

Financial Results Briefing for Second Quarter of Fiscal Year Ending March 31, 2026

November 21, 2025



Agenda

- 1 Overview of Consolidated Financial Results as of September 30, 2025
- 2 Status of Key Measures as of September 30, 2025
- 3 Outlook for the Fiscal Year Ending March 31, 2026
..... Hiroyoshi Kobayashi, President and Representative Director
- 4 Overview of Financial Results as of September 30, 2025
..... Shuichi Ozaki, Director and Executive Officer in charge of Corporate Sector

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Overview of Consolidated Financial Results as of September 30, 2025

Overview of Consolidated Financial Results as of September 30, 2025

Financial Results

operating results

(Millions of yen)	Q2 FY Ending March 2026	Profit Margin	YOY	Q2 FY Ended March 2025
Net sales	23,343	-	9.3%	21,349
Gross profit	5,000	21.4%	9.2%	4,579
Operating profit	2,647	11.3%	10.2%	2,401
Ordinary profit	2,756	11.8%	12.9%	2,442
Profit attributable to owners of parent (interim)	1,984	8.5%	20.1%	1,652

Overview of Consolidated Financial Results as of September 30, 2025

Highlights

highlight

- ▶ Each business field performed well this fiscal year as well, with proceeds exceeding the plan, achieving an increase in revenue
- ▶ With regard to SG&A expenses, although we are actively expanding business and human resource investments for future business expansion, these increases were absorbed by the positive effects of revenue increases
- ▶ Despite cost overruns on certain projects due to increased man-hours more than expected associated with entering new business domains with a high degree of technical difficulty, profit growth was secured through higher revenues

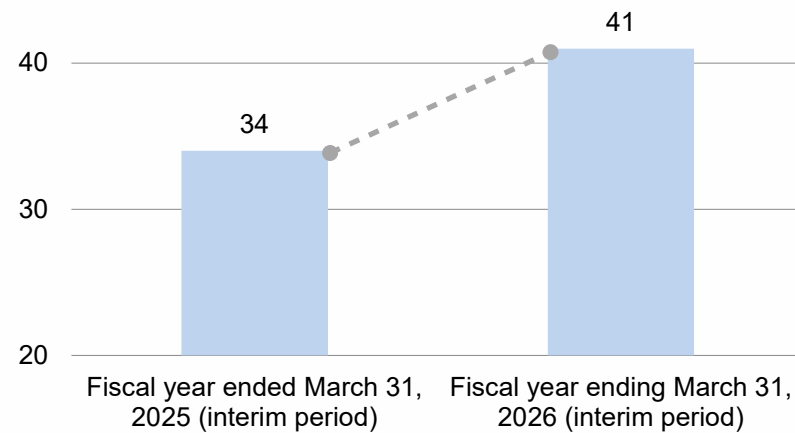


Highlights of Each Field

IT Consulting & Services Field

IT Consulting & Services

(Hundreds of millions of yen)



YoY
+18.3%

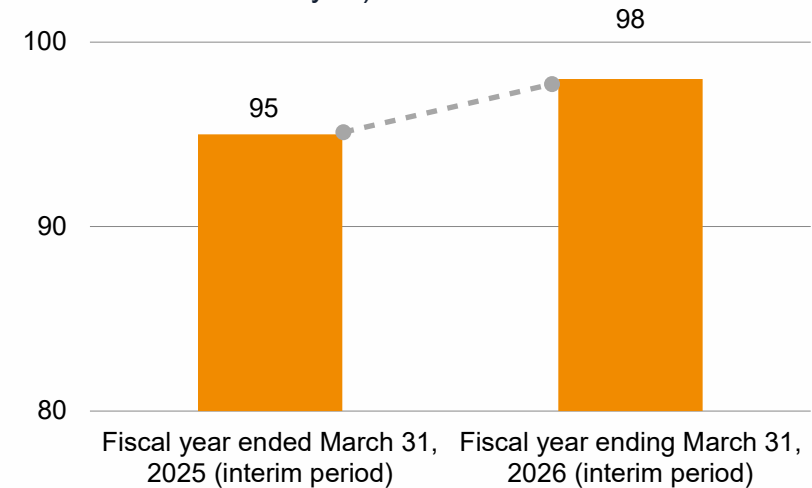
Enterprise SaaS solution projects continue to perform strongly



IT Solutions for Financial Services Field

Financial IT solutions

(Hundreds of millions of yen)



YoY
+3.0%

System development projects, particularly for the banking and insurance sectors, are performing well

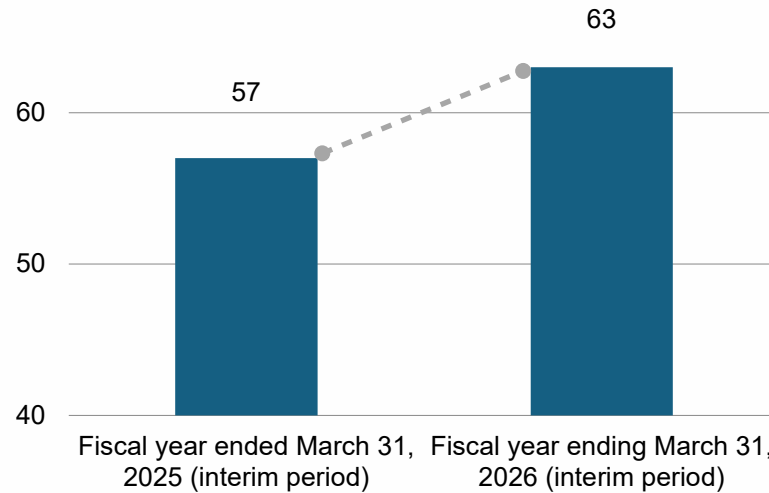


Highlights of Each Field

IT Solutions for Public Corporations Field

Public corporation IT solutions

(Hundreds of millions of yen)



YoY

+10.6%

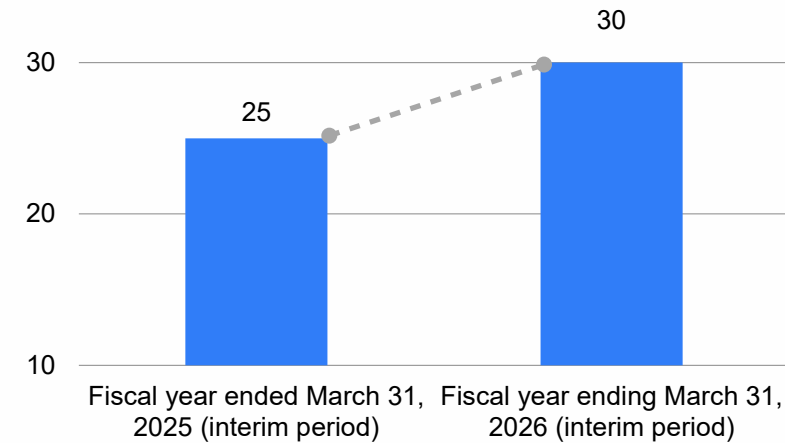
Development projects for the steel industry and government agencies continued to perform well



