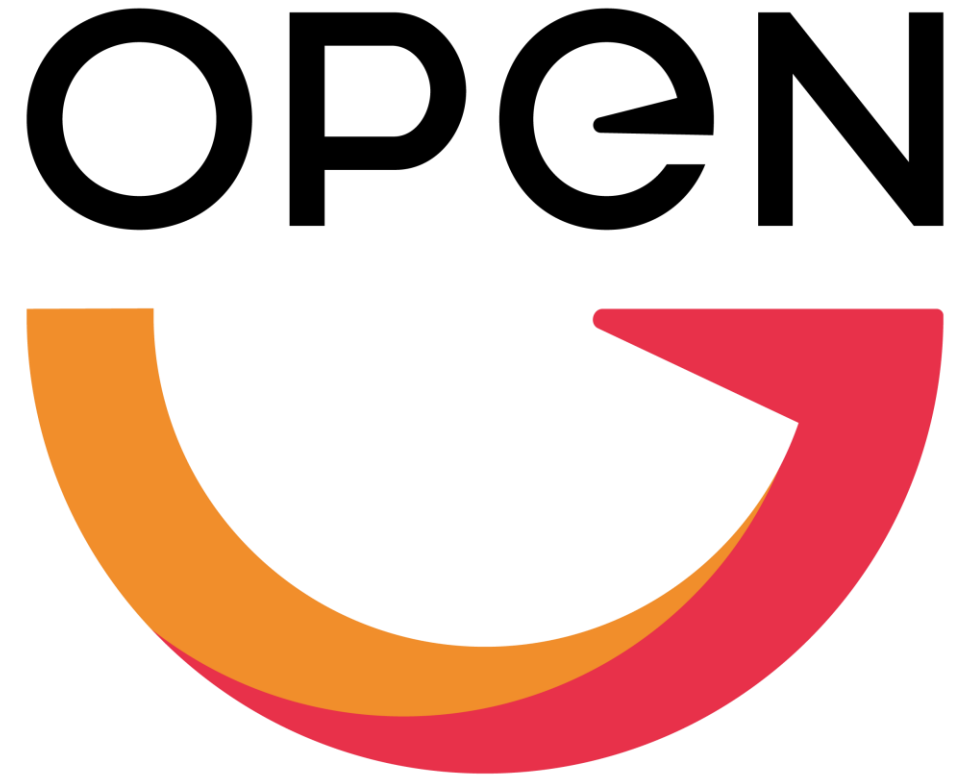


Q1 FY2026/2 Financial Update

OPEN Group, Inc.
(TSE PRIME MARKET : 6572)

July 15, 2025



#1

Q1 FY2026/2 Financial Overview

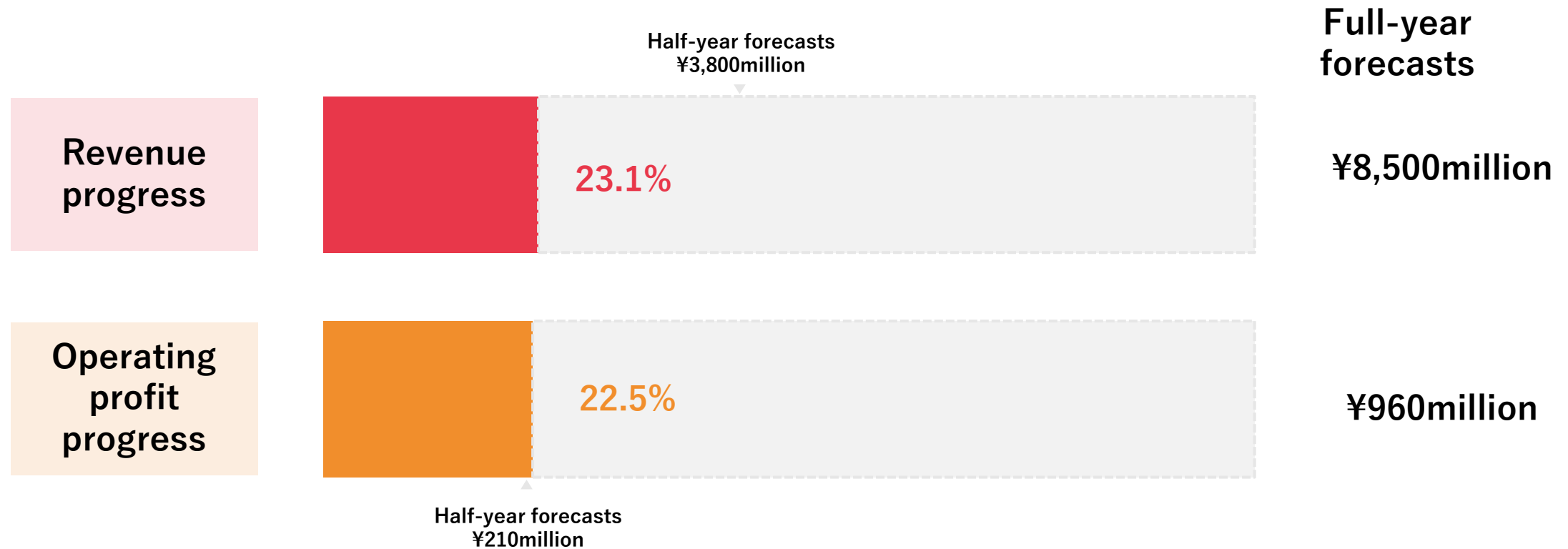
Q1 FY2026/2 Financial Overview

The Intelligent Automation Segment and the Ad Automation Segment delivered firm results, and achieved increases in revenue, operating profit, ordinary profit, and profit attributable to owners of parent YoY. Last year, we recorded a loss on investment of ¥106 million related to an equity affiliate as non-operating expenses.

	JPY MM		
	Q1 FY2025/2	Q1 FY2026/2	YoY
Revenue	1,783	1,960	+9.9%
Operating Profit	164	215	+30.8%
Ordinary profit	44	189	+327.1%
Profit attributable to owners of parent	20	137	+574.9%

Progress Toward the Full-Year Earnings Forecasts

Against a full-year earnings forecast that is heavily weighted toward the second half, both revenue and operating profit are off to a good start.

