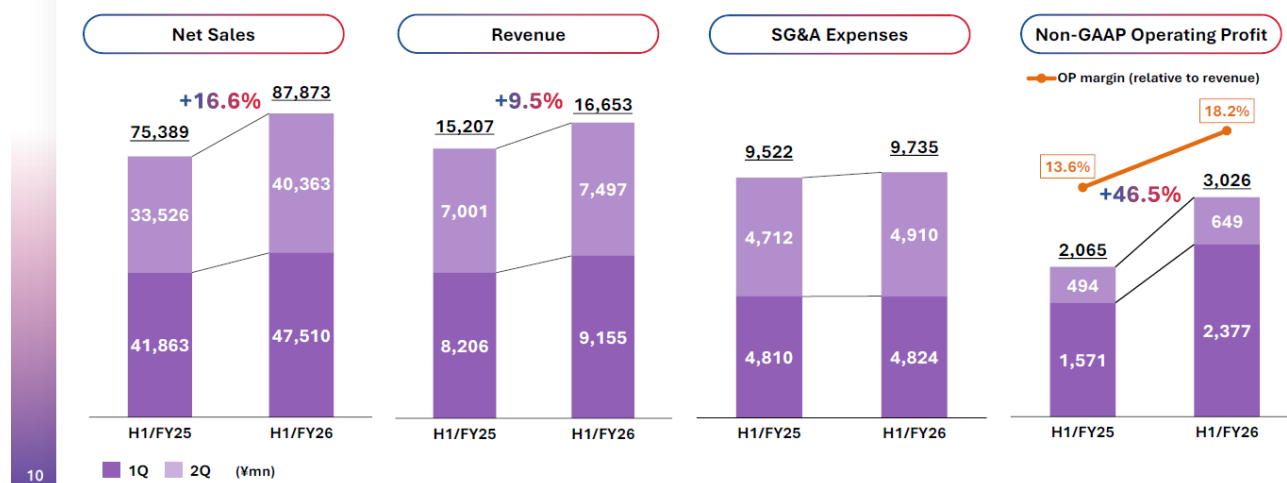
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H1 FY2026 Consolidated Earnings Trend

Expanding the topline by growing existing projects and acquiring new projects, while controlling SG&A expenses, resulting in an improvement of **+4.6Pt YoY** in Non-GAAP operating profit margin.



Page 10 shows the consolidated performance trends for the first half.

In the current fiscal year, top-line growth has continued whether viewed on a single-quarter basis or on a cumulative first-half basis, driven by the expansion of existing projects and the acquisition of new ones.

Furthermore, with top-line expansion progressing without a significant increase in expenses, the Non-GAAP operating profit margin improved by 4.6Pt year-on-year.

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Q2 FY2026 (Apr-Jun) Consolidated Income Statement

Achieving **net sales growth of +20.4% YoY** and **double-digit Non-GAAP operating profit growth of +31.5% YoY** by absorbing increases in cost of sales and SG&A expenses.

Delivering **significant growth in profit attributable to owners of parent of +332.3% YoY**, reflecting the effect of reduced corporate tax burden due to the decision to liquidate a subsidiary.

(¥millions, unless otherwise stated)	Q2 2026				Q2 2025		
	Value	Ratio to net sales	Ratio to revenue	YoY	Value	Ratio to net sales	Ratio to revenue
Revenue	7,497	18.6%	100.0%	+7.1%	7,001	20.9%	100.0%
Gross profit	5,532	13.7%	73.8%	+6.7%	5,186	15.5%	74.1%
SG&A expenses	4,910	12.2%	65.5%	+4.2%	4,712	14.1%	67.3%
Non-GAAP operating profit	649	1.6%	8.7%	+31.5%	494	1.5%	7.1%
Operating profit	588	1.5%	7.8%	+25.8%	467	1.4%	6.7%
Equity in earnings of affiliates, etc.	234	0.6%	3.1%	+50.4%	155	0.5%	2.2%
Profit attributable to owners of parent	1,433	3.6%	19.1%	+332.3%	332	1.0%	4.7%
[Reference] Net sales	40,363	100.0%	—	+20.4%	33,526	100.0%	—

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Next, moving on to the second item on the agenda.

From here, I will explain the overview of our consolidated financial results for the second quarter alone, covering the period from April to June.

Page 12 shows our consolidated income statement for the second quarter. Net sales increased 20.4% year-on-year, reaching approximately ¥40.4 billion.

As a result of absorbing the increase in cost of sales and SG&A expenses, Non-GAAP operating profit came in at ¥0.65 billion, achieving substantial profit growth of 31.5% year-on-year.

Furthermore, reflecting the tax burden reduction effect stemming from the decision to liquidate a subsidiary, quarterly profit attributable to owners of parent stood at ¥1.43 billion, representing a significant increase of 332.3% year-on-year.

