

Results for the 3rd Quarter of the Fiscal Year Ending March 31, 2026



MEITEC Group Holdings Inc.
January 29, 2026

Comments on Results



1. In the 3rd quarter, consolidated net sales rose 3.1%, operating profit rose 6.3%, and profit rose 13.5% year on year (in the previous fiscal year an impairment loss on real estate was recorded).
2. In the Engineering Solutions Business, net sales rose 3.2% and operating profit rose 7.4% year on year, against a backdrop of firm orders and utilization ratios.
3. As a result of continuing proactive recruitment that adheres to high standards, we faced challenges in the recruitment market. The number of engineers (total of Meitec/Meitec Fielders) was 12,283 (down 82 employees or down 0.7% year on year).
4. In the Recruiting & Placement Business for Engineers, net sales fell 3.8% and operating profit fell 3.2% year on year due mainly to a decrease in the number of job placements.

Results for the 3rd Quarter of the Fiscal Year Ending March 31, 2026 (Group Consolidated)

| (Fractions of one million yen are rounded down) | 3Q ended Dec. 31, 2024 | 3Q ended Dec. 31, 2025 | YoY Amount | % Change | Past Forecast | % Change |
|-------------------------------------------------|------------------------|------------------------|------------|----------|---------------|----------|
| Net sales | 100,398 | 103,522 | +3,123 | +3.1% | 137,000 | 75.6% |
| Cost of sales | 72,346 | 75,142 | +2,795 | +3.9% | 100,000 | |
| Cost of sales to Net sales | 72.1% | 72.6% | +0.5% | | 73.0% | |
| SG&A Expenses | 12,839 | 12,211 | -627 | -4.9% | 16,800 | |
| Operating profit | 15,212 | 16,168 | +956 | +6.3% | 20,200 | 80.0% |
| Operating profit margins | 15.2% | 15.6% | +0.5% | | 14.7% | |
| Ordinary profit | 15,253 | 16,295 | +1,042 | +6.8% | 20,400 | 79.9% |
| Extraordinary income & loss | -621 | -36 | +584 | — | | |
| Profit before income taxes | 14,632 | 16,259 | +1,626 | +11.1% | | |
| Profit attributable to owners of parent | 9,801 | 11,124 | +1,323 | +13.5% | 13,900 | 80.0% |
| Profit margins | 9.8% | 10.7% | +1.0% | | | |

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Results for the 3rd Quarter of the Fiscal Year Ending March 31, 2026 (Business Domains)

| (Fractions of one million yen are rounded down) | 3Q ended Dec. 31, 2024 | 3Q ended Dec. 31, 2025 | YoY Amount | % Change |
|-------------------------------------------------|------------------------|------------------------|------------|--------------|
| Engineering Solutions Business | Sales | 99,403 | 102,560 | +3,157 +3.2% |
| | Component ratio | 99.0% | 99.1% | +0.1% |
| | Meitec | 69,763 | 71,905 | +2,142 +3.1% |
| | Meitec Fielders | 26,964 | 27,670 | +705 +2.6% |
| | Operating profit | 14,953 | 16,058 | +1,105 +7.4% |
| | Component ratio | 98.3% | 99.3% | +1.0% |
| Recruiting & Placement Business for Engineers | Sales | 1,004 | 965 | -38 -3.8% |
| | Component ratio | 1.0% | 0.9% | -0.1% |
| | Operating profit | 343 | 331 | -11 -3.2% |
| | Component ratio | 2.3% | 2.1% | -0.2% |