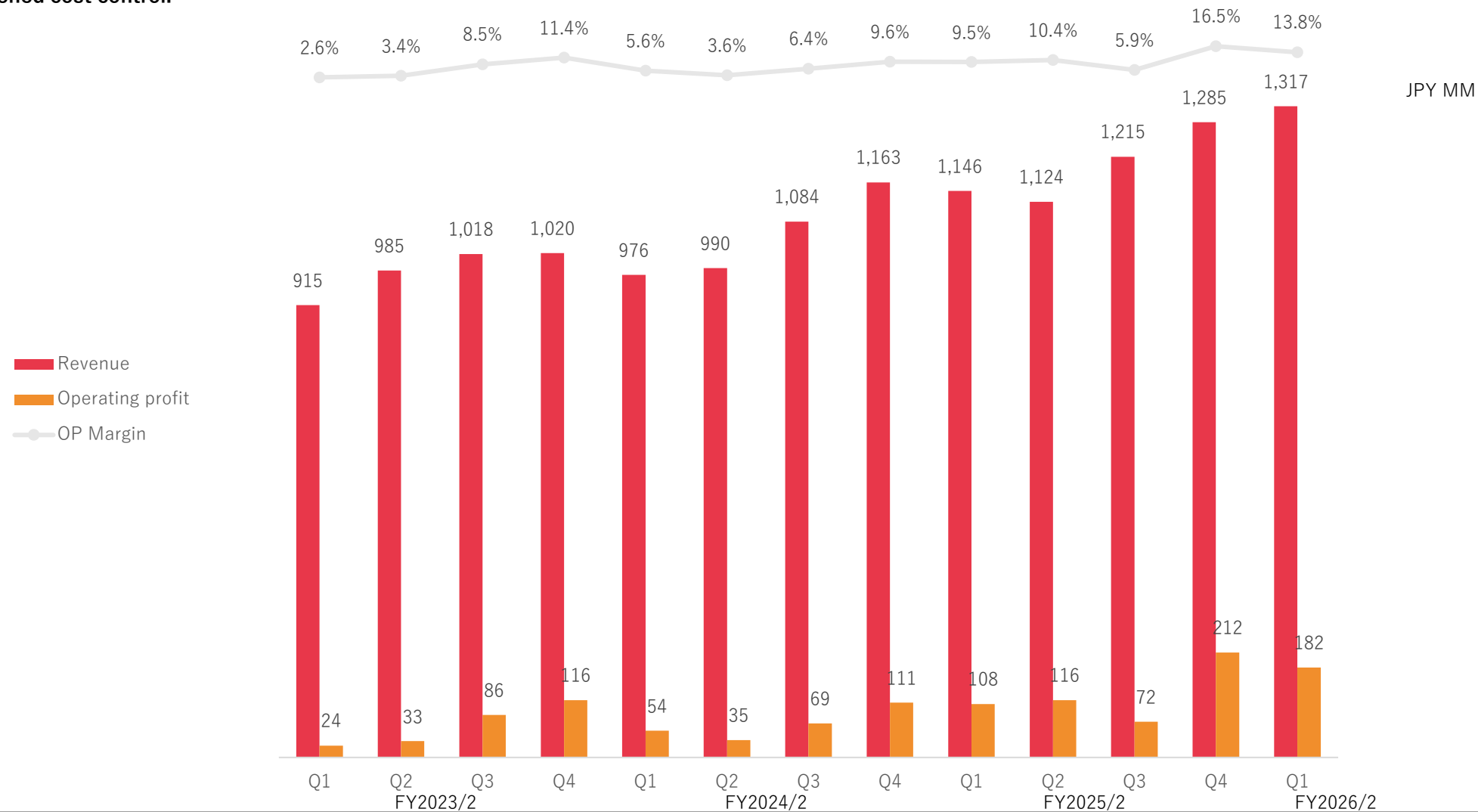


#2

Overview of the Intelligent Automation Segment

Intelligent Automation Highlight

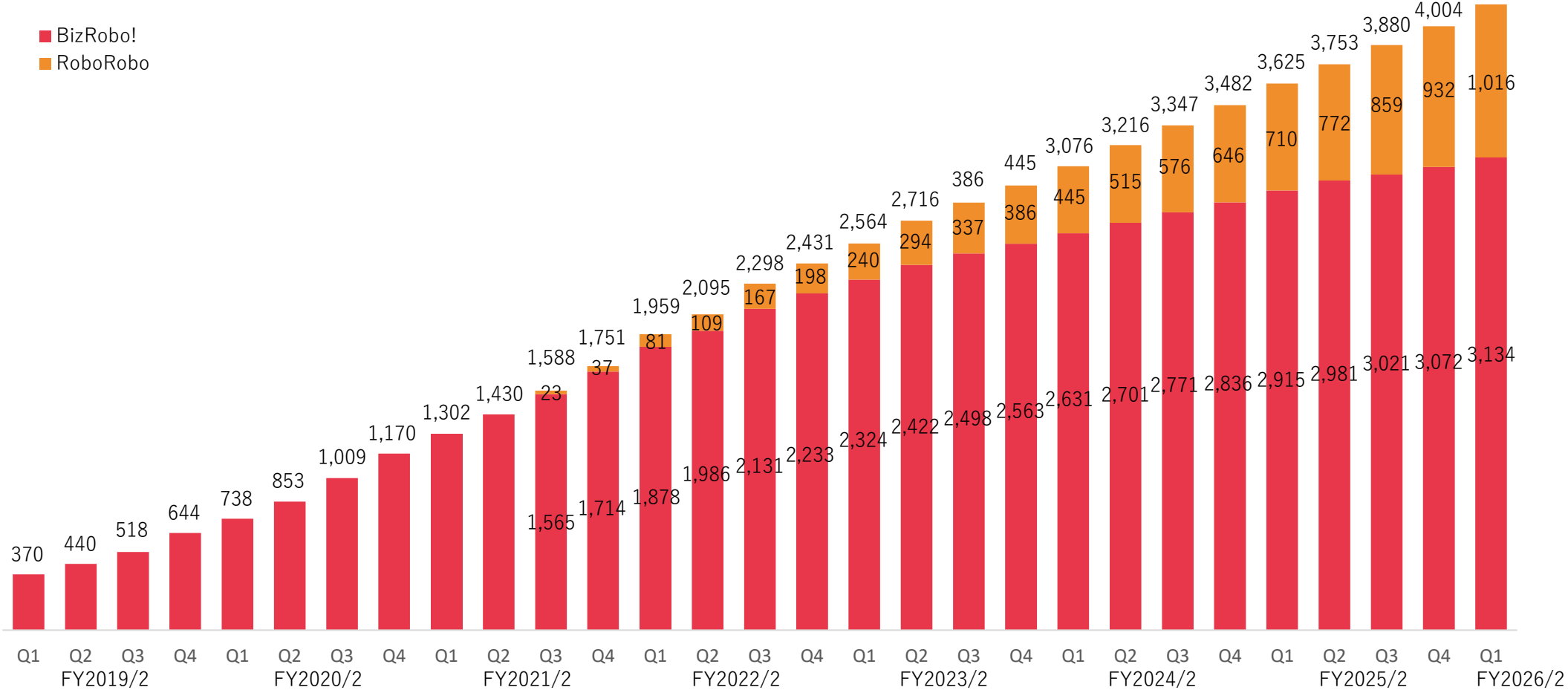
Revenue of both BizRobo! and RoboRobo was firm as the number of companies that have adopted them increased steadily. BizRobo! and RoboRobo delivered increases in both revenue and profit. While continuing upfront investments, mainly for RoboRobo's product development, profit margins improved due to an increase in recurring revenue and strengthened cost control.



Intelligent Automation Highlight : Number of Customers

The total number of companies that have adopted BizRobo! and RoboRobo has continued to steadily expand this quarter.
The churn rate for BizRobo! remains low at 0.83%.

