

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%		

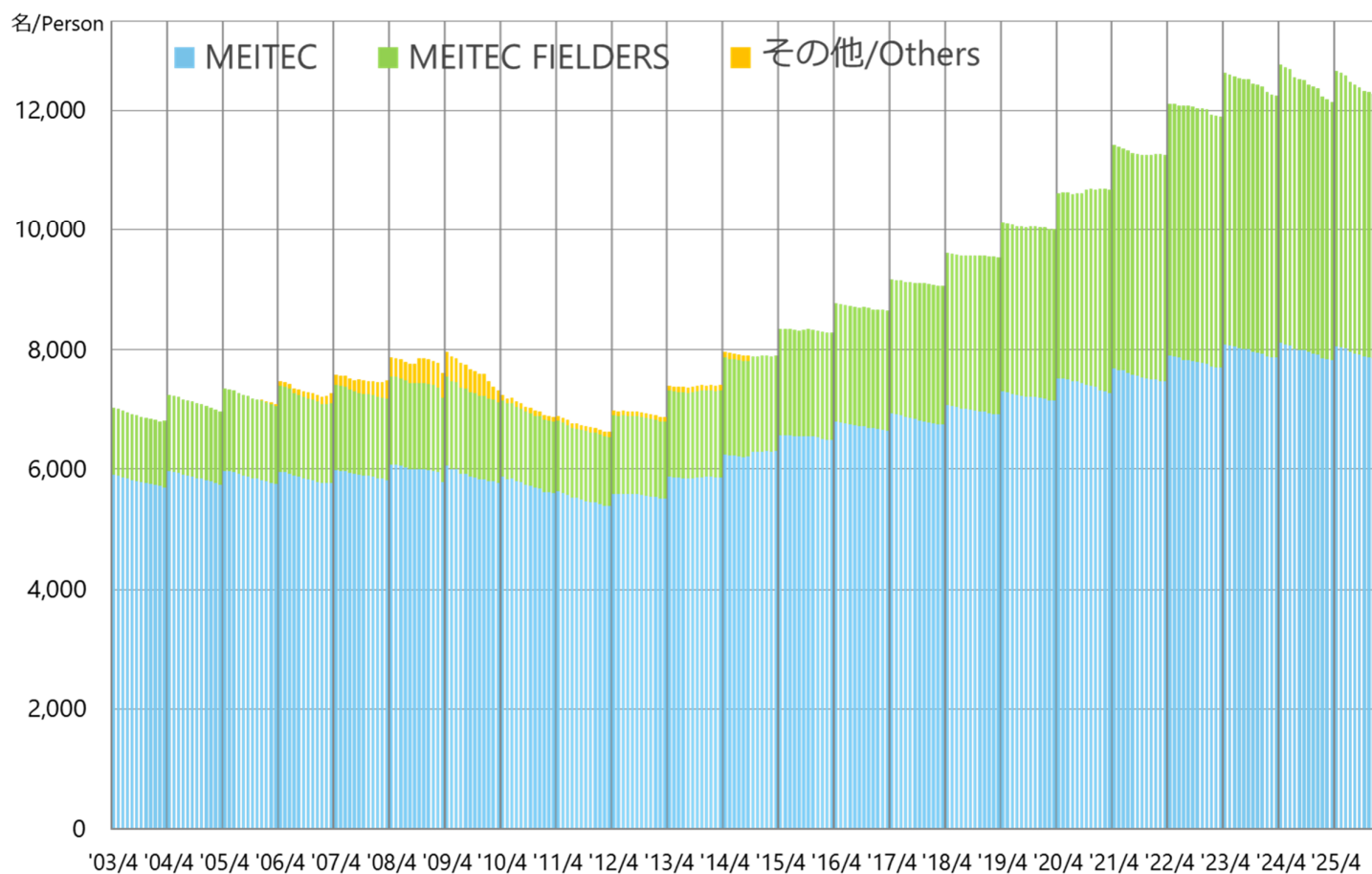
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Results for the 3rd Quarter of the Fiscal Year Ending March 31, 2026 (MEITEC Fielders)

