

LINK Smart

Toward a shared, connected future

CYBERLINKS CO., LTD.

Financial Results for 1H FY12/26(Interim Period)

(January 1, 2026 – June 30, 2026)

September 4, 2026

0. Overview of Business Operations

- Cyberlinks operates across four segments: the Distribution Cloud business, the Government Cloud business, the Trust business, and the Mobile Network business
- A business portfolio centered on essential-infrastructure markets and resilient to economic cycles

1 Distribution Cloud



Delivering cloud services specifically targeting the food distribution industry
Future growth drivers

Sales JPY**5.3**bn Ordinary Profit JPY**0.77**bn

2 Government Cloud



Providing digital transformation (DX) solutions for local governments
Expanding through both Local Engagement and National Expansion

Sales JPY**8.4**bn Ordinary Profit JPY**1.20**bn

4 Mobile Network



Operates approximately half of all Docomo Shops in Wakayama Prefecture
Stable earnings base

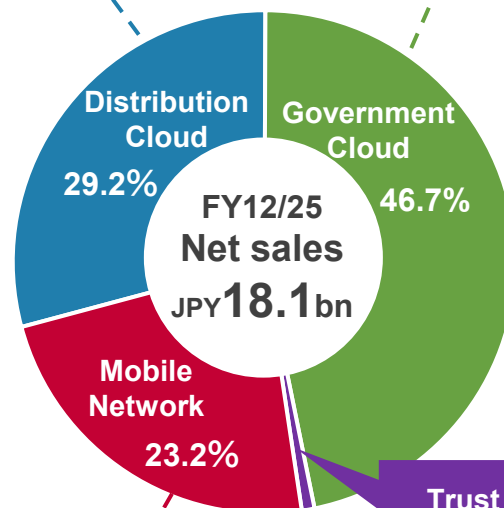
Sales JPY**4.2**bn Ordinary Profit JPY**0.37**bn

3 Trust — launched in 2021



Provides My Number Card-based authentication and digital certificate issuance services
Building Trust into a new pillar of growth

Sales JPY**0.14**bn Ordinary Profit JPY**(0.06)**bn

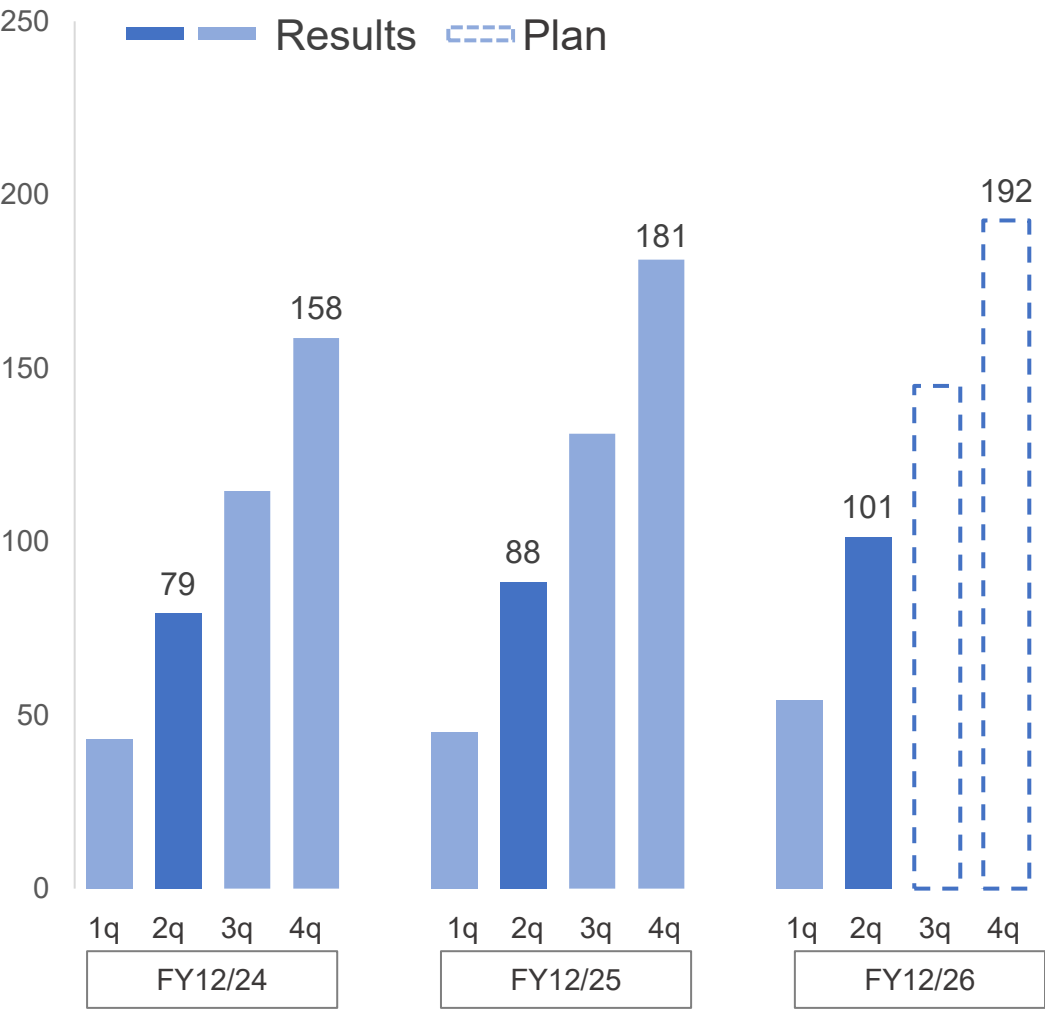


- Net sales and ordinary profit increased, driven mainly by progress on various Government Cloud projects and the broader rollout of Distribution Cloud services.