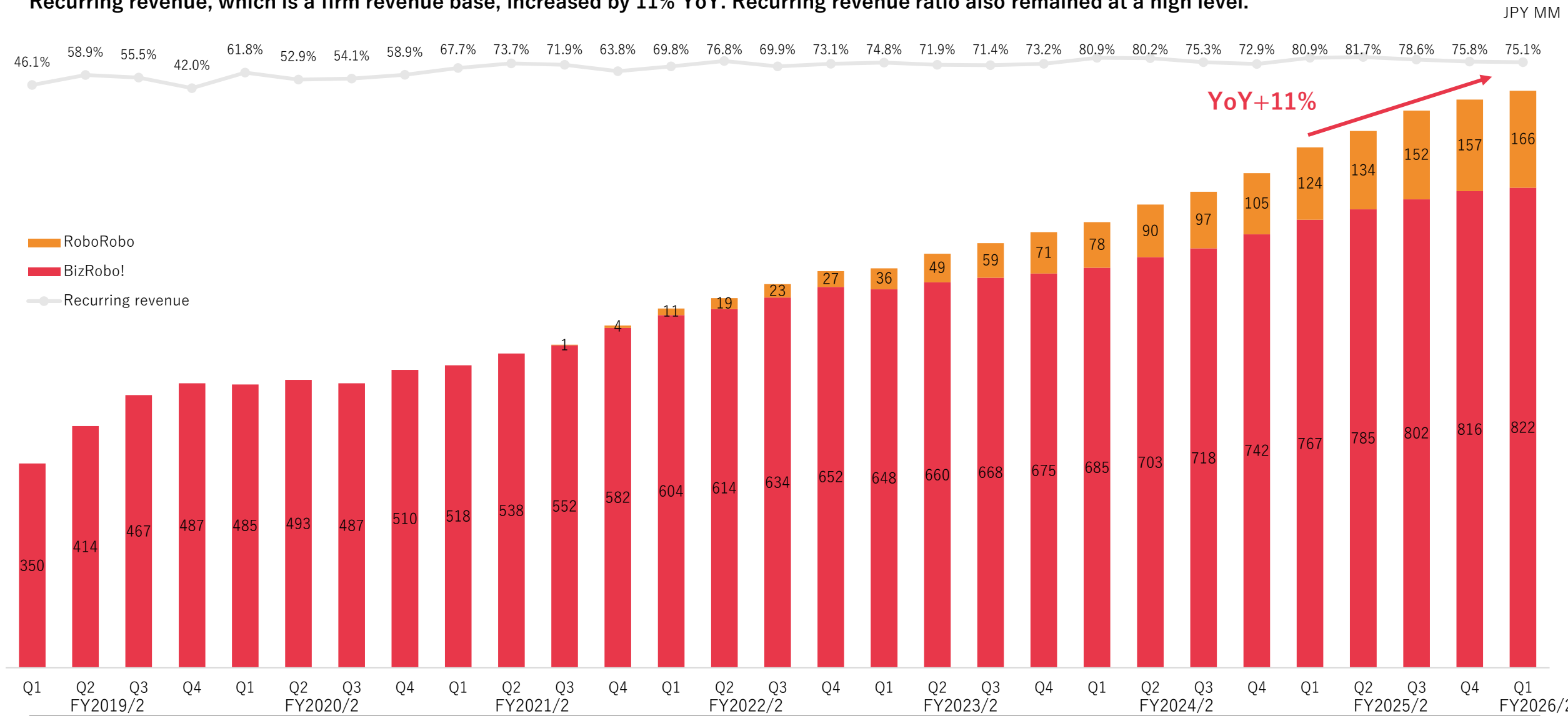
4,150



* For BizRobo!, the total number of companies that have adopted BizRobo! Basic, BizRobo! Lite and BizRobo! mini

Intelligent Automation Highlight : Recurring revenue

Recurring revenue, which is a firm revenue base, increased by 11% YoY. Recurring revenue ratio also remained at a high level.



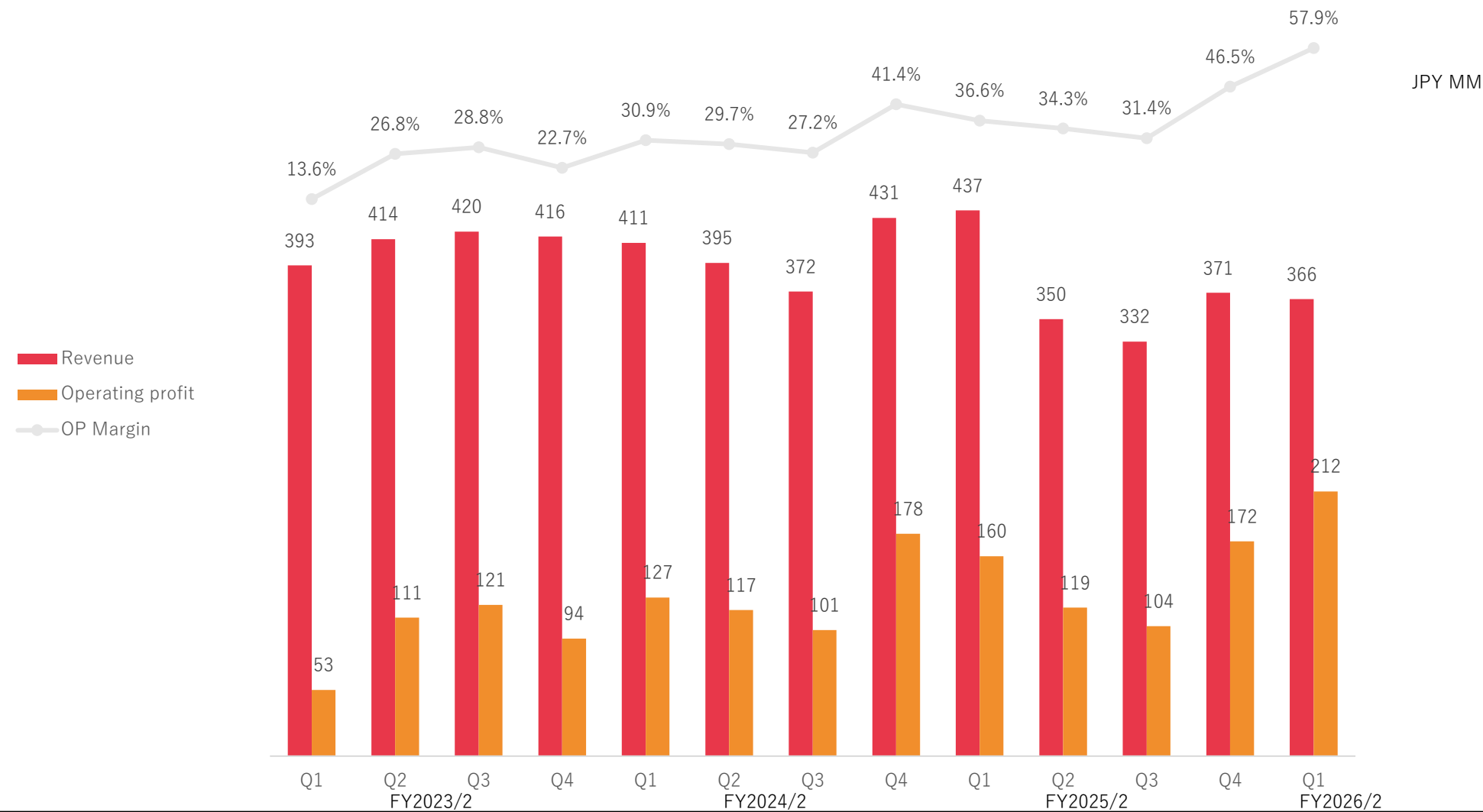
* For BizRobo!, the total amount of recurring revenue from BizRobo! Basic, BizRobo! Lite and BizRobo! mini

#3

Overview of the Ad Automation Segment

Ad Automation Highlight

There was an impact of a decline in revenue and profit due to progress made in the business reorganization of projects that had increased the volatility of business performance. However, profit increased as a result of continuing smooth progress in efforts to expand the handling share of our mainstay CPA advertising business, in conjunction with improved fee rates and strengthened cost control.