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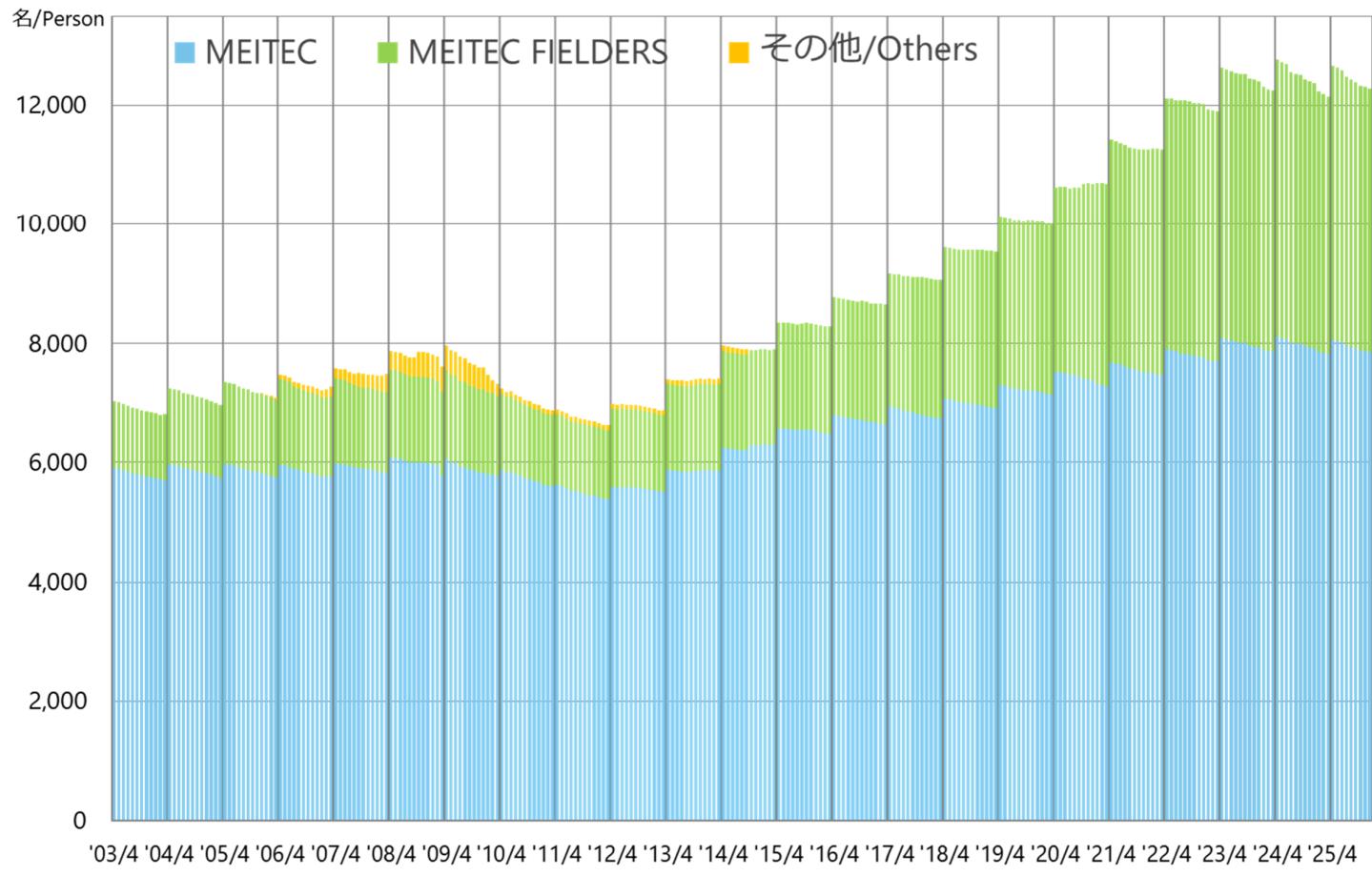
Results for the 3rd Quarter of the Fiscal Year Ending March 31, 2026 (Meitec)

| (Fractions of one million yen are rounded down) | 3Q ended Dec. 31, 2024 | 3Q ended Dec. 31, 2025 | YoY Amount | % Change | Past Forecast | % Change |
|----------------------------------------------------|---------------------------|---------------------------|---------------|-------------|---------------|-------------|
| Net sales | 69,763 | 71,905 | +2,142 | +3.1% | 95,000 | 75.7% |
| Operating profit | 11,706 | 12,807 | +1,101 | +9.4% | 16,000 | 80.0% |
| Operating profit margins | 16.8% | 17.8% | +1.0% | | 16.8% | |
| Ordinary profit | 11,716 | 12,837 | +1,120 | +9.6% | 16,000 | 80.2% |
| Profit | 8,048 | 8,798 | +749 | +9.3% | 11,000 | 80.0% |
| Utilization ratio (Company-wide) | 98.0% | 98.2% | +0.2% | | 98.5% | |
| Working Hours 〈h/day〉 | 8.35 | 8.32 | -0.03 | -0.4% | 8.35 | |
| Number of Engineers | 7,913 | 7,859 | -54 | -0.7% | | |