Platform Solutions Field

Platform solutions

(Hundreds of millions of yen)



YoY

+17.8%

Infrastructure development projects for banking, insurance, and transportation sectors continued to perform well





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Status of Key Measures as of September 30, 2025

Be a Visionary System Integrator

Proceeds

600 Hundreds of millions of yen

Operating profit

62 Hundreds of millions of yen

Diversification and Advancement of Expertise and Knowledge

Expand holdings in highly specialized fields to strengthen problem-solving capabilities for increasingly complex customer challenges

Basic Strategy

1



Enhancement of Proposal Capabilities that Connect to Customer Value

Enhance proposal capabilities that connect IT to customer value through deep understanding of elemental technology characteristics, customer situations, and strategies

Basic Strategy

2

Key Strategies and Target Management Indicators

Key Strategies

Business Strategy

- Deepen our value chain and promote better offerings
- Enhance our expertise related to each business and expand our business domain
- Expand global business

Investment Strategy

- Promote business investment that integrates advanced technologies acquisition and marketing functions
- Strengthen human capital
- Promote strategic partnerships that include M&A and alliances

Human Resource Strategy

- Enhance management that possesses advanced expertise
- Pursue advancement of training systems in engineering fields
- Promote the success of diverse human resources and improve employee engagement

Business portfolio

High-end business ratio	Consulting business
25 %	1.5 billion yen
Product sales business	
2.0 billion yen	

Portfolio by industry

Financial field	Corporate field
45 %	40 %
Public field	
15 %	

Dividend payout ratio

40 % or more

Number of employees

2,900 persons

KPI Progress: High-End Business

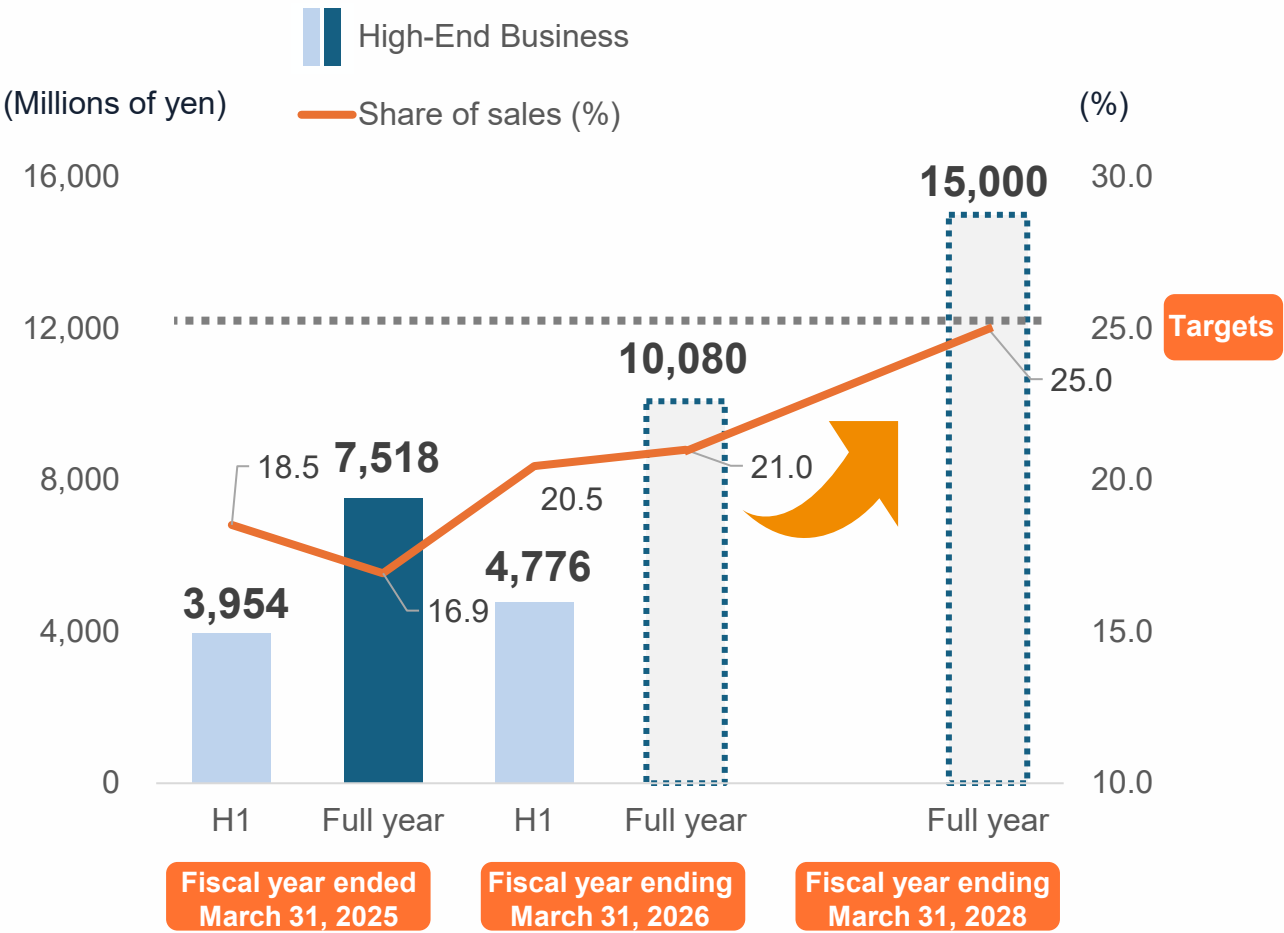
Highlights

highlight

- ▶ Related sales have shown steady growth as we actively take on support requiring advanced specialized technical expertise in upstream processes such as systems planning and design, as well as technically challenging projects.

High-End Business

By accurately capturing market and customer trends and leveraging cutting-edge technologies, including state-of-the-art architecture design and enhanced security, we have successfully delivered high-value-added services for projects with demanding technical requirements.



