

Financial Results Briefing for Fiscal Year Ended March 31, 2026

May 25, 2026

TSE Prime
Securities code: 4687

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Agenda

- 1 Overview of Consolidated Financial Results as of March 31, 2026
- 2 Status of Key Measures as of March 31, 2026
- 3 Outlook for the Fiscal Year Ending March 31, 2027
..... Hiroyoshi Kobayashi, President and Representative Director
- 4 Details of Financial Results as of March 31, 2026
- 5 Appendix: Topics
..... Minoru Kumada, Director and Executive Officer

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Overview of Consolidated Financial Results as of March 31, 2026

Overview of Consolidated Financial Results as of March 31, 2026

Financial Results

(Unit: millions of yen)	Fiscal year ended March 31, 2026	Profit margin	Year on Year	Fiscal year ended March 31, 2025
Proceeds	48,359	-	8.9%	44,417
Gross profit	9,802	20.3%	3.1%	9,505
Operating profit	5,159	10.7%	8.1%	4,772
Ordinary profit	5,359	11.1%	9.9%	4,876
Profit attributable to owners of parent	3,880	8.0%	13.0%	3,433
EPS	82.11 yen	-	12.7%	72.86 yen
Annual dividends per share	33.00 yen	-	22.2%	27.00 yen

Overview of Consolidated Financial Results as of March 31, 2026

Highlights

- ▶ Each business field performed well this fiscal year as well, achieving an increase in revenue
- ▶ Increased profits from the growth of high-value-added businesses absorbed the increase in expenses associated with upfront investments and M&A for future business expansion, resulting in overall profit growth
- ▶ With regard to dividends, we have implemented an increase from our initial projections in line with improved business performance



Net Sales Composition Matrix

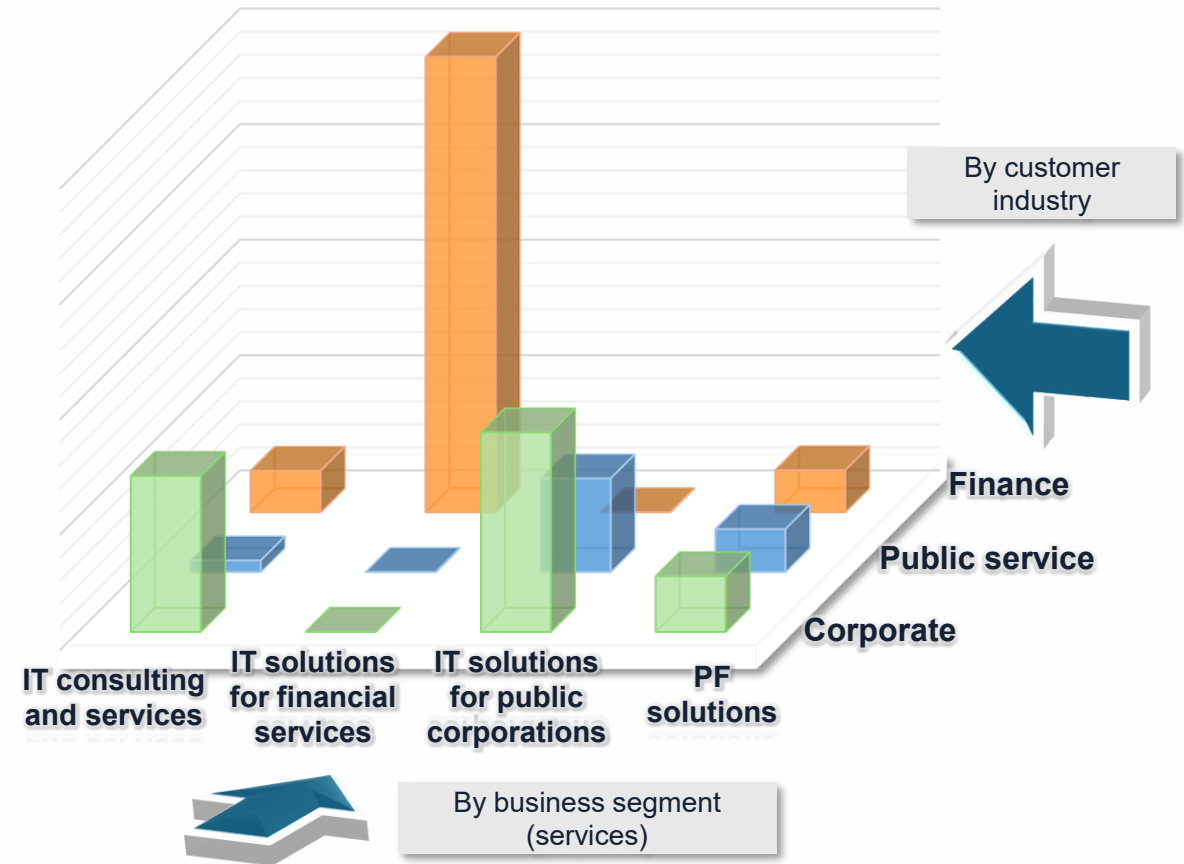
Net sales composition analysis

To capture our net sales from both the perspective of business characteristics and customer base, we organize them from the following two viewpoints:

- a. By business segment (services)
- b. By customer industry

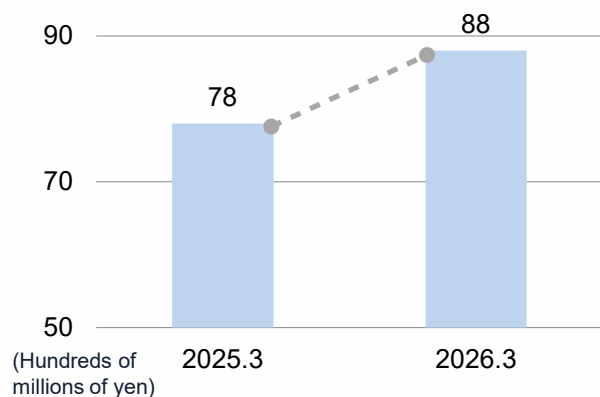
*Each represents a breakdown that constitutes total net sales, organizing our business structure from different perspectives

Detailed figures are provided on the following pages



Highlights By Business Segment (Services)