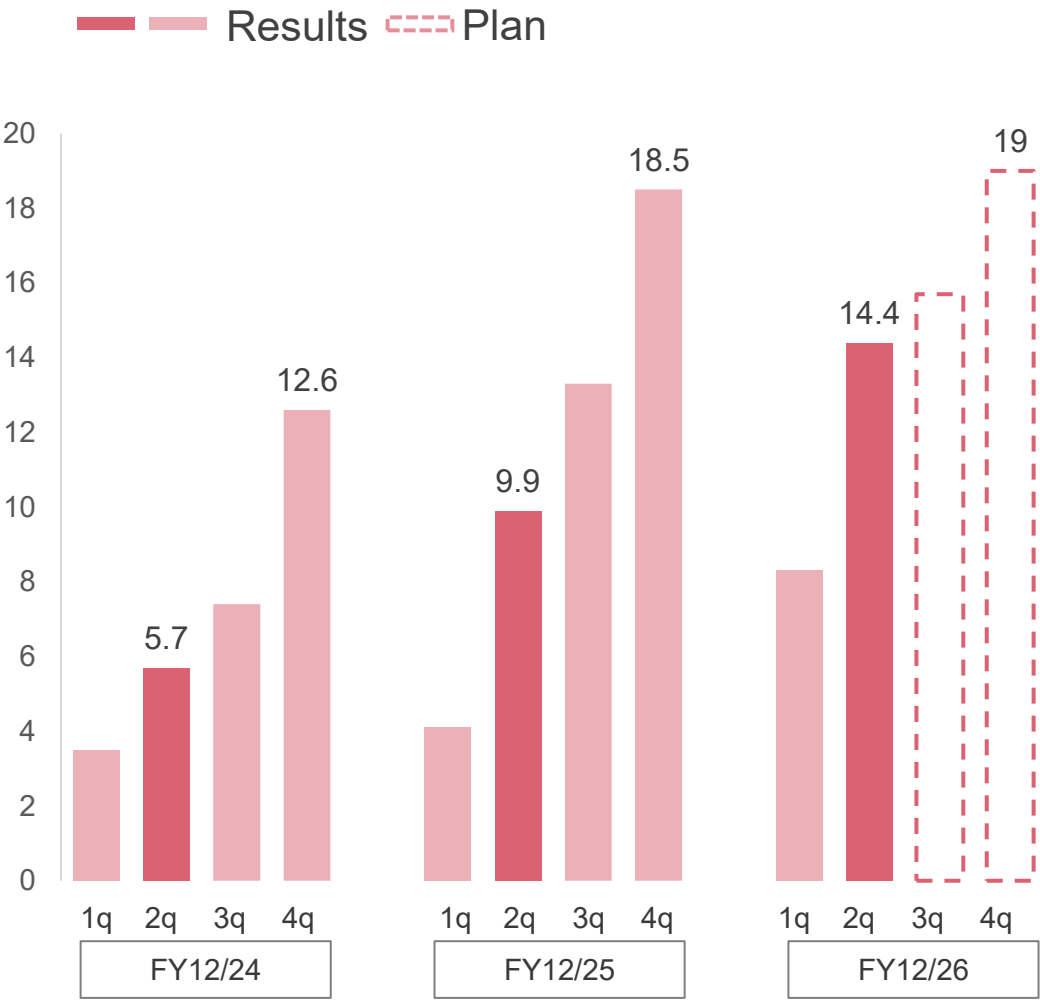


- Net sales and ordinary profit progressed broadly in line with the 1H forecast. The Company is targeting full-year record highs for both.

Net sales (cumulative) (100mn yen)



Ordinary profit (cumulative) (100mn yen)



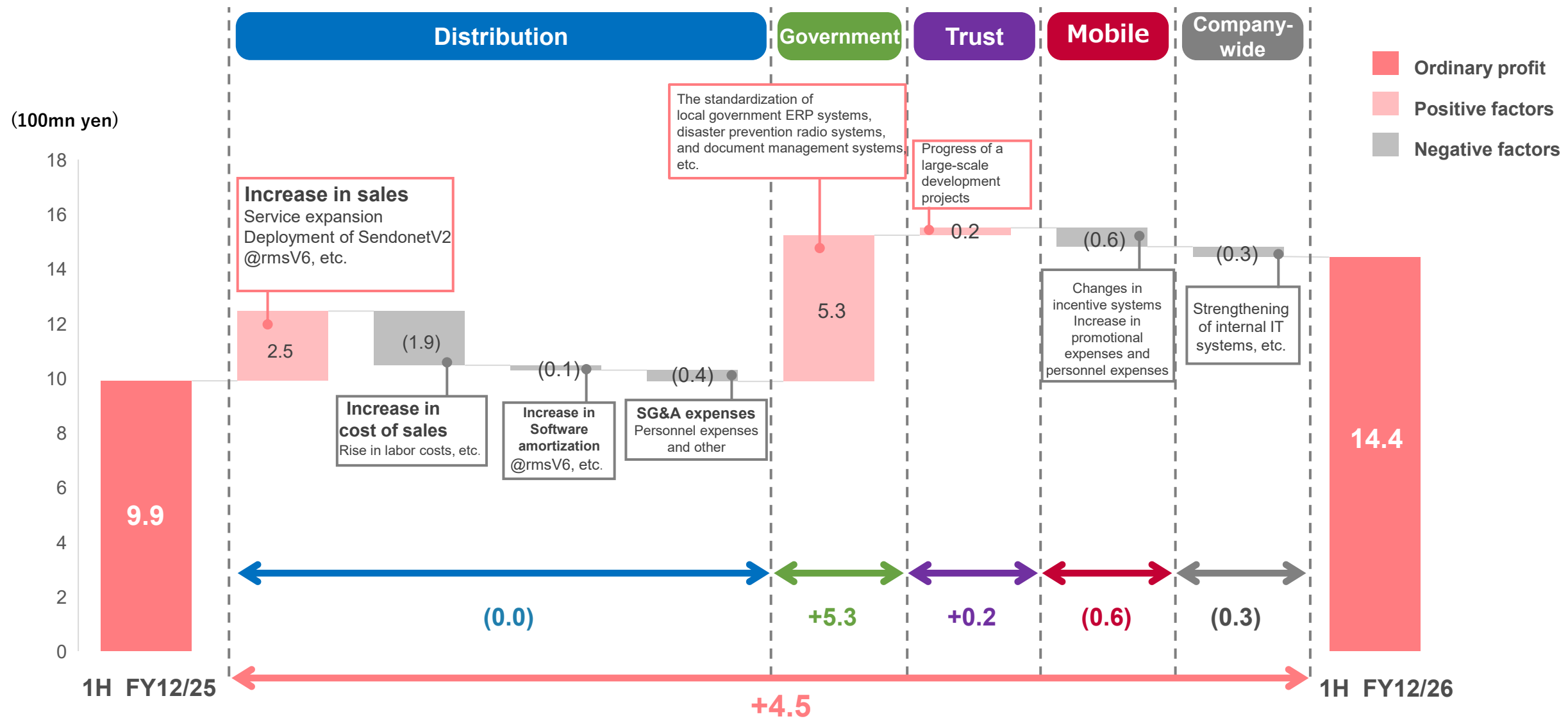
2. Consolidated 1H FY12/26 Results & Full-Year FY12/26 Forecast Consolidated Income Statement