KPI Progress: Consulting Business

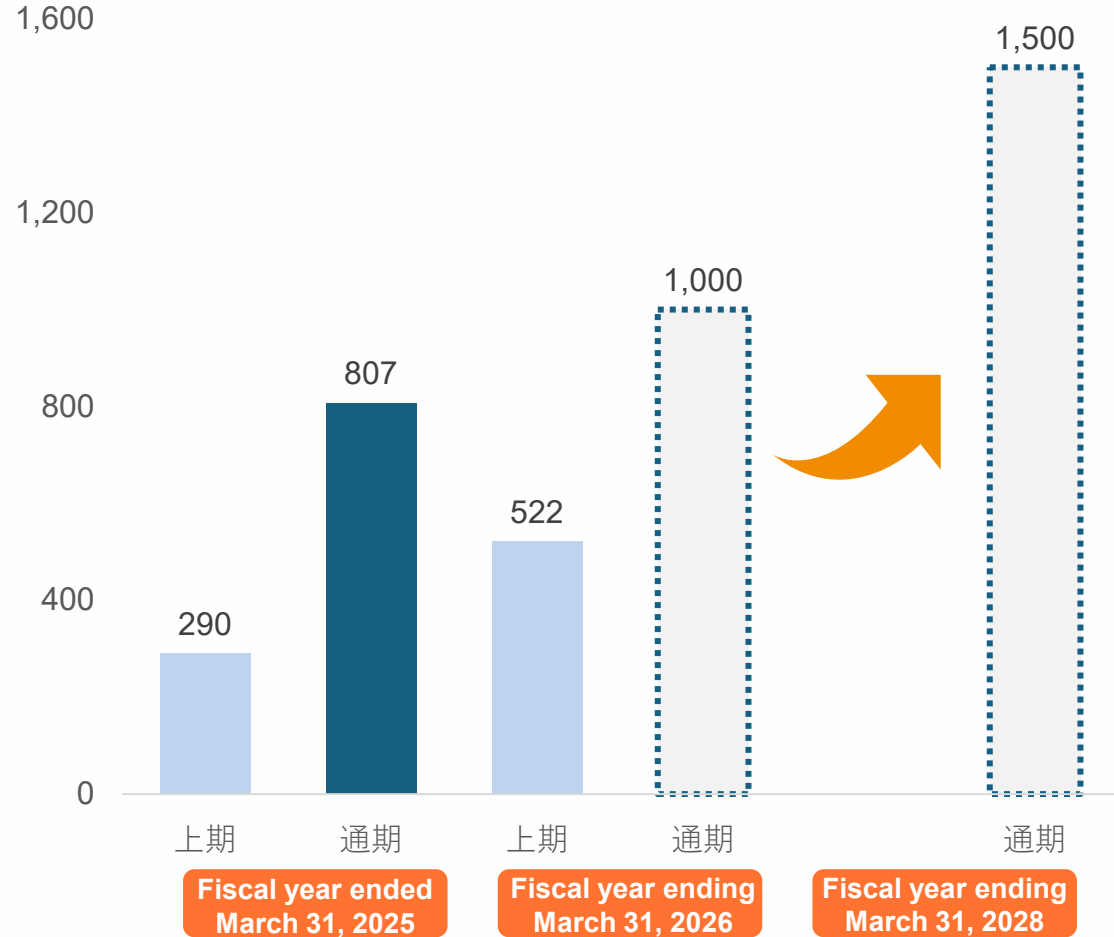
Highlights

highlight

- ▶ Marketing activities conducted last fiscal year generated numerous new customer leads, with sales continuing to trend upward
- ▶ We are expanding our consulting team and will continue to focus on winning additional projects to achieve our sales targets

Year on Year
80% increase

(Millions of yen)



KPI Progress: Product Sales Business

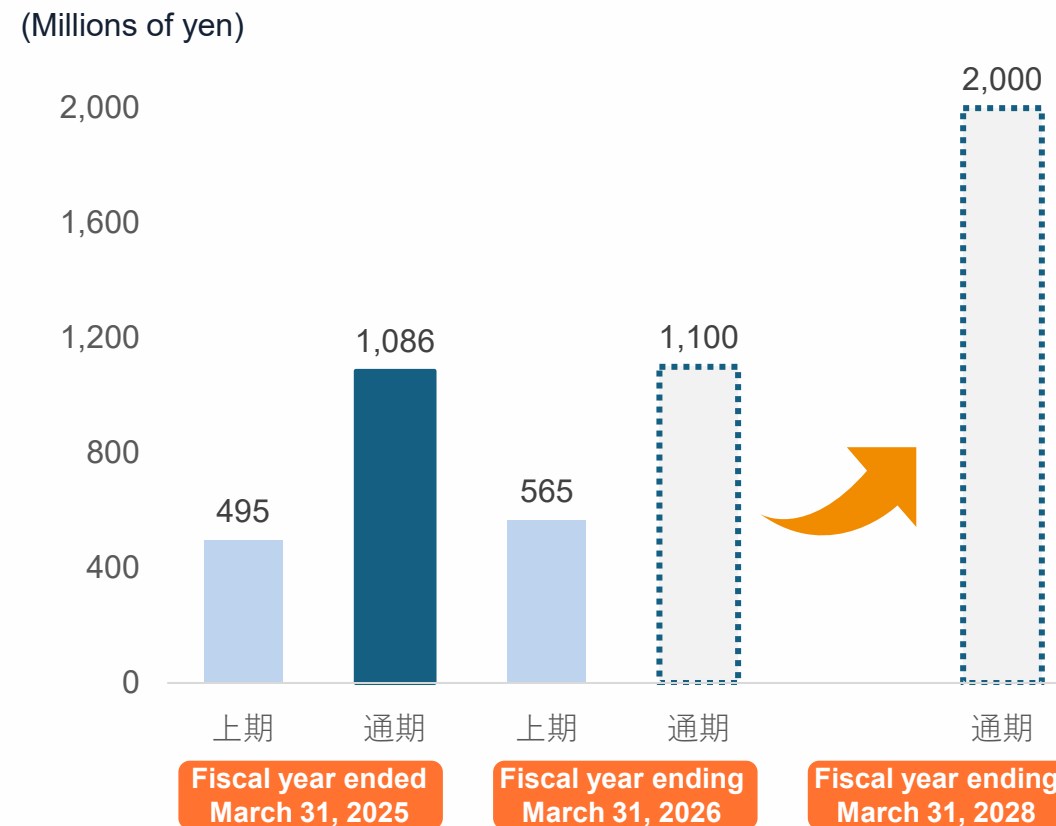
Highlights

highlight

- ▶ Sales of our proprietary products, SaaS solutions such as ServiceNow, and BI tools have grown
- ▶ We will continue to focus on strengthening sales efforts, including cross-selling and marketing, to further grow sales of our proprietary products and solutions

