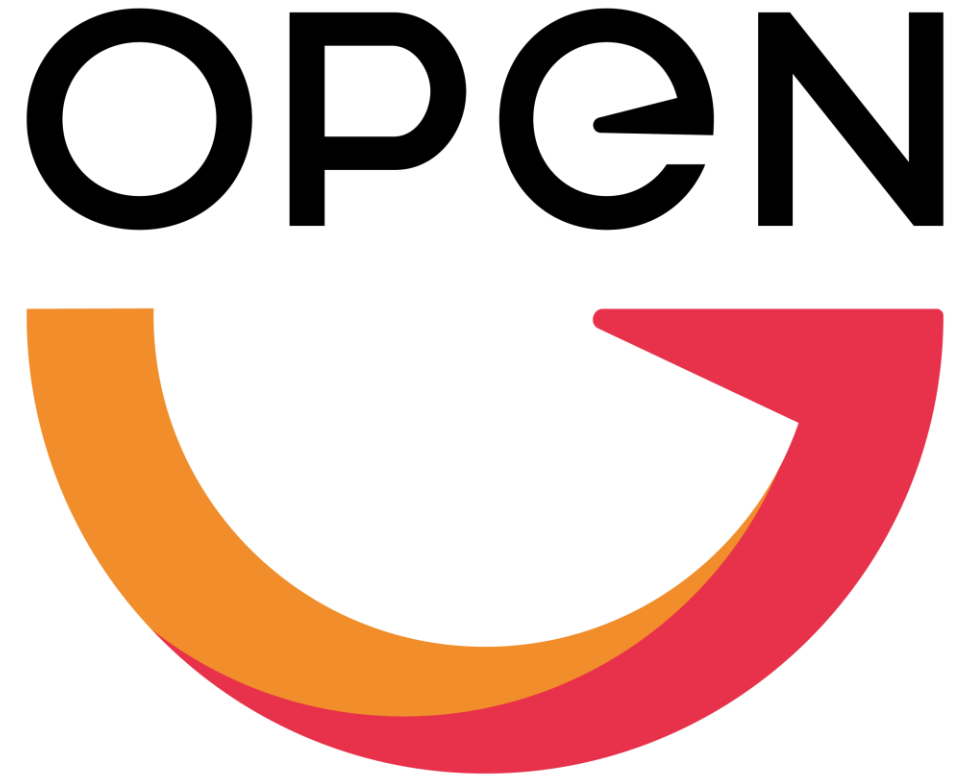


Q3 FY2026/2 Financial Update

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

Jan 14, 2026



#1 Q3 FY2026/2 Financial Overview

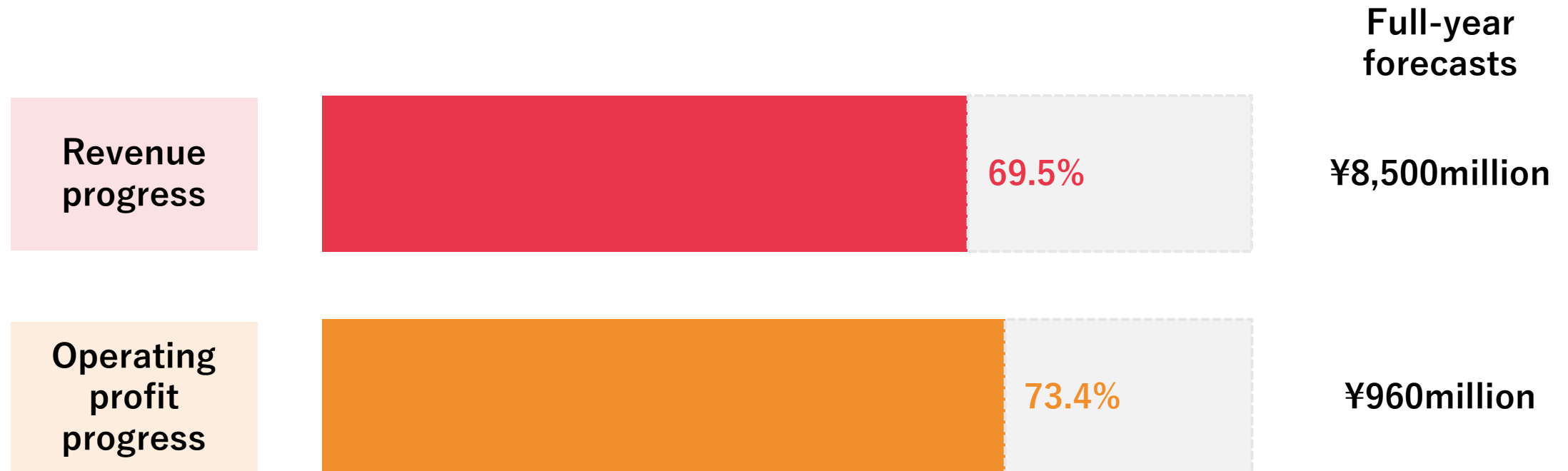
Q3 FY2026/2 Financial Overview

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 ¥298 million related to an equity affiliate as non-operating expenses.

	JPY MM		
	Q3 FY2025/2	Q3 FY2026/2	YoY
Revenue	5,274	5,905	+12.0%
Operating Profit	334	705	+110.7%
Ordinary profit	△23	706	—
Profit attributable to owners of parent	131	527	+299.4%

Progress Toward the Full-Year Earnings Forecasts

Both revenue and operating profit are progressing smoothly.

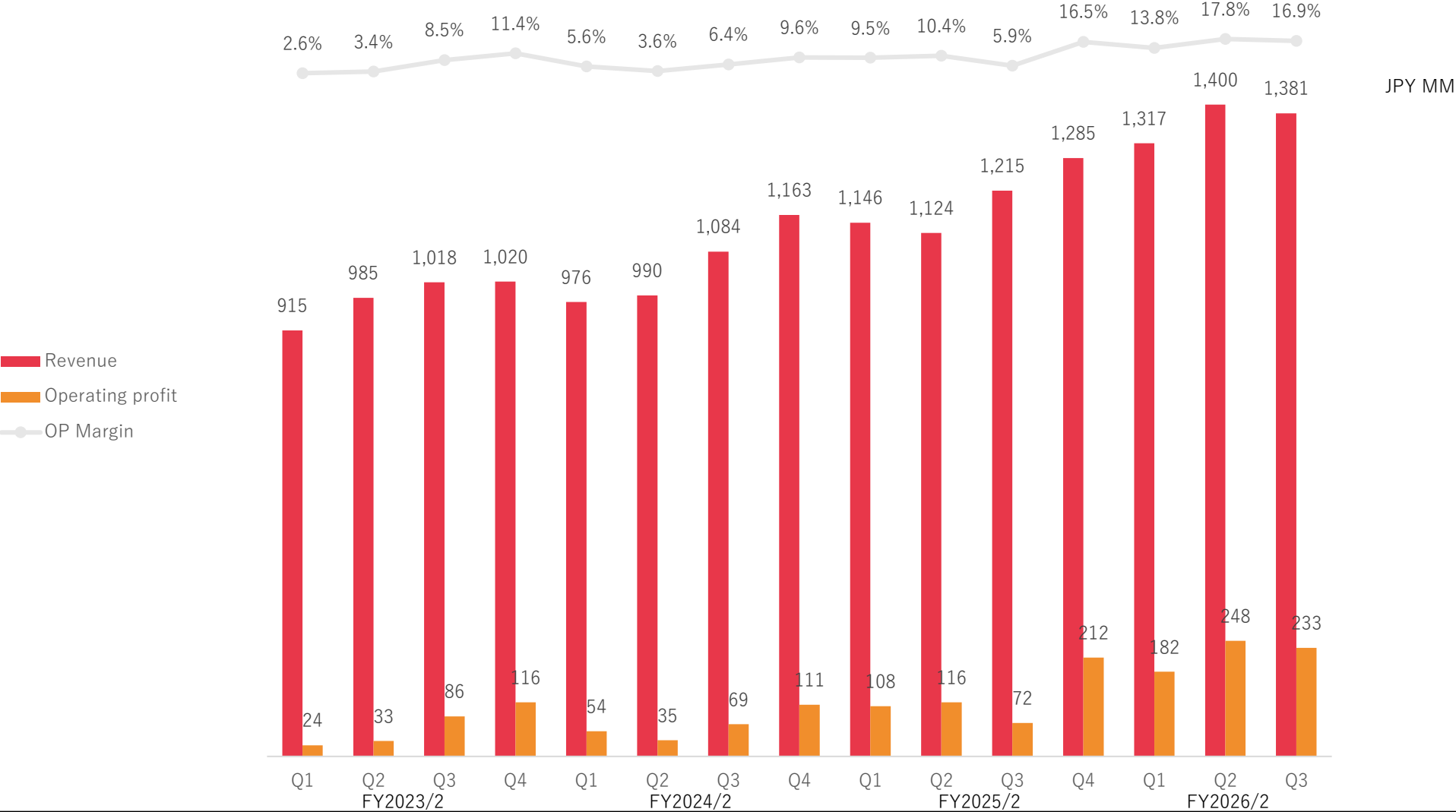


#2

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. Upfront investments, mainly for RoboRobo’s product development, continued, but profit margins improved due to an increase in recurring revenue and strengthened cost control.