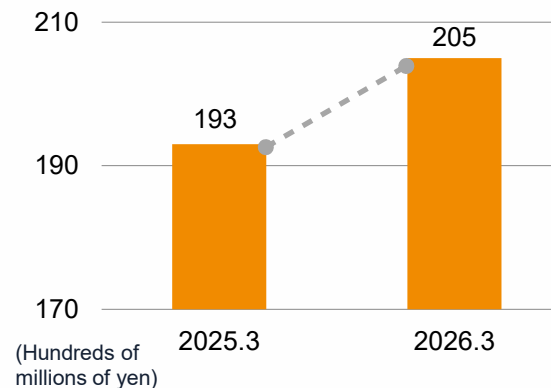
IT Consulting & Services Field



Technology consulting for DX promotion and development projects utilizing cutting-edge elemental technologies continued to perform well

YoY
+13.8%

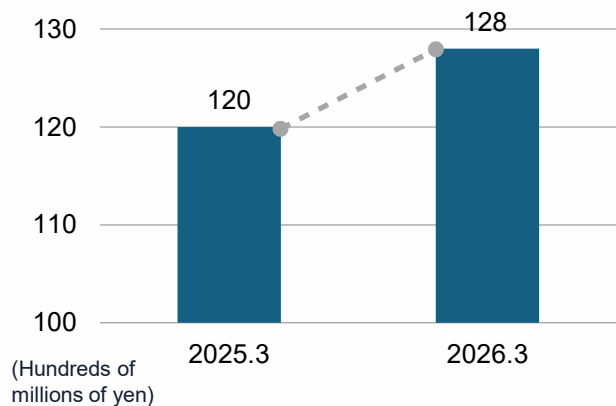
IT Solutions for Financial Services Field



System development projects related to the banking and insurance sectors continued to perform well

YoY
+6.3%

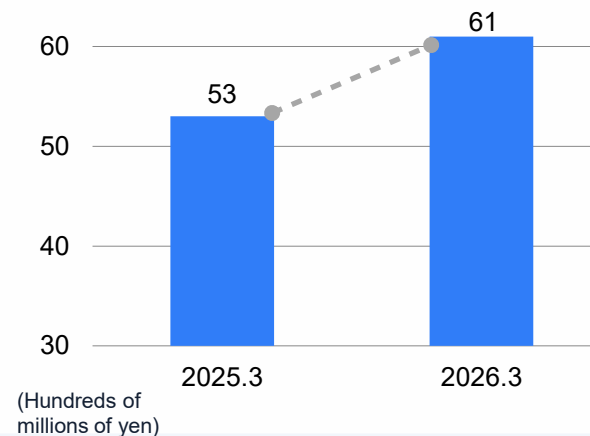
IT Solutions for Public Corporations Field



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

YoY
+7.0%

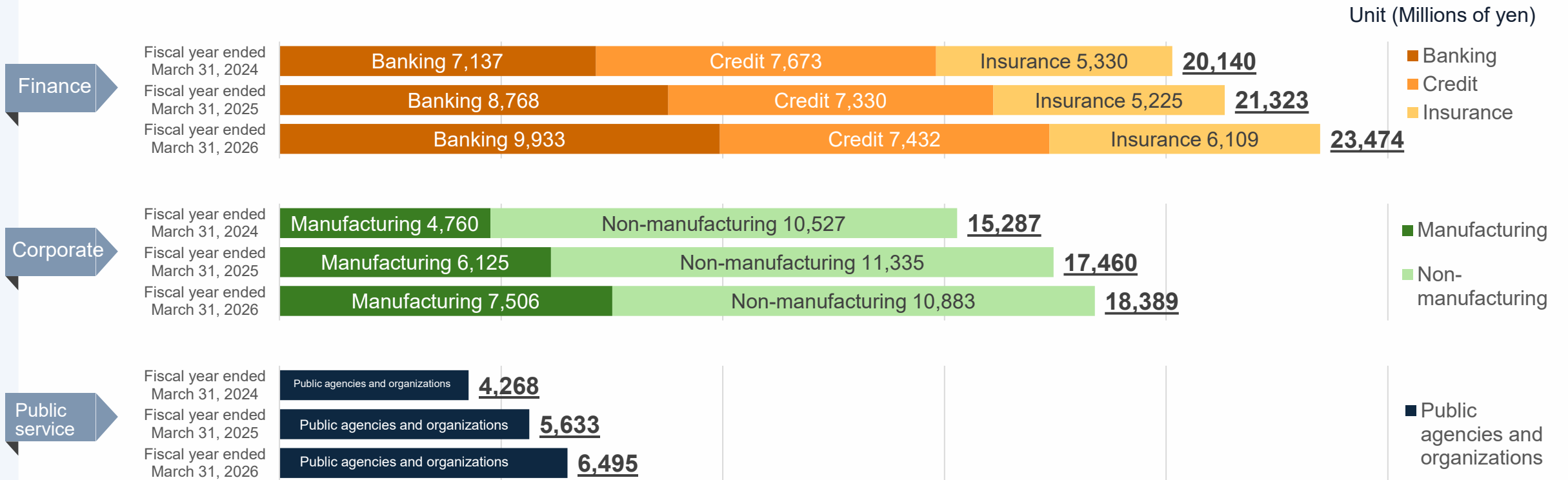
Platform Solutions Field



Projects to build infrastructure for the insurance, transportation, and energy-related industries continued to perform well

YoY
+15.3%

Highlights By Customer Industry



- ▶ Finance: Revenue increased across all industries, including banking, credit, and insurance (+10.1% YoY)
- ▶ Corporate: Development projects for the steel and food industries grew significantly (+5.3% YoY)
- ▶ Public service: Large-scale development projects for government agencies and organizations continued to perform well (+15.3% YoY)



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Status of Key Measures as of March 31, 2026