Results for the 3rd Quarter of the Fiscal Year Ending March 31, 2026 (MEITEC Fielders)

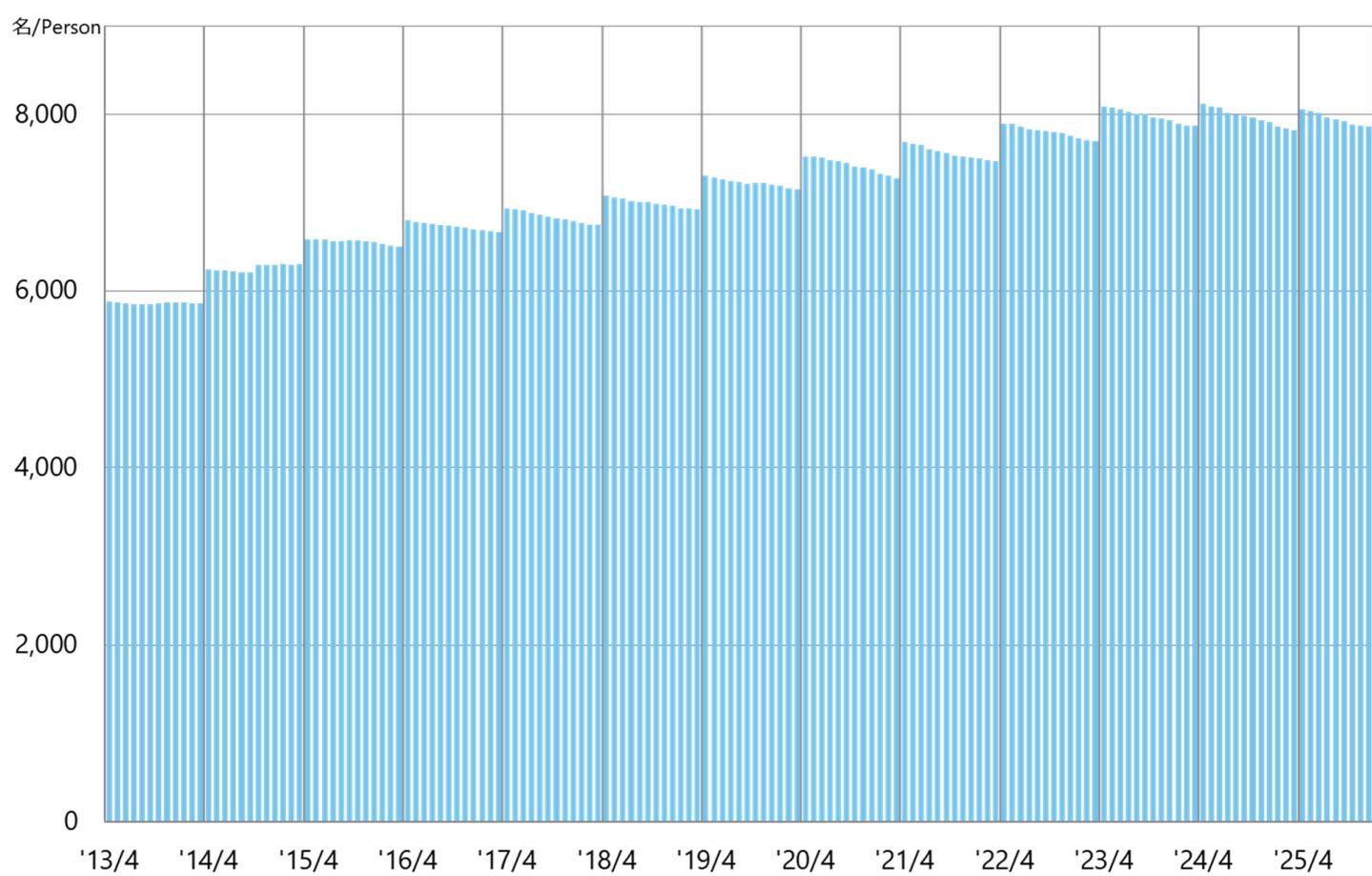
| (Fractions of one million yen are rounded down) | 3Q ended Dec. 31, 2024 | 3Q ended Dec. 31, 2025 | YoY Amount | % Change | Past Forecast | % Change |
|----------------------------------------------------|---------------------------|---------------------------|---------------|-------------|---------------|-------------|
| Net sales | 26,964 | 27,670 | +705 | +2.6% | 36,500 | 75.8% |
| Operating profit | 3,088 | 3,039 | -48 | -1.6% | 3,700 | 82.1% |
| Operating profit margins | 11.5% | 11.0% | -0.5% | | 10.1% | |
| Ordinary profit | 3,088 | 3,049 | -38 | -1.3% | 3,700 | 82.4% |
| Profit | 2,126 | 2,100 | -25 | -1.2% | 2,500 | 84.0% |
| Utilization ratio (Company-wide) | 96.7% | 96.7% | — | | 97.0% | |
| Working Hours 〈h/day〉 | 8.21 | 8.18 | -0.03 | -0.4% | 8.21 | |
| Number of Engineers | 4,452 | 4,424 | -28 | -0.6% | | |