(millions of yen)	1H FY12/26 (Actual)	1H FY12/25 (Actual)	YoY Change (%)	1H FY12/26 (Plan)	Achievement Rate (%)
Net sales	10,160	8,849	14.8%	10,203	99.6%
Distribution Cloud	2,758	2,503	10.2%	2,835	97.3%
Government Cloud	5,125	4,148	23.5%	4,977	103.0%
Trust	155	51	199.9%	194	80.3%
Mobile Network	2,121	2,145	(1.2%)	2,197	96.5%
Recurring revenue	4,730	4,250	11.3%	4,585	103.2%
Distribution Cloud	2,188	2,102	4.1%	2,198	99.6%
Government Cloud	2,092	1,755	19.2%	1,955	107.0%
Trust	41	39	6.5%	47	88.9%
Mobile Network	408	352	15.9%	385	106.1%
Operating profit	1,446	990	45.9%	1,382	104.6%
Ordinary profit	1,443	990	45.8%	1,373	105.1%
Distribution Cloud	324	328	(1.2%)	386	84.1%
Government Cloud	1,232	697	76.7%	1,073	114.9%
Trust	(26)	(53)	—	2	—
Mobile Network	167	236	(29.2%)	187	89.5%
Adjustments	(255)	(219)	—	(275)	—
Profit attributable to owners of parent	967	673	43.5%	930	104.0%
EPS	JPY87.12	JPY60.34	—	JPY83.96	—

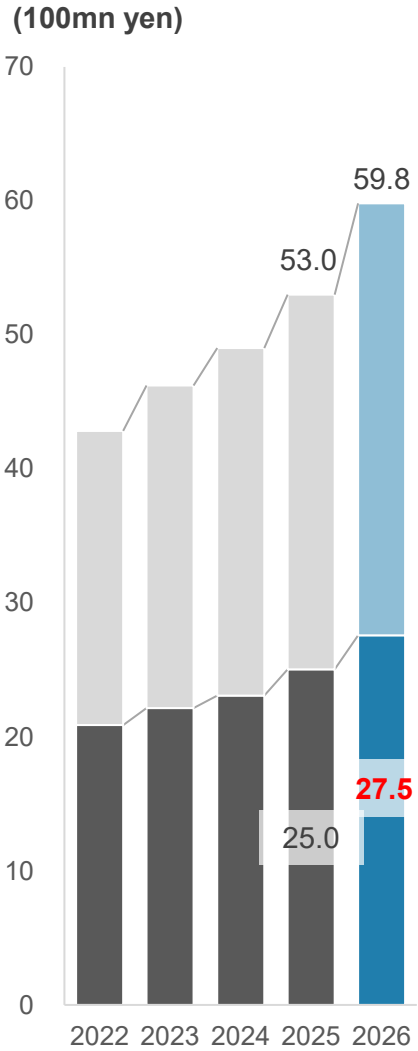
2. Consolidated 1H FY12/26 Results & Full-Year FY12/26 Forecast Factors affecting ordinary profit



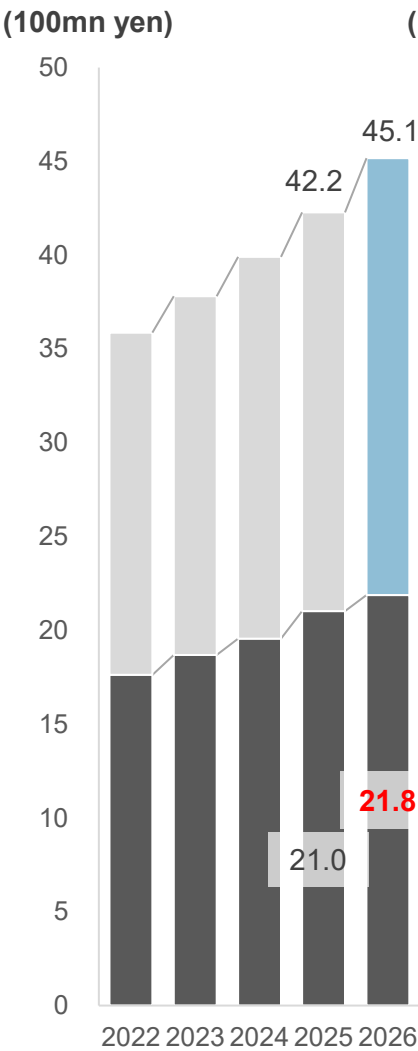
- In the Distribution Cloud segment, sales increased as service delivery expanded, but ordinary profit edged down as labor and other costs increased following staffing expansion conducted to support new system implementation projects.
- Government Cloud: Projects involving the standardization of local government ERP systems, disaster prevention radio systems, and document management progressed, contributing significantly to profit growth.