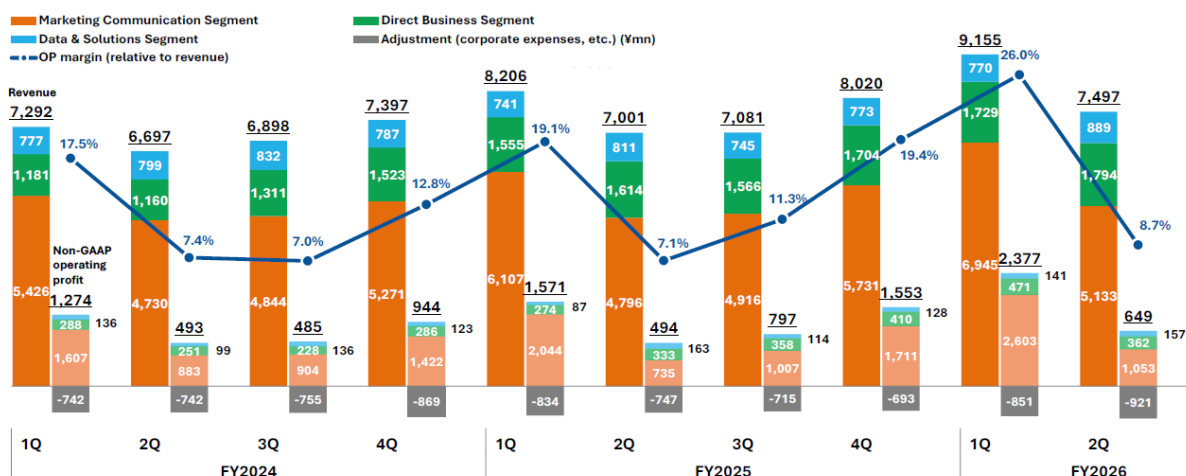
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Quarterly Trend of Consolidated Earnings

Improving Non-GAAP operating profit margin by **+1.6Pt YoY**, even amidst 2Q seasonality where topline growth tends to slow and personnel expenses tend to increase.



*As the elimination of intersegment revenue is omitted, the total of each business revenue and consolidated revenue (underlined figures) do not coincide.

Page 13 shows the quarterly trend of consolidated earnings by segment.

Every year, this second quarter tends to be a period where top-line growth is restrained due to market seasonality and personnel expenses such as new graduate hiring increase. However, the Non-GAAP operating profit margin improved by 1.6Pt to 8.7% for the current period, compared with 7.1% for the same period of the previous fiscal year.

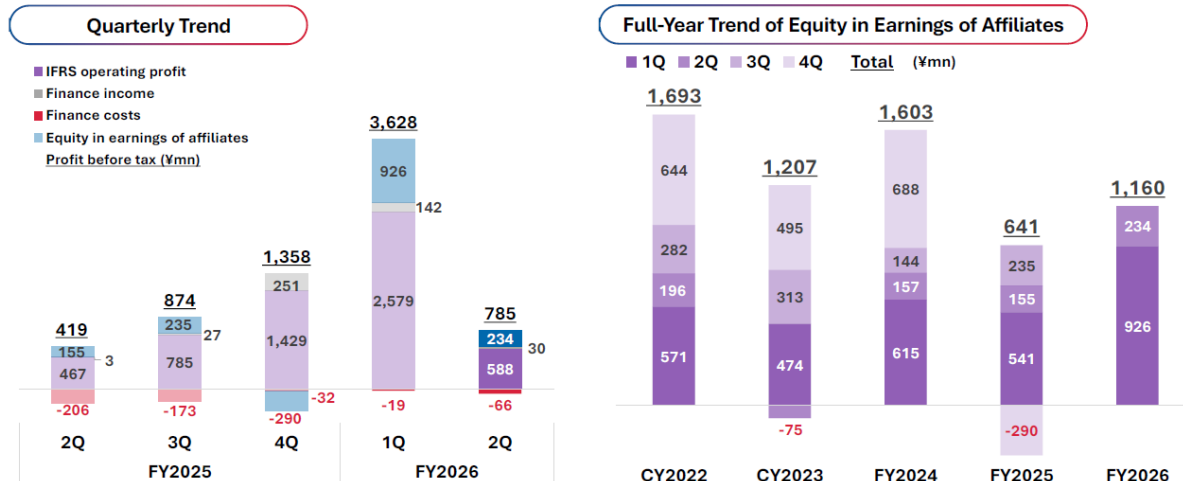
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Quarterly Trend of Consolidated Profit Before Tax (After reclassification of discontinued operations)

Achieving strong performance in equity in earnings of affiliates, primarily driven by Dentsu Digital, with progress as of H1 surpassing the full-year results of the previous fiscal year.



Page 14 details the breakdown down to profit before tax and the cumulative trend of share of profit (loss) of investments accounted for using equity method.

Share of profit of investments accounted for using equity method, centered on Dentsu Digital, remained solid, with progress as of the end of the second quarter exceeding the full-year results for the previous year.