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



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

KPI Progress: High-Value-Added Business

Management Indicator

High-value-added business ratio **25 %**

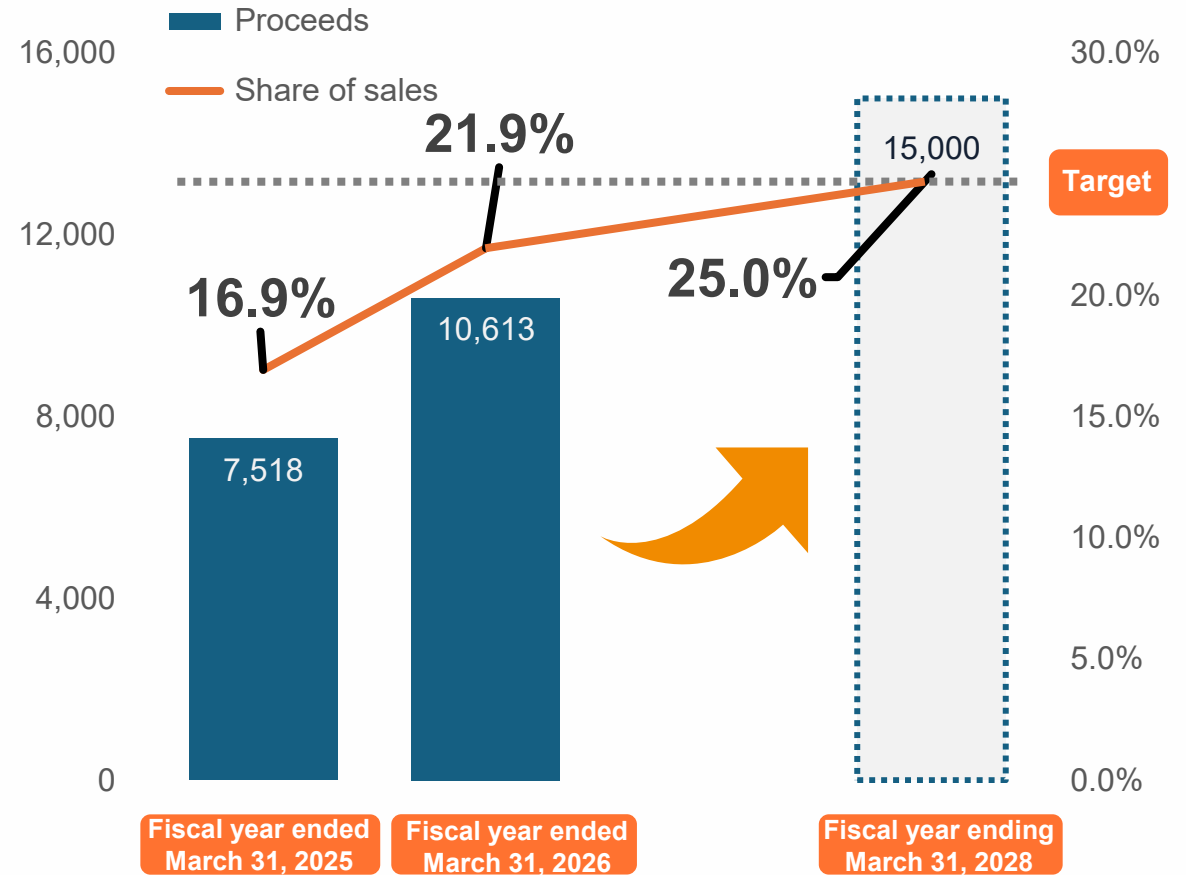
Highlights

- ▶ Related sales have shown steady growth as we actively take on IT consulting, systems planning and design requiring advanced business expertise, and technically challenging projects

High-value-added 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

(Millions of yen)



KPI Progress: Consulting Business

Management Indicator

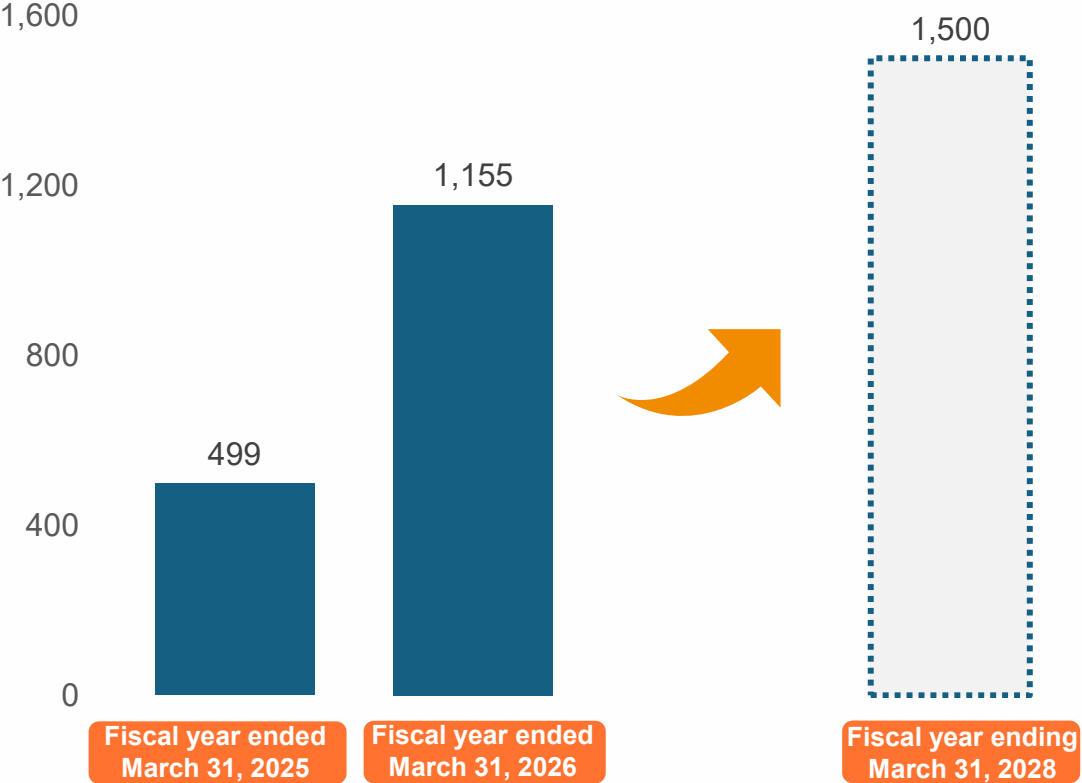
Consulting business net sales **15** hundreds of millions of yen