#4

Business Growth Strategy

Future Growth Strategy of the Group

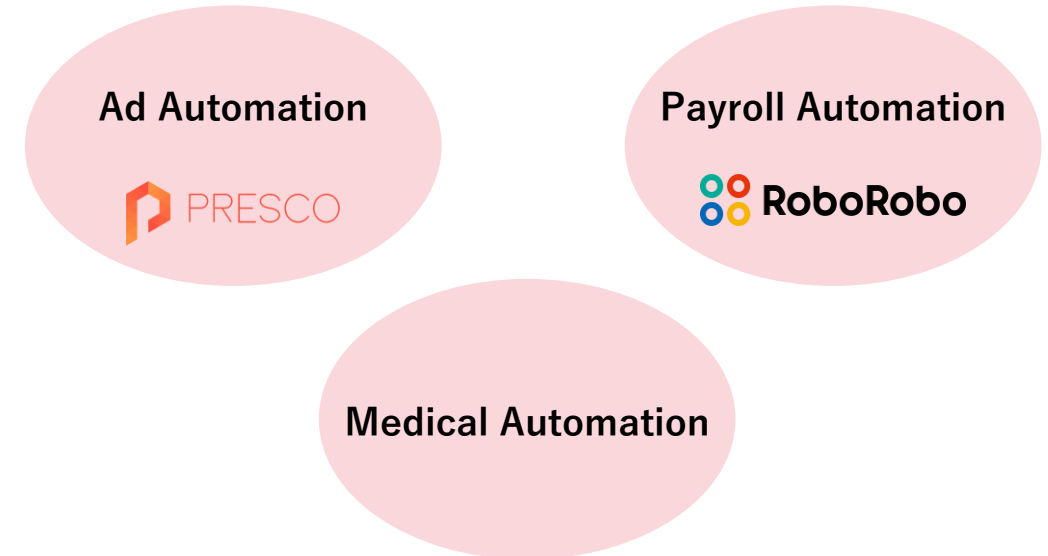
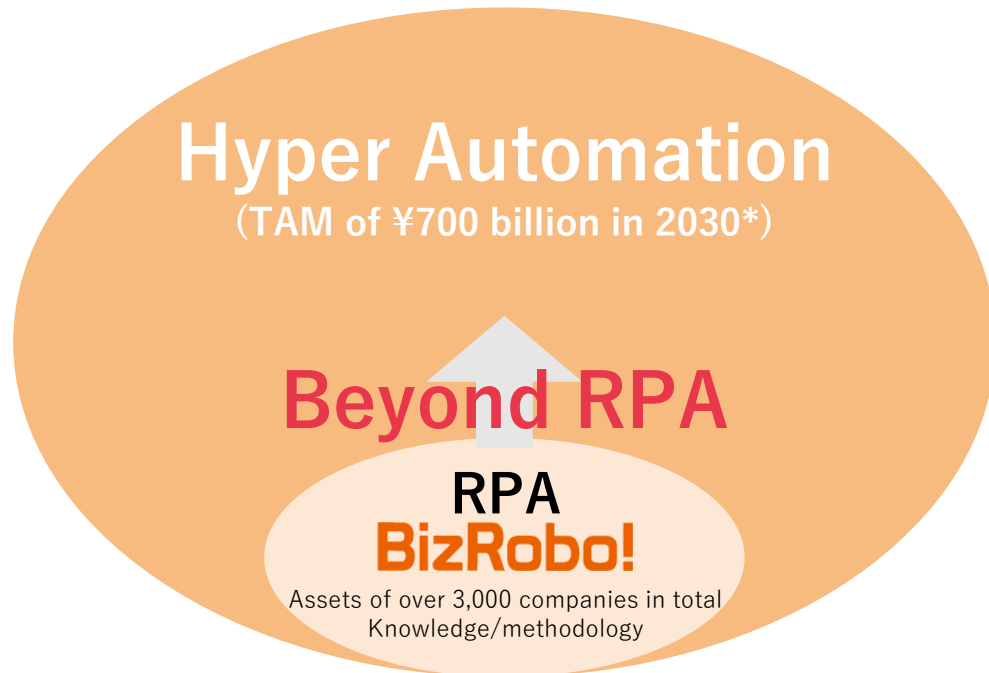
Until now, we have supported the automation of individual tasks using RPA-centered technologies. Going forward, we will combine these technologies with AI to evolve into the automation of entire processes (hyper automation) and maximize the value provided to customers.

We will leverage hyper automation to the fullest extent possible to enter industries facing labor shortages and DX deficiencies and redefine them.

AI Transformation

Evolve from task to process automation

Redefine every industry through automation



Highly Probable Growth Through Horizontal Expansion of Industry Redefinition

The redefinition of industries through hyper automation has been proven

- In the performance-based advertising industry, we have automated existing agency operations through hyper automation, achieving productivity that exceeds our competitors by 2-3 times.
- We have drastically reduced tasks such as advertising placement and performance analysis for advertisers, while improving the quality of referrals to media outlets.
- We have grown to where we are now aiming to become the top company in terms of handling volume in a short period of time.

Hyper automation
platform



Industries with labor shortages/
labor-intensive operations
(Targeting companies facing challenges
in terms of resources (funds and personnel)
due to their business scale)

Payroll calculation industry

- We will achieve significant improvement in productivity and operational efficiency with RoboRobo Payroll, which hyper-automates existing payroll calculation operations
- Players providing payroll calculation outsourcing services to mid-sized and SME mainly in rural areas, which have labor-intensive operations, are facing serious labor shortages
- The payroll calculation outsourcing providers that we target, with revenue of ¥100 million to ¥300 million, have limited investment capacity, so DX has not progressed, and combined with labor shortages, they are facing business continuity challenges
- In addition to offering the RoboRobo Payroll hyper automation service, we will actively pursue M&A with the goal of becoming a payroll calculation outsourcing provider with the No. 1 share

Medical office work industry

- We are preparing to launch an “online medical office work service” that hyper-automates existing medical office work to achieve significant improvement in productivity and operational efficiency
- Due to the nature of medical care, clinics nationwide are small- to medium-sized community-based businesses with labor-intensive operations, and are facing serious labor shortages (960,000 workers will be needed by 2040*)
- The approximately 15,000 home medical care facilities in Japan that we target have limited investment capacity, so DX has not progressed, and combined with labor shortages, they are facing serious management challenges
- In addition to offering a hyper-online medical office work service, we will actively pursue M&A to redefine the industry

Intelligent Automation

Basic strategy

We are aiming to increase revenue by combining operation automation services such as RPA and iPaas with high value-added automation technologies such as hyper automation to offer total automation services that solve issues faced by companies and local governments. We will evolve from automating individual tasks to automating entire processes to maximize the value we provide to our customers.

Growth story

1

Business operation knowledge cultivated through RPA and superior hyper automation products

2

Technology implementation capabilities that thoroughly prioritize the perspective of customers struggling to introduce technology

3

Upselling and cross-selling to a cumulative total of 3,000 customer companies, including 800 enterprise companies

Business goals

Hyper automation market
(TAM of ¥700 billion* in 2030)
By FY2028/2

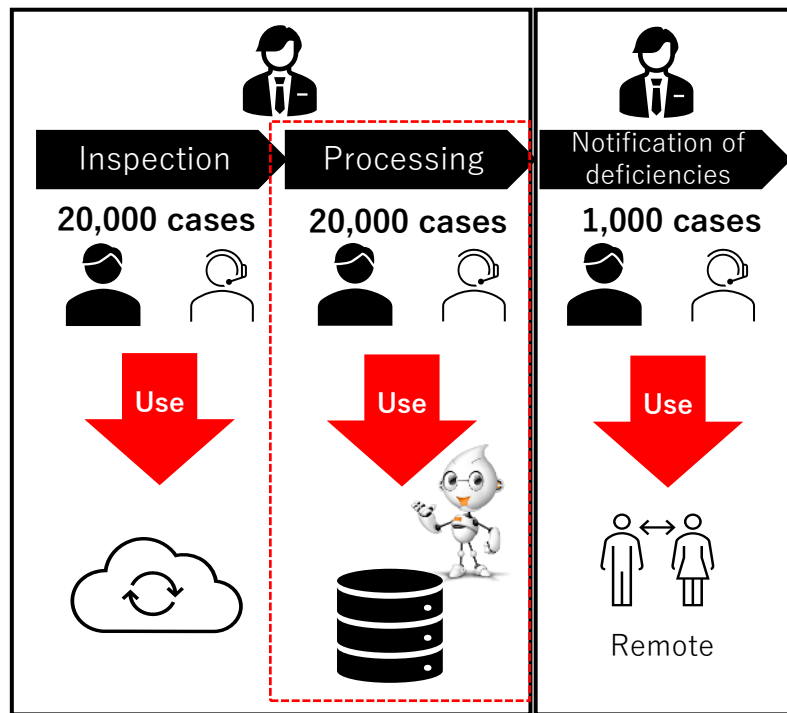
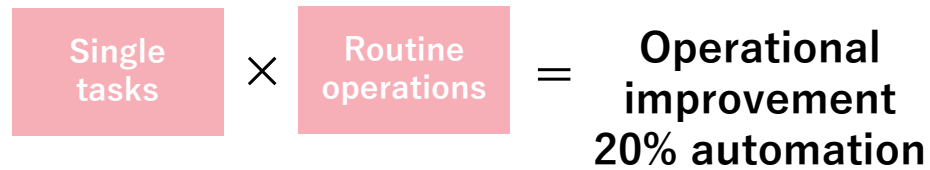
No. 1 share