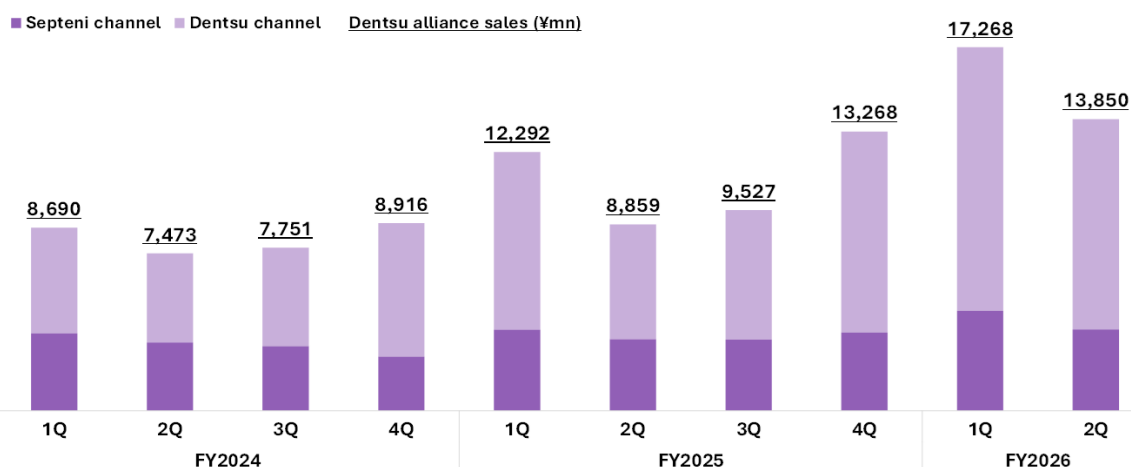
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Progress on Business Alliance with Dentsu Group

— Growing overall alliance sales by **+56.3% YoY**, driven by the acquisition of global brands as well as major domestic clients.



On page 15, we outline the progress of our business alliance with the Dentsu Group.

To more clearly illustrate the synergy with the Dentsu Group, we have updated the breakdown of the graph starting from the first quarter.

First, regarding the data definition: the dark purple portion of the graph, labeled "Septeni channel," represents the total of projects within this Dentsu collaboration where our Group acts as the primary contact for the client and recognizes the sales. The light purple portion, labeled "Dentsu channel," refers to sales primarily recognized through the Dentsu Group. The progress of our collaboration is shown as the sum of these two channels.

During this quarter, as a result of the acquisition of global brands as well as major domestic clients contributing to performance, collaboration sales reached approximately ¥13.9 billion, representing an increase of 56.3% year-on-year, continuing to demonstrate strong progress.

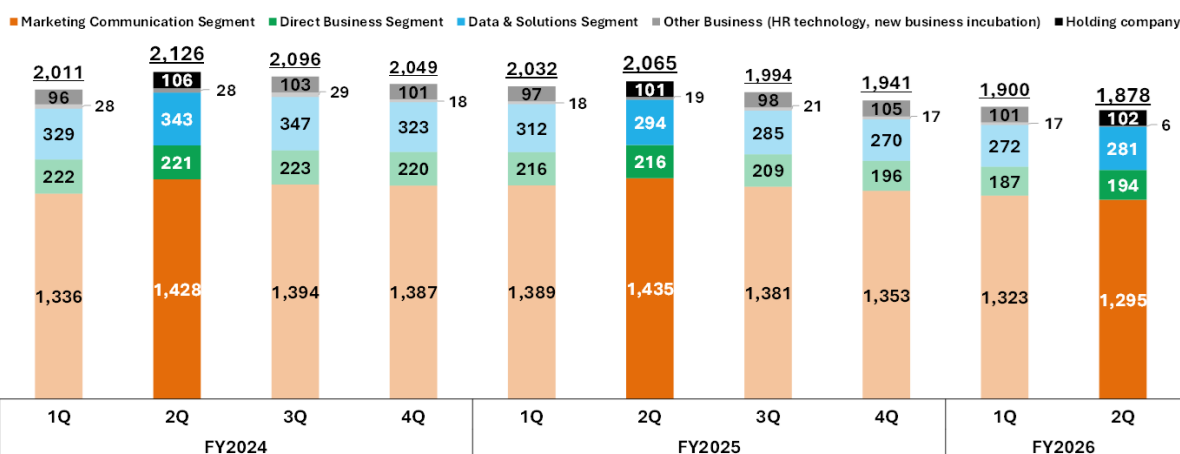
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Workforce Size Trend

Welcoming 26 new graduates in April, alongside a net decrease of 25 headcount due to deconsolidation resulting from the promotion of business portfolio management. Controlling headcount at an appropriate level, promoting optimization and efficiency in group-wide personnel allocation.



Page 16 shows the trends in our consolidated employee headcount.

In April, 26 new graduates joined the company. On the other hand, there was a net decrease of 25 employees due to changes such as deconsolidation accompanying the promotion of business portfolio management, bringing the total employee headcount at the end of the current quarter to 1,878.

We will continue to control the employee headcount at an appropriate level while promoting the optimization of workforce allocation and efficiency across the entire Group.