Number of Engineers (Group Consolidated)



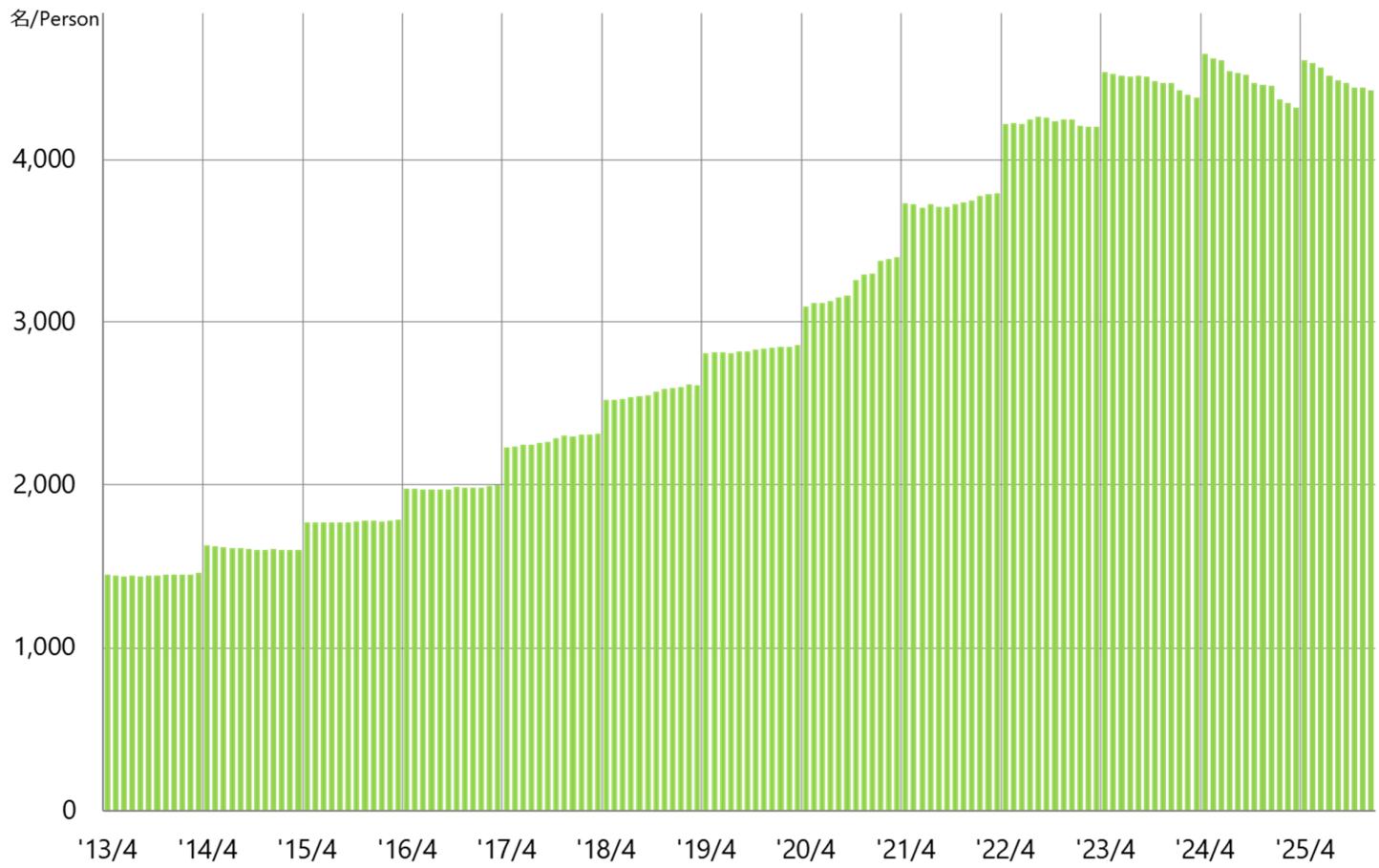
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Number of Engineers (MEITEC)