FY2026 – FY2028
Operating profit, average annual growth rate

30% growth

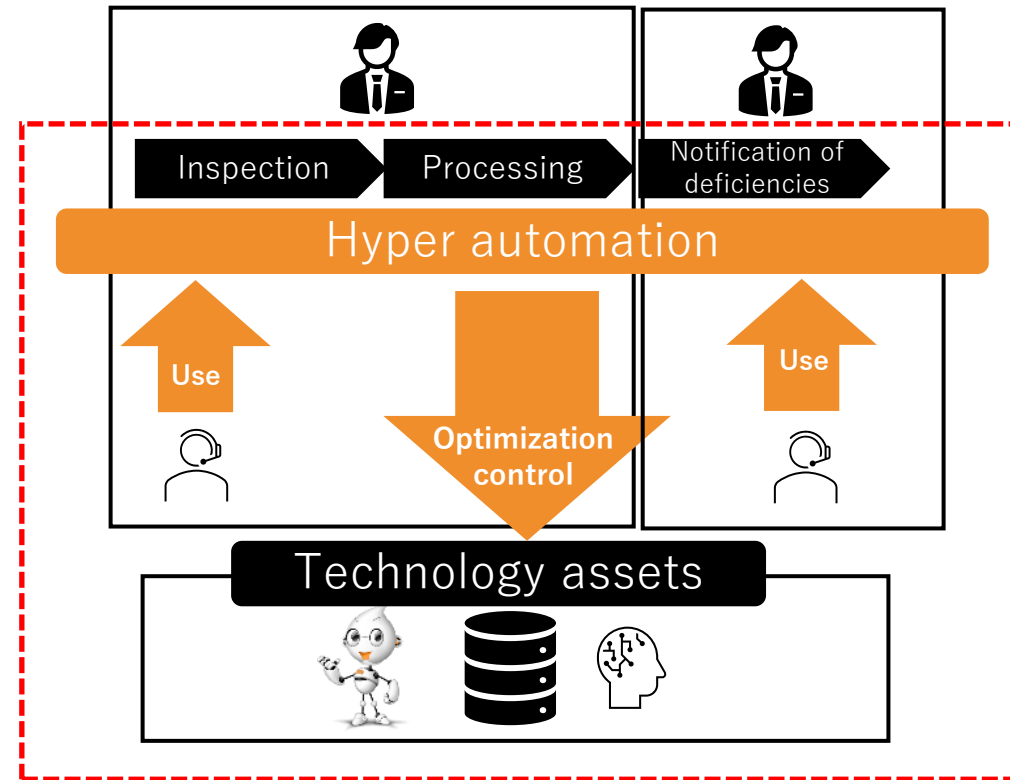
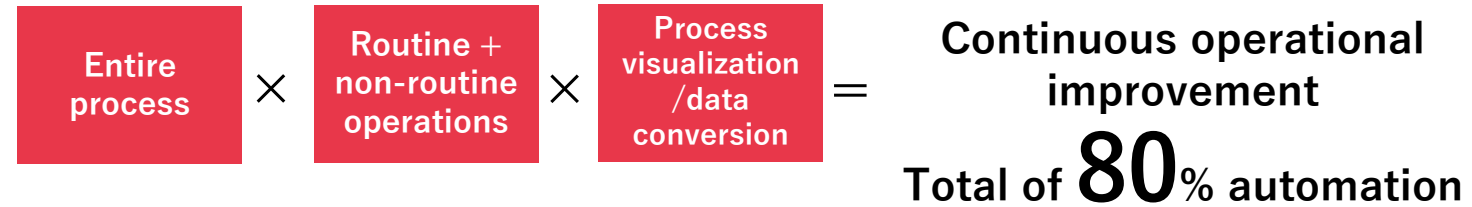
Intelligent Automation Topic: Contract Processing Process Case Study at a Major Financial Institution

<RPA>



Reduction of 20 man-months

<Hyper automation>



Reduction of 80 man-months

Hyper Automation Market Outlook and Our Products

“Tungsten TotalAgility,” our hyper automation tool, is positioned as one of the global market leaders. We are implementing an upselling strategy targeting over 3,000 BizRobo user companies in total. We anticipate an increase in LTV through high value-added services achieved by shifting from automating tasks to automating processes.

Size of the hyper automation market

Global

Market size in 2030
Approx. \$118.6 billion

Growth rate
(CAGR of 2022-2030)
16.5%

Japan

Market size in 2030
Approx.
¥700 billion

Positioning of Tungsten TotalAgility



Ad Automation

Basic strategy

We are introducing hyper automation into ad automation in the inefficient online advertising industry, where an agency structure remains, to improve technological superiority and redefine the industry structure. We are aiming to become No. 1 in the performance-based advertising industry in terms of handling volume by maintaining competitive fee rates through productivity that exceed our competitors by 2-3 times.

Growth story

1

Attractive pricing for customers supported by overwhelming productivity

2

TAM for the performance-based advertising industry is estimated to be over ¥400 billion* and still has plenty of room for growth

3

Gradually improve fee rates for programs with high handling shares to strengthen profitability