Highlights

- ▶ Sales have steadily expanded through the successful conversion of leads acquired via expansion of consulting staff and marketing activities into business deals
- ▶ We will continue to focus on achieving sales target by further expanding our consulting team and expanding into new consulting service areas

Year on Year
131.4% increase

(Millions of yen)



KPI Progress: Product Sales Business

Management
Indicator

Product sales business net sales **20** hundreds of millions of yen

Highlights

- ▶ Sales of our proprietary products, ServiceNow, and security products have grown
- ▶ We will continue to focus on strengthening sales efforts, including cross-selling and marketing, to further grow our sales business
- ▶ To further expand our proprietary product business, we have dramatically improved scalability by renewing the architecture of StyleFlow

Year on Year

119.3% increase

(Millions of yen)

2,000

1,600

1,200

800

400

0

Fiscal year ended
March 31, 2025

480

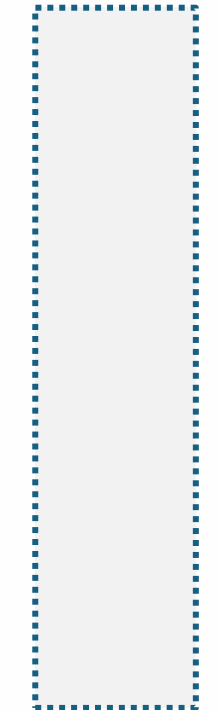
Fiscal year ended
March 31, 2026

1,053

Target

2,000

Fiscal year ending Ma
31, 2028



KPI Progress: Portfolio by Industry

Management Indicator

Finance: **45%**

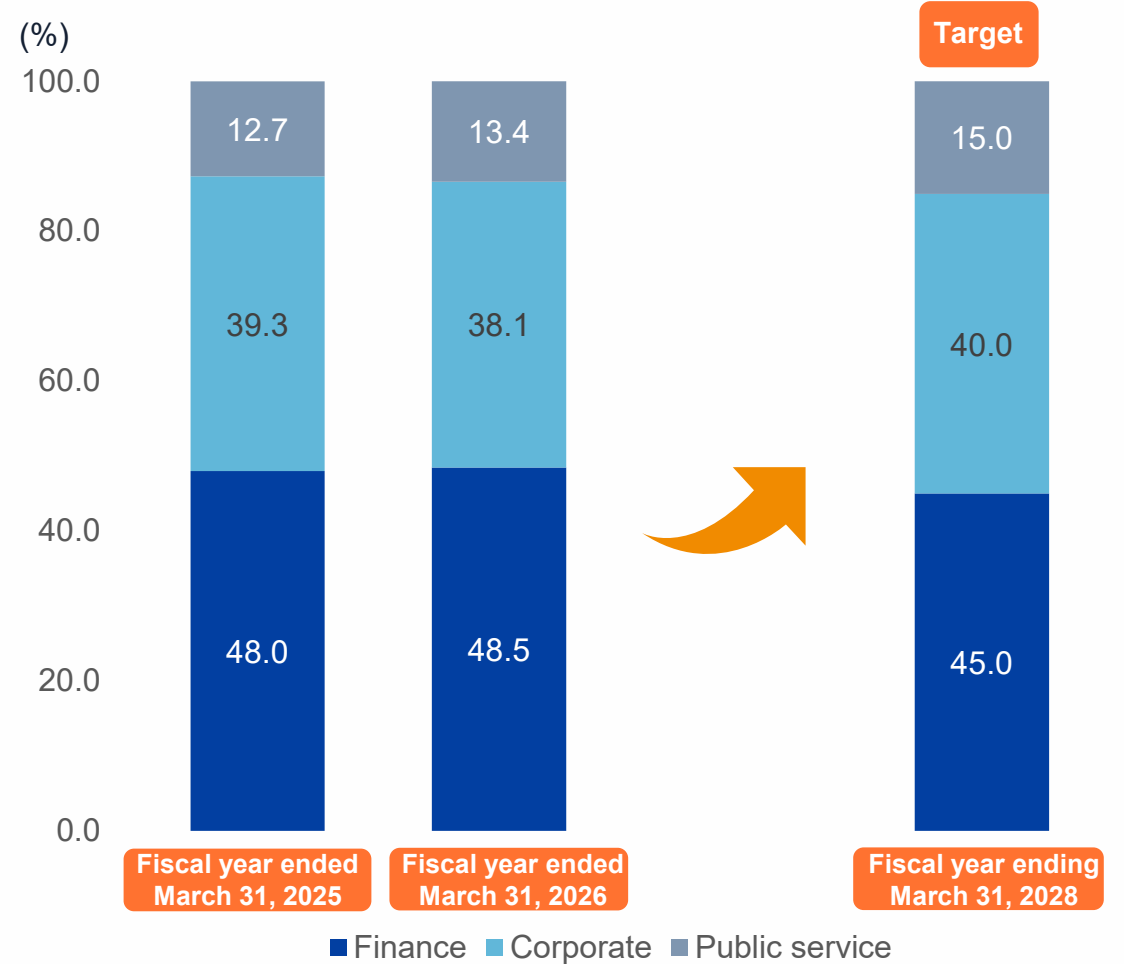
Corporate: **40%**

Public service: **15%**

Highlights

- ▶ Sales to each industry have steadily expanded
- ▶ While the composition ratio has shifted in the finance and corporate segments along with the expansion of our business foundation, the public service segment has made steady progress as planned
- ▶ We will continue to advance initiatives toward the industry-specific portfolio defined in the Medium-Term Management Plan

*Detailed sales by industry sector are provided on page 8, "Highlights By Customer Industry"

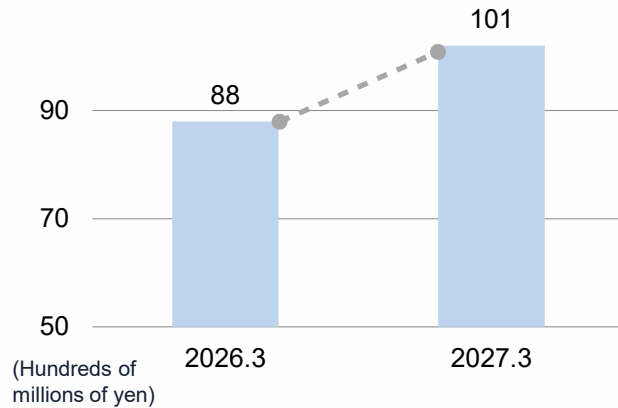


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Outlook for the Fiscal Year Ending March 31, 2027