Year on Year

14% increase



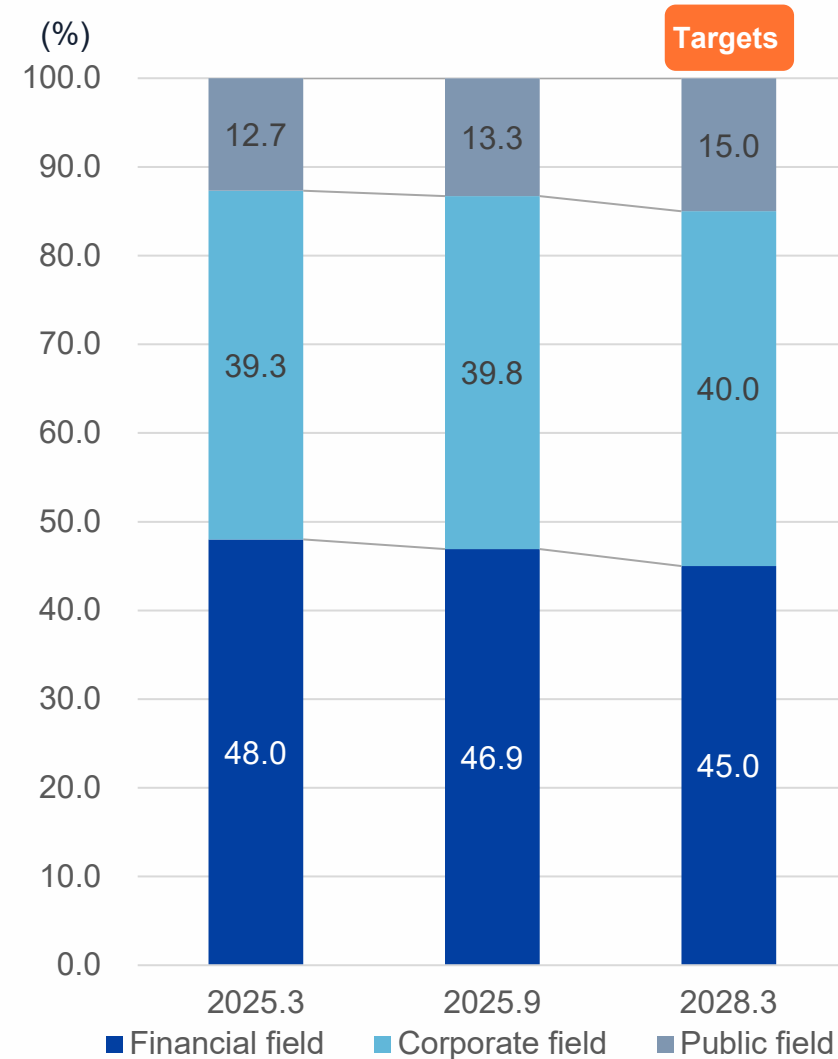
KPI Progress: Portfolio by Industry

Highlights

highlight

- ▶ While overall sales across all industry sectors have expanded, progress toward the industry sector portfolio targets set for the final year of our medium-term management plan continued to perform well
- ▶ Sales to the public sector and manufacturing industries have been particularly strong

*Detailed sales by industry sector are provided on page 25, "Overview of Proceeds by Customer Industry"



Topic (1): Consulting Business

Our Initiatives Related to the Scaled Agile Framework (SAFe)



TDCソフト、ビジネスアジリティーを向上させる「SAFe」パッケージを提供

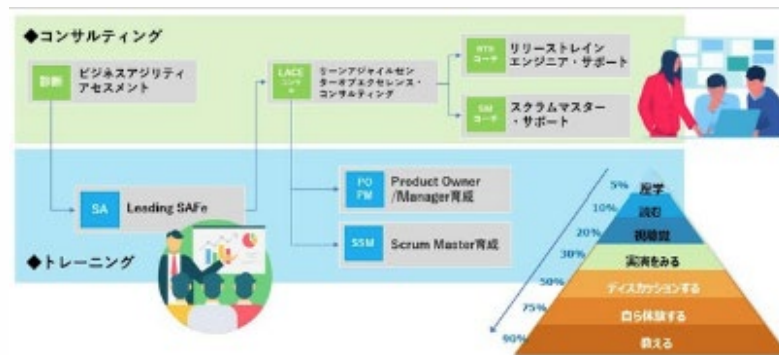
TDCソフトは10月15日、米Scaled Agileが提供する大規模アジャイルフレームワーク「SAFe」の導入から定着までを包括的に支援する新サービス「SAFe パッケージ」の提供を開始した。

TDCソフト、アジャイル開発のコンサルティング/教育サービス「SAFeパッケージ」を提供

デジタルビジネスを加速する専門情報サイト

IT Leaders

TDCソフトは、米Scaled Agileが提供する、大規模組織のアジャイルを推進するためのフレームワークであるSAFe (Scaled Agile Framework) の導入から定着までを包括的に支援する新サービス「SAFeパッケージ」の提供を10月15日に開始した。



October 15, 2025: Press release

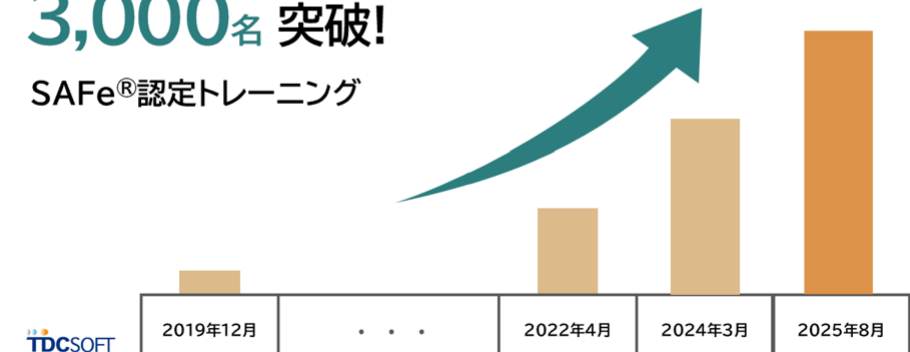


法人向けIT市場の最新を追う
ITビジネス情報サイト

TDCソフト、SAFe認定トレーニングの累計受講者数が3000人を突破

TDCソフトは9月9日、米Scaled Agileが提供する大規模組織でアジャイルを推進するためのフレームワークであるSAFe (Scaled Agile Framework) の認定トレーニングで、累計受講者数が8月時点で3000人を突破したと発表した。