(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%		

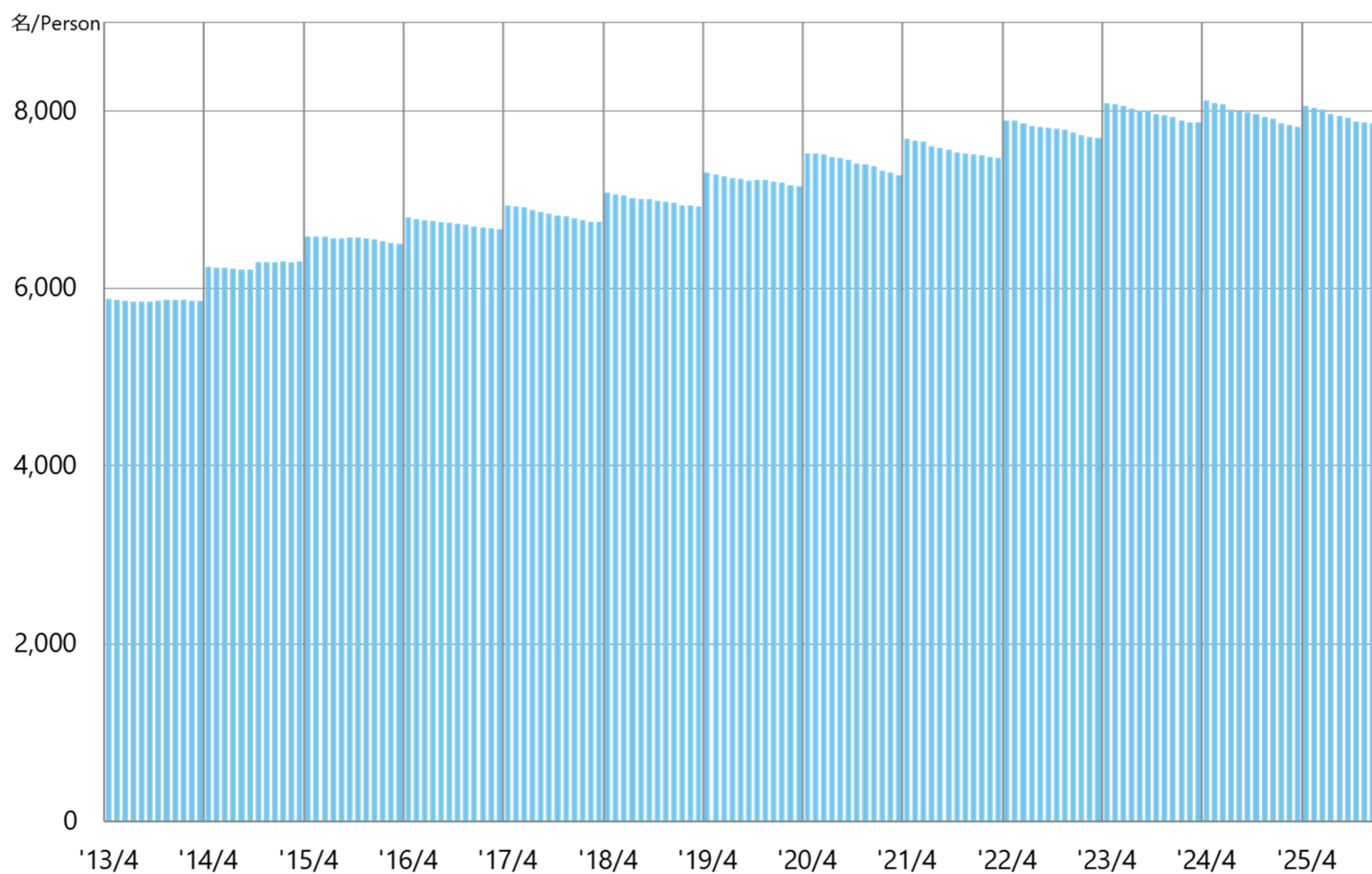
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Number of Engineers (Group Consolidated)



