August 31, 2026

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Q&A collection
Financial Results for the Three Months Ended May 31, 2026
(Updated on August 31, 2026)

This Q&A collection is a compilation of anticipated questions regarding the financial results for the three months ended May 31, 2026, which were announced on July 9, 2026, as well as excerpts of inquiries from investors and their responses. Some content has been edited for clarity.

Q | Please tell us about the integration and relocation plan for the logistics centers scheduled for the second half of the fiscal year, and its impact on business performance.

From the third quarter onwards, we are proceeding with a plan to integrate and expand our two logistics centers in Saitama Prefecture and relocate them to Chiba Prefecture. While we anticipate increases in rent, personnel expenses, and other costs associated with the relocation, these have all been incorporated into our initial budget, and we have determined that they will not lead to major deviations from our company-wide earnings forecasts. Through this integration and expansion, we aim to improve productivity and further expand our sourcing.

Q | Sales of home appliances are strong, but what is the specific situation regarding air conditioners and the future outlook?

Summer home appliances, mainly air conditioners, have been performing strongly currently, boosted by this summer's extreme heat. Regarding the future outlook, given concerns over soaring prices of new products accompanying the revision of energy conservation standards in 2027, we expect demand for affordable second-hand air conditioners to rise even further in the medium to long term. We believe this is an area that we can continue to grow as an important category by consistently securing solid inventory sourcing going forward.

TREASURE FACTORY