受講人数
3,000名突破!
SAFe®認定トレーニング



September 9, 2025: Press release

Topic (2): Services and Case Studies

Launched New Migration Services and Generated Customer Case Studies

EnterpriseZine

TDCソフト、UNIX環境で稼働する基幹システムの移行を支援 機能変更なしでクラウドや最新インフラへ

TDCソフトは、「UNIXサーバマイグレーションサービス」の提供を開始した。UNIX環境で稼働する基幹システムの安定稼働と、ビジネス変化への対応を支援するとしている。



TDCソフト、UNIX環境で稼働する基幹システムの移行を支援するマイグレーションサービスを提供

TDCソフト株式会社は18日、UNIX環境で稼働する基幹システムの移行を支援する「UNIXサーバマイグレーションサービス」を提供開始したと発表した。



高品質

多くの実績を持つ自動化ツールを活用し、人的ミスを最小限に、自動化できない作業においても、これまでに蓄積してきた豊富なノウハウを活用して高品質を確保。



低コスト

ソリューション提供元企業のオフショア/ニアショアを活用することで低コストを実現。ソリューション固有のライセンス費用無し。運用コスト削減。



管理負担軽減

豊富なSI経験に裏付けされる最適化された管理モデルと、お客様と弊社およびソリューション提供元企業の明確な役割分担により、お客様の管理負担を最小限に。



短期間

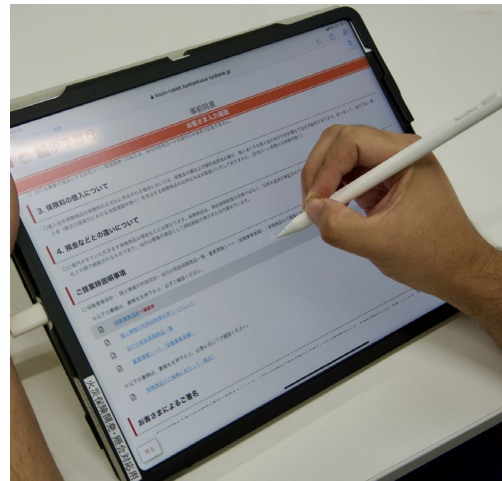
自動化ツール、豊富なマイグレーションノウハウ、プロジェクトマネジメント技術、オフショア/ニアショアの豊富な人的リソースの活用により、短期間での開発を実現。

June 18, 2025: Press release



伊予銀行、住宅ローンと連携したデジタル手続きで顧客体験と営業効率を向上

伊予銀行は「2018年度中期経営計画」を契機にDXを推進し、行員が付加価値の高い業務に集中できる時間を創出してきた。2023年6月、その一環で住宅ローン向け火災保険の申込手続きをデジタル化する「かんたん火災保険システム」を導入した。これにより、従来の紙ベースの手続きを撤廃し、顧客と営業現場双方の負担を軽減。同行が掲げる「Digital-Human-Digital」を軸とする「DHDモデル」の理念を体現した重要なデジタル実装事例となっている。



September 2, 2025: Press release



TDCソフト、西川計測の開発技術標準「LITEC」を策定し、技術支援プロジェクト開始

TDCソフトは9月16日、計測・制御・理化学の専門商社である西川計測に対し、独自開発した開発技術標準「LITEC(リテック)」を策定し、これを土台に技術支援プロジェクトを開始した。同プロジェクトでは、特に生成AI(GitHub Copilot)の活用を焦点を当て、開発プロセス全体の生産性向上と品質強化を包括的に支援する。



TDCソフト、西川計測の開発技術標準を策定し技術支援プロジェクトを開始

TDCソフトは9月16日、計測・制御・理化学の専門商社として、多岐にわたる産業の発展に貢献する西川計測に対し、独自に開発した開発技術標準「LITEC(リテック)」を策定し、これを土台とした技術支援プロジェクトを開始したと発表した。同プロジェクトでは、とくに生成AI(GitHub Copilot)の活用を焦点を当て、開発プロセス全体の生産性向上と品質強化を包括的に支援する。



September 16, 2025: Press release

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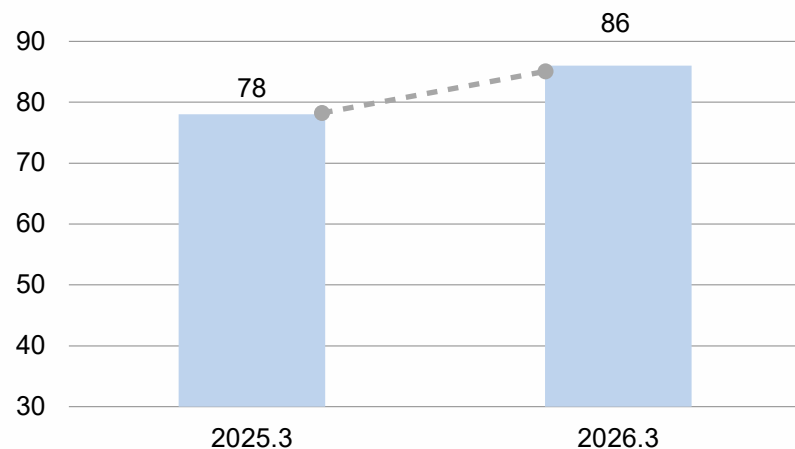
Outlook for the Fiscal Year Ending March 31, 2026

Outlook for the Fiscal Year Ending March 31, 2026 (By Field)

IT Consulting & Services Field

IT Consulting & Services

(Hundreds of millions of yen)



YoY
+10.6%

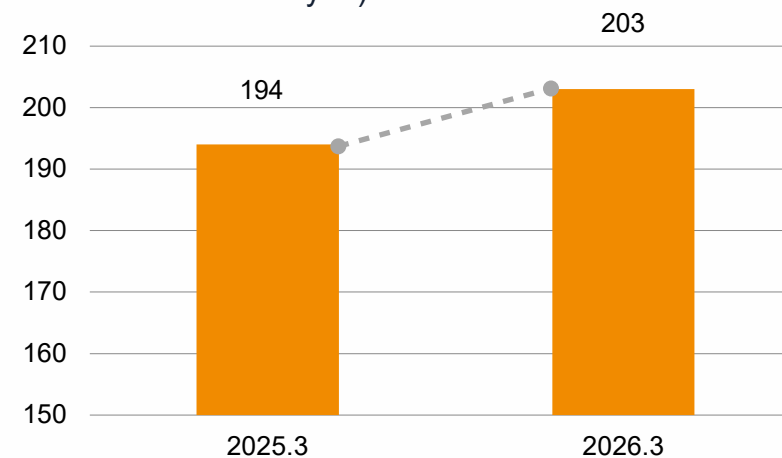
Our SaaS, iPaaS, and other cloud solutions are solid.
We will develop better offerings through combinations of various services.