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Number of Engineers (MEITEC Fielders)

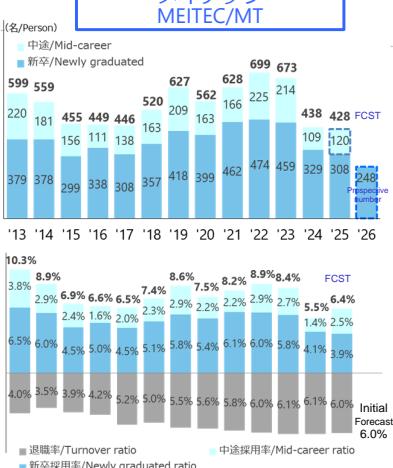


Status of Recruitment and Hiring Target

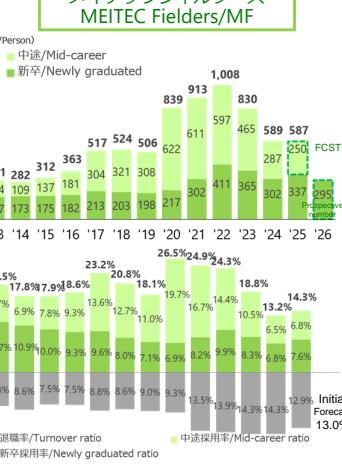
Re-posted

| (Person) | Meitec | | | Meitec Fielders | | | 2 group companies | | |
|------------------------------------|------------------|---------------|------------|------------------|---------------|------------|-------------------|---------------|------------|
| | Total | New Graduates | Mid-career | Total | New Graduates | Mid-career | Total | New Graduates | Mid-career |
| FY2026 | | | | | | | | | |
| April 2026 | 248 | | | 295 | | | 543 | | |
| YoY Comparison to Initial Forecast | -60 | | | -42 | | | -102 | | |
| -152 | | | | -155 | | | -307 | | |
| FY2025 | Target(i)+(ii) | (i)Actual | (ii)Target | Target(i)+(ii) | (i)Actual | (ii)Target | Target(i)+(ii) | (i)Actual | (ii)Target |
| April 2025 | 428 | 308 | 120 | 587 | 337 | 250 | 1,015 | 645 | 370 |
| YoY Comparison to Initial Forecast | -10 | -21 | +11 | -2 | +35 | -37 | -12 | +14 | -26 |
| -192 | -80 | | | -63 | -50 | | -255 | | -130 |
| FY2024 | Actual(iii)+(iv) | (iii)Actual | (iv)Actual | Actual(iii)+(iv) | (iii)Actual | (iv)Actual | Actual(iii)+(iv) | (iii)Actual | (iv)Actual |
| April 2024 | 438 | 329 | 109 | 589 | 302 | 287 | 1,027 | 631 | 396 |
| YoY | -235 | -130 | -105 | -241 | -63 | -178 | -476 | -193 | -283 |