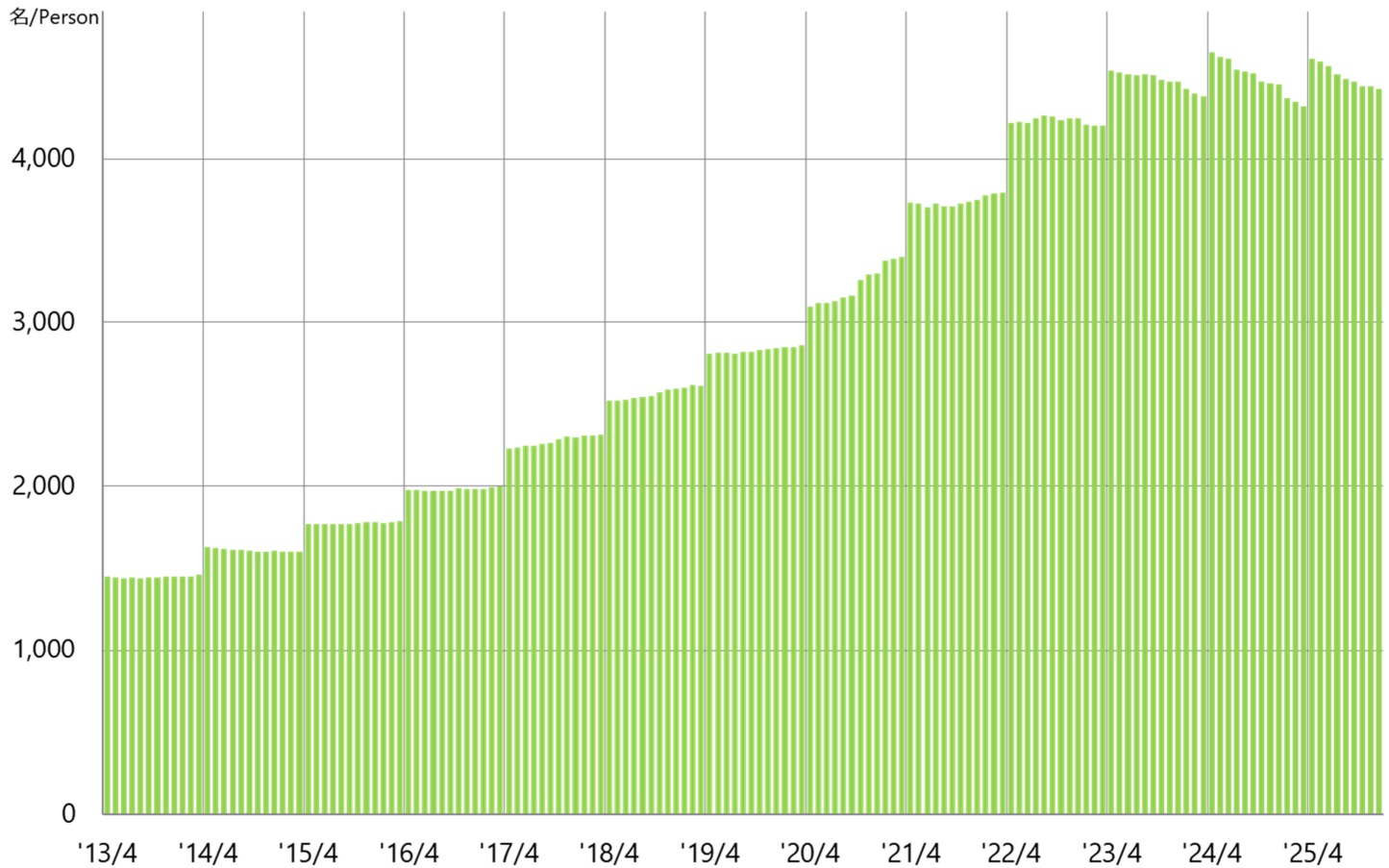
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Number of Engineers (MEITEC)