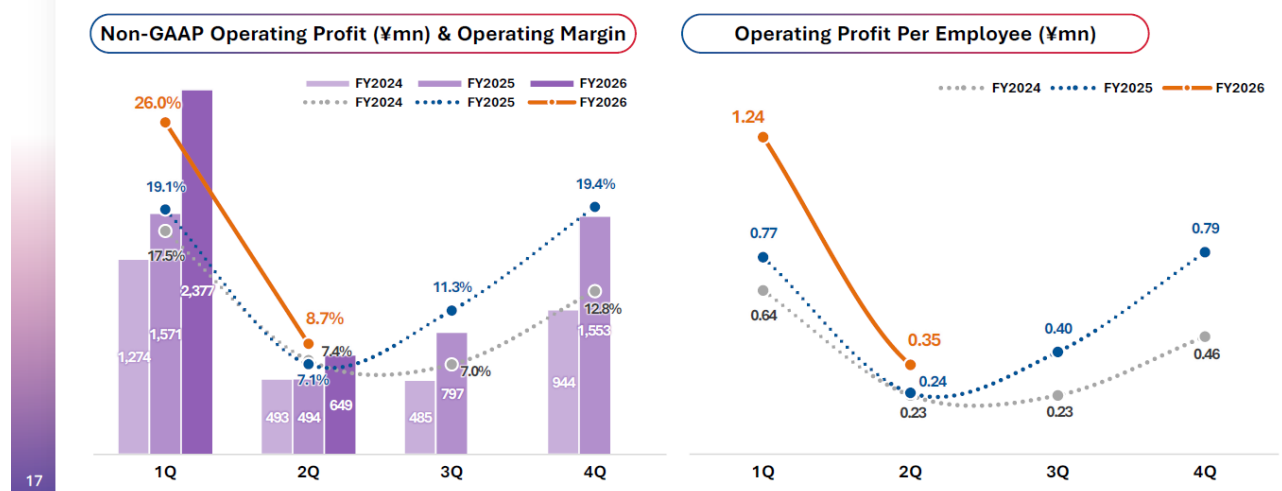
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Non-GAAP Operating Profit and Productivity Trends

Expanding and improving both the amount and margin of Non-GAAP operating profit, while steadily improving operating profit per employee as a productivity metric over the past two years.



Page 17 shows the trends in consolidated Non-GAAP operating profit and productivity.

As mentioned on the previous page, our employee headcount has recently decreased slightly, mainly due to factors such as promoting portfolio management and implementing appropriate recruitment controls.

On the left, we present a graph showing the quarterly trend of Non-GAAP operating profit over the past three years, and on the right, the change in operating profit per employee. As the topline expanded without a significant increase in expenses, both the amount and margin of Non-GAAP operating profit have continued to expand and improve.

As a result, operating profit per employee as a productivity indicator reached ¥1.24 million in Q1 and ¥350,000 in Q2 of the current period, exceeding the levels of the past two years and demonstrating an increase in productivity. We believe that with progress in workforce optimization and efficiency, we are steadily evolving into a lean organizational structure capable of generating high profits through appropriate resource allocation.

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Marketing Communication Segment Earnings Overview

- Achieving **strong net sales growth of +24.7% YoY** driven by the expansion of existing clients, along with **Non-GAAP operating profit growth of +43.3% YoY** through management focusing on cost efficiency without significantly increasing cost of sales or SG&A expenses.

(¥millions, unless otherwise stated)	Q2 2026				Q2 2025		
	Value	Ratio to net sales	Ratio to revenue	YoY	Value	Ratio to net sales	Ratio to revenue
Revenue	5,133	14.9%	100.0%	+7.0%	4,796	17.3%	100.0%
Gross profit	4,176	12.1%	81.3%	+8.9%	3,833	13.9%	79.9%
SG&A expenses	3,128	9.1%	60.9%	+0.8%	3,104	11.2%	64.7%
Non-GAAP operating profit	1,053	3.1%	20.5%	+43.3%	735	2.7%	15.3%
[Reference] Net sales	34,476	100.0%	—	+24.7%	27,649	100.0%	—

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From here, I will move on to the overview of our performance by segment. First, let me explain the Marketing Communication Segment.

Page 19 presents the performance overview for the Marketing Communication Segment.

Centered on the expansion of existing clients, net sales reached approximately ¥34.5 billion, representing a significant increase of 24.7% year-on-year. In addition, Non-GAAP operating profit reached approximately ¥1.1 billion, up 43.3% year-on-year, achieving substantial profit growth.

We believe this is the result of managing our operations to achieve top-line expansion while emphasizing cost efficiency, without incurring a significant increase in cost of sales and SG&A expenses.

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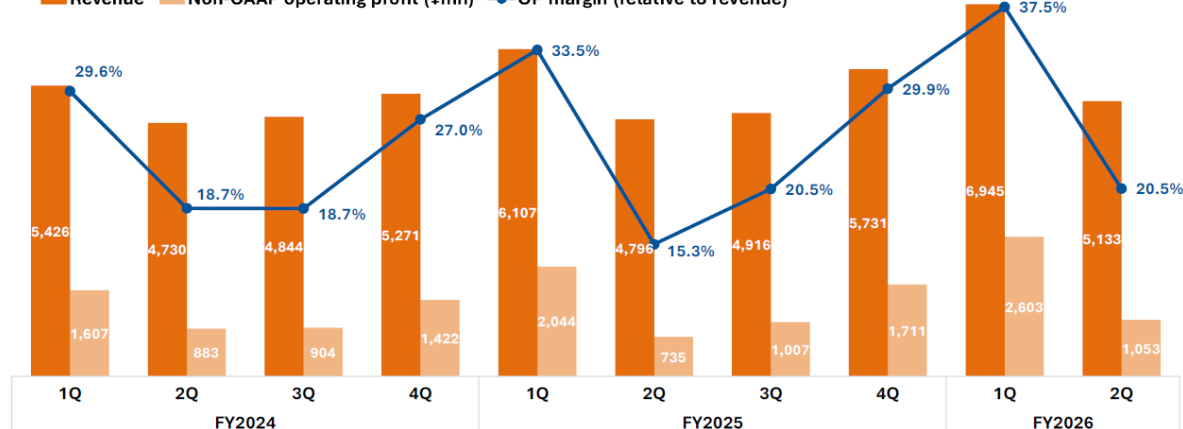
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Marketing Communication Segment Quarterly Earnings Trend

Improving productivity per employee and increasing Non-GAAP operating profit margin by **+5.2Pt YoY**, while aiming to achieve an operating profit margin exceeding the past two years by enhancing profitability and productivity through the expansion of individual projects and the strengthening of solution sales.