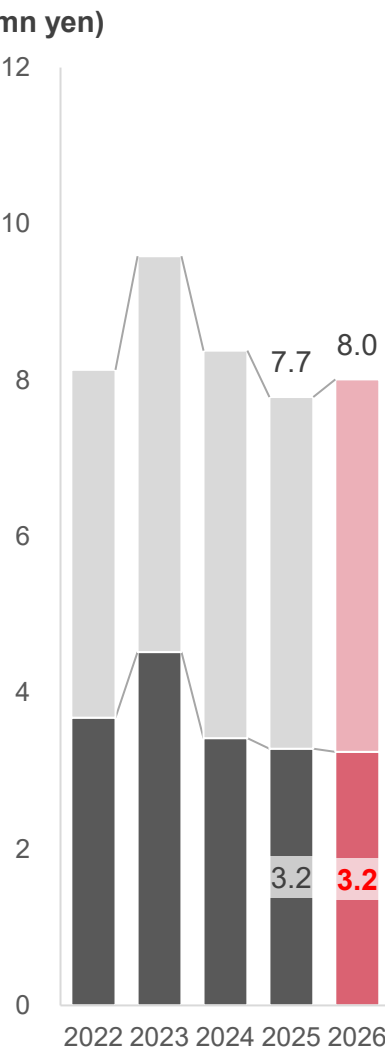
Net sales



Recurring revenue



Ordinary profit



1H FY12/26 Results

Sales increased on broader delivery of various services, but ordinary profit edged down due to growth in labor costs accompanying staff expansion and related measures adopted to support a growing number of new system implementation projects.

- ◆ @rmsV6, a core ERP system for medium-sized and large supermarket chains
Launched operations for two additional customers from March 2026
- ◆ Sales growth generated through progress on implementation of @rmsV6, sendonetV2, etc
- ◆ @rmsV6, Automatic Ordering, etc.
secured multiple new orders
- ◆ Cloud EDI Platform
Secured an order from an existing major customer seeking to migrate fully to the Cloud EDI Platform.