メイテック MEITEC/MT



メイテックフィルダーズ MEITEC Fielders/MF



April 2026 New Graduate Prospective Number: Meitec

- Under pressure from intensifying competition, the number of prospective new graduates was 248, 152 fewer than targeted
- Delayed response to earlier start of student job hunting, target students received many offers and ended their activities early

April 2026 New Graduate Prospective Number: Meitec Fielders

- Under pressure from intensifying competition, the number of prospective new graduates was 295, 155 fewer than targeted
- Slow to respond to earlier start of student job hunting, did not adequately deal with lowering of standards by competitors.

April 2027 New Graduate Recruitment Status: Meitec

- Rather than lowering hiring standards we will adhere to them in order to obtain appropriate consideration, and to prevent lower utilization ratios/higher turnover ratios
- Early start to activities is becoming increasingly entrenched, so we must revise our approach and work to expand the population

April 2027 New Graduate Recruitment Status: Meitec Fielders

- Will adhere to hiring standards, focus particularly on science students
This is because lowering standards irresponsibly becomes a significant burden in terms of the effort required to move them from training to assignments, rapid turnover, and other factors
- Will swiftly revise our approach to address changes such as earlier start to job hunting

First-half Trends: Meitec(Mid-career Hiring)

- Achieving the desired number of hires has been challenging
- In particular, acceptance of prospective offers is at low levels due to the absence of a clinching factor
- Some companies are using recruitment campaigns that are widening the breadth of such lowering of standards
- The market is seeing an increase in job hoppers who tentatively join companies.

First-half Trends: Meitec Fielders(Mid-career Hiring)

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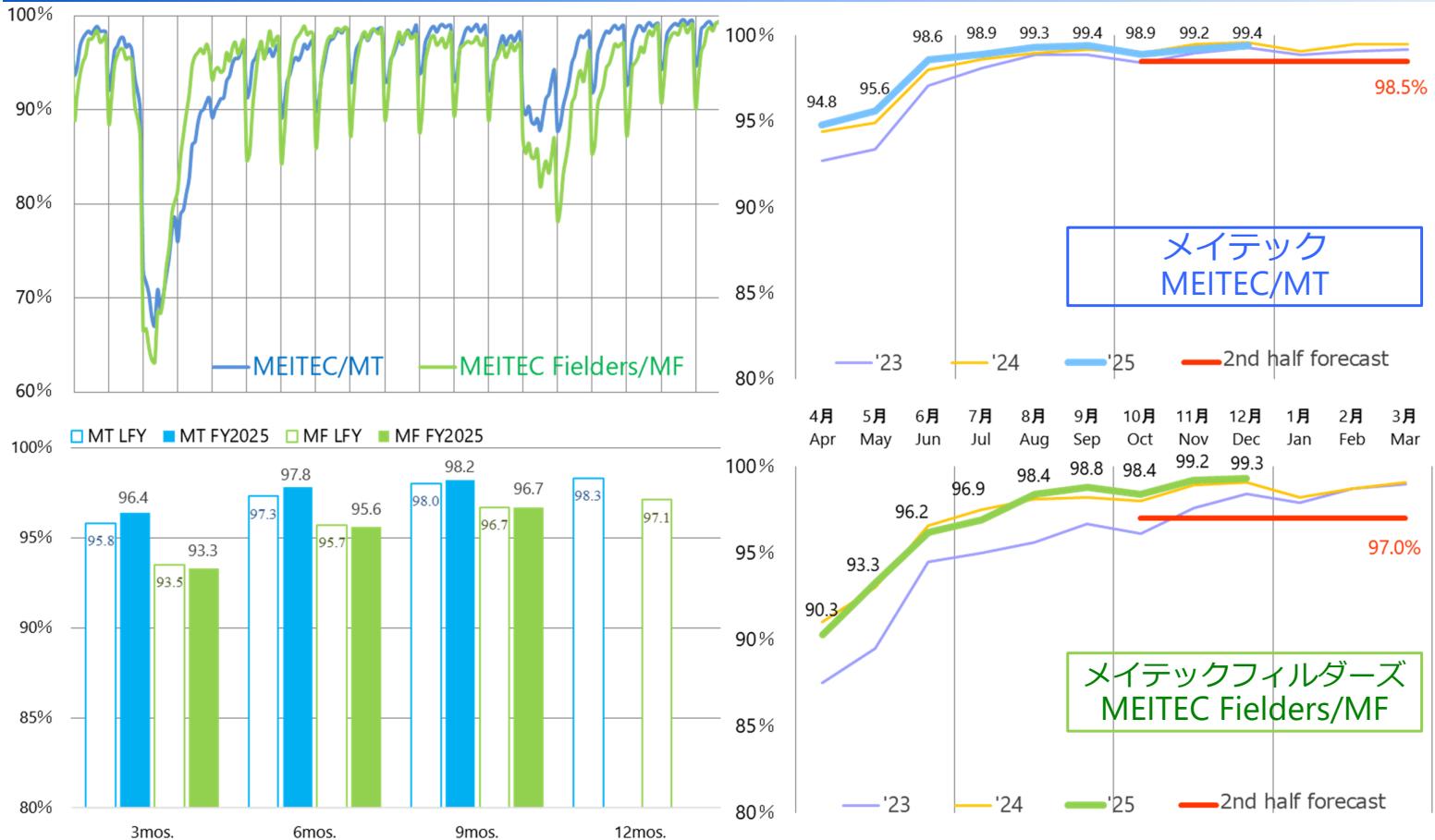
Revisions to Fiscal Year Targets: Meitec