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Number of Engineers (MEITEC Fielders)



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Status of Recruitment and Hiring Target

(Person)	Meitec			Meitec Fielders			2 group companies		
	Total	New Graduates	Mid-career	Total	New Graduates	Mid-career	Total	New Graduates	Mid-career
FY2026		Prospective Number			Prospective Number			Prospective Number	
April 2026		248			295			543	
YoY		-60			-42			-102	
Comparison to Initial Forecast		-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	-10	-21	+11	-2	+35	-37	-12	+14	-26
Comparison to Initial Forecast		-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

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.

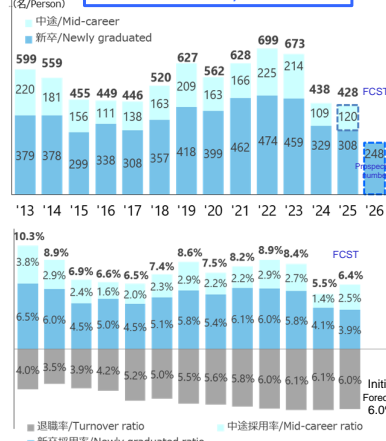
April 2027 New Graduate Recruitment Status: Meitec

- 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

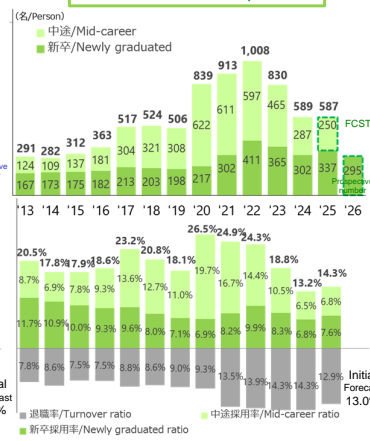
April 2027 New Graduate Recruitment Status: Meitec Fielders

- 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

メイテック MEITEC/MT



メイテックフィールドーズ MEITEC Fielders/MF



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

- Achieving the desired number of hires has been challenging
- In particular pass rates have fallen, and the number of entries who did not to meet the standards has increased
- We have also sensed a decline in the number of people genuinely looking to change career

First-half Trends: Meitec Fielders(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.