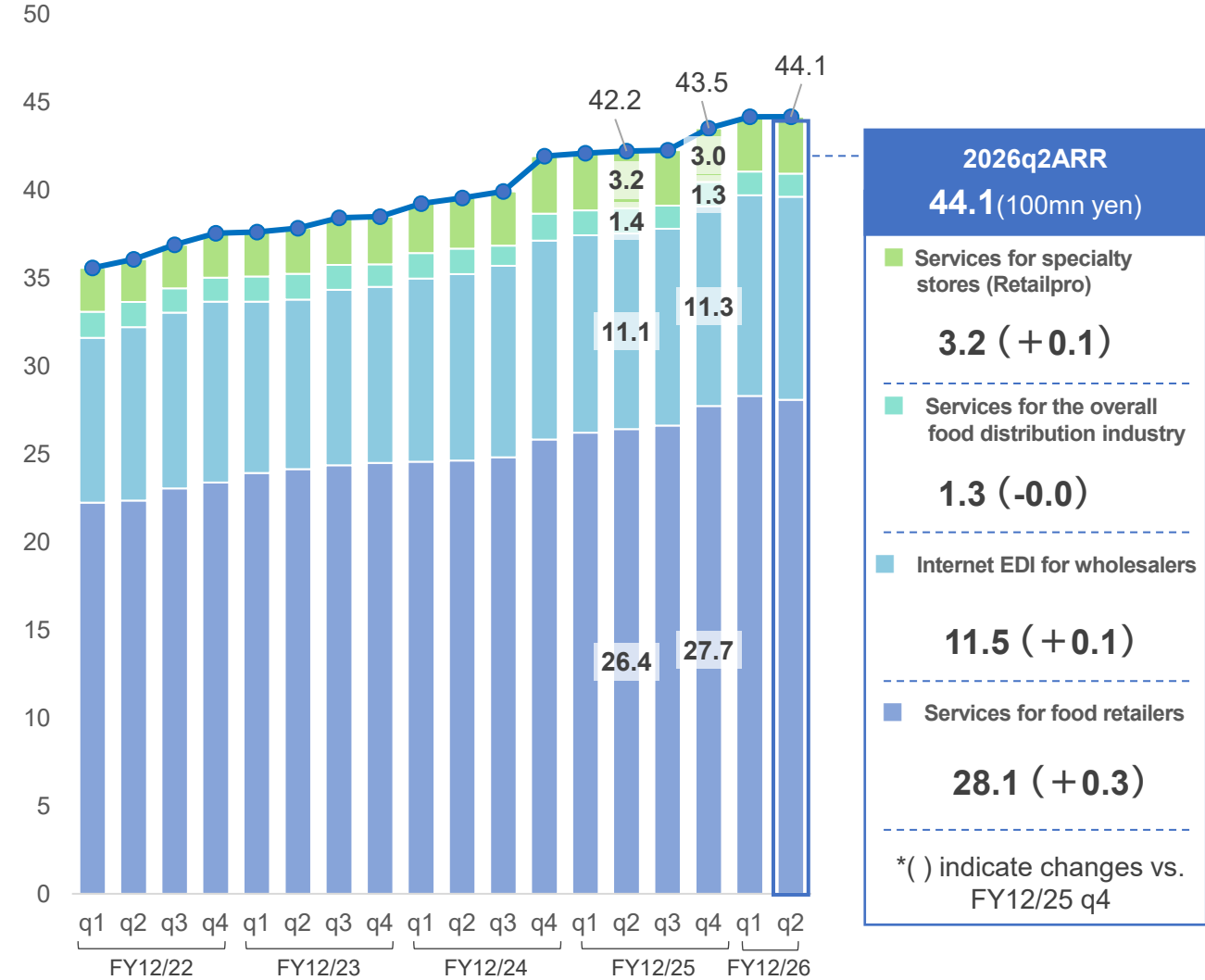
Full-Year FY12/26 Forecast

Although some system rollout projects have been delayed, work continues to progress steadily. Meanwhile, upfront investment continues as the Company builds the staffing and system implementation capabilities needed for upcoming customer go-lives

- ◆ @rmsV6
Advance development targeting the incorporation of AI functionality
Prioritize system implementation work for upcoming customer go-lives
- ◆ Increase recurring revenue through broader service delivery
@rmsV6 , SendonetV2 , Automatic Ordering,
Cloud EDI Platform etc.
- ◆ RetailPro, a sales management system for specialty stores.
Rollout is expanding from an existing customer's overseas stores to its stores in Japan.

- ARR has increased with the launch of multiple services, including @rmsV6.

ARR (Monthly recurring revenue for the final month of a given quarter × 12 months)
(100mn yen)



Key Service KPIs *() indicate changes vs. FY12/25 q4

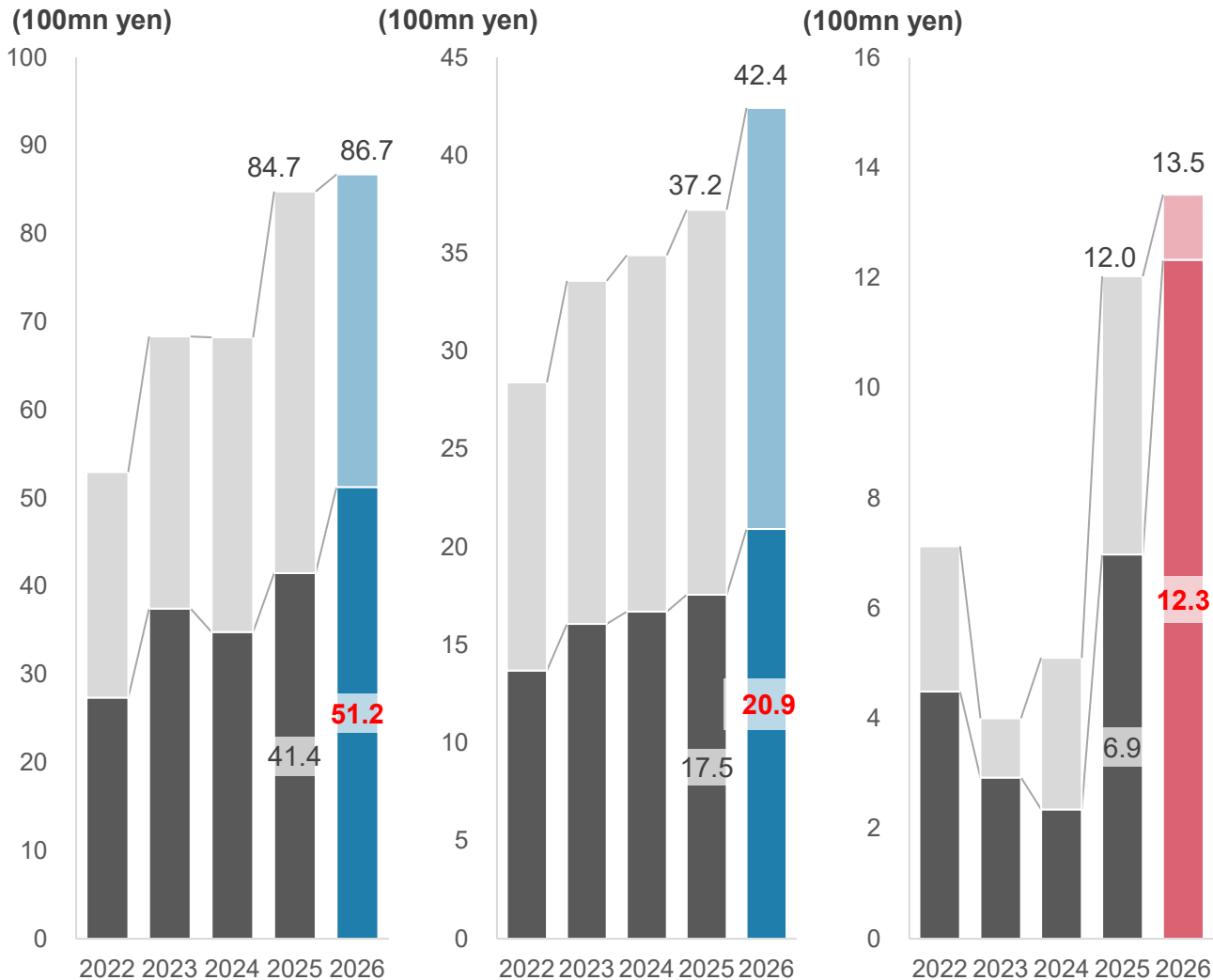
 All Retail Management System	FY12/25 Results	1H FY12/26 Results	FY12/30 Medium-term management plan
	Number of stores using core ERP system	1,219	1,283 (+64) 2,400
 communication & collaboration platform	FY12/25 Results	1H FY12/26 Results	FY12/30 Medium-term management plan
	Number of registered IDs for C2Platform	693	749 (+56) 6,500
 A Nayax Company	FY12/25 Results	1H FY12/26 Results	FY12/30 Medium-term management plan
	Number of stores using RetailPro*	Overseas 173 Domestic 41	191(+18) 40(-1) 700 1,300

*Number of RetailPro-equipped stores operated by Japanese companies with overseas operations.