Business goals

Performance-based advertising handling volume

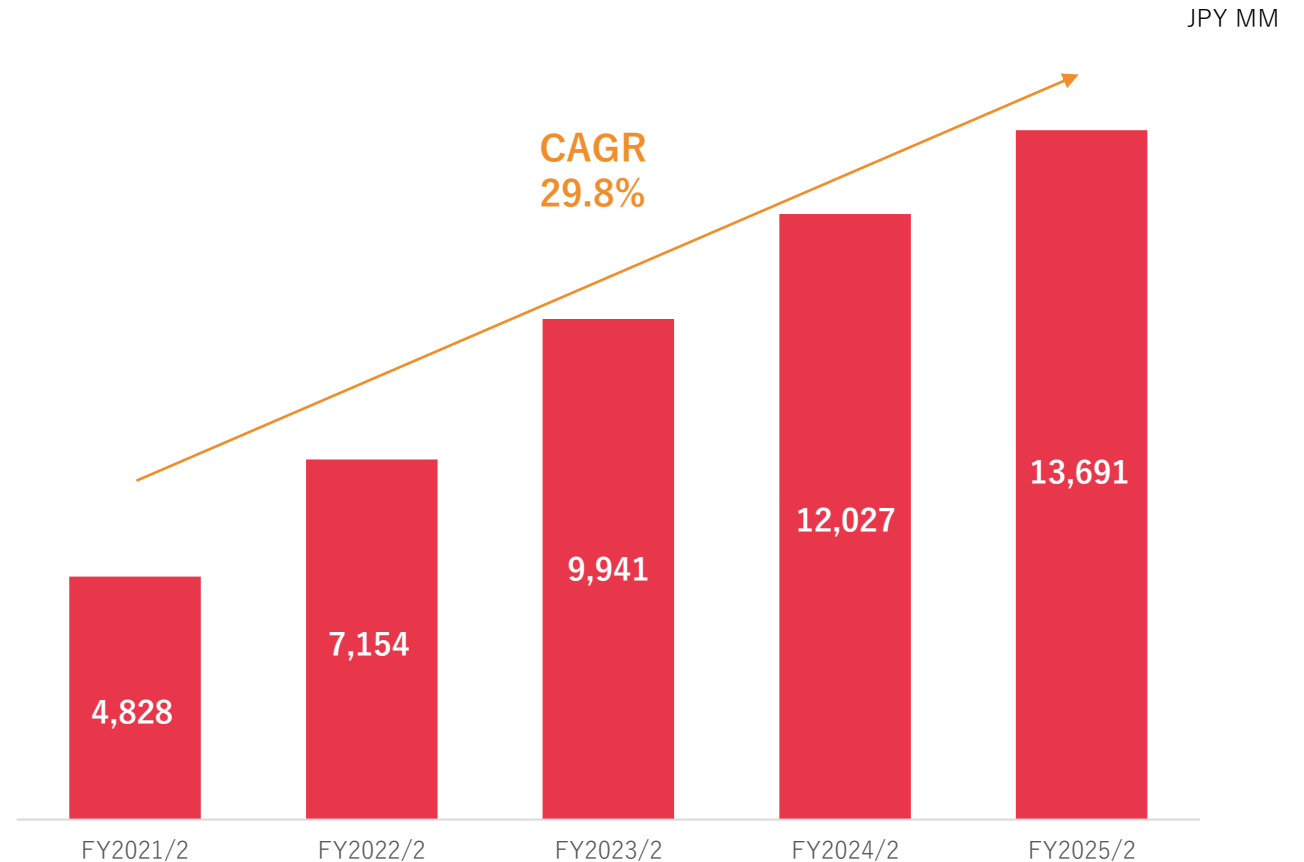
By FY2028/2

No. 1 share **¥30 billion annually**

Increase in PRESCO transaction volume

- PRESCO has achieved automation in the labor-intensive CPA advertising industry. This is the field where social implementation of the Company's core-strength RPA and its other cutting-edge technologies has been most powerful.
- It has achieved high growth in recent years by entering a cycle of replacing competitors, expanding market share and increasing transaction volumes. By FY2028/2, we aim to achieve handling volume of ¥30 billion annually and secure the No. 1 share. Based on our track record to date, we see a high probability of success.
- In tandem with expanding transaction volumes, we will pursue further improvement in profitability through measures such as a review of set fee rates.

< Trends in PRESCO transaction volume >



Payroll Automation

Basic strategy

In payroll automation, we offer AI and digital BPO services that automate operations, aiming to become No. 1 in the mid-sized and SME markets. We improve the productivity of acquired companies through roll-up M&A, achieving vertical business expansion and profit growth, and fully leverage the power of hyper automation to redefine industries.

Growth story

1

Attractive pricing for customers supported by overwhelming productivity

2

A vast TAM* expected to exceed ¥1 trillion in the future

3

Positioning as a strong buyer in the M&A market

Business goals

Mid-sized and SME payroll calculation industry

By FY2028/2

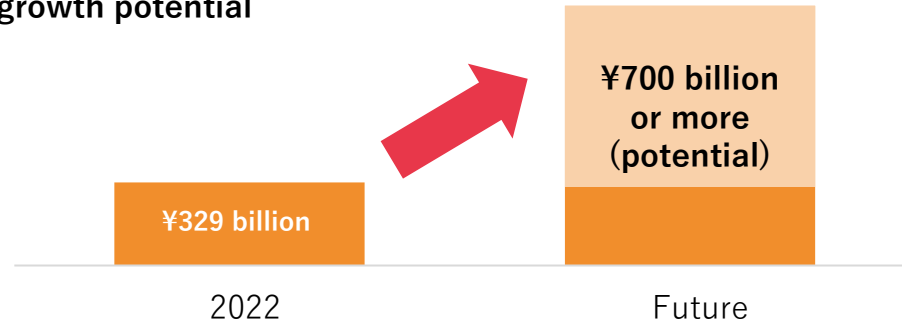
No. 1 revenue ¥3 billion annually

Active Service Expansion and M&A Promotion in the Payroll Field

Starting with the acquisition of Asuka Payroll Pro, we are rapidly expanding our business in the fast-growing payroll calculation outsourcing market

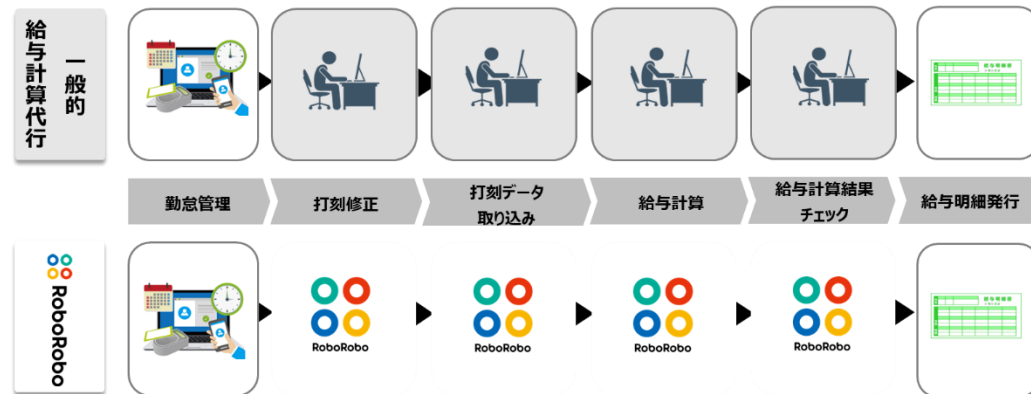
Expansion of *the* payroll calculation BPO market*

We are rapidly implementing measures targeting markets with growth potential



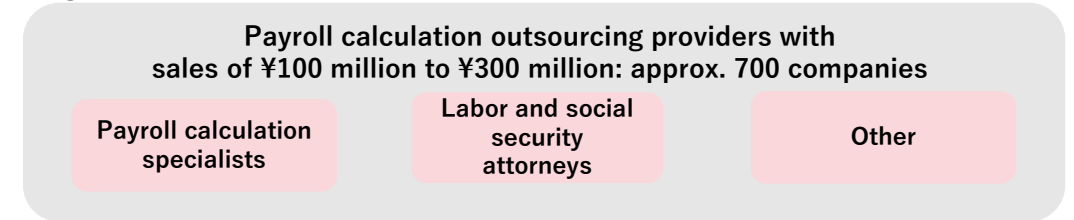
Strengthening the DX capabilities of SMEs

The introduction of “RoboRobo Payroll” has achieved significant improvement in productivity and operational efficiency



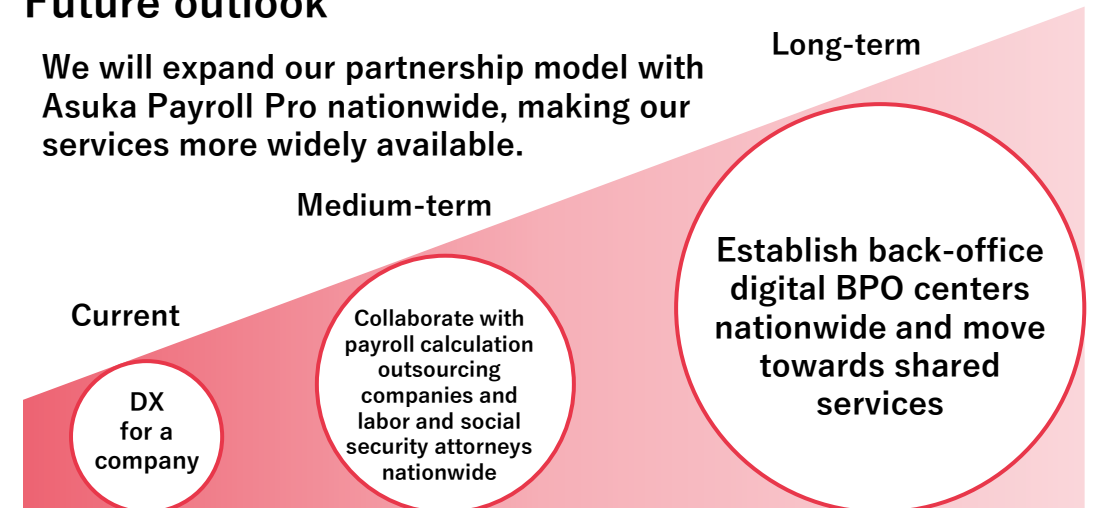
Probability of growth through M&A in this field

Many small-scale payroll calculation outsourcing providers are struggling with labor shortages and a lack of DX capabilities. Following the acquisition of Asuka Payroll Pro, our aggressive acquisition strategy in this field has gained recognition, and we are receiving numerous inquiries. We are currently executing a steady stream of M&A projects (top-level meetings, due diligence, etc.).



