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Notice Concerning Revisions to Consolidated Earnings Forecast

Genky DrugStores Co., Ltd. (the "Company") hereby announces that it has revised its consolidated earnings forecasts for the cumulative period of the second quarter (interim period) and for the full fiscal year ending June 2026, which were previously announced on July 29, 2025, as follows.

1. Revision of Consolidated Earnings Forecasts for the Second Quarter (Interim Period) of the Fiscal Year Ending June 20, 2026 (June 21, 2025 to December 20, 2025)

(unit: million yen)

	Net sales	Operating income	Ordinary income	Interim net income attributable to owners of parent	Interim net income per share
Previously announced forecasts (A)	109,210	5,270	5,360	3,700	121.72 yen
Revised Forecast (B)	109,261	5,717	5,843	4,020	132.12 yen
Change (B-A)	51	447	483	320	
Change (%)	0.0%	8.5%	9.0%	8.7%	
(Reference)Results for the second quarter (interim period) of the previous fiscal year	98,758	4,596	4,722	3,268	107.55 yen

2. Revision of Consolidated Earnings Forecasts for the Fiscal Year Ending June 20, 2026 (June 21, 2025 to June 20, 2026)

(unit: million yen)

	Net sales	Operating income	Ordinary income	Net income attributable to owners of parent	Net income per share
Previously announced forecasts (A)	221,840	10,500	10,700	7,500	246.74 yen
Revised Forecast (B)	221,200	11,050	11,200	7,850	257.55 yen

Change (B-A)	(640)	550	500	350	
Change (%)	(0.3%)	5.2%	4.7%	4.7%	
(Reference) Results for the previous fiscal year	200,786	9,658	9,899	7,066	232.51 yen

2. Reasons for the revision

(1) Comparison of First-Half Results with the Plan

Net sales were generally in line with the plan. However, the number of new store openings fell short of the plan by 1 store due to timing differences.
The gross profit margin exceeded the plan by +0.3 pts in the first quarter, and this upside was allocated from the second quarter onward to price competitiveness measures within a range that does not affect the full-year gross profit margin. As a result, the gross profit margin in the second quarter was -0.1 pts below the plan, while the first-half cumulative margin was +0.1 pts above the plan at 20.39%. In addition, weaker performance in non-food products in the second quarter, reflecting heightened consumer price sensitivity, also contributed to the slight shortfall in the gross profit margin. Disposal losses for daily and fresh foods continued to be appropriately controlled, as in the first quarter.
Selling, general and administrative expenses came in significantly below the initial plan by 320 million yen, mainly due to personnel expenses, which were 340 million yen below plan. As this fiscal year is the first year of full-scale rollout of self-checkout systems across all stores, the initial personnel cost plan was set conservatively in anticipation of potential operational issues. However, thorough labor hour control by the store operations division enabled efficient store management, contributing to the reduction versus plan.
As a result, while net sales were in line with the plan, gross profit exceeded the plan by 120 million yen and SG&A expenses were below the plan by 320 million yen, and operating profit, ordinary profit, and profit attributable to owners of parent are all expected to exceed the forecasts.

(2) Revision of the Forecast for the Second Half

The number of new store openings in the second half has been revised downward from 45 stores to 41 stores. Including adjustments to opening schedules, second-half net sales are expected to be lower than the initial plan by 690 million yen. Although lease agreements for all planned sites had been completed, construction costs have risen and construction schedules have become increasingly tight. In particular, construction costs directly affect store profitability, and as we continued negotiations without compromise to ensure they do not exceed our internal standards, some store openings have been postponed to the next fiscal year.
The number of store closures remains unchanged from the initial plan at 3 stores for the full year, and the net increase in the number of stores at fiscal year-end is expected to be +58 stores. Compared with the net increase of +47 stores in the previous fiscal year, this represents an increase of more than 20% in the pace of new store openings, even while maintaining a focus on dominant areas. We strongly feel that the organizational strengthening of the Store Development Division, which is key to our store expansion strategy, over the past several years has produced tangible results.
Looking ahead, the Market Research Division, Store Development Division, and Construction Division will continue to work as an integrated team, and we intend to accelerate toward achieving an annual pace of 100 new store openings as early as possible.
The gross profit margin plan for the second half has been slightly revised downward by 0.03 pts versus the initial plan; however, due to the reduction in sales, gross profit is expected to be lower than the initial plan by 180 million yen. SG&A expenses have been revised downward by 280

million yen versus the initial plan, reflecting variances in personnel expenses and utility costs observed in the first half. As a result, operating profit for the second half is expected to exceed the initial plan by 100 million yen, and by 500 million yen on a full-year basis.

In addition, rising interest rates are pushing up non-operating expenses, and therefore the year-on-year growth in ordinary profit is expected to be slightly weaker than that of operating profit. On the other hand, we are also working to improve non-operating income, including through leasing out large stores after closure.

Further details will be provided in the financial results report and presentation materials scheduled for release on January 27, as well as at the online financial results briefing for institutional investors to be held on January 30, which will be conducted in Japanese only.

* The above forecasts are based on information available as of the date of the announcement of this document. Actual results may differ from the forecasts due to various uncertain factors.