- Based on requests from customers and high turnover ratios relative to the past, we will adhere to our hiring standards
- We have revised the initial target of 200 people to 120 people
- To achieve a recovery in the past rate we will swiftly revise our approach

Revisions to Fiscal Year Targets: Meitec Fielders

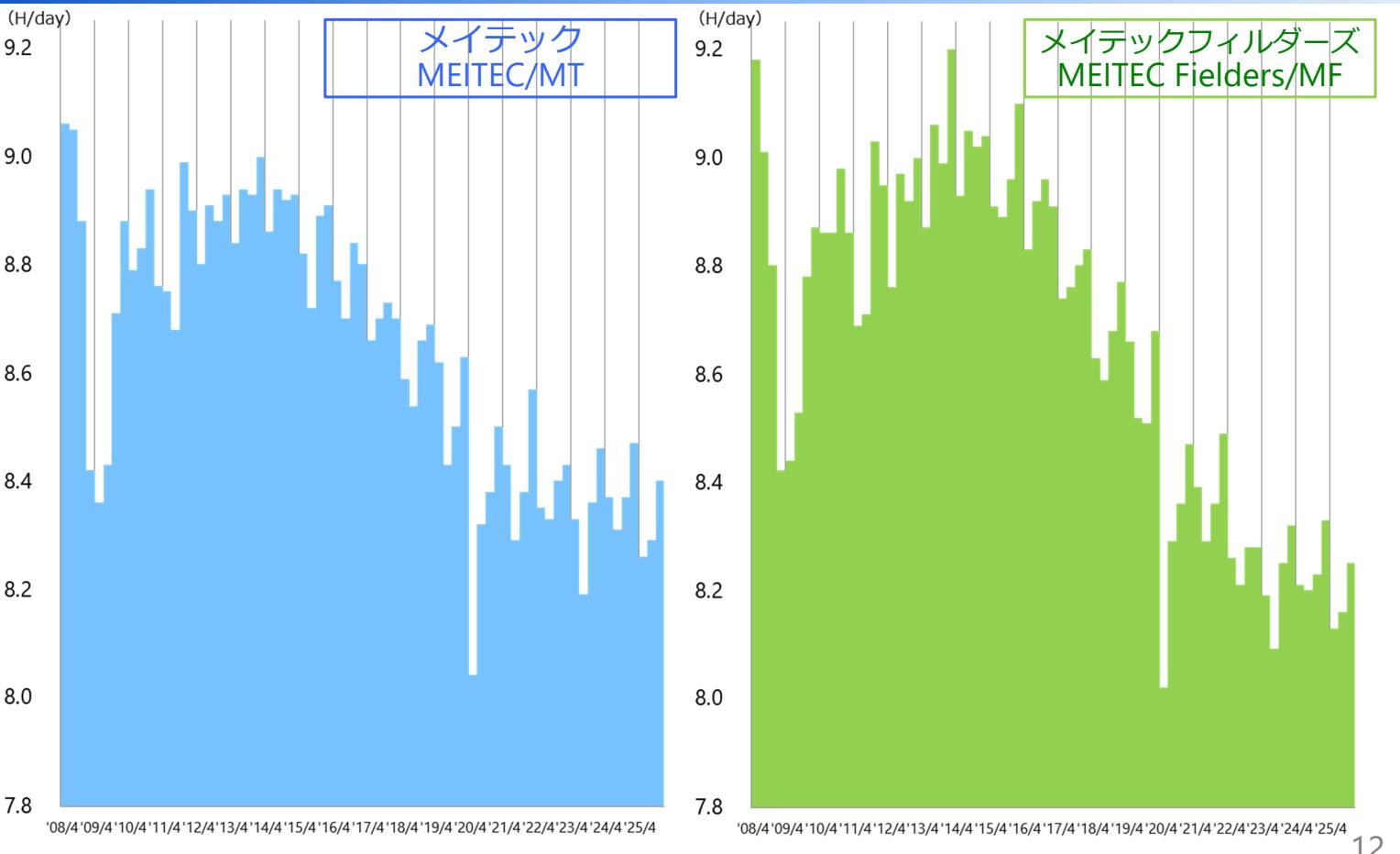
- Based on requests from customers and high turnover ratios relative to the past, we will adhere to our hiring standards
- We have revised the initial target of 300 people to 250 people
- We will swiftly revise our approach, including methods used to form the entry population and raising acceptance of prospective offers