Outlook for the Fiscal Year Ending March 31, 2027 (Highlights By Business Field)

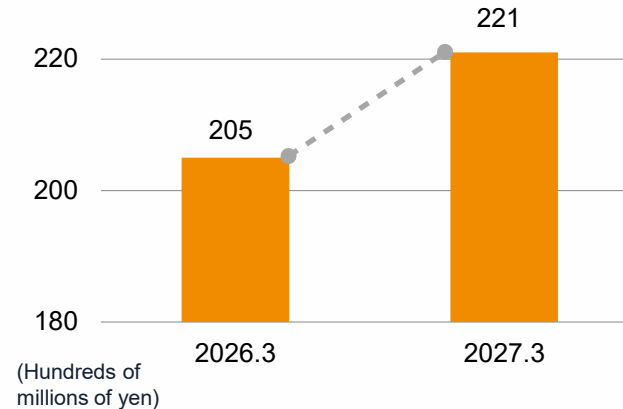
IT Consulting & Services Field



Trends vary by solution product. We will work to develop better offerings through combinations of various services.

YoY
+14.8%

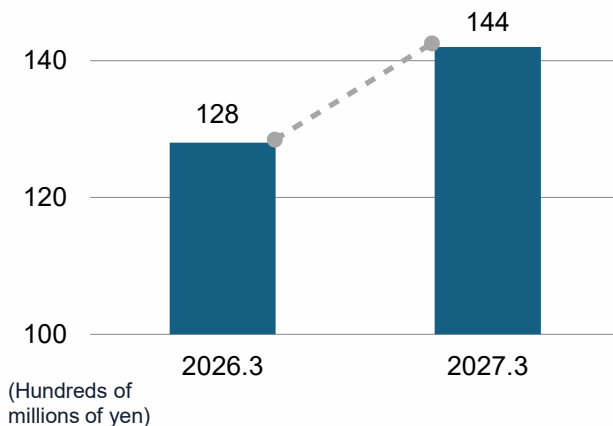
IT Solutions for Financial Services Field



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

YoY
+7.8%

IT Solutions for Public Corporations Field

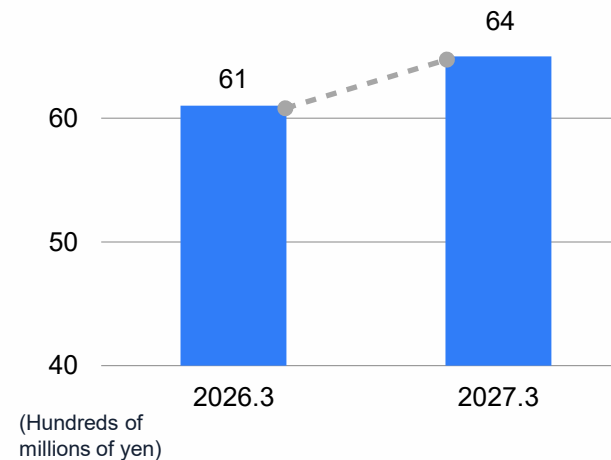


Led by large-scale projects driven by social infrastructure demand, particularly in the public sector.

Continuing to expand support from IT/DX planning as customers' partners.

YoY
+12.2%

Platform Solutions Field



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

YoY
+5.6%

Outlook for the Fiscal Year Ending March 31, 2027

Final Results Forecast and Dividend Forecast

(Unit: Millions of yen)□	Net sales	Operating profit	Ordinary profit	Profit	EPS (yen)	Dividend Forecast (Yen)	Dividend payout ratio
Full year	53,000 (+9.6%)	5,600 (+8.5%)	5,800 (+8.2%)	3,915 (+0.9%)	82.75	34	41.1%

*The dividend payout ratio for the previous fiscal year was 40.2%

- ▶ The business environment is expected to remain strong, with revenue projected to increase 9.6% year-on-year
- ▶ As investments for securing a competitive advantage, we are actively pursuing the acquisition of cutting-edge technologies including AI, the promotion of strategic mid-career hiring, and further strengthening of education initiatives

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Details of Financial Results as of March 31, 2026