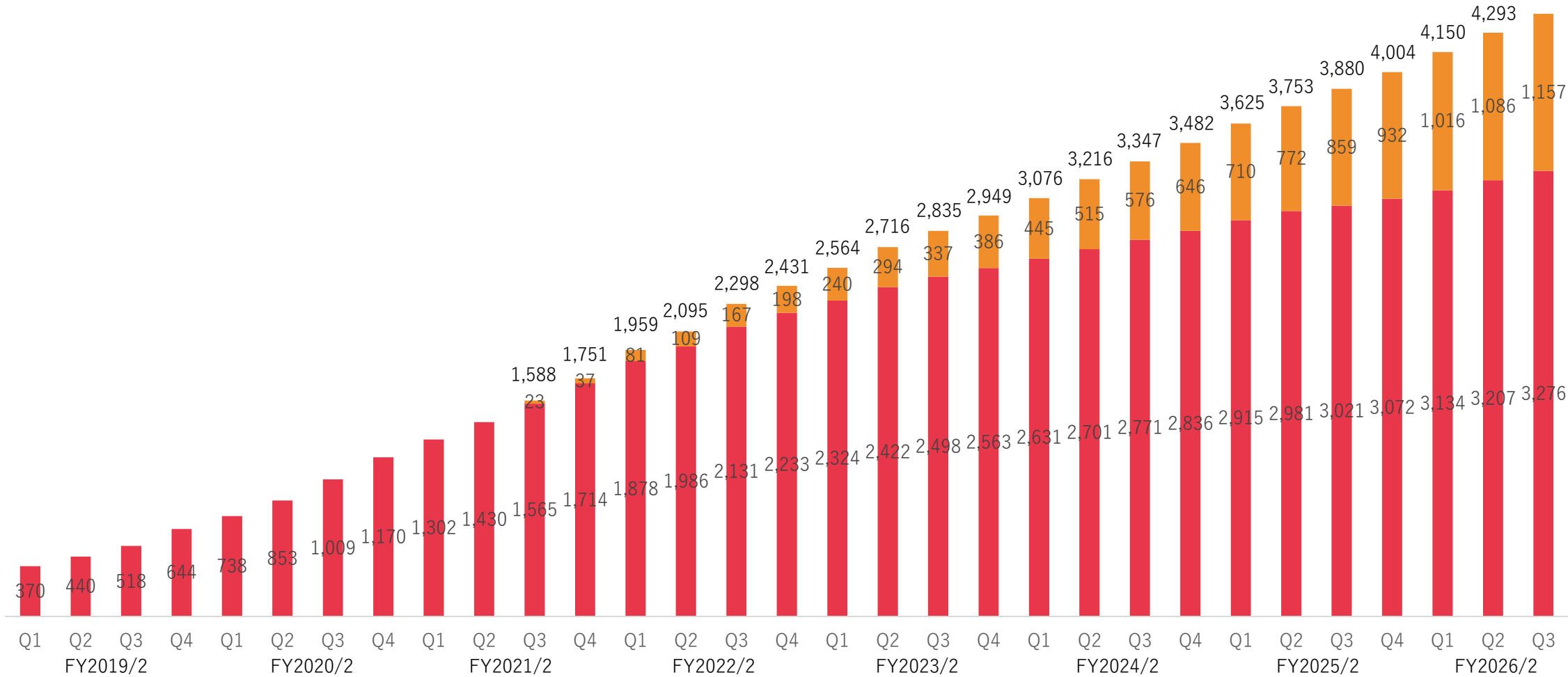


Intelligent Automation Highlight : Number of Customers

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 0.88%.

4,433

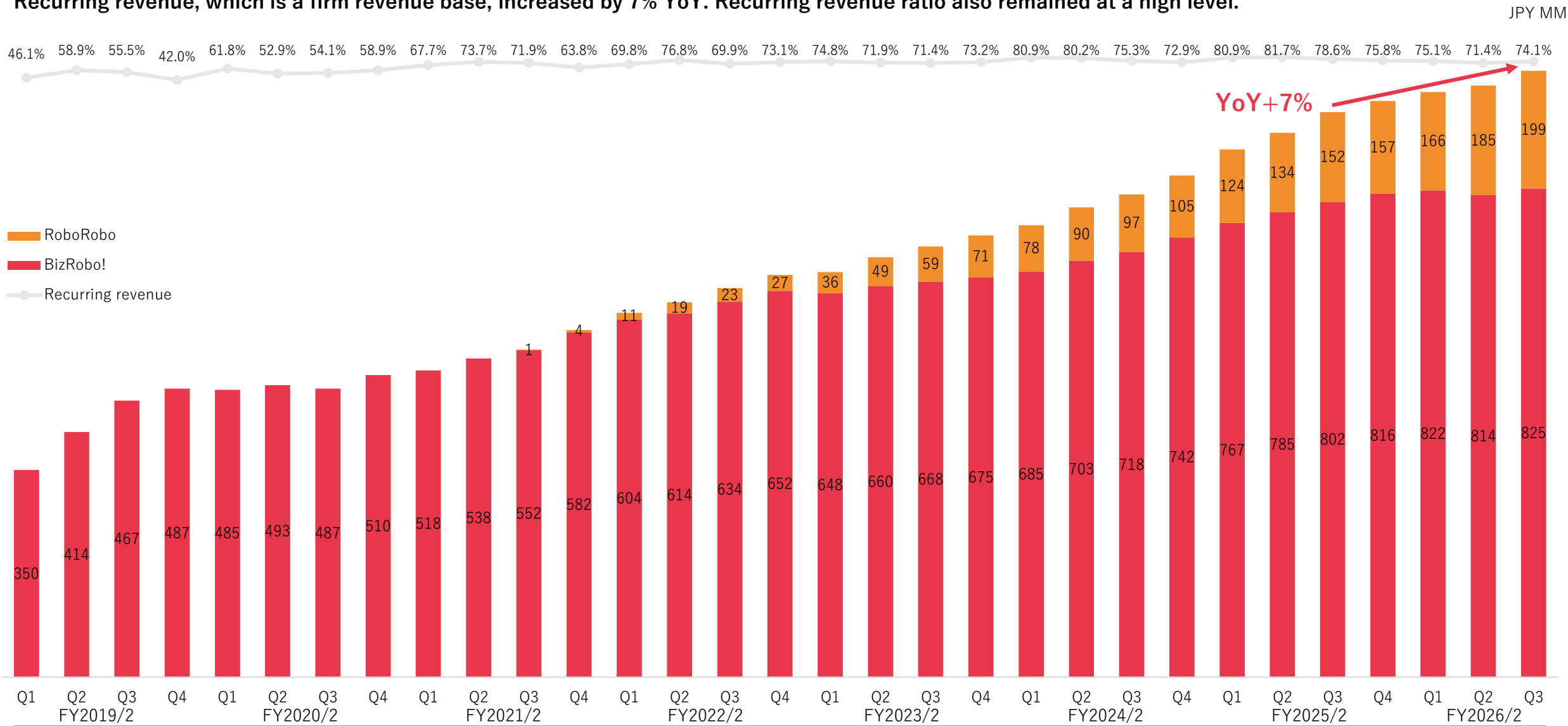
RoboRobo
BizRobo!



* 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 7% YoY. Recurring revenue ratio also remained at a high level.