Revenue Non-GAAP operating profit (¥mn) OP margin (relative to revenue)



Page 20 shows the quarterly performance trends for the Marketing Communication Segment.

With productivity per employee also improving, the Non-GAAP operating profit margin improved by 5.2Pt year-on-year to 20.5%.

By expanding each project and strengthening solution sales, we will improve profitability and productivity, aiming for further improvement in the operating profit margin.

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Marketing Communication Segment Topic

Winning double awards for the "Top Sales Award" and the "Best Growth Award" in the Platinum category for the second half of FY2025 under Indeed's Certified Partner Program.*

Indeed's Certified Partner Program

Being certified as a **Platinum Partner**, the highest category in Indeed's Certified Partner Program, starting in FY2025



〈Top Sales Award〉

Awarded to the certified partner that generated the highest sales volume within the category

〈Best Growth Award〉

Awarded to the certified partners that achieved a significant half-on-half increase in total sales volume compared to the first half of the fiscal year

Utilizing in HR Solutions

Developing integrated HR solution services by combining our proprietary, scientific AI matching technology "HaKaSe" with our job site advertising management capabilities, which served as the foundation for this award

Attracting candidates (AX):

Maximizing candidate pool formation through ad operations



Recruiting talent (CX):

Improving hiring rates by utilizing HaKaSe



Fostering talent (EX):

Preventing employee turnover by optimizing onboarding and other processes

*From October 2025 to March 2026

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On page 21, as a topic, I will report on two awards received under Indeed's Certified Partner Program.

We won double awards in the Platinum category for the second half of 2025: the "Top Sales Award" and the "Best Growth Award."

We believe this recognition resulted from achieving both the highest revenue performance and a substantial growth rate within the same category simultaneously, proving our high operational capabilities.

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Direct Business Segment Earnings Overview

- Achieving revenue growth of **+11.2% YoY** driven by the further expansion of existing clients, along with Non-GAAP operating profit growth of **+8.9% YoY** despite increasing expenses aimed at building new revenue models.

(¥millions, unless otherwise stated)	Q2 2026				Q2 2025		
	Value	Ratio to net sales	Ratio to revenue	YoY	Value	Ratio to net sales	Ratio to revenue
Revenue	1,794	31.0%	100.0%	+11.2%	1,614	28.6%	100.0%
Gross profit	962	16.6%	53.6%	+4.2%	923	16.3%	57.2%
SG&A expenses	610	10.5%	34.0%	+1.1%	603	10.7%	37.4%
Non-GAAP operating profit	362	6.3%	20.2%	+8.9%	333	5.9%	20.6%
[Reference] Net sales	5,793	100.0%	—	+2.5%	5,651	100.0%	—

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Moving on to the fourth item on our agenda: an overview of the Direct Business Segment.

Page 23 presents the performance overview for the Direct Business Segment.

Driven by the further expansion of existing clients, revenue reached approximately ¥1.8 billion, achieving year-on-year growth of 11.2%.

In addition, while increasing upfront investments toward building a new revenue model, Non-GAAP operating profit reached ¥0.36 billion, achieving a year-on-year profit increase of 8.9%.

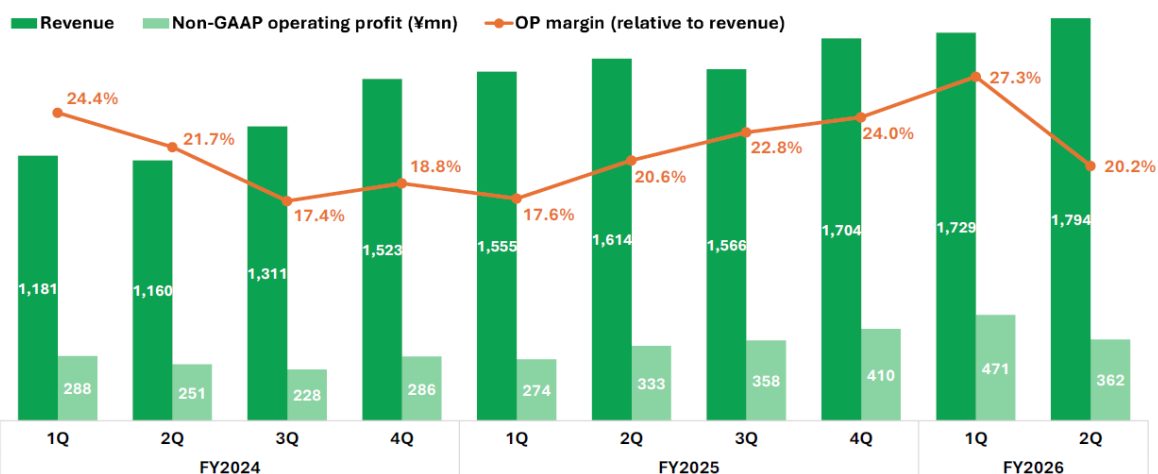
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Direct Business Segment Quarterly Earnings Trend

Experiencing a decline in Non-GAAP operating profit margin due to upfront investments in subsidiaries established and acquired to strengthen the D2C business, as anticipated at the beginning of the fiscal year.