Financial Results as of March 31, 2026 - Categories



Financial Statements



Orders Received/Backlog



Operating Profit Analysis

Financial Statements

Statement of Income

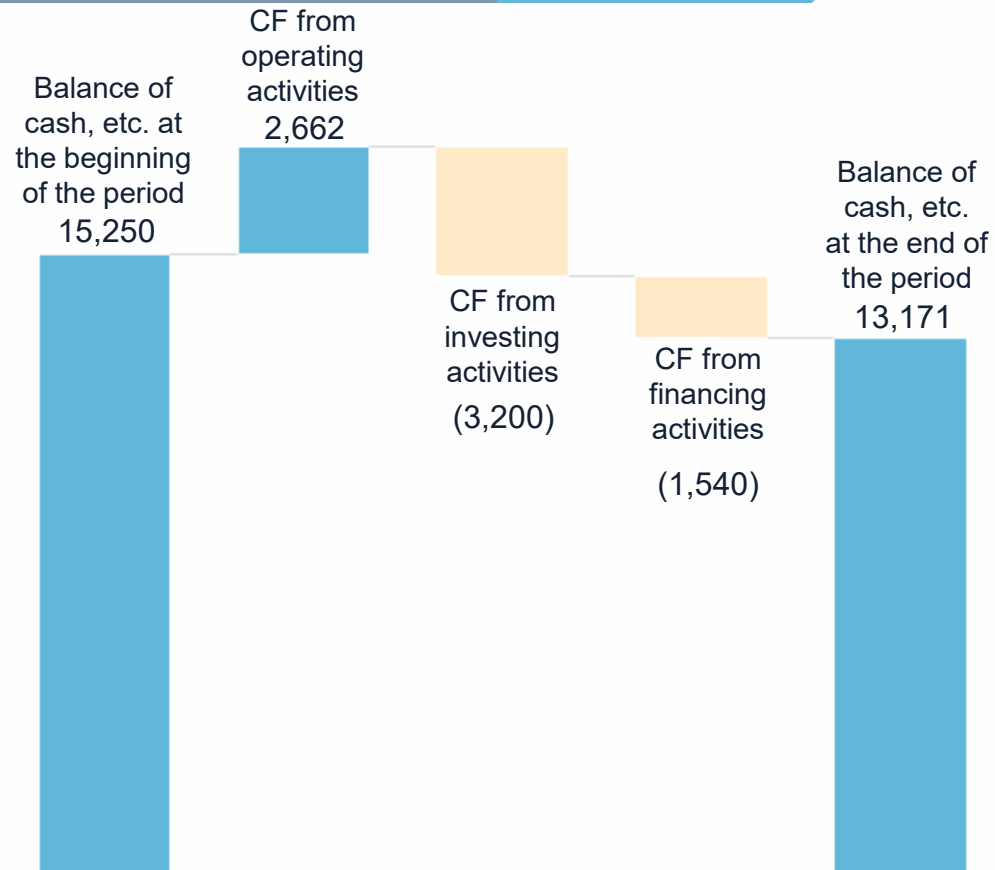
(Unit: Millions of yen)	Fiscal year ended March 31, 2026	Fiscal year ended March 31, 2025	Percentage Change
Net sales	48,359	44,417	8.9%
Labor costs	15,869	14,325	10.8%
Outsourcing costs	21,259	19,240	10.5%
Other expenses	1,490	1,393	7.0%
Work-in-process adjustment	(62)	(45)	37.8%
Cost of sales	38,556	34,912	10.4%
Gross profit	9,802	9,505	3.1%
Selling, general and administrative expenses	4,642	4,732	(1.9%)
Operating profit	5,159	4,772	8.1%
Non-operating income/expenses	199	103	91.6%
Ordinary profit	5,359	4,876	9.9%
Profit before income taxes	5,525	4,876	13.3%
Profit	3,880	3,433	13.0%
EPS	82.11 yen	72.86 yen	12.7%

Balance Sheet

(Unit: Millions of yen)	Fiscal year ended March 31, 2026	Fiscal year ended March 31, 2025	Percentage Change
Total assets	31,500	28,286	11.4%
Current assets	24,895	23,247	7.1%
Non-current assets	6,604	5,039	31.1%
Total liabilities	8,063	7,405	8.9%
Current liabilities	7,644	6,870	11.3%
Non-current liabilities	419	535	(21.7%)
Total net assets	23,436	20,881	12.2%
Total liabilities and net assets	31,500	28,286	11.4%
Owners' equity ratio	74.4%	73.8%	-
Net assets per share	495.37	442.98	11.8%

Financial Statements

Statement of Cash Flows



Balance of cash, etc. at the beginning of the period	15,250
Profit (loss) before income taxes	5,525
Increase in notes and accounts receivable – trade and contract assets	(1,454)
Other	43
Income taxes paid	(1,452)
CF from operating activities	2,662
Purchase of securities	(2,098)
Purchase of investment securities	(1,409)
Other	307
CF from investing activities	(3,200)
Net increase/decrease in short-term borrowings	(233)
Dividend payment	(1,292)
Other	(15)
CF from financing activities	(1,540)
Balance of cash, etc. at the end of the period	13,171

Unit: millions of yen

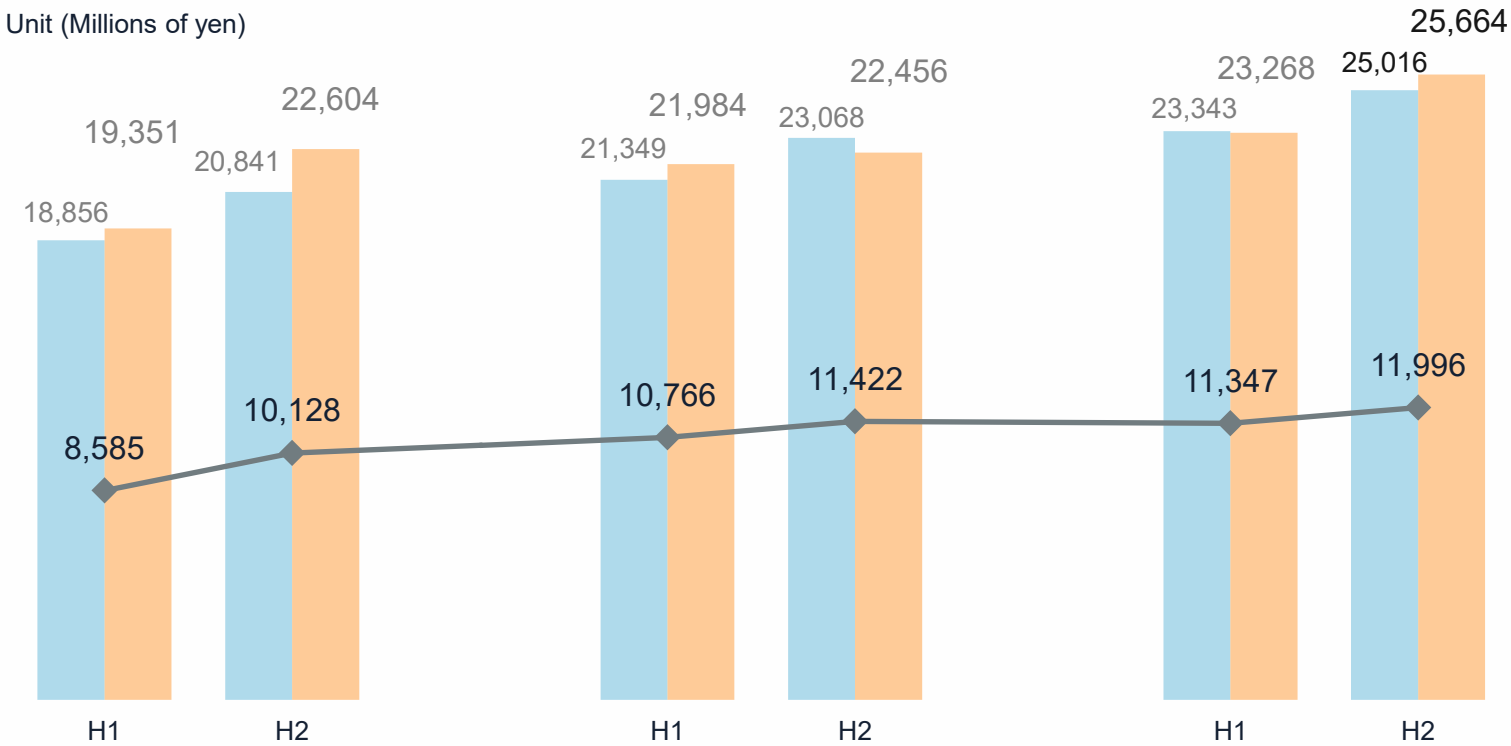
Orders Received/Backlog



Orders Received/Backlog

Proceeds Orders received Backlog

Unit (Millions of yen)