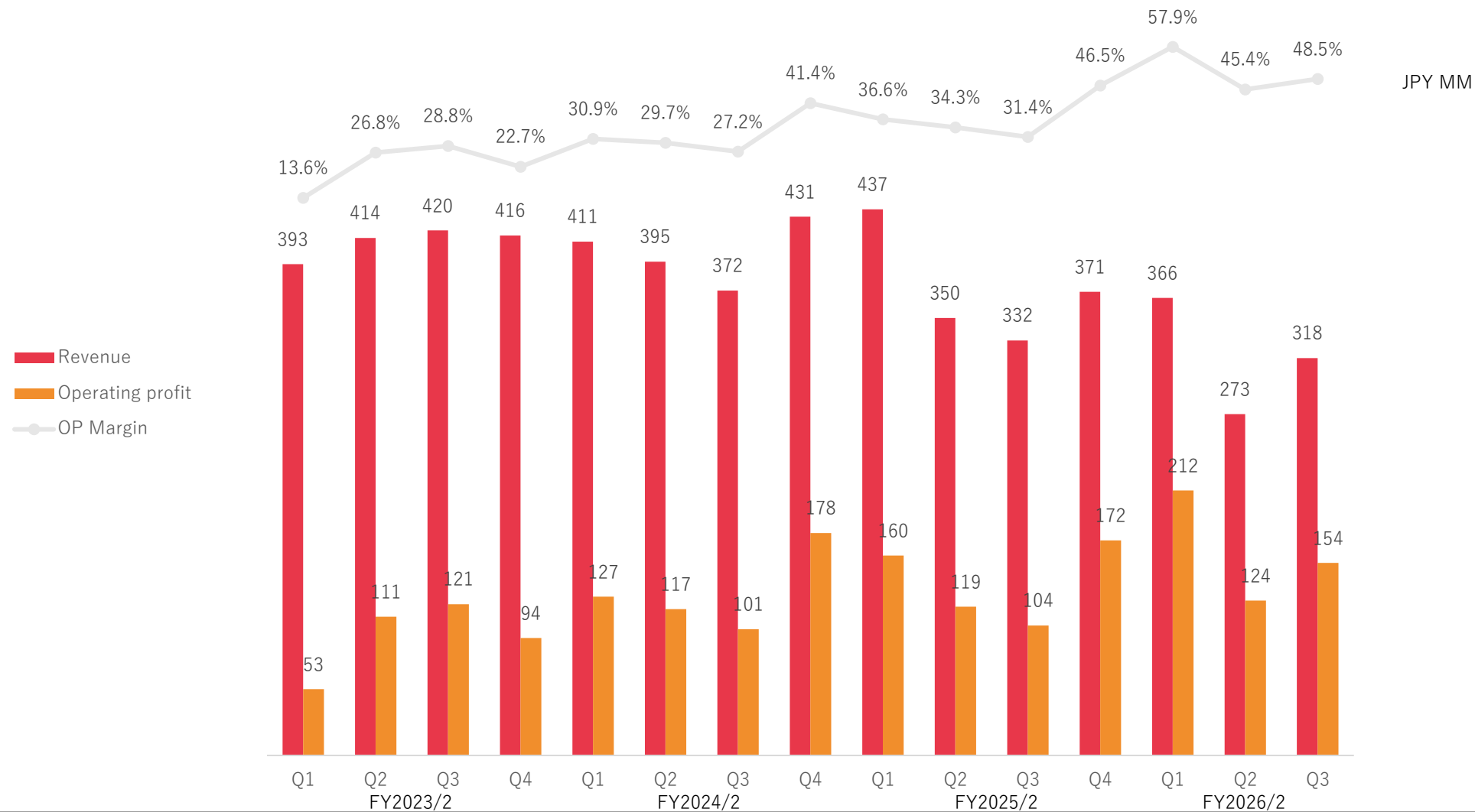
* For BizRobo!, the total amount of recurring revenue from BizRobo! Basic, BizRobo! Lite and BizRobo! mini

#3

Overview of the Ad Automation Segment

Ad Automation Highlight

There was an impact of a decline in revenue due to progress made in the business reorganization of projects that had increased the volatility of business performance. However, profit margins improved and profit increased YoY 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.



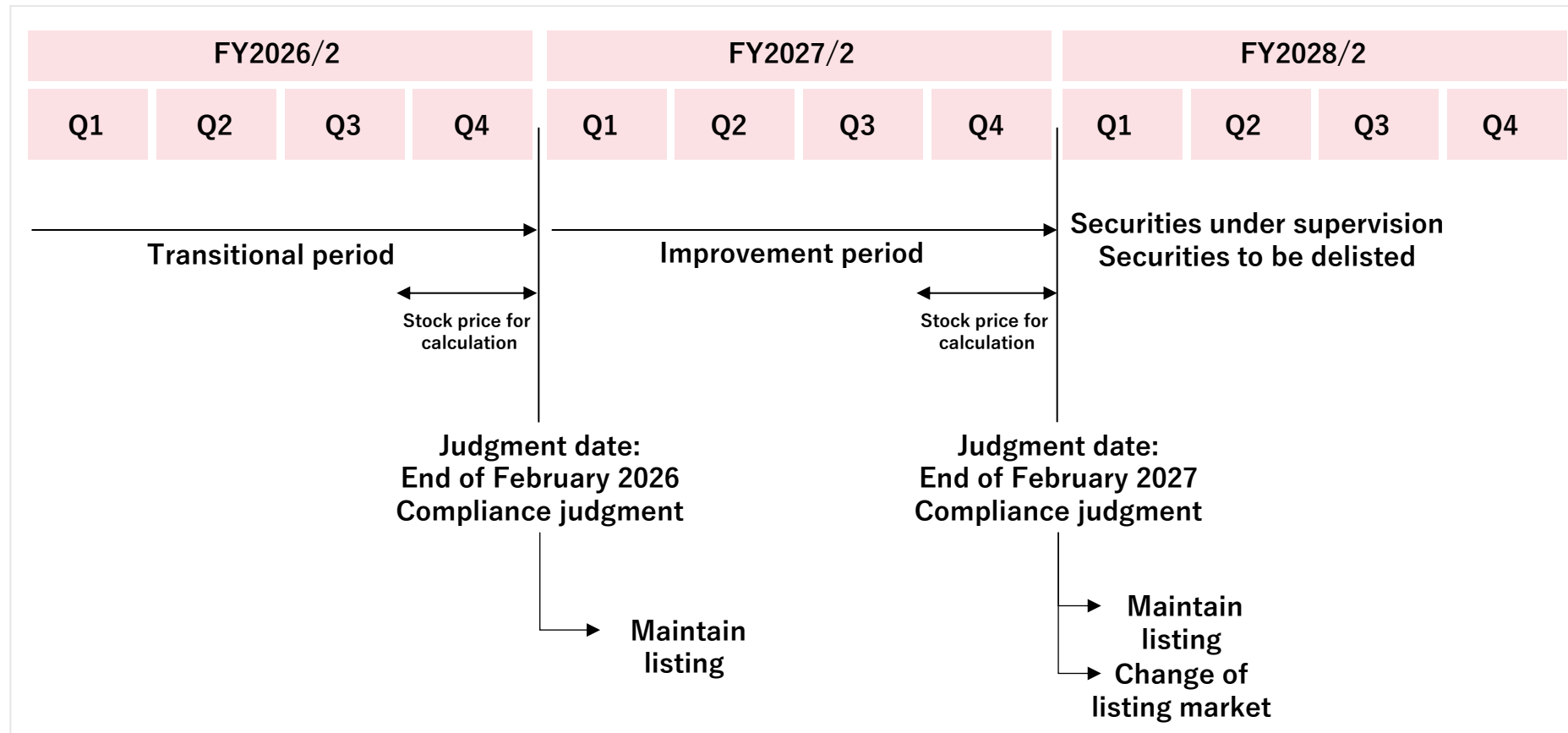
#4

Status of Response to Prime Market Listing Criteria

Status of Response to Prime Market Listing Criteria

Concerning our current compliance status with Prime Market Listing Criteria, the criteria for “Market capitalization of tradable shares” and “Ratio of tradable shares” have not been met.

We aim to achieve the Prime Market listing criteria either during the transitional period until the end of February 2026, or during the fiscal year ending the end of February 2027, which is the designated improvement period. We have also begun investigating and considering backup plans.