Page 24 presents the quarterly performance trends for the Direct Business Segment.

While the Non-GAAP operating profit margin has declined due to upfront investments in subsidiaries established and acquired to strengthen the D2C business, which was anticipated from the beginning of the fiscal year, the business scale is steadily expanding.

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Data & Solutions Segment Earnings Overview

Achieving a **+9.6% YoY** increase in revenue, driven by improved engineer utilization rates in development projects, as well as the effects of expanding the service lineup including training businesses and solutions.

(¥millions, unless otherwise stated)	Q2 2026			Q2 2025	
	Value	Ratio	YoY	Value	Ratio
Revenue	889	100.0%	+9.6%	811	100.0%
Gross profit	555	62.4%	+6.5%	521	64.3%
SG&A expenses	398	44.8%	+11.0%	359	44.2%
Non-GAAP operating profit	157	17.7%	-3.5%	163	20.1%
[Reference] Net sales	889	100.0%	+9.6%	811	100.0%

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Moving on to the fifth item on our agenda: an overview of the Data & Solutions Segment.

Page 26 presents the performance overview for the Data & Solutions Segment.

While improving the engineer utilization rate in development projects, supported also by the effects of expanding our service lineup, including the training business and solutions, revenue reached ¥0.89 billion, achieving year-on-year revenue growth of 9.6%.

Contact Information

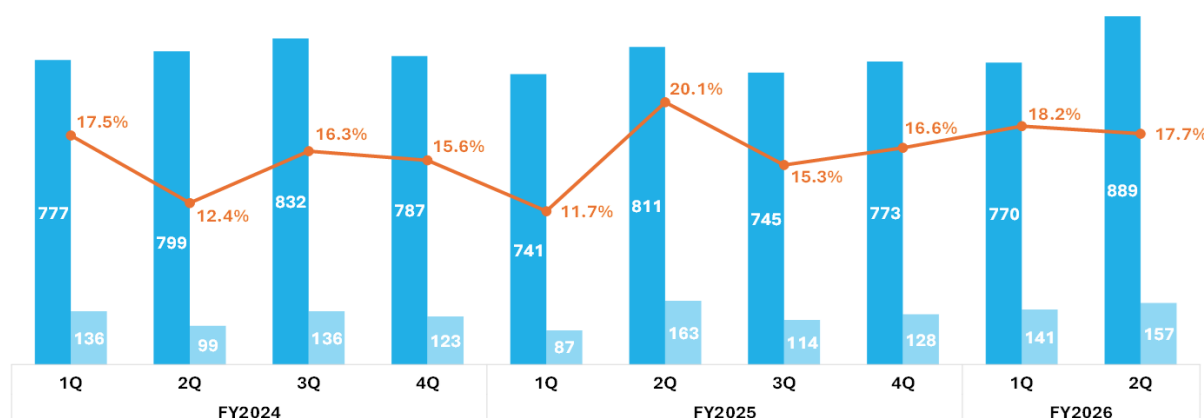
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Data & Solutions Segment Quarterly Earnings Trend

Achieving record-high quarterly revenue for this business segment, while aiming to increase top-line performance and improve profit margin by continuing headcount optimization and utilization rate improvements.

Revenue Non-GAAP operating profit (¥mn) OP margin (relative to revenue)



Page 27 presents the quarterly performance trends for the Data & Solutions Segment.

Within the Data & Solutions Segment, we achieved record-high revenue for a single quarter.

Going forward, while continuing to optimize headcount and improve utilization rates, we will strive to increase the topline and enhance profit margins.

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Data & Solutions Segment Topic

— Launching the **Claude Code Corporate Training**, which covers all four products* of "Claude" provided by Anthropic, supporting everything from initial setup and training to security measures and practical workplace implementation.

Background

- Facing growing needs from companies seeking to systematically implement and operate Claude, which possesses high autonomous processing capabilities in practical operations, to improve productivity
- Sensing a sense of crisis that failing to adopt it will result in losing competitiveness

Facing the risk of implementing into practical operations without sufficient professional expertise or management systems (governance)

Value Proposition

- Offering all-in-one learning for four products alongside end-to-end support from environment setup to practical workplace implementation
- Ensuring governance quality aligned with listed company standards
- Providing implementation programs supervised by officially certified professionals and backed by an extensive track record in training

Supporting a wide range of companies in AI utilization based on the Septeni Group's track record of service implementation and training expertise, **contributing to sustainable growth and organizational transformation** of client companies



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*Claude, Claude Cowork, Claude Code, Claude Design

*This service is provided independently by FLINTERS. There is no partnership, official endorsement, sponsorship, or promotional affiliation between FLINTERS and Anthropic.

Page 28 presents a key topic.

In the Data & Solutions Segment, we launched the "Claude Code Corporate Training," which covers four "Claude" products provided by Anthropic and supports everything from introduction and setup to practical integration into business operations.

Through this initiative, while advancing the use of AI within our company, we aim to leverage that know-how to contribute to our client companies' sustainable growth and organizational transformation.