IT Solutions for Financial Services Field

Financial IT solutions

(Hundreds of millions of yen)



YoY
+4.9%

Due to good demand for modernization, we will expand mainly in the credit and banking fields.

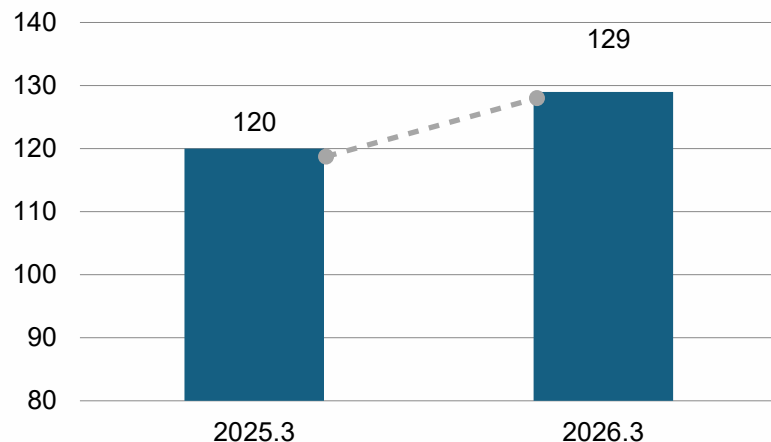


Outlook for the Fiscal Year Ending March 31, 2026 (By Field)

IT Solutions for Public Corporations Field

Public corporation IT solutions

(Hundreds of millions of yen)



YoY

+11.7%

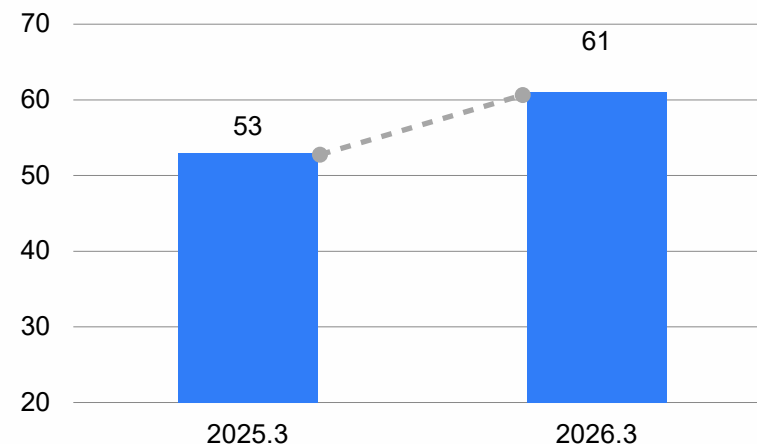
Led by large-scale projects driven by social infrastructure demand, particularly in the public sector. Continuing to expand support from IT/DX planning as customers' partners.



Platform Solutions Field

Platform solutions

(Hundreds of millions of yen)



YoY

+7.8%

Our business is expected to steadily expand due to ongoing cloud needs.



Outlook for the Fiscal Year Ending March 31, 2026

Final Results Forecast and Dividend Forecast

(Millions of Yen)	Net sales	Operating profit	Ordinary profit	Net earnings	EPS (yen)	Dividend Forecast (yen)
Full Fiscal Year	48,000 (+8.1%)	5,100 (+6.9%)	5,200 (+6.6%)	3,520 (+2.5%)	74.67	30

- ▶ The business environment is expected to remain strong, with revenue projected to increase 8.1% year-on-year
- ▶ While maintaining an operating profit margin of 10% or more, we will continue to actively invest in future business expansion, including securing and developing human resources aimed at acquiring advanced elemental technologies and strengthening expertise in line with our medium-term management plan

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Overview of Financial Results as of September 30, 2025

Financial Results as of September 30, 2025 - Categories



Financial Statements

Financial statements



Orders Received/Backlog

Sales order • backlog of unfilled orders



Overview of Proceeds by Customer Industry

Sales by Customer Industry



Operating Profit Analysis

Operating profit analysis

Financial Statements

Statement of Income Profit and Loss Statement

(Millions of Yen)	Q2 FY Ending March 2026	Q2 FY Ended March 2025	Change
Net sales	23,343	21,349	9.3%
Labor expenses	7,420	6,953	6.7%
Outsourcing expenses	10,404	9,319	11.6%
Other expenses	721	667	8.2%
In-process increase/decrease	(204)	(169)	20.3%
Cost of sales	18,342	16,770	9.4%
Gross profit	5,000	4,579	9.2%
Selling, general and administrative expenses	2,353	2,177	8.1%
Operating profit	2,647	2,401	10.2%
Non-operating income/expenses	109	41	167.7%
Ordinary profit	2,756	2,442	12.9%
Profit before income taxes	2,922	2,442	19.7%
Interim profit	1,984	1,652	20.1%
EPS	42.04 yen	35.06 yen	19.9%