#5

Business Growth Strategy

Future Growth Strategy of the Group

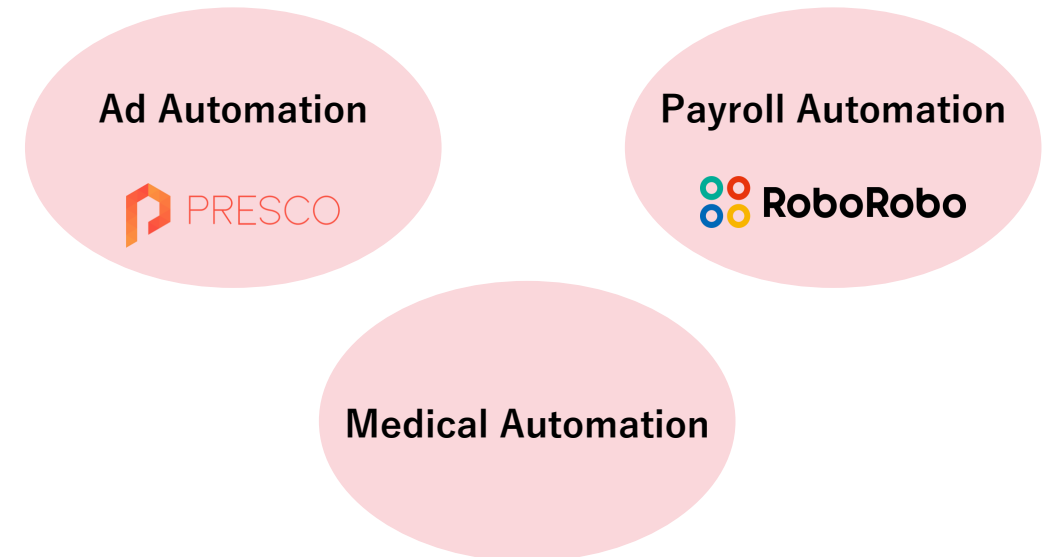
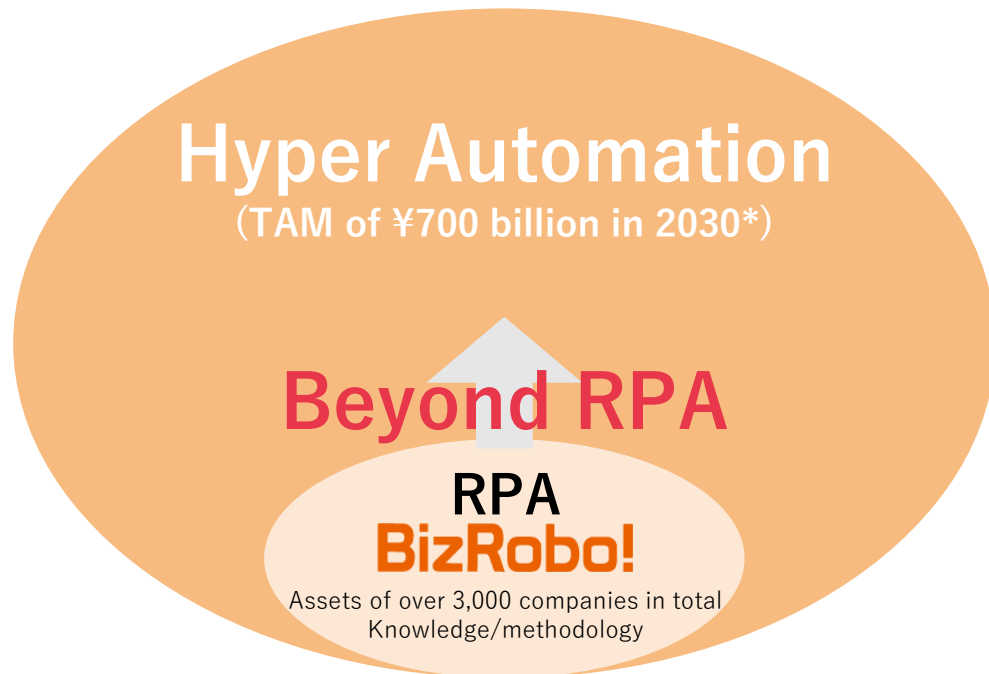
Until now, we have supported the automation of individual tasks using RPA-centered technologies. Going forward, we will combine these technologies with AI to evolve into the automation of entire processes (hyper automation) and maximize the value provided to customers.

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

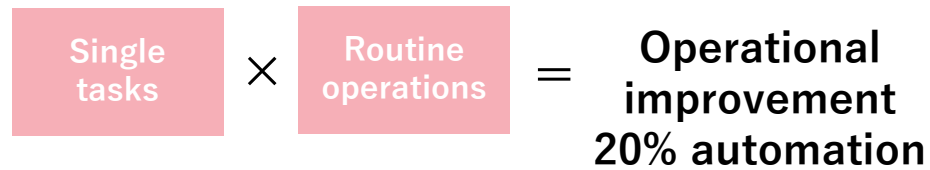
No. 1 share

FY2026 – FY2028
Operating profit, average annual growth rate

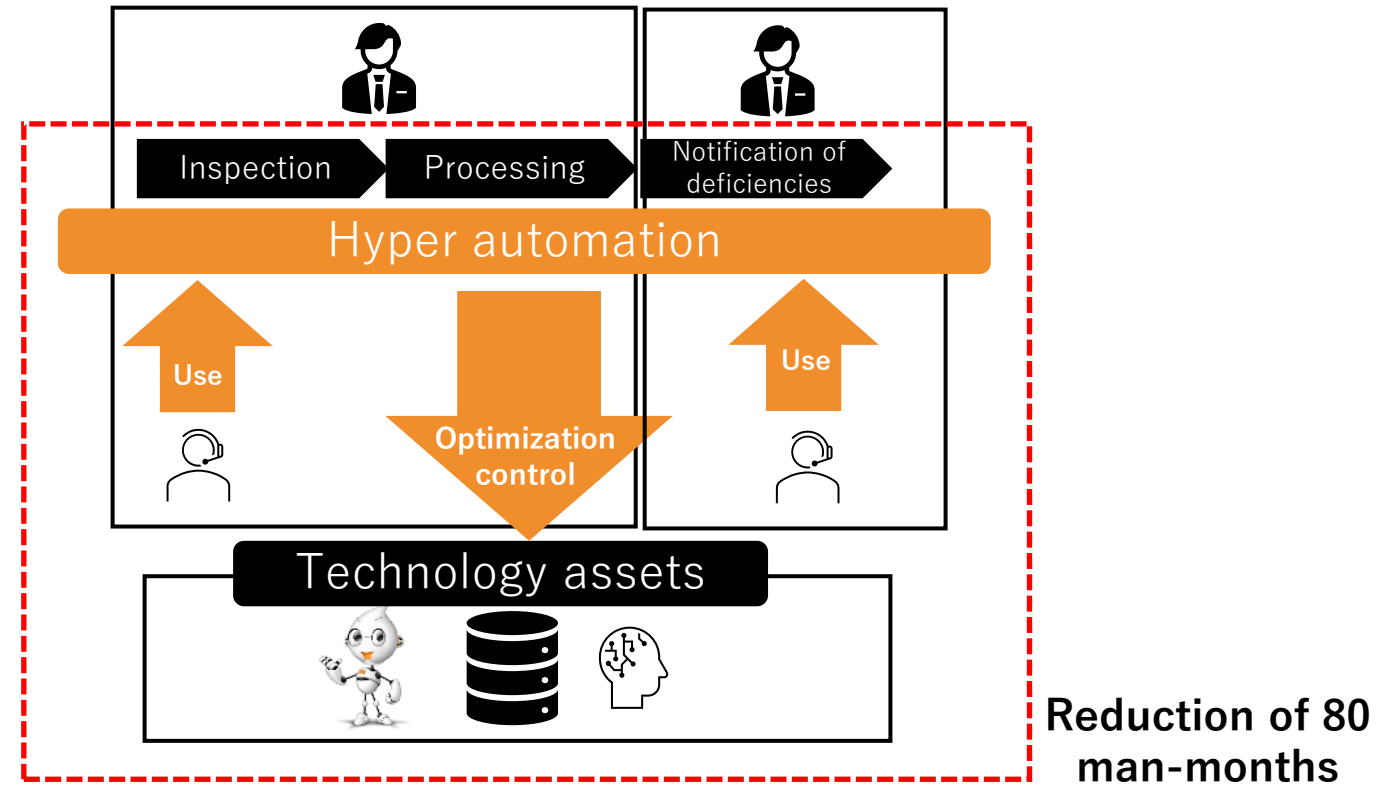
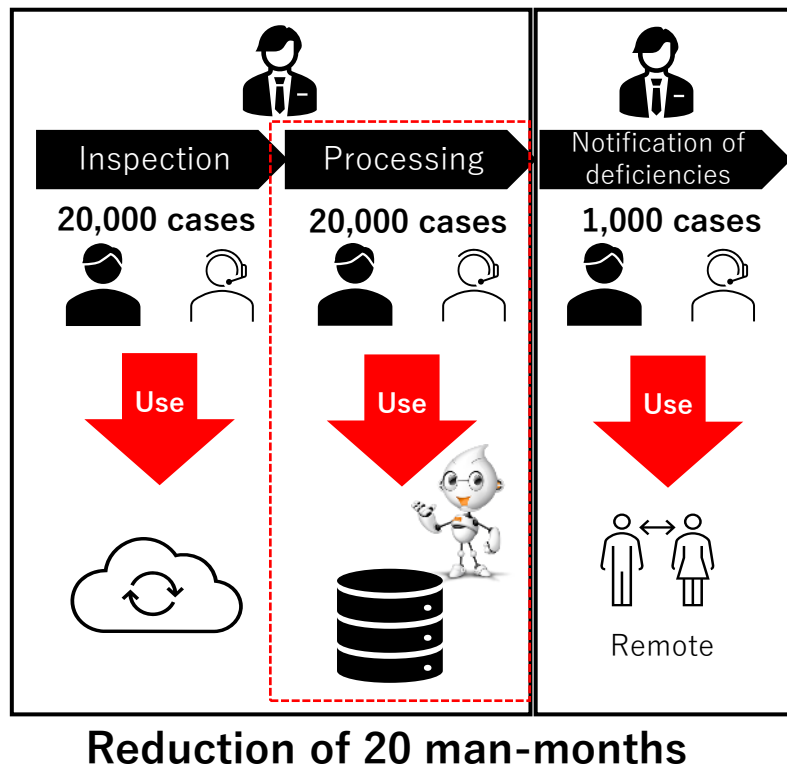
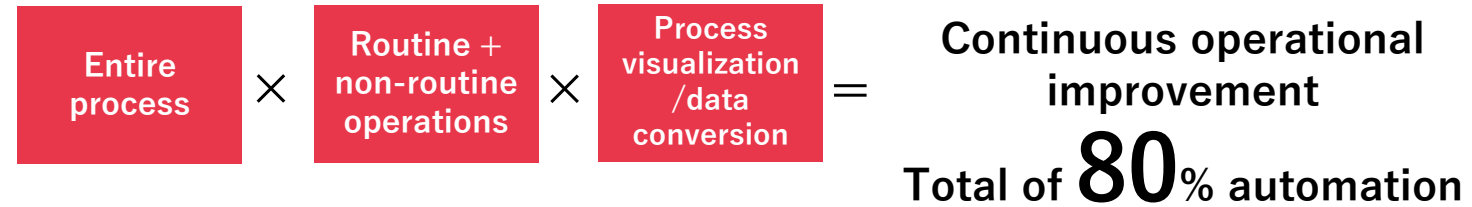
30% growth

