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AEON Fantasy Co., LTD.

【Summary】 Financial Results Supplemental Materials for the Interim Period of the Fiscal Year Ending February 28, 2026

Stock code: 4343 | Tokyo Stock Exchange Prime Market





Financial Results Supplemental Materials
for the Interim Period of the Fiscal Year Ending February 28, 2026

Consolidated Financial Summary

- Net sales and all profit categories reached record highs for the interim consolidated fiscal period.
- EBITDA was ¥8,902 million, an increase of ¥818 million from the same period in the previous year.

		(¥M)
Net sales		
46,624		
YoY	106.2%	
Progress Rate*	50.6%	
Operating profit		
3,630		
YoY	126.5%	
Progress Rate	49.7%	
Ordinary profit		
3,418		
YoY	169.7%	
Progress Rate	60.0%	
Profit attributable to owners of parent		
1,763		
YoY	471.7%	
Progress Rate	70.5%	
EBITDA		
8,902		
YoY	110.1%	
Progress Rate	-	

*Progress vs. Annual Target

	(¥M)	Interim FYE 2/25	Interim FYE 2/26	Change Amount	Change Rate
Net sales		43,920	46,624	2,704	106.2%
Store-level profit		6,403	7,106	702	111.0%
Operating profit		2,870	3,630	760	126.5%
Ordinary profit		2,014	3,418	1,403	169.7%
Profit attributable to owners of parent		373	1,763	1,389	471.7%
Basic earnings per share/Yen		+18.91	+89.18	+70.27	471.5%
EBITDA		8,083	8,902	818	110.1%

- Both net sales and operating profit were led by the domestic business, while the China business showed steady improvement.

	Net Sales		Operation Profit		
	Interim FYE 2/26	YoY Change Rate	Interim FYE 2/26	YoY Change Amount	Operati ng Profit Margin
(¥M)					
JAPAN	37,759	+8.6%	3,903	551	10.3%
ASEAN	7,296	+14.2%	381	△361	5.2%
CHINA	1,704	△40.5%	△ 653	569	-
Consolidat ed total*	46,624	+6.2%	3,630	760	7.8%

*The consolidated totals are calculated including consolidation adjustments.



Consolidated

Operating profit margin was a record- high 7.8%.



JAPAN

Both net sales and operating profit achieved record highs for the second consecutive term. The operating profit margin also reached a record high of 10.3%.



ASEAN

Net sales achieved a record high for the fourth consecutive term.



CHINA

Operating profit improved by ¥569 million year-on-year due to the execution of structural reforms.

	End of FY 2/25		End of 1Q FY 2/26		
	Amount	Composition ratio	Amount	Composition ratio	Change vs. Prior FYE (Amount)
(¥M)					
Current Assets	12,185	22.7%	19,776	30.6%	+7,591 [※]
Non-Current Assets	41,488	77.3%	44,854	69.4%	+3,366
Total Assets	53,673	100%	64,631	100.0%	+10,958
Current Liabilities	30,758	57.3%	38,783	60.0%	+8,024 [※]
Short-term Borrowings	15,394	28.7%	21,549	33.3%	+6,155
Non-current Liabilities	16,072	29.9%	17,277	26.7%	+1,204
L/T Borrowings	10,540	19.6%	12,523	19.4%	+1,982
Total Liabilities	46,831	87.3%	56,060	86.7%	+9,229
Total Equity	6,842	12.7%	8,571	13.3%	+1,728
Total Liabilities and Equity	53,673	100%	64,631	100.0%	+10,958

※ The impact of financial institution holidays at the interim period (¥4,859 million).

Consolidated cash flows

Interim FYE 2/26

Consolidated
Financial Summary

(¥M)	Interim FYE 2/25	Interim FYE 2/26	Change vs. Prior FYE (Amount)
Cash flows from operating activities	+2,581	+3,429 [※]	+847
Profit before income taxes	+1,629	+3,106	+1,476
Depreciation	+5,213	+5,271	+58
Decrease (increase) in trade receivables	△4,570	△4,856	△285
Income taxes paid	△891	△1,036	△145
Cash flows from investing activities	△4,945	△7,919	△2,974
Purchase of property, plant and equipment	△4,397	△7,429	△3,032
Cash flows from financing activities	+2,213	+6,492	+4,278
Net increase (decrease) in short-term borrowings	△6,920	+5,307	+12,228
Net increase (decrease) in long-term borrowings	+10,841	+2,752	△8,088
Dividends paid	△98	0	+98
Effect of exchange rate change on cash and cash equivalents	△10	+12	+23
Net increase (decrease) in cash and cash equivalents	△160	+2,014	+2,174
Cash and cash equivalents at beginning of period	+7,491	+6,141	△1,350
Cash and cash equivalents at end of period	+7,330	+8,155	+824

※ Adjusting for the impact of financial institution holidays at the end of the interim period (¥3.80 billion), the company generated an actual cash flow of ¥7.23 billion.

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- 154 new stores opened and 109 stores were closed, bringing the total number of stores to 1,273 as of the end of August 2025.

(Stores)	Amusements		Playgrounds			Others	FC	TOTAL	Interim FYE 2/26	
	Standard	Small	Large	Standard	Small				Opened	Closed
JAPAN	414	323	18	3	3	11	0	772	52	33
ASEAN	66	86	10	159	55	0	5	381	64	15
Indonesia	3	34	5	40	6	0	0	88	38	0
Vietnam	8	6	1	15	9	0	0	39	2	3
Philippines	0	0	0	56	15	0	0	71	6	1
Malaysia	54	31	3	27	15	0	0	130	9	11
Thailand	1	15	1	21	10	0	0	48	9	0
Cambodia	0	0	0	0	0	0	4	4	0	0
Myanmar	0	0	0	0	0	0	1	1	0	0
CHINA	24	55	5	28	2	0	6	120	38*	61
Total	504	464	33	190	60	11	11	1,273	154	109
Business Total	968		283							

* In China, our strategy for new store openings is focused on small-format stores "Molly-Katsuryoku-kuukan" with lower business risk.



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Consolidated Financial Forecasts

(¥M)	FY2/25 Results	FY2/26 Forecast	Change Rate	Change Amount
Net Sales	87,240	92,200	5.7	+4,959
Operation Profit	4,344	7,300	68.0	+2,955
Ordinary Profit	3,440	5,700	65.7	+2,259
Profit attributable to owners of parent	△1,816	2,500	-	+4,316
Basic earnings per share /Yen	△91.87円	+126.42円	-	+218.29円
Dividends Per Share /Yen	5.00円	15.00円	-	10.00円

There is no change from the figures announced previously (April 11).



Disclaimer:

The forward-looking statements such as business forecasts contained in this material are based on information currently available to the Company and on certain assumptions that the Company deems reasonable. The Company does not guarantee the achievement of these forecasts.

Actual results may differ materially from these forecasts due to various factors.