Net sales

Recurring revenue

Ordinary profit



1H FY12/26 Results

Local government DX and disaster prevention system construction projects contributed to sales and profit growth

- ◆ Sales and profit increased, driven by projects related to the unification and standardization of local government ERP systems, and disaster prevention radio systems
- ◆ Recurring revenue increased due mainly to the standardization of local government ERP systems, new ActiveCity document management system deployments, and M&A activity undertaken in FY12/25
- ◆ Minnano Madoguchi online public service portal for local governments
Launched for the Tokyo's Edogawa Ward
Released AI chatbot functionality
- ◆ Undertook sales initiatives to raise awareness of the Company's nationwide cloud services
Participation in trade shows led to growth in new orders and a larger pipeline of sales opportunities

Full-Year FY12/26 Forecast

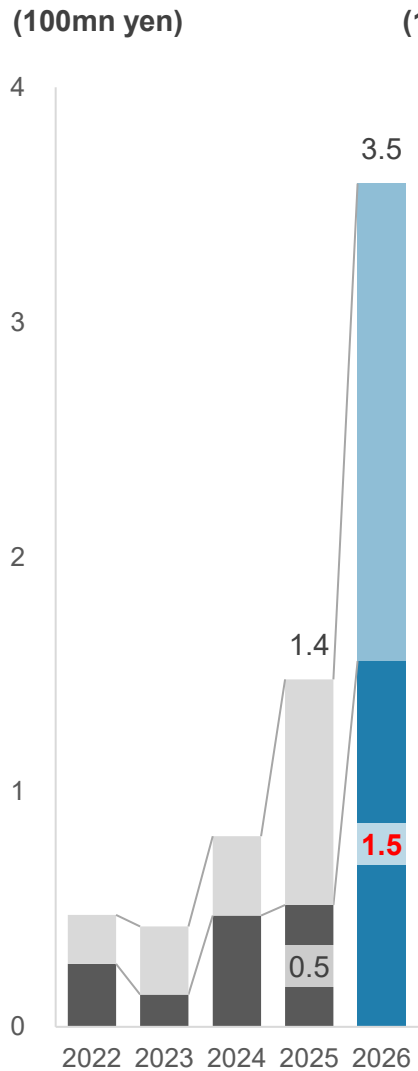
Sales and profit growth driven primarily by local government DX projects

Aiming to outperform full-year targets

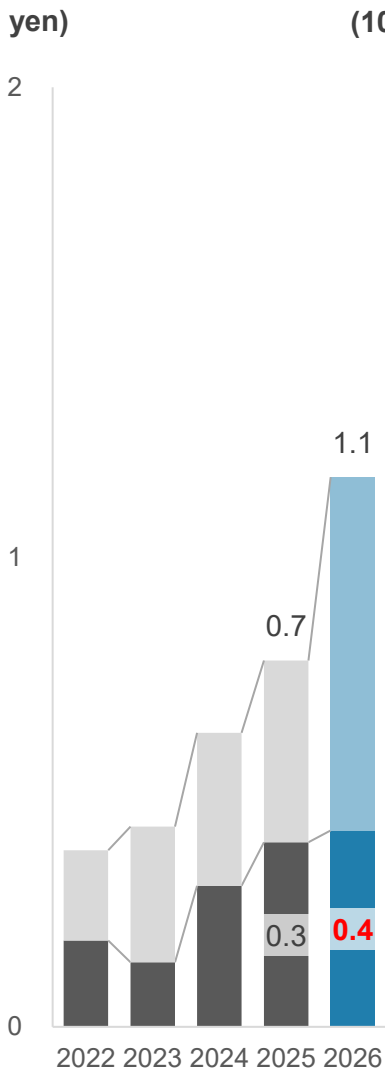
- ◆ Projects related to the unification and standardization of local government ERP systems
Recurring revenue expanded as system migrations were completed
- ◆ Promote initiatives aiming to incorporate AI functionality into Minnano Madoguchi and ActiveCity
- ◆ Software amortization associated with the acquisition of Synergy Inc. to decrease JPY 70 million per year

*We changed our reportable segment classification starting in FY12/24.
The segment sales and profit figures for FY12/23 in this document are based on the new segment classification.

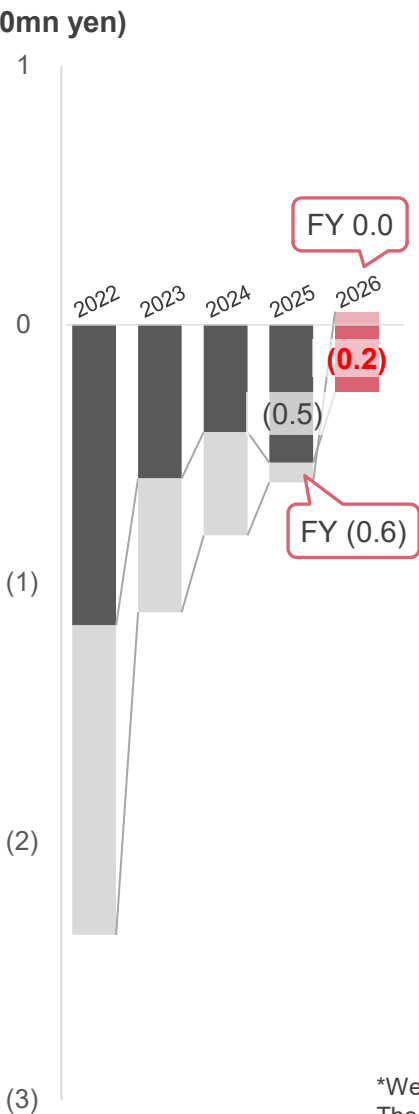
Net sales



Recurring revenue



Ordinary profit



1H FY12/26 Results

Sales increased thanks to contribution from large-scale development projects

- ◆ Contribution from contract-based development projects for national qualification examination systems
- ◆ Expanded delivery of CloudCerts services
Secured several new orders, primarily for small projects, and began issuing digital certificates.
- ◆ Continue aiming to acquire new customers through initiatives such as joint trade show participation between the Trust and Government Cloud segments