This concludes our review of the second quarter for our three main business segments.

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Revision of Full-Year Earnings Forecast for FY2026 (Consolidated)

Deciding to liquidate consolidated subsidiaries in Southeast Asia in connection with the share transfer of LION DIGITAL GLOBAL announced on May 26, 2026, and reflecting the effect of reduced corporate tax burden.

Revising upward the full-year forecast for profit attributable to owners of parent through the selection and concentration of the business portfolio.

(¥millions, unless otherwise stated)	FY2025 results	Previous forecast for FY2026	Revised forecast for FY2026	Change	Projected growth rate (YoY)
Revenue	30,309	33,300	33,300	—	+9.9%
Non-GAAP operating profit	4,414	5,400	5,400	—	+22.3%
Profit attributable to owners of parent	3,491	5,250	6,000	+14.3%	+71.9%
Earnings per share (EPS)	¥16.83	¥25.31	¥29.21	+¥3.90	+¥12.38
Net sales	148,783	163,000	163,000	—	+9.6%
[Reference] Revenue to net sales ratio	20.4%	20.4%	20.4%	—	—
Dividends per share	¥18.00	¥18.00	Interim ¥9.00	—	± 0
			Year-end ¥9.00		

*For details, please refer to the timely disclosure announced on August 6, 2026.

Finally, I would like to share the revision of our earnings forecast and the progress relative to the revised forecast.

Page 30 presents the revision of our full-year earnings forecast.

Following the transfer of shares of LION DIGITAL GLOBAL announced on May 26, 2026, we decided to liquidate a consolidated subsidiary in Southeast Asia.

Reflecting the tax reduction effect resulting from this, we decided to upwardly revise our full-year forecast for profit attributable to owners of parent to ¥6.0 billion.

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Full-Year Earnings Forecast for FY2026 (By business segment)

■ Expecting growth in both revenue and profit across all segments, led by the Marketing Communication Segment.

(¥millions)	Revenue			Non-GAAP operating profit		
	FY2025 results	FY2026 forecasts	YoY	FY2025 results	FY2026 forecasts	YoY
Marketing Communication	21,550	24,000	+11.4%	5,497	7,000	+27.3%
Direct Business	6,439	6,800	+5.6%	1,374	1,400	+1.9%
Data & Solutions	3,069	3,600	+17.3%	492	640	+30.2%
Eliminations & Corporate (incl. Other Business)	-750	-1,100	—	-2,948	-3,640	—
Consolidated	30,309	33,300	+9.9%	4,414	5,400	+22.3%

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Page 31 details the full-year earnings forecast by segment.

Across all three segments—Marketing Communication, Direct Business, and Data & Solutions—we expect growth in both revenue and profit for every business.

Because this revision applies solely to consolidated results, there is no change to the earnings forecasts by segment.

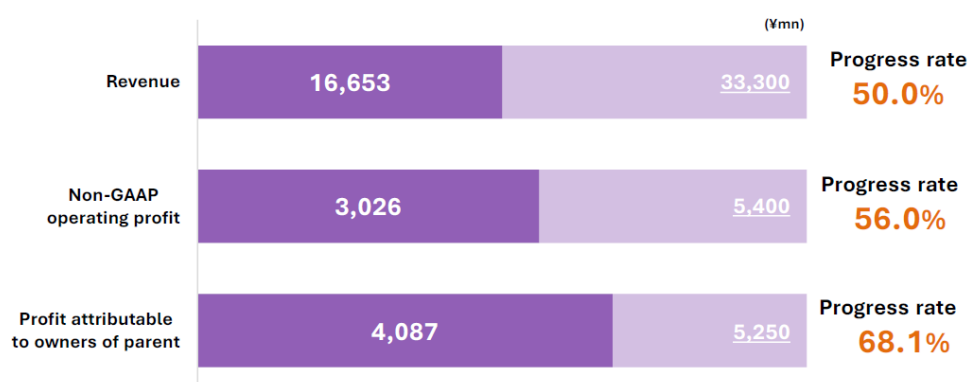
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Progress Against Revised Earnings Forecast (Consolidated)

■ Maintaining a conservative assumption for the second half, considering the potential indirect impact on the overall advertising market, while continuing to expect no direct impact on our business performance arising from macroeconomic uncertainties, including global geopolitical conditions. Aiming to achieve the full-year earnings forecast by **improving profitability and productivity through the construction of a lean business foundation**, in addition to business growth.



On page 32, I will explain the progress relative to our revised earnings forecast.

Looking ahead to the second half, while we continue to expect no direct impact on our performance stemming from uncertainties in the macroeconomic environment, including global affairs, we have adopted a conservative assumption in light of the possibility that indirect impacts may arise across the overall advertising market.

We will strive to achieve our full-year earnings forecast by improving profitability and productivity through the construction of a lean business foundation, in addition to business growth.