Fiscal year ended March 31, 2024

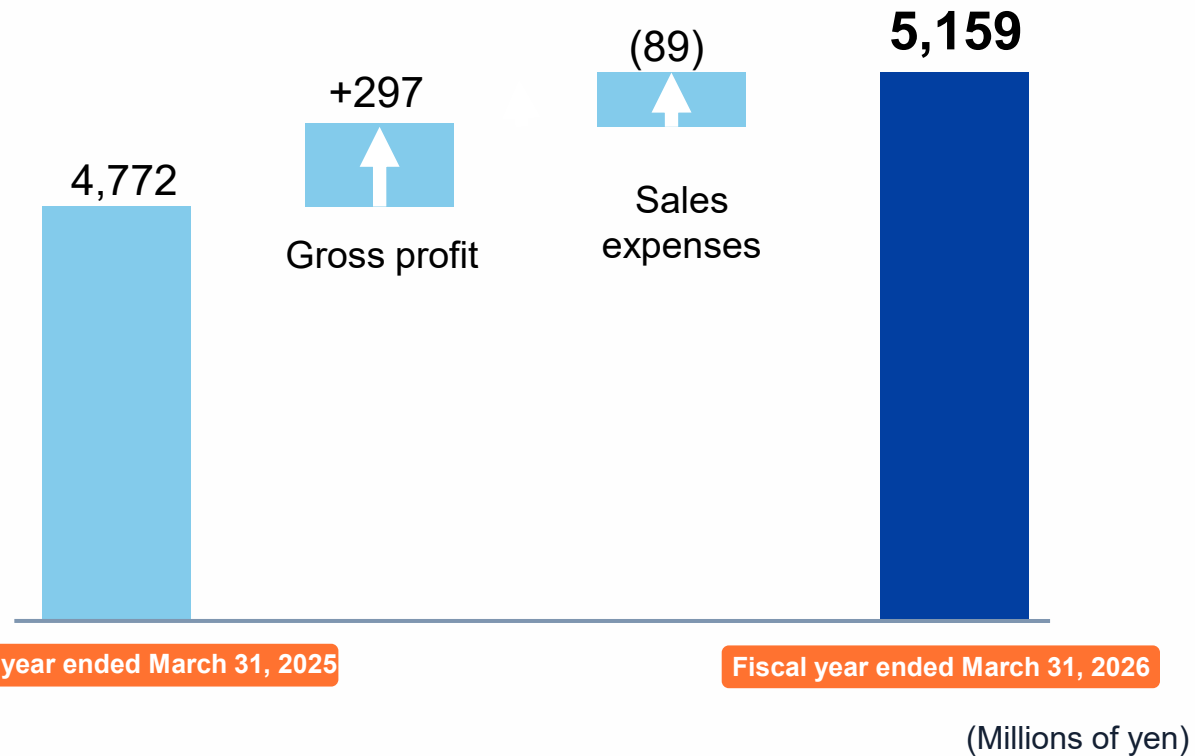
Fiscal year ended March 31, 2025

Fiscal year ended March 31, 2026

Year on Year

- Orders received **114.3 %**
- Backlog **105.0 %**

Operating Profit Analysis



Gross profit

- Increase in proceeds leading to profit improvement

Sales expenses

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

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Appendix: Topics

Improvement of capital efficiency, organizational expansion through M&A, and renewal of internal systems aimed at eliminating troubled projects

自己株式立会外買付取引（ToSTNeT-3）による自己株式の取得結果及び取得終了並びに自己株式の消却に関するお知らせ （会社法第 165 条第 2 項の規定による定款の定めに基づく自己株式の取得及び自己株式立会外買付取引（ToSTNeT-3）による自己株式の買付け）

当社は、2026 年 5 月 13 日開催の取締役会で決議した、会社法第 165 条第 3 項の規定により読み替えて適用される同法第 156 条の規定に基づく自己株式の取得について、下記のとおり実施いたしましたのでお知らせいたします。なお、2026 年 5 月 13 日開催の取締役決議による自己株式の取得は、これもちまして終了するとともに、同日の取締役会において決議した会社法第 178 条の規定に基づく自己株式の消却について、消却する株式の総数が確定しましたので、併せてお知らせいたします。

記

1. 取得に関する事項

- ① 取得した株式の種類 当社普通株式
- ② 取得した株式の総数 700,000 株
(発行済株式総数（自己株式を除く）に対する割合 1.46%）
- ③ 株式の取得価格の総額 675,500,000 円（1 株につき 965 円）
- ④ 取得日 2026 年 5 月 14 日
- ⑤ 取得方法 東京証券取引所の自己株式立会買付取引（ToSTNeT-3）による買付け

株式会社コムドシステムの株式取得（子会社化）に関する株式譲渡契約締結のお知らせ

よ、2025年12月16日開催の取締役会において、以下のとおり、株式会社コムドシステムの株式取得に関する契約を締結し、子会社化することについて決議いたしましたので、お知らせいたします。

株式の取得の理由

会社コムドシステムは2004年に設立された、業務システムの構築に豊富な実績を有する会社であり、本件で経験豊富な人材とノウハウの獲得が可能となります。

助する子会社（株式会社コムドシステム）の概要

名称	株式会社コムドシステム		
所在地	東京都中央区新川 1-2-2 GC 茅場町ビル 3 階		
代表者の役職・氏名	代表取締役社長 杉山 幹夫		
事業の内容	システム開発		
資本金	13百万円		
設立年月日	2004年10月7日		
株主及び持株比率	大株主が個人であり、株式譲渡契約における守秘義務を踏まえ開示を控えます		
上場会社と当該会社との関係	資本関係	該当事項はありません	
	人的関係	該当事項はありません	
	取引関係	営業上の取引があります	