Full-Year FY12/26 Forecast

Accelerating efforts targeting the distribution of VC*

- ◆ Achieved progress on contract-based development projects for national qualification examination systems
The Pharmacist Credential Application Service and Review System developed for the Japan Pharmaceutical Association, a public interest incorporated association from July 2026.
- ◆ Construction of VC* distribution platform
Promote sales of eKYC (facial recognition) services; facilitate initiatives aiming to build wallet functionality

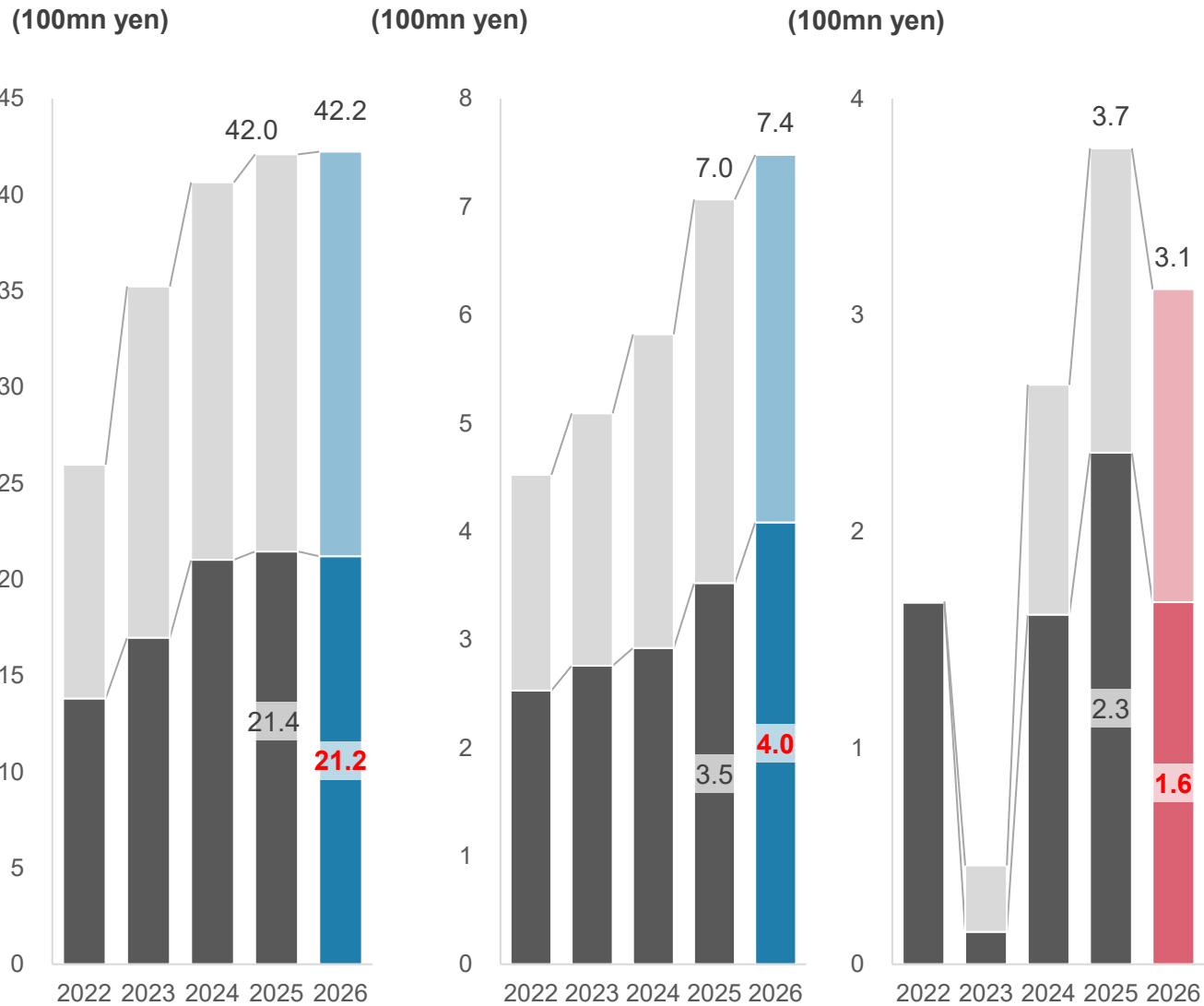
*VC: Abbreviation for “Verifiable Credentials”
A machine-readable, general-purpose data format (digital certificate) and data distribution model enabling functions such as authenticity verification and tamper prevention through digital signatures

*We changed our reportable segment classification starting in FY12/24.
The segment sales and profit figures for FY12/23 in this document are based on the new segment classification.

Net sales

Recurring revenue

Ordinary profit



1H FY12/26 Results

Sales were flat, but ordinary profit declined partly because of revisions made to incentive programs.