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

<RPA>



<Hyper automation>



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

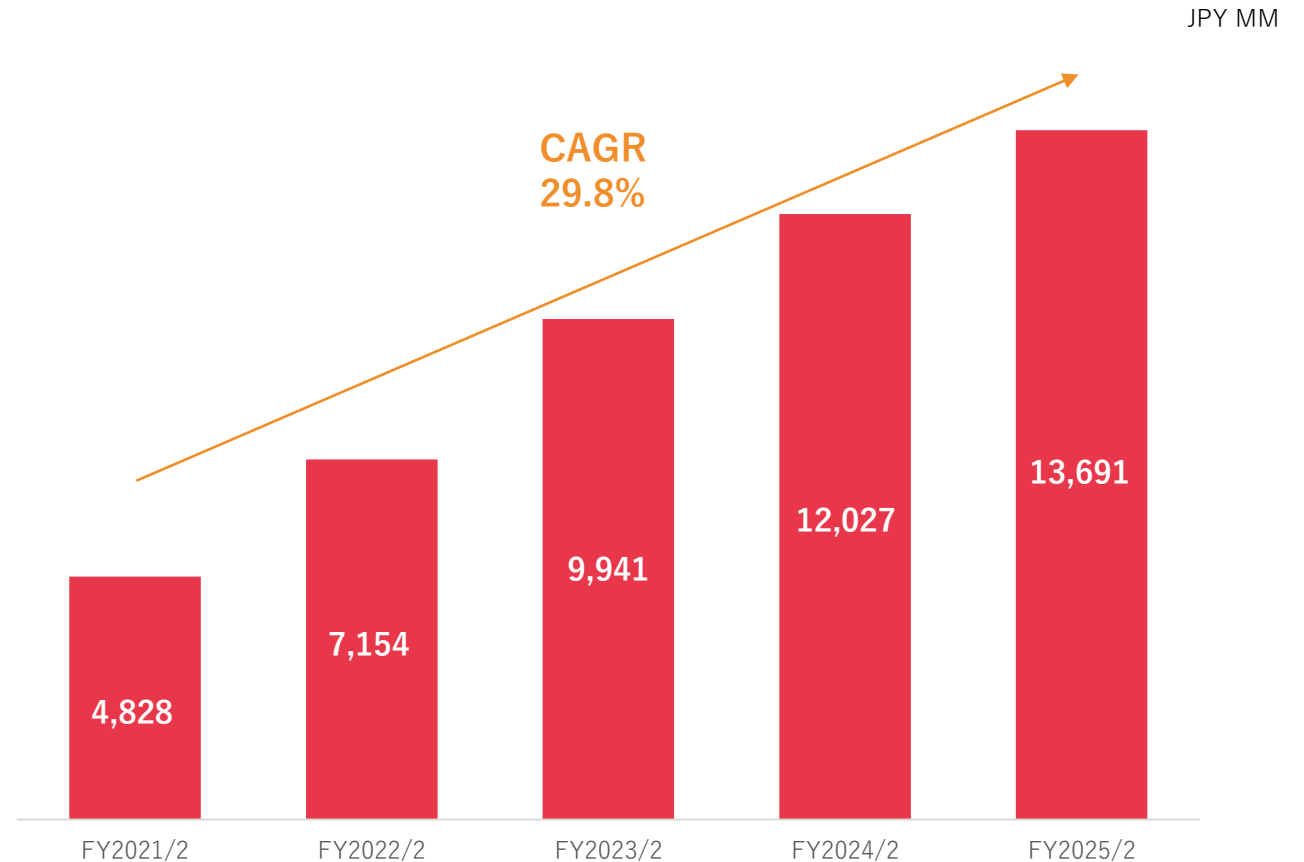
By FY2028/2

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

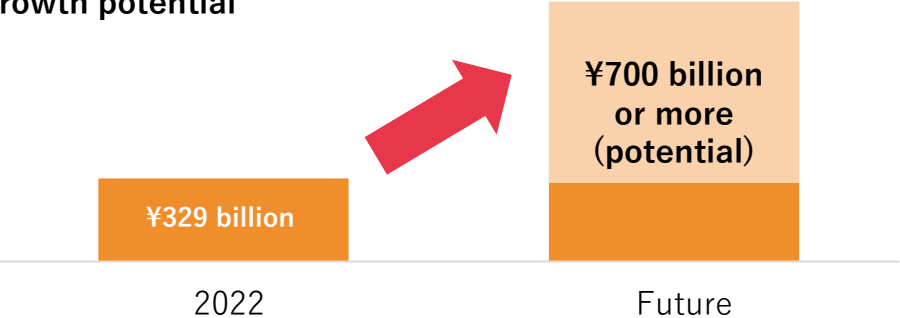
No. 1 revenue ¥3 billion annually

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

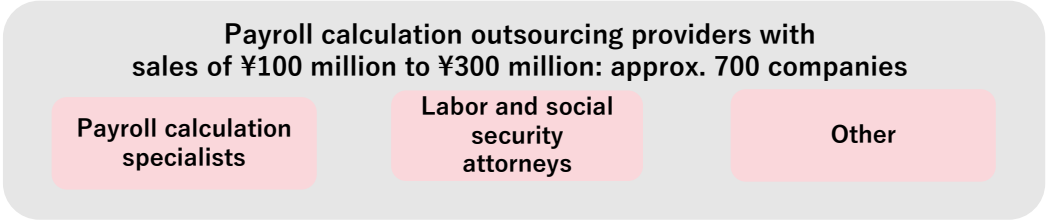
Expansion of *the* payroll calculation BPO market*