Future outlook

We will expand our partnership model with Asuka Payroll Pro nationwide, making our services more widely available.



Active Service Expansion and M&A Promotion in the Payroll Field

Benefits of promoting digitalization at acquired companies



Expected acquisition effects

Growth rate	Productivity	Operating profit margin
105% ➡ 120%	¥10 million ➡ ¥31 million	20 % ➡ 40 %

Redefining Industries/Medical Automation

Basic strategy

We are building and providing a hybrid BPO service that combines people and AI to fully handle middle-office (such as claims processing) and back-office operations remotely primarily for home medical care clinics and home nursing care industries across Japan, aiming to become the industry leader in essential service infrastructure for the Medical 4.0 era (outpatient care → home care = medical care → health responsibility). At the same time, we are pursuing M&A of medical corporations and similar businesses that share our vision of creating an environment that concentrates personnel on frontline medical care, as well as collaborative models with medical players, to contribute to the transition and acceleration of Japan's healthcare infrastructure toward a proper model.

Growth story

1

Market assets

(Accumulation of social issues)

Collaborative members (approx. 1,000 medical institutions nationwide) and existing users (approx. 300 institutions) originating from the Medical RPA Association

2

Solution development capability

In addition to standardizing digital workers (RPA*AI) that directly solve structural issues in the medical industry in a one-stop manner, redefine through further integration of AI-native technology

3

Market development capability

Accelerate the development of a nationwide market based on the Group's corporate culture and financial foundation

- Expand alliances through M&A (roll-up type)
- Co-creation partners with nationwide coverage
- AI-native shared platform

Business goals

Launch of hyper-online medical service to 200 institutions (No. 1 share)

*In three years

#5

Appendix

Consolidated P/L (Q1 FY2026/2)

JPY MM

	Q1 FY2025/2	Q1 FY2026/2	YoY
Revenue	1,783	1,960	+ 9.9%
Intelligent Automation Segment	1,146	1,317	+ 14.9%
Ad Automation Segment	437	366	△16.2%
Other	199	276	+ 38.6%
Operating profit	164	215	30.8%
OP Margin	9.2%	11.0%	-
Profit before income taxes	44	189	+327.1%
Net Income	20	137	+574.9%
NI Margin	1.1%	7.0%	-

Segment Financials (Q1 FY2026/2)

JPY MM

	Intelligent Automation Segment	Ad Automation Segment	Total	Other	Adjust- ment	Consoli- dated
Revenue	1,339	371	1,711	277	△27	1,960
Revenue from external customers	1,317	366	1,684	276	-	1,960
Adjustments	21	4	26	0	△27	-
Operating profit	182	212	394	△10	△169	215
OP Margin	13.6%	57.2%	23.1%	-		11.0%

Consolidated B/S

JPY MM

	FY2025/2	Q1 FY2026/2	Difference
Current assets	15,577	15,371	△206
Cash & cash equivalents	10,510	10,612	102
Non-current assets	4,389	4,652	262
Total assets	19,967	20,023	56
Current liabilities	5,978	6,871	893
Non-current liabilities	2,005	1,791	△214
Total liabilities	7,984	8,663	678
Total debt	4,278	4,002	△275
Common stock	5,926	5,926	-
Capital surplus	6,071	6,059	△12
Retained earnings	647	452	△194
Treasury shares	△678	△1,108	△429
Total equity	11,982	11,360	△622

#6

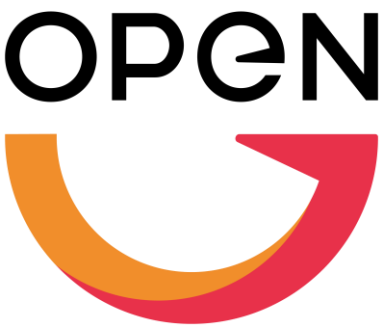
Company Overview

Company Overview

Company name	OPEN Group, Inc.	
Foundation	April 2000	
Common stock	JPY 5,926million yen (As of February 28, 2025)	
Location	KDX Nishi-Shinbashi Building 3F 3-3-1 Nishi-Shinbashi, Minato-ku, Tokyo	
Board of directors	Representative Director	Tomomichi Takahashi
	Director	Nobuyuki Osumi
	Director	Satoshi Matsui
	Director	Takashi Nishiki
	Director*	Yoshihiko Masuda
	Director*	Eiichi Nagai
	Director*	Hideaki Takahashi
	Director*	Miho Yokoyama
Business	Pure holding company	
Group companies	OPEN, Inc. LEAGLE Inc. Hospitality Partners, inc. AUTORO Inc. Gokinjowork Inc. Asuka Payroll Pro Inc. Payroll Pro Inc.	

MISSION

Co-creating Human
Evolution



* Audit and supervisory committee member



Freeing All Workers from Routine Tasks

Increase your productivity by delegating tedious tasks to BizRobo! Create a better work environment by avoiding human errors in simple tasks, chronic worker shortages, and manual labor.



Cloud-based back office efficiency tools

No more labor-intensive back-office operations— they can all be automated. We combine the strengths of both humans and automation to improve the efficiency of your back office operations.



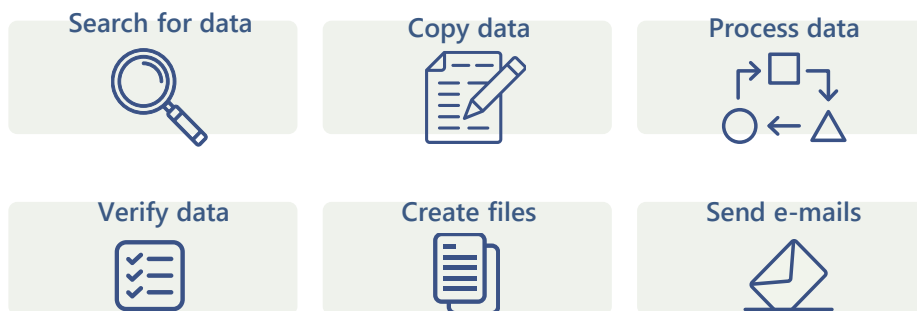
Robots x Online Advertising

In a world inundated with information, PRESCO aims to help users make essential decisions. We use robots and AI to organize and deliver relevant information so that users can make proactive decisions.

Intelligent Automation : BizRobo!

BizRobo! automates day-to-day operations that utilize various systems based on the Company's proprietary RPA technologies, and increases corporate productivity. Usability that can also be used for non-IT applications, a robust support system and wide-ranging product lineup that responds to corporate needs are the sources of its competitiveness.