Utilization Ratio



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Working Hours



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Q. Please tell us about the policies and initiatives you are exploring for the new Mid-term Management Plan.

- ✓ We plan to announce the new Mid-term Management Plan, which is scheduled to start from FY2026, in May.

| Billion Yen | Group Consolidated | | | MEITEC | | | Meitec Fielders | | | Recruiting&Placement | | | |
|------------------|--------------------|----------|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|-------------------|----------|----------|----------------------|----------|----------|--|
| | FY2025 | | | Mid-Term 3rd year | | | Mid-Term 3rd year | | | Mid-Term 3rd year | | | |
| | Plan | forecast | progress | Plan | forecast | progress | Plan | forecast | progress | Plan | forecast | progress | |
| Net Sales | 145.0 | 137.0 | 94% | 95.0 | 95.0 | 100% | 44.5 | 36.5 | 82% | 1.8 | 1.4 | 79% | |
| Operating Profit | 19.0 | 20.2 | 106% | 14.3 | 16.0 | 112% | 4.5 | 3.7 | 82% | 0.6 | 0.5 | 88% | |
| Margin | 13% | 15% | | 15% | 17% | | 10% | 10% | | 33% | 37% | | |
| Profit | 13.0 | 13.9 | 107% | Utilization ratios are high, and we expect to be able to achieve the profit level targeted in the Mid-term Management Plan. Net sales are expected to fall short of forecasts at both Meitec and Meitec fielders due to the downward revision to mid-career hiring targets | | | | | | | | | |
| ROE | 30% | 29% | | | | | | | | | | | |

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|---------------------|----------------------------------------------------------------------------|
| Company Name | MEITEC Group Holdings Inc. Tokyo Stock Exchange, Prime Market(No. 9744) |
| Tokyo Headquarters | 1-1-10 Ueno, Taito-ku, Tokyo |
| Atsugi Headquarters | 15-1 Aoyama, Morinosato, Atsugi-shi, Kanagawa |
| Incorporated | July 17, 1974 |

Disclaimer regarding forward-looking statements

Earnings forecasts and other forward-looking statements in this release are based on data currently available to management and certain assumptions that management believes are reasonable.

Actual results may therefore differ materially from these statements for various reasons.

Some important factors that might have an effect on business performance pertain to Business Risks stated in the Company's annual securities report and other information already released, but factors influencing business performance are not limited to those released.

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