We are rapidly implementing measures targeting markets with growth potential



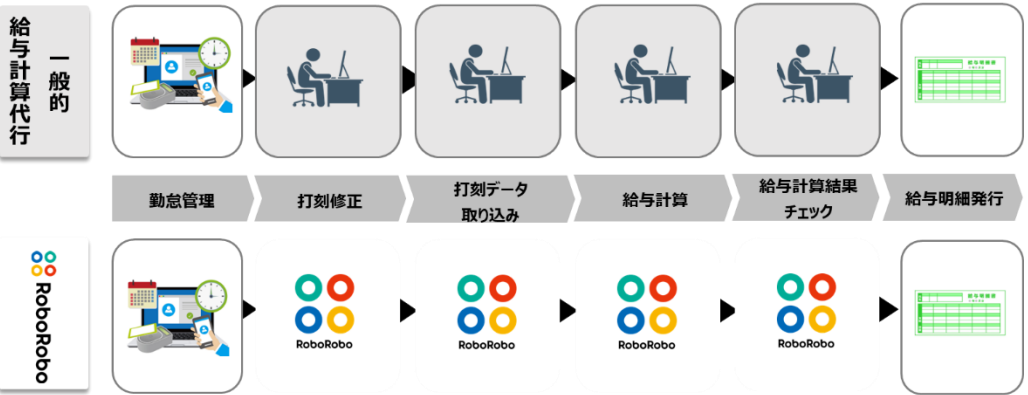
Probability of growth through M&A in this field

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.).



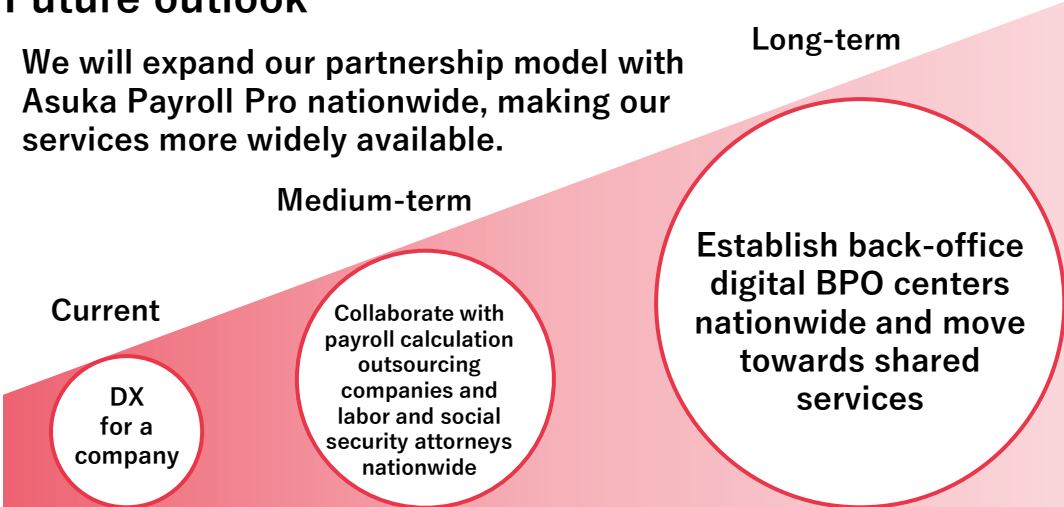
Strengthening the DX capabilities of SMEs

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



Future outlook

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



*“Human Resources & General Affairs Outsourcing Market 2024,” Yano Research Institute Ltd.

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

OASIS INNOVATION, Inc. joins the Group

Starting with the integration of OASIS INNOVATION into the Group, we seek to build and expand nationwide a hybrid remote BPO service that combines people and AI. Through this initiative, we seek to create a high-quality, highly specialized medical management infrastructure, focusing primarily on the core area of medical management, which is claims processing.

Overview of target company

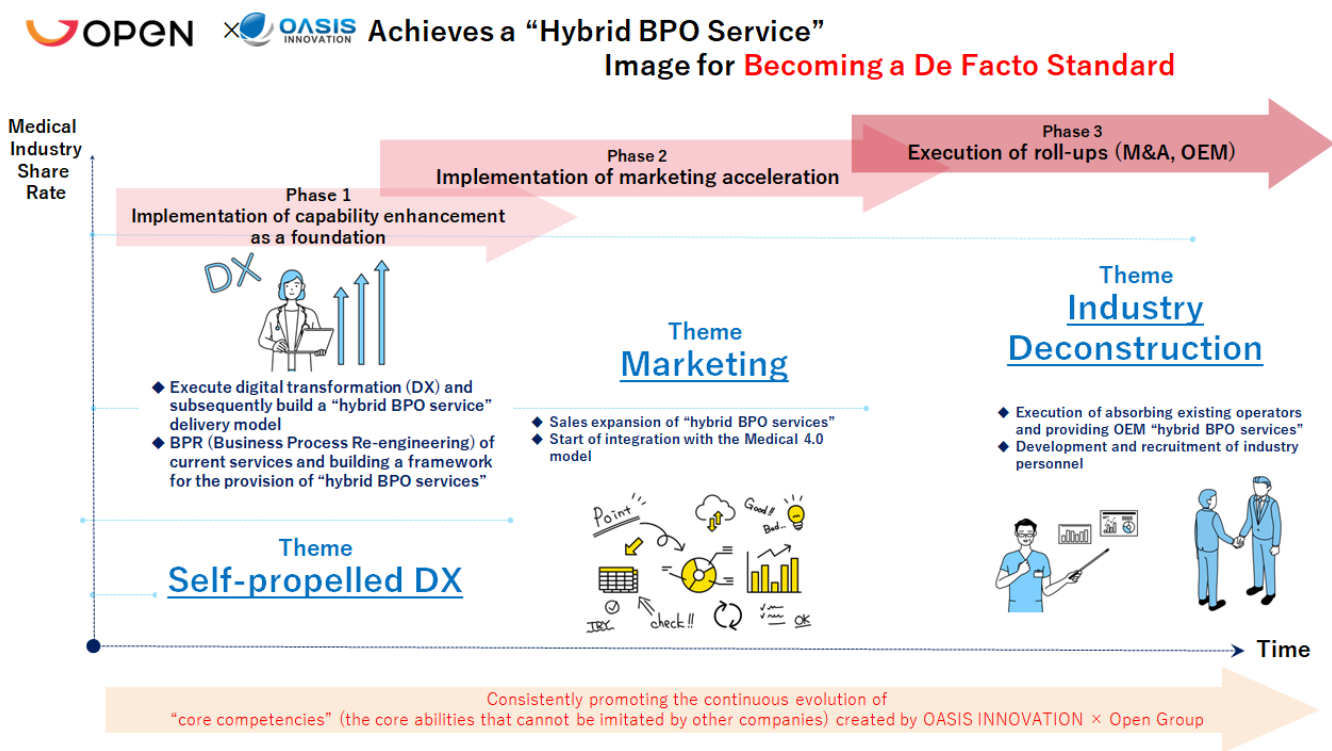
Name	OASIS INNOVATION, Inc.
Location	SANKI Shiba Kanasugibashi Building 5F, 4-3, Shiba 1-chome, Minatoku, Tokyo
Title and name of representative	Kusano Masanori, Representative Director
Description of business	Centralized center for medical fee billing (Medical office work remote outsourcing business)

Significance of acquisition and expansion of medical BPO market

Due to factors such as the decline in the working population, the need to adapt to new medical systems and management, and the acceleration of digitalization in medical office work, the medical BPO market, which was around 270 billion yen in 2024, is predicted to double to approximately 560 billion yen* by 2033 (CAGR 8.06%). We believe that claims processing BPO will occupy a particularly important part of this market.

In response to the traditional BPO in the claims processing domain, which can be handled by OASIS INNOVATION’s outpatient/home MedOS, we aim to scale up to a nationwide level by integrating RPA/AI through the technology provided by OPEN Inc., an operating company of the Open Group. Additionally, by expanding into other important medical office work areas beyond claims processing, we aim to contribute to ensuring and advancing the continuity of healthcare in an aging society. This will be achieved by addressing fundamental issues in the medical industry, such as chronic deficit management problems, deterioration of medical quality due to labor shortages, and the pressure of digital transformation.