With RPA as its core technology, BizRobo! automates all of the following day-to-day operations:



Solve the following issues shared by all companies

Human errors in menial tasks



Chronic labor shortage



Over-specialized operations



Examples: Product information entry for sales websites, recording and printing of invoices, attendance input reminders, monthly consolidated account closing, etc.

Examples of sales partners*



Examples of companies that have introduced BizRobo! (more than 3,000 companies)

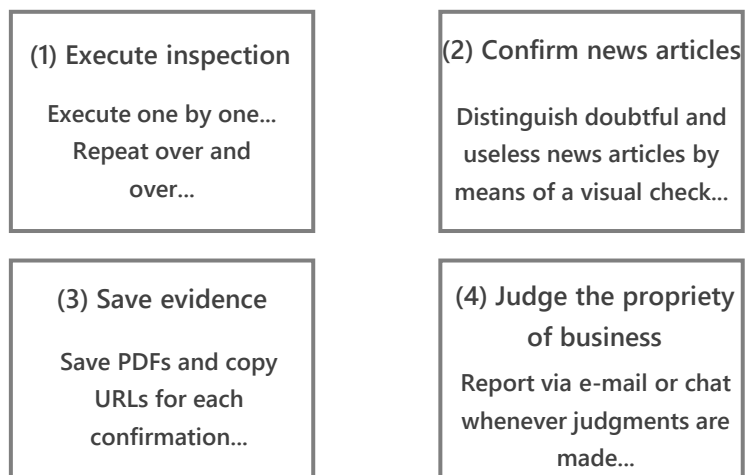


* Sales partners buy digital labor from the Company, and sell to client companies.

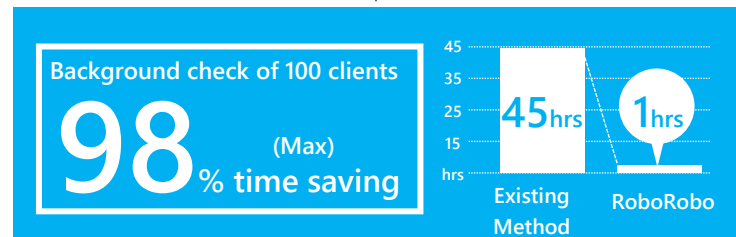
Intelligent Automation : RoboRobo

RoboRobo is a cloud service that automates operations shared by all companies, such as legal/general administration, recruiting, human resources and labor affairs. Starting with legal/general administration, we are expanding into fields such as recruiting, human resources and labor affairs.

All work was previously done by hand for background checks...



Automate all processes with RoboRobo



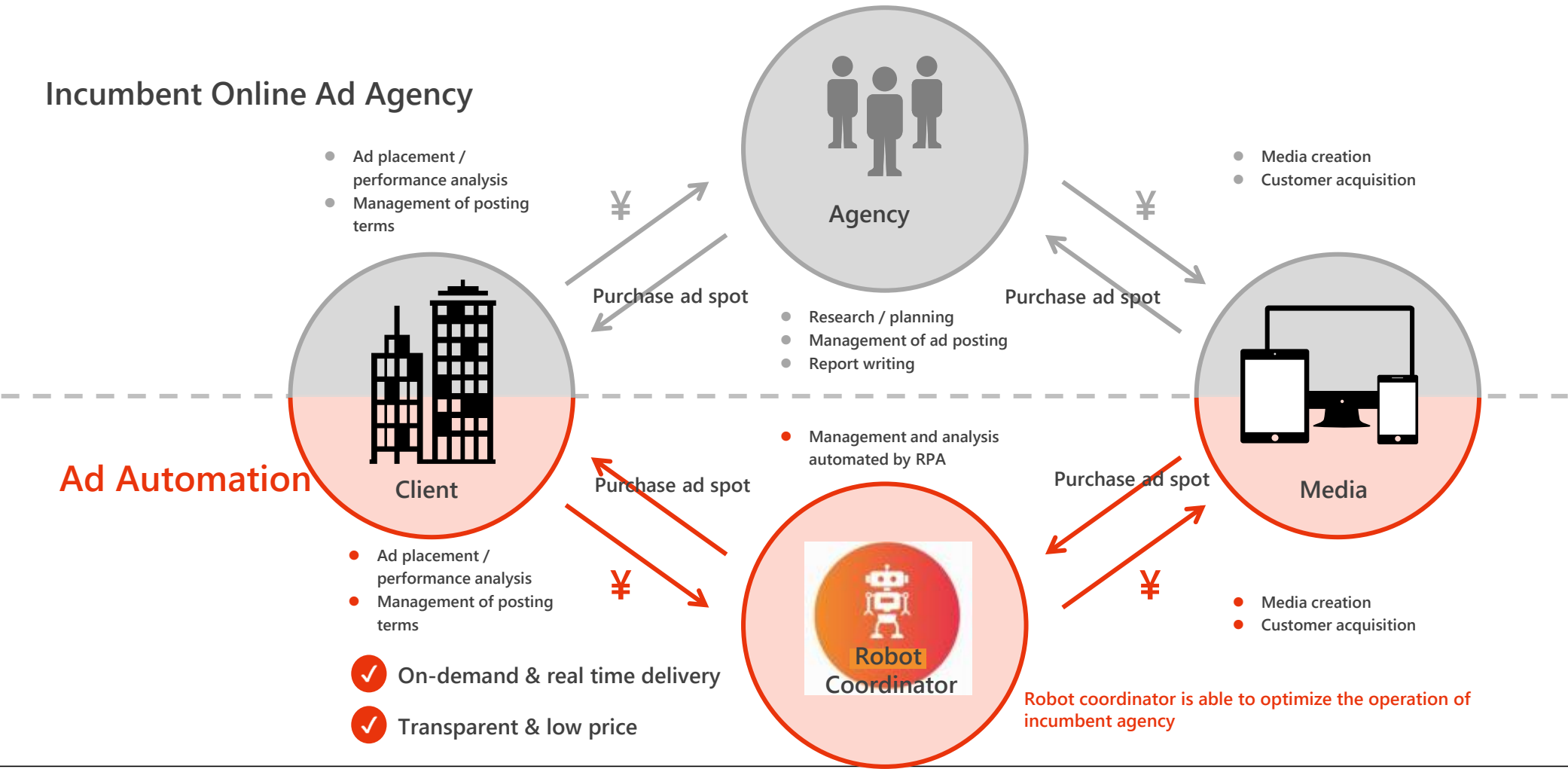
Legal/ general Administra- tion	RoboRobo Compliance check	Service that automatically checks business partners' status of legal and social compliance
	RoboRobo Credit check	Service that makes it possible to automatically obtain business partners' credit data
Recruiting	RoboRobo Recruiting	All-in-one service that creates recruitment pages, batch posts to recruitment media, and manages applicants
	RoboRobo Background check	Service that automatically checks the previous work history and status of legal compliance of candidates for recruitment
HR and labor affairs	RoboRobo Payroll	Hybrid service that combines outsourcing of payroll calculation with the issuance of detailed statements and master management of personnel
	RoboRobo Attendance	Service that makes it possible to simply manage time recording for arriving at work, leaving work and breaks only

Examples of companies that have introduced RoboRobo
(more than 6,000 companies*)



Ad Automation : PRESCO

The RPA-enabled robot coordinator functions in place of the agency to achieve the Automation. It provides completely new customer experiences.



Disclaimer

This material includes forward-looking statements. These forward-looking statements were created based on the information available at the time they were created. They do not guarantee our future results and involve certain risks and uncertainties. Please note that actual results may differ materially from those discussed in the forward-looking statements due to changes in environments surrounding OPEN Group or any other factors.

The factors which may affect actual results include but not limited to: Japanese and global economic conditions, conditions of markets in which OPEN Group operates.

OPEN Group is not obligated to update or revise any contents of the forward-looking statements within this material, even in cases such as where new information becomes available or future events take place.

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