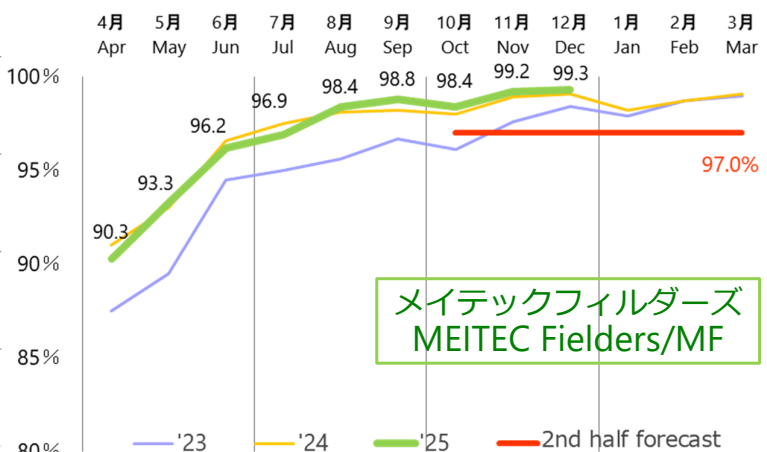
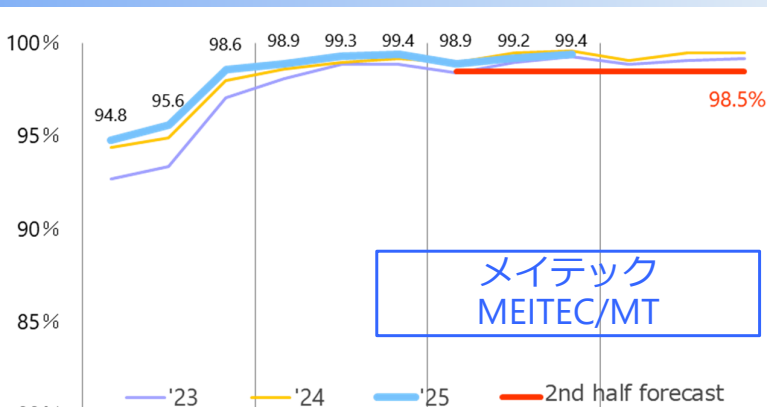
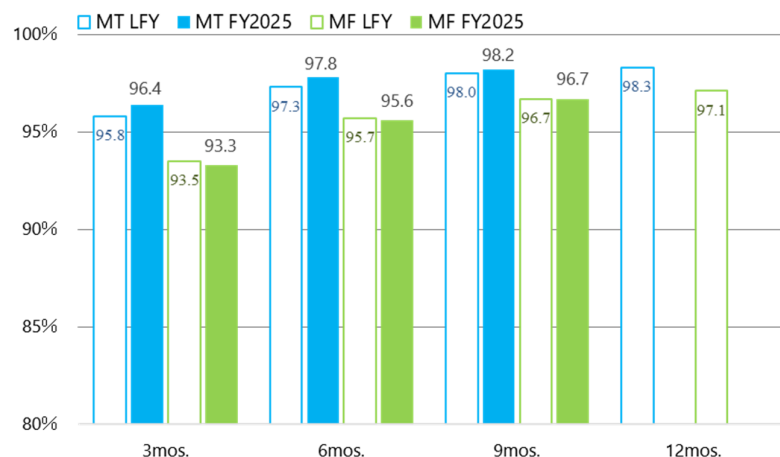
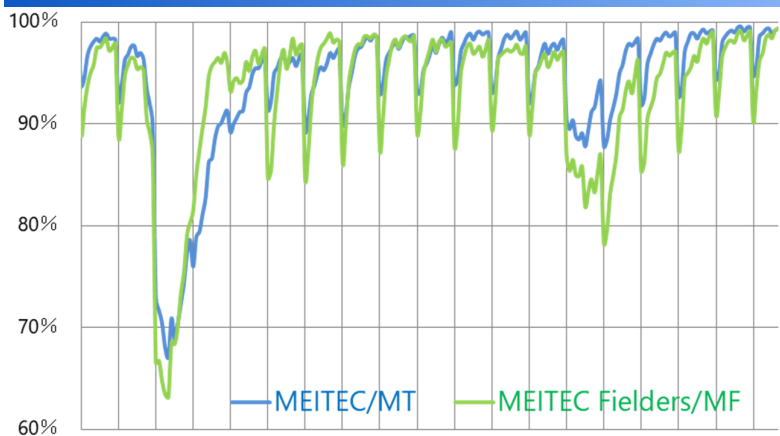
Revisions to Fiscal Year Targets: Meitec

- We would like to increase staff but, taking on feedback from customers, we are adhering to 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

