FY2026 1H Financial Results and FY2026 Outlook

FY2026 1H(2025.12.1－2026.5.31)

NACHI-FUJIKOSHI CORP. (Code:6474)

July 22, 2026

Outline

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1. FY2026 1H Financial Results

FY2026 1H Financial Results

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(Unit : JPY 100millions)

		FY2025 1H (A)	FY2026 1H (B)	YoY Change (%)	YoY Change B-A
Net Sales		1,158	**1,248**	(+7.7%)	+89
Operating Profit		42	**67**	(+60.7%)	+26
%		3.6%	**5.4%**	-	+1.8pt
Ordinary Profit		29	**61**	(+107.3%)	+32
%		2.6%	**4.9%**	-	+2.3pt
Net Profit attributable to owners of the parent		18	**33**	(+81.0%)	+15
Exchange rate	USD	150	**157**	-	7 JPY depreciation
	EUR	161	**184**	-	23 JPY depreciation
	CNY	20.6	**22.7**	-	2.1 JPY depreciation
Cash Dividends per share		-	**-**	-	-

FY2026 1H Financial Results

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(Unit : JPY 100millions)

	FY2025 1H (A)	FY2026 1H (B)	YoY Change (B-A)
R O E	**2.4%**	**3.9%**	+1.5pt
Total Assets	**3,208**	**3,425**	+217
Total Equity	**1,561**	**1,778**	+217
Equity Ratio	**48.7%**	**51.9%**	+3.2pt
Interest-bearing Debts	**881**	**941**	+60
Net D/E ratio	**0.39**	**0.36**	−0.03
Facility Investment	**38**	**68**	+30
Depreciation and Amortization	**94**	**88**	−6
Regular Employees	**6,826**	**6,478**	−348

FY2026 1H Sales by Business Segment and Region

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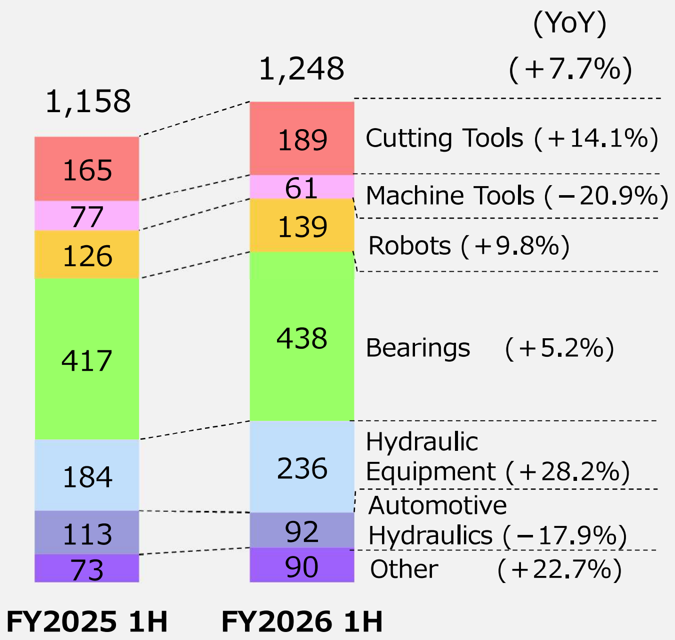
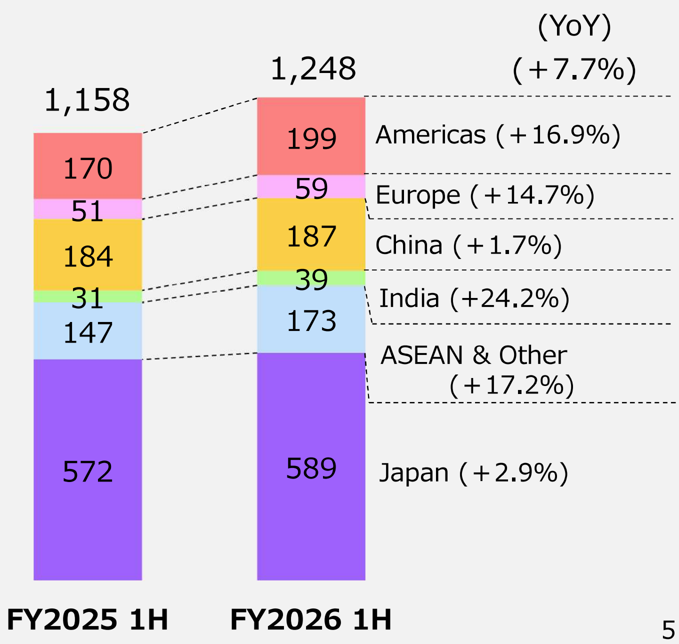
(Unit : JPY 100millions)