Future outlook

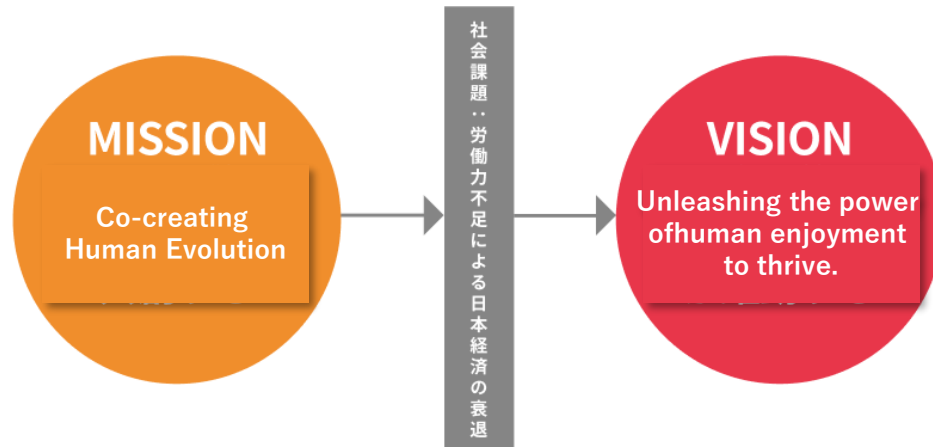


* 「Japan Healthcare BPO Market Report by Service and Region 2025-2033」 H&I Global Research Co.

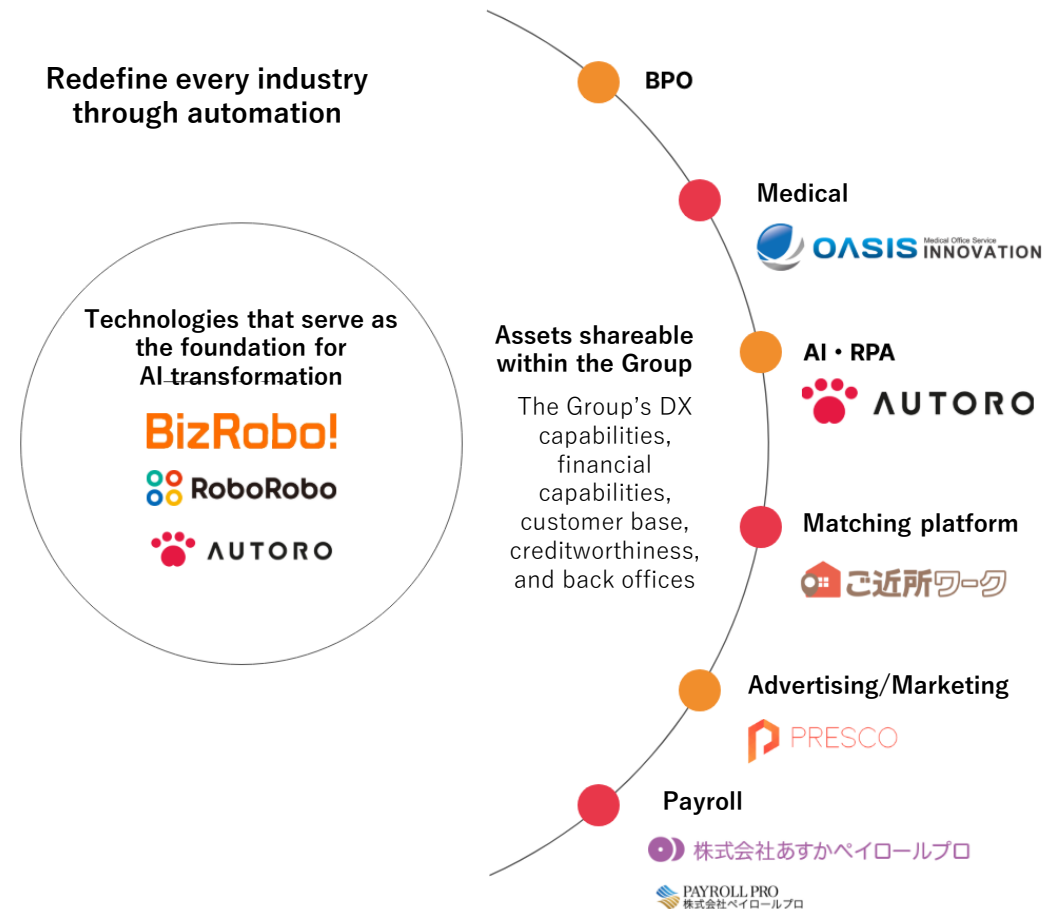
M&A Strategy of OPEN Group

Solving the problem of the decline in the working population with AI Transformation

With the mission of “Co-creating Human Evolution” as our fundamental starting point, OPEN Group will solve the structural decline in Japan’s working population, leveraging AI Transformation. OPEN Group’s vision for M&A is to use it to connect with partners and co-create evolution.



Social problem: The decline of the Japanese economy due to labor shortage



#6

Appendix

Consolidated P/L (Q3 FY2026/2)

JPY MM

	Q3 FY2025/2	Q3 FY2026/2	YoY
Revenue	5,274	5,905	+ 12.0%
Intelligent Automation Segment	3,486	4,099	+ 17.6%
Ad Automation Segment	1,120	958	△14.4%
Other	668	847	+ 26.8%
Operating profit	334	705	+110.7%
OP Margin	6.3%	11.9%	-
Profit before income taxes	△121	664	-
Net Income	131	527	+299.4%
NI Margin	2.5%	8.9%	-

Segment Financials (Q3 FY2026/2)

JPY MM

	Intelligent Automation Segment	Ad Automation Segment	Total	Other	Adjust- ment	Consoli- dated
Revenue	4,167	977	5,145	849	△89	5,905
Revenue from external customers	4,099	958	5,058	847	-	5,905
Adjustments	68	18	86	2	△89	-
Operating profit	664	490	1,155	△5	△445	705
OP Margin	15.9%	50.2%	22.5%	-		11.9%

Consolidated B/S

JPY MM

	FY2025/2	Q3 FY2026/2	Difference
Current assets	15,577	14,482	△1,095
Cash & cash equivalents	10,510	10,430	△79
Non-current assets	4,389	5,008	619
Total assets	19,967	19,490	△476
Current liabilities	5,978	6,387	408
Non-current liabilities	2,005	2,418	413
Total liabilities	7,984	8,806	822
Total debt	4,278	4,603	324
Common stock	5,926	5,926	-
Capital surplus	6,071	6,058	△13
Retained earnings	647	842	194
Treasury shares	△678	△2,177	△1,498
Total equity	11,982	10,684	△1,298

#7

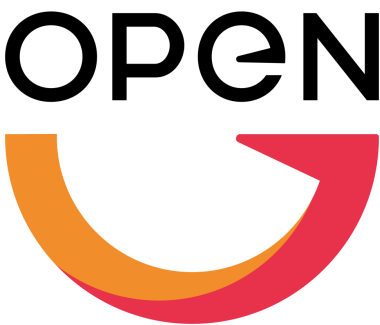
Company Overview

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. OASIS INNOVATION, 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.