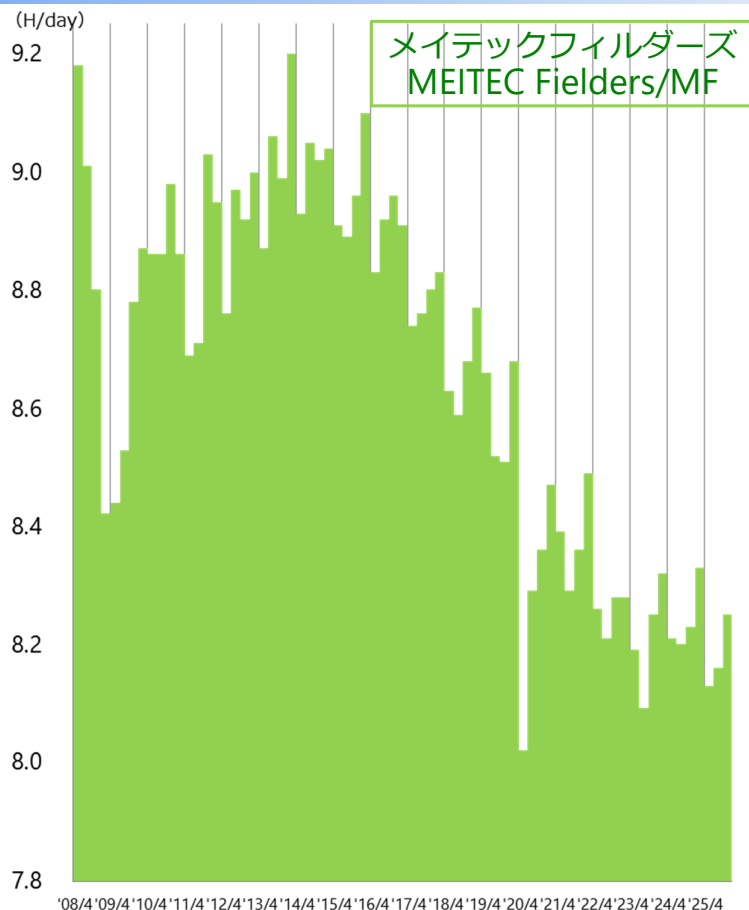
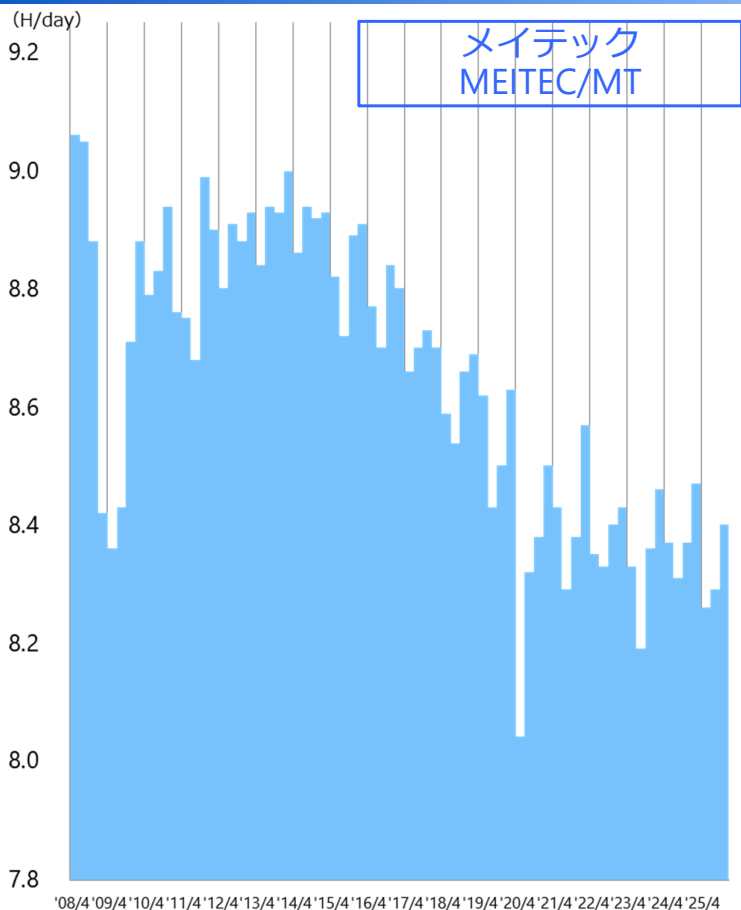
- Based on requests from customers and high turnover ratios relative to the past, we will adhere to our hiring standards
- We have revised the initial target of 300 people to 250 people
- We will swiftly revise our approach, including methods used to form the entry population and raising acceptance of 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			FY2025			FY2025			FY2025		
	Mid-Term	3rd year		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%									
ROE	30%	29%										

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

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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

Develop a new era by People and Technology



 Engineering Firm at The Core
 MEITEC GROUP HOLDINGS

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.

IR Contact

E-mail: ir@meitecgroup-holdings.com

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