- ◆ Ordinary profit declined due to incentive program changes, higher promotional expenses, and growth in personnel expenses attributable to salary increases.
- ◆ Optimized store locations to balance coverage across trade areas
Closed the Docomo Shop JR Wakayama Station Store and opened the Docomo Shop AEON TOWN Kishigawa Store
Established a sales presence in a new trade area
- ◆ Established a centralized operations hub at headquarters.
Launched online customer-service support for stores

Full-Year FY12/26 Forecast

Despite incentive program changes and other factors, the Company will pursue productivity improvements with the aim of achieving its full-year targets.

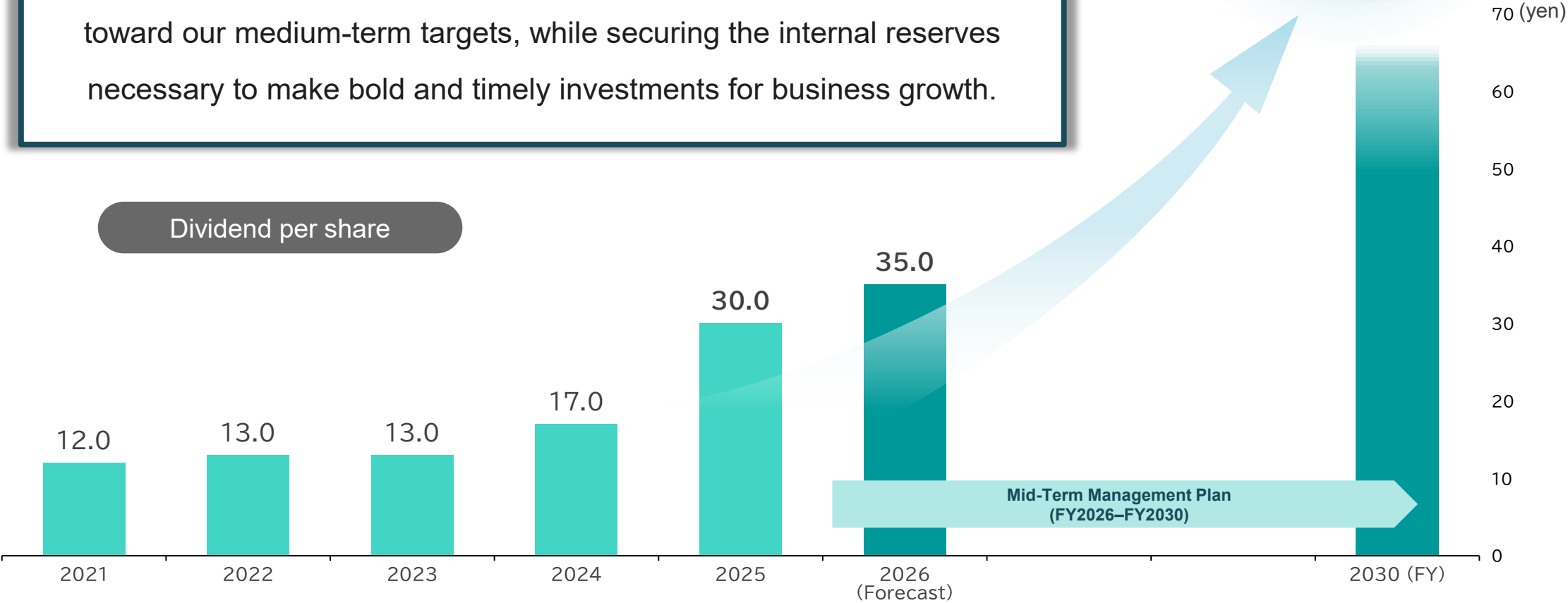
- ◆ Focus on sales activities, including off-site sales efforts and the development of new sales areas
- ◆ Pushing forward with initiatives targeting improvement in store-operating productivity
Expanding the range of operations handled by the centralized operations hub at headquarters to drive further improvement in store-operating efficiency

Shareholder Return Policy

We will raise our dividend payout ratio and dividend per share in line with improved earnings and profitability (improved cash flow) by making progress toward our medium-term targets, while securing the internal reserves necessary to make bold and timely investments for business growth.

Basic shareholder return approach
Maintain progressive dividend policy and raise the dividend payout ratio

Dividend per share



- We develop content on platforms such as IR note magazine and X (formerly Twitter), allowing readers to catch up on our initiatives in real time.
- Reports on our company are available through Shared Research.

X (formerly Twitter)



User name: @CyberLinks_3683

https://x.com/CyberLinks_3683



IR note magazine

note

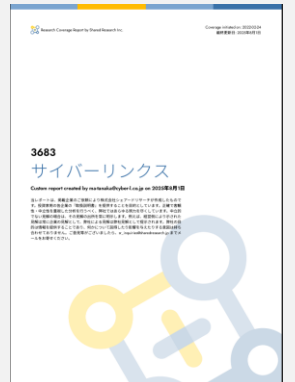
https://note.com/cyberlinks_note



Shared Research



<https://sharedresearch.jp/ja/companies/3683>



WiLL makes anything すべては思うことから始まる—



CYBERLINKS CO., LTD.
Corporate Planning Division

<https://www.cyber-l.co.jp/inquiry/>

■ Disclaimer

This document contains forward-looking statements, including forecasts, future plans, and management targets pertaining to the Company. These forward-looking statements are based on current assumptions about future events and trends, and the accuracy of these assumptions is not guaranteed. Actual results may differ significantly from those described in this document due to a variety of factors. Unless otherwise specified, the financial data in this document is presented in accordance with accounting principles generally accepted in Japan. The Company makes no guarantee that it will revise any of the forward-looking statements it has already made, regardless of the occurrence of future events, except as required by disclosure regulations. Information regarding other companies is based on information that is generally known to the public.

WiLL makes anything