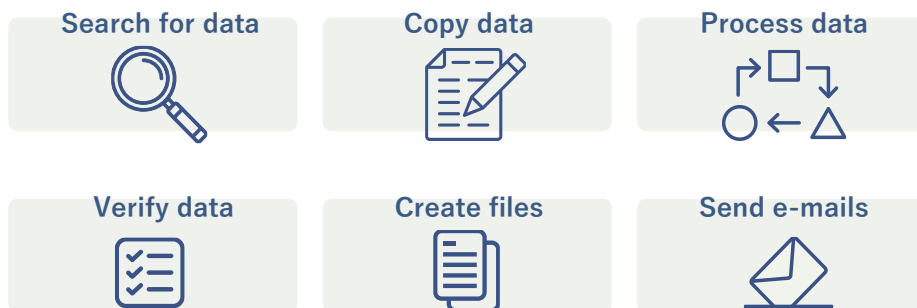
Robots x Online Advertising

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)

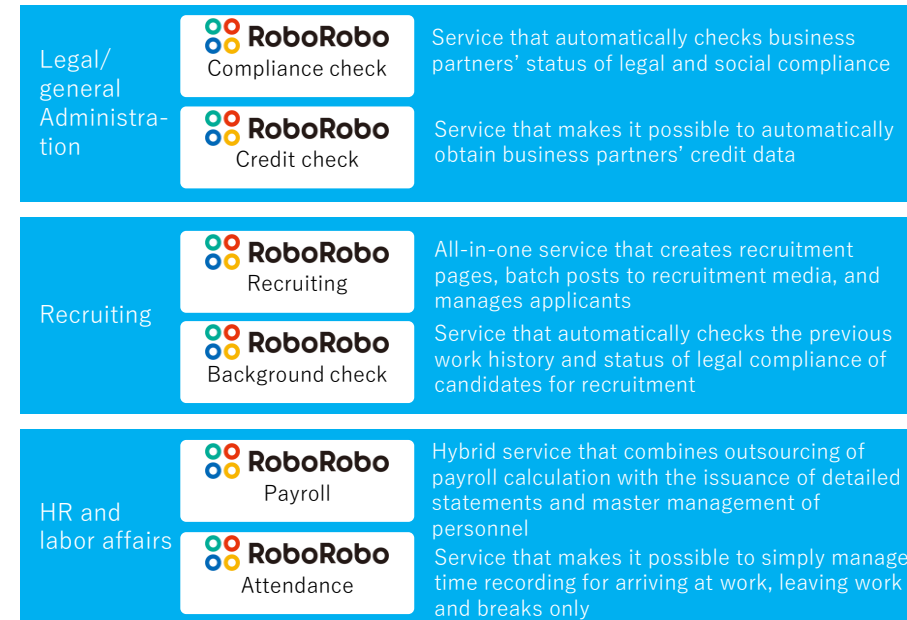
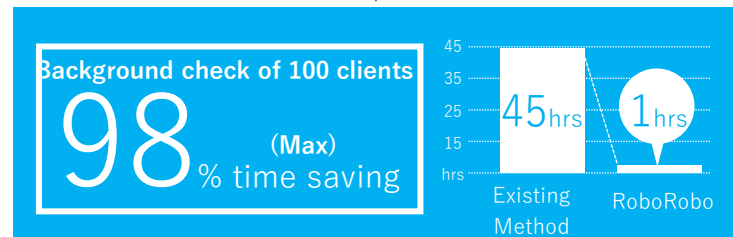
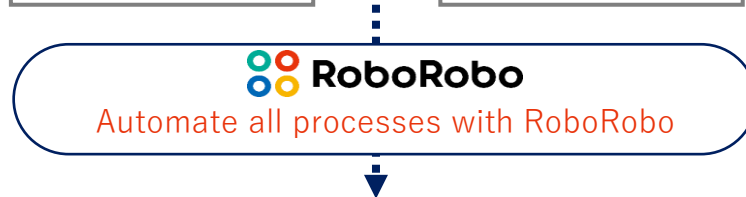
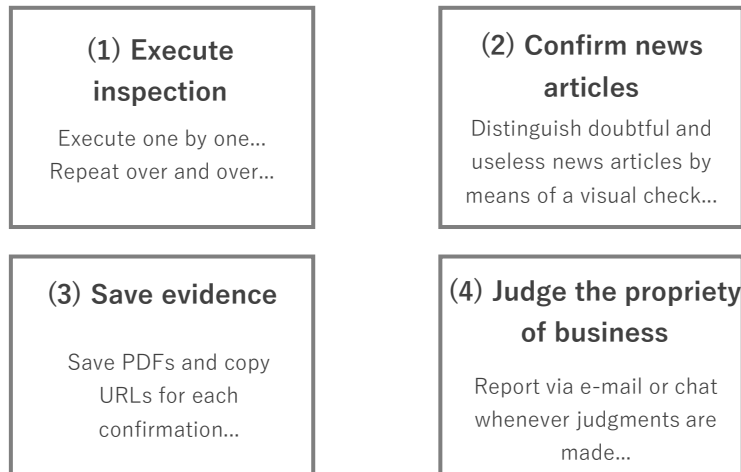


* Sales partners buy digital labor from the Company, and sell to client companies.

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...



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

三菱地所リアルエステートサービス

三菱地所ハウスネット

FUJITSU
富士通コミュニケーションサービス株式会社

IBJ

STARBUCKS

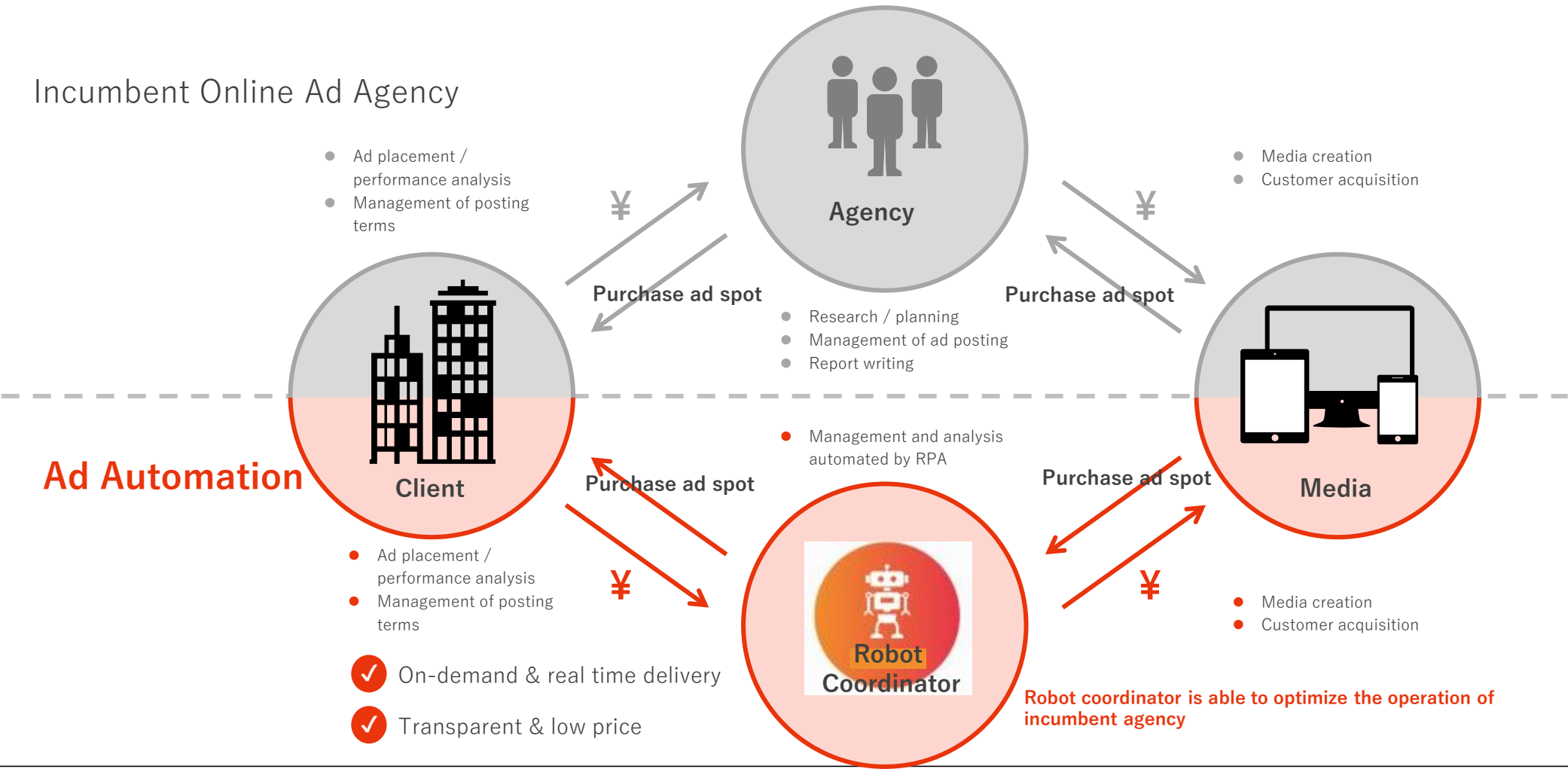
TAITO

RECEPTIONIST

* The number of companies that introduced RoboRobo Compliance Check (including free-trial users and paying spot-use users)

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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