May 14, 2026: Press release

December 19, 2025: Press release



TDCソフト、プロジェクトパフォーマンス評価を実装した社内システムに新機能

掲載日 2026/02/09 16:47

著者：岩井 健太

TDCソフトは2月9日、社内プロジェクトパフォーマンス評価システム「PROJECT IQ」に、デリバリー(進捗管理)と、クオリティ(品質管理)機能を新たに追加したと発表した。



February 9, 2026: Press release

Topic B: New Services & Partnerships

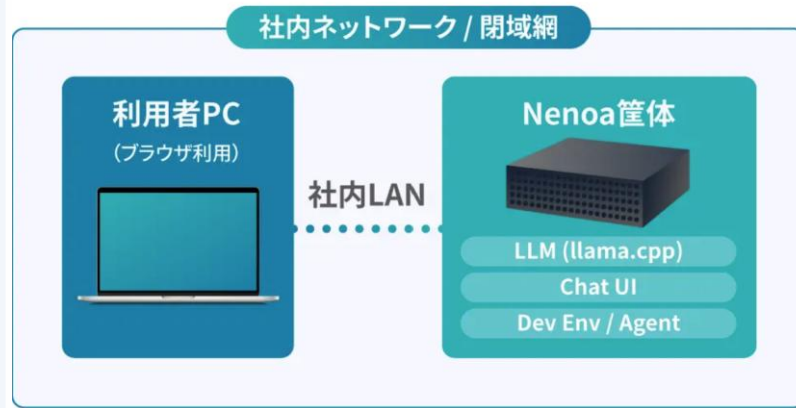
Expansion of new services that drive our customers' businesses, and strategic partnerships

EnterpriseZine

<https://enterprisezine.jp/news/detail/24048>

TDCソフト、閉域網や厳格なセキュリティ環境でプライベートAIを即利用開始できる「Nenoa」提供へ

ローカルLLM・AIチャット・AIエディター・API連携を搭載した設置型のハードウェア端末とのこと。電源とネットワーク接続のみで即座に利用開始できるという。特徴は以下のとおり。



March 30, 2026: Press release

デジタルビジネスを加速する専門情報サイト

IT Leaders

<https://it.impress.co.jp/articles/-/28925>

TDCソフト、レガシーシステム移行支援「Movina」を提供、UNIX、Struts、IEなどから移行

TDCソフトの「Movina (モヴィナ) - Move In & Navigate to Modern Systems」は、レガシーシステムの刷新・移行を支援するSIサービスである。UNIXサーバー、Javaフレームワーク、Microsoftプラットフォーム、Webブラウザ (脱Internet Explorer) の主要4領域において、調査・診断から移行・テストまでをワンストップで支援する (図1)。

言語変換	フレームワーク移行	ブラウザ刷新
Microsoft系 <ul style="list-style-type: none">ASP ⇒ ASP.NETVB ⇒ VB.NETVB.NET ⇒ C#VC ⇒ C#Delphi ⇒ C#	Microsoft系 <ul style="list-style-type: none">.NET Framework ⇒ .NETWebForms ⇒ MVCWebForms ⇒ Blazor Java系 <ul style="list-style-type: none">Terasoluna1 ⇒ 5Terasoluna2 ⇒ 5Struts ⇒ Terasoluna5Struts ⇒ Spring BootSeasar2 ⇒ Spring BootIntra-mart ⇒ Spring Boot	<ul style="list-style-type: none">IE ⇒ Edge, Chrome
メインフレーム/UNIX系 <ul style="list-style-type: none">COBOL各種 ⇒ COBOL2002COBOL各種 ⇒ NetCOBOLCOBOL各種 ⇒ MF COBOLCOBOL各種 ⇒ C#COBOL各種 ⇒ JavaAssembler ⇒ COBOLBAGLES II ⇒ COBOLJCL ⇒ ShellPL/1 ⇒ JavaRPG ⇒ JavaVB ⇒ JavaC ⇒ Java		データベース移行 <ul style="list-style-type: none">Oracle ⇒ PostgreSQLPL/SQL ⇒ PGSQLPL/SQL ⇒ scala/SparkSQL階層型DB ⇒ RDB
		各種バージョンアップ <ul style="list-style-type: none">JDKバージョンアップIntra-martバージョンアップjQueryバージョンアップ

January 28, 2026: Press release

週刊BCN⁺ ITビジネスのプロが選ぶ情報源

https://www.weeklybcn.com/journal/news/detail/20260213_214048.html

ニュース

TDCソフト、米Scaled Agileと国内初の「AI-Native」パートナー契約

2026/02/13 14:18

TDCソフトは、エンタープライズ向けアジャイルフレームワーク「SAFe」を提供する米Scaled Agileの新プログラム「AI-Native」の国内初となるパートナー契約を2月12日に締結した。この契約により同社は、Scaled Agileが定義する「EDGE」フレームワークを軸に、企業のAI活用を事業価値創出につなげるためのトレーニングとコンサルティングの提供を開始する。

AI技術は急速に普及する一方で、AI導入がPoC (概念実証) にとどまり、十分な事業価値を生み出せていないケースも少なくない。AIプロジェクトの80%以上が期待した成果を上げられておらず、その主な要因は技術ではなく、AIを前提とした組織の考え方や仕事の進め方が確立されていない点にあると指摘されている。

TDCソフトはこれまで、システム開発やアジャイル導入支援を通じて、技術を現場で使いこなすための組織変革支援に取り組んできた。今回の提携は、そうした知見をAI活用の領域に拡張するものとなる。

同社は中期経営計画「Be a Visionary System Integrator」で、顧客の課題解決力を高めるための「専門性・知見の多角化と高度化」を掲げている。AI-Native支援はこの中期経営計画に沿って取り組んでおり、AIを単なるツールとして導入するのではなく、人材・組織・業務プロセスに組み込み、継続的に価値を生み出す状態を目指すもの。その中核とな



February 12, 2026: Press release



<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.