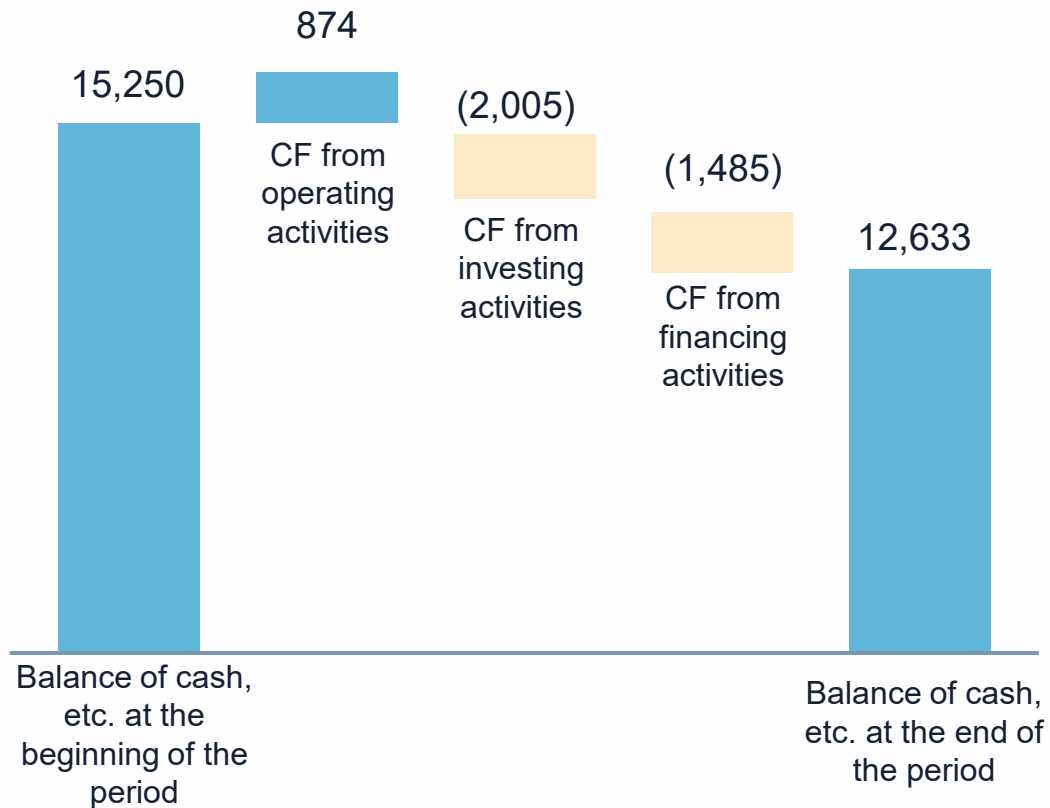
Balance Sheet Balance sheet

(Millions of Yen)	End of Q2 FY Ending March 2026	FY Ended March 2025	Change
Total assets	28,616	28,287	1.2%
Current assets	22,105	23,248	-4.9%
Non-current assets	6,511	5,039	29.2%
Total liabilities	6,680	7,406	-9.8%
Current liabilities	6,234	6,870	-9.3%
Non-current liabilities	446	535	-16.6%
Total net assets	21,935	20,881	5.0%
Total liabilities and net assets	28,615	28,287	1.2%
Owners' equity ratio□	76.7%	73.8%	-
Net assets per share	463.65	442.98	4.7%

Financial Statements

Statement of Cash Flows

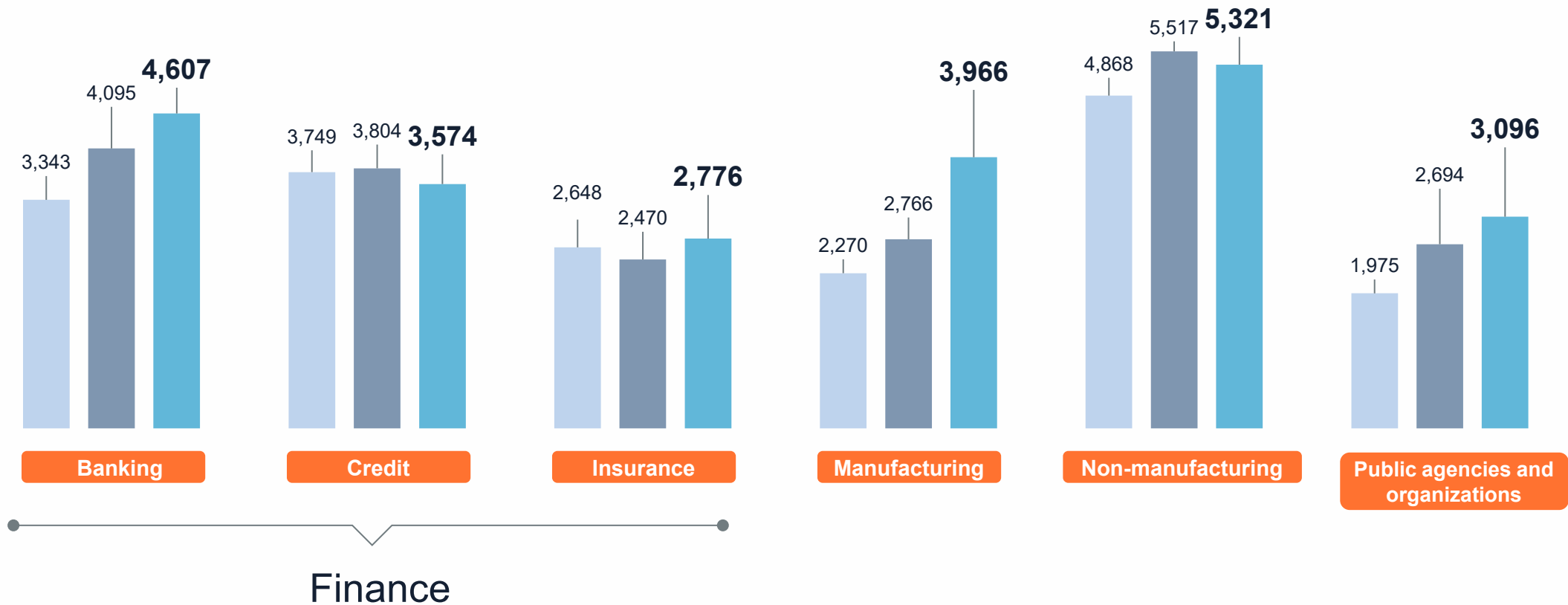
Cash Flow Statement



Balance of cash etc. at the beginning of the period	15,250
Profit (loss) before income taxes	2,922
Increase in notes and accounts receivable – trade and contract assets	(202)
Other	(1,087)
Income taxes	(759)
CF from operating activities	874
Purchase of securities	(1,098)
Purchase of investment securities	(1,203)
Other	296
CF from investing activities	(2,005)
Net increase in short-term loans payable	(186)
Dividend payment	(1,292)
Other	(7)
CF from financing activities	(1,485)
Balance of cash, etc. at the end of the period	12,633

Overview of Proceeds by Customer Industry

As of September 30, 2023 As of September 30, 2024 As of September 30, 2025 Unit (Millions of yen)