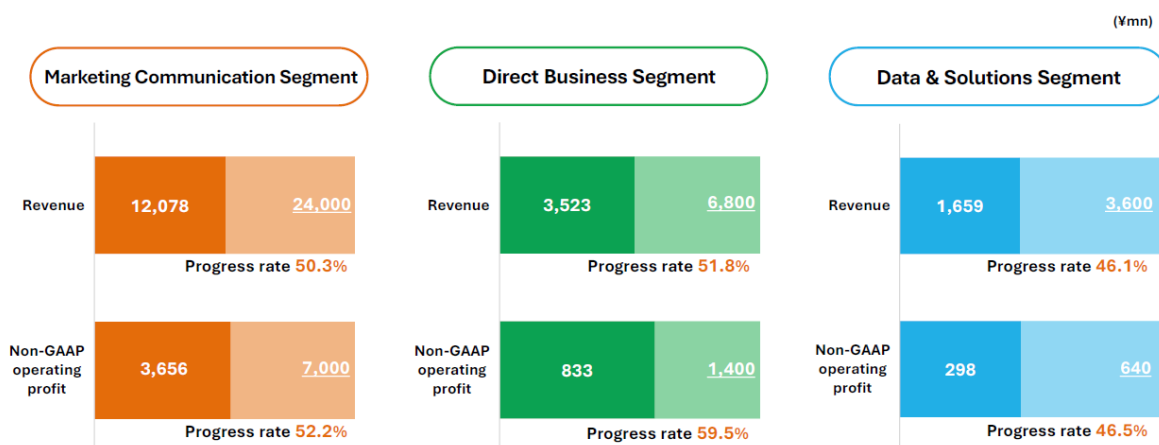
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Progress Against Revised Earnings Forecast (By business segment)

■ Making steady progress across all businesses relative to the earnings forecast as of August 2026.



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Page 33 presents the progress relative to our revised earnings forecast by segment.

Against the revised earnings forecast as of August, progress across all segments remains solid.

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Implementation of Shareholder Returns

- **Paying an interim dividend of ¥9.00 per share** with a record date of June 30, 2026, and continuing shareholder returns in accordance with our capital allocation and shareholder return policy.

FY2026 Annual Dividends Per Share

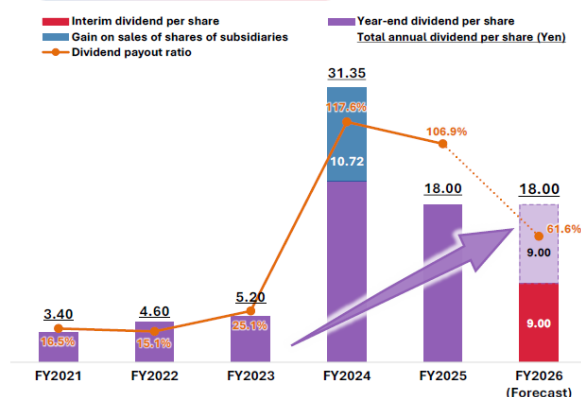
Dividend Per Share	
Interim (result)	9.00円
Year-end (forecast)	9.00円
Total	18.00円

*Record date for year-end dividends: December 31, 2026

FY2026 EPS Forecast

Forecast	
Earnings per share (EPS)	29.21円
Dividend payout ratio	61.6%

Trend of Dividend Per Share



*For details, please refer to the timely disclosure announced on July 21, 2026.

Page 34 presents the implementation of shareholder returns.

At the board of directors meeting in July, we resolved to pay an interim dividend of surplus of ¥9 per share with a record date of June 30, 2026.

Going forward, we will continue to execute shareholder returns in line with our capital allocation and shareholder return policy.

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Story of Septeni Group

SEPTENI STORY

We launched “SEPTENI STORY,” an archive site tracing our 35-year history and our journey of ongoing challenges. (Japanese only)

Please click the image below or scan the QR code.



Shared Research Report

We have published an analyst report prepared by Shared Research Inc. to foster a deeper understanding of our Group's business overview and future growth strategies.

This report was compiled with an emphasis on neutrality, based on SR's research and analysis from a third-party perspective. Moving forward, the content is scheduled to be updated quarterly in conjunction with the Company's earnings announcements.

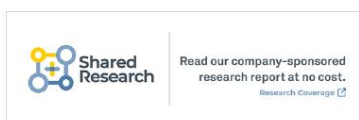
Integrated Report

In Integrated Report 2025, we updated the future we aim for and the specific roadmap toward its realization, focusing on VISION 2030 and the Medium-term Management Plan (FY2026-2028).

Please click the image below or scan the QR code to view the full report.



Please click the image below or scan the QR code to view the full report.



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Finally, I would like to introduce the Septeni Group's story. We have newly launched and disclosed several items in the current fiscal year, and I will summarize them here.

First, in April, we launched "SEPTENI STORY," an archive site tracing the 35-year history and track record of challenges since our founding.

In addition, in May, we published Integrated Report 2025, which was produced centered around VISION 2030 and our Medium-Term Management Plan (FY2026–2028).

Furthermore, starting in May, Shared Research Inc. has published an analyst report on our company with the goal of fostering an even deeper understanding of our Group's business overview and future growth strategies. Going forward, the content is scheduled to be updated quarterly in conjunction with our earnings announcements.

We will continue our IR activities to foster an even deeper understanding of our Group's business overview and future growth strategies, so please take a look.

This concludes my explanation of the financial results for the second quarter of FY2026.

As we reach the midpoint of the current fiscal year, through the growth of all businesses and portfolio optimization, we were able to achieve record-high performance for the first half. Maintaining this strong momentum, we will continue to strive to achieve our revised earnings forecast.

We appreciate your continued support for our group. Thank you for your time today.

[END]

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