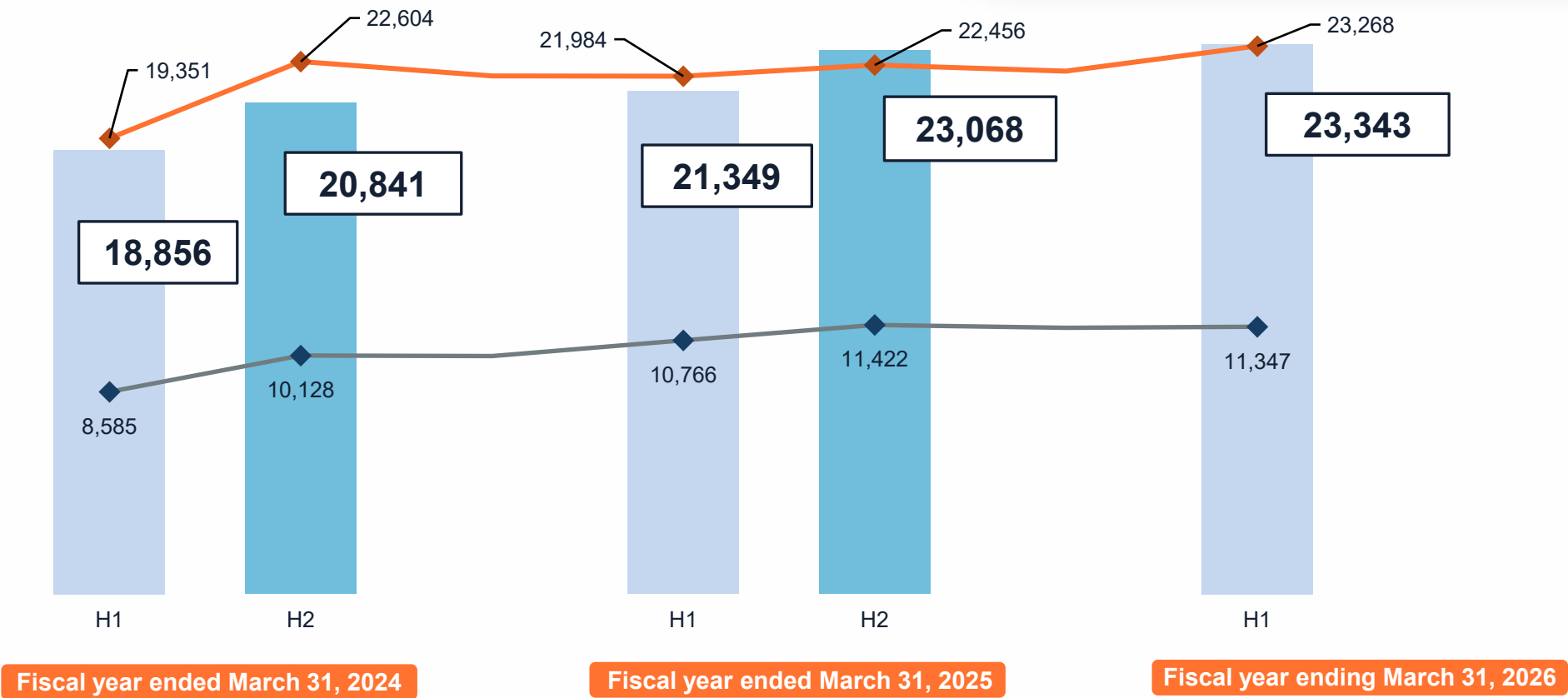
Orders Received/Backlog

Orders received Backlog Proceeds Unit (Millions of yen)

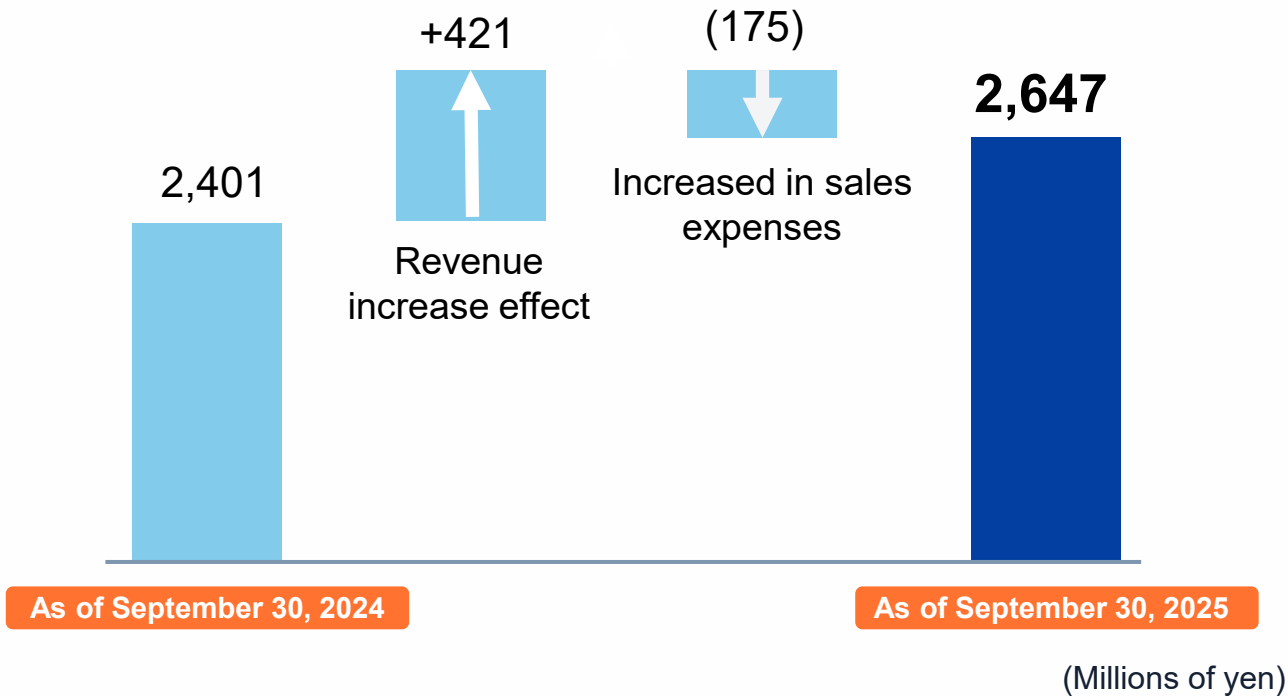


Orders Received/Backlog

Sales order · backlog of unfilled orders



Operating Profit Analysis



Operating Profit Analysis

Operating profit analysis

Gross profit

- Increase in proceeds leading to profit improvement
- Profit margin remained flat (21.4%)

Sales expenses

- Expansion of recruitment and education investment
- Expansion of business investment for new technology acquisition, etc.
- Strengthening marketing initiatives



<https://www.tdc.co.jp/>

***Note about this document:**

The future projections for the TDC Soft Group outlined in this document are based on information available at the present time. These projections are subject to change due to inherent uncertainties and changes in business operations in the future.