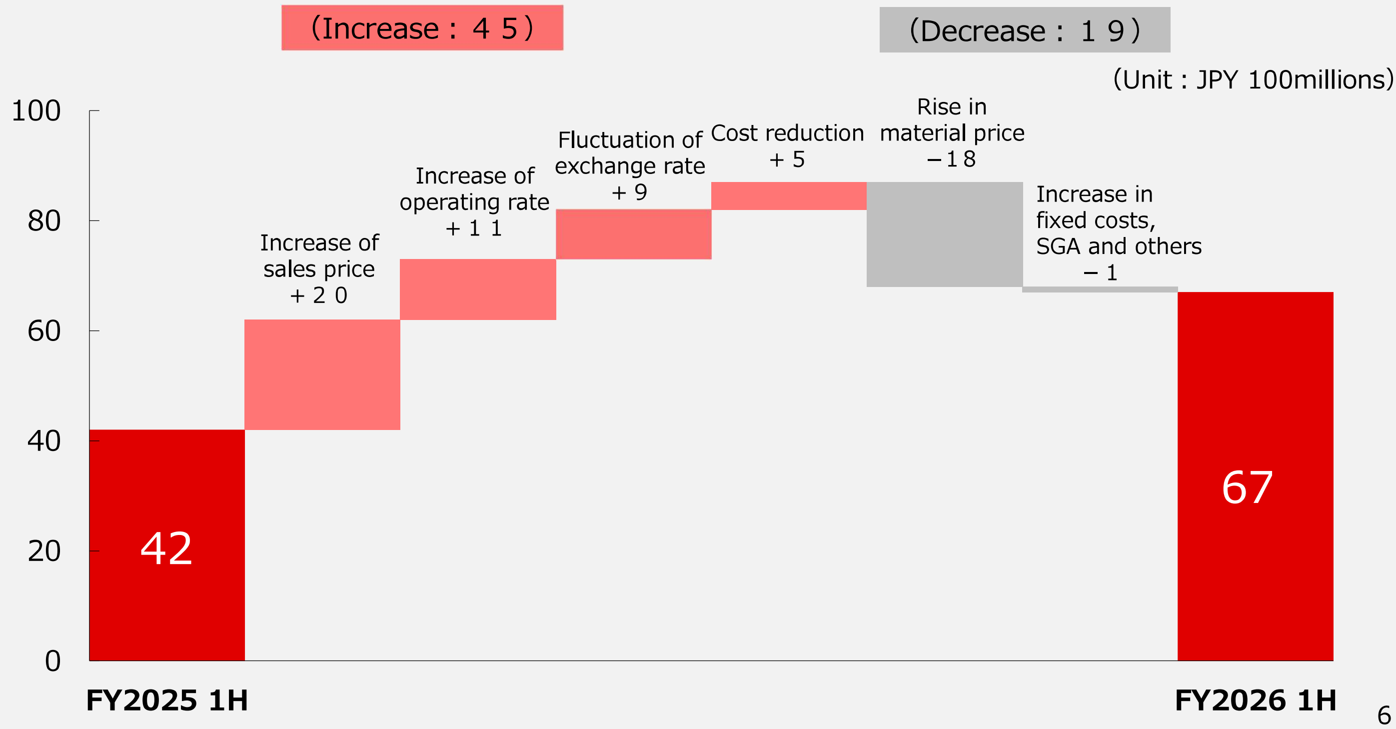
<Sales by Business Segment>



<Sales by Region>



FY2026 1H Factors Affecting Operating Profit



FY2026 1H Extraordinary Income and Losses

(Unit：JPY 100millions)

	FY2025 1H (A)	FY2026 1H (B)	YoY Change (B-A)
Extraordinary Income	9	**0**	－9
−Gain on sales of investment securities	9	**0**	－9
−Gain on sales of non-current assets	0	**0**	＋0
Extraordinary Losses	10	**10**	＋0
−Restructuring Expenses	9	**8**	－2
(incl. impairment and inventory valuation losses)	(5)	**(3)**	(－1)
(incl. disposal losses on fixed assets and inventories)	(－)	**(0)**	(＋0)
(incl. special retirement payment)	(3)	**(1)**	(－2)

FY2026 1H Sales & Operating Profit by Business Segment

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(Unit : JPY 100millions)

		FY2025 1H (A)	FY2026 1H (B)	YoY Change %	YoY Change B-A
Machinery & Tools	Cutting Tools	165	189	+14.1%	+23
	Machine Tools	77	61	−20.9%	−16
	Robots	126	139	+9.8%	+12
	Net Sales	370	390	+5.2%	+19
	Operating Profit	16	21	+32.9%	+5
	%	4.4%	5.6%	-	+1.2pt
Components	Bearings	417	438	+5.2%	+22
	Hydraulic Equipment	184	236	+28.2%	+52
	Automotive Hydraulic	113	92	−17.9%	−20
	Net Sales	714	768	+7.5%	+53
	Operating Profit	21	37	+70.5%	+15
	%	3.1%	4.9%	-	+1.8pt
Other	Net Sales	73	90	+22.7%	+17
	Operating Profit	3	7	+126.2%	+4
	%	4.7%	8.7%	-	+4.0pt
Total Net Sales		1,158	1,248	+7.7%	+89
Total Operating Profit		42	67	+60.7%	+26
%		3.6%	5.4%	-	+1.8pt

2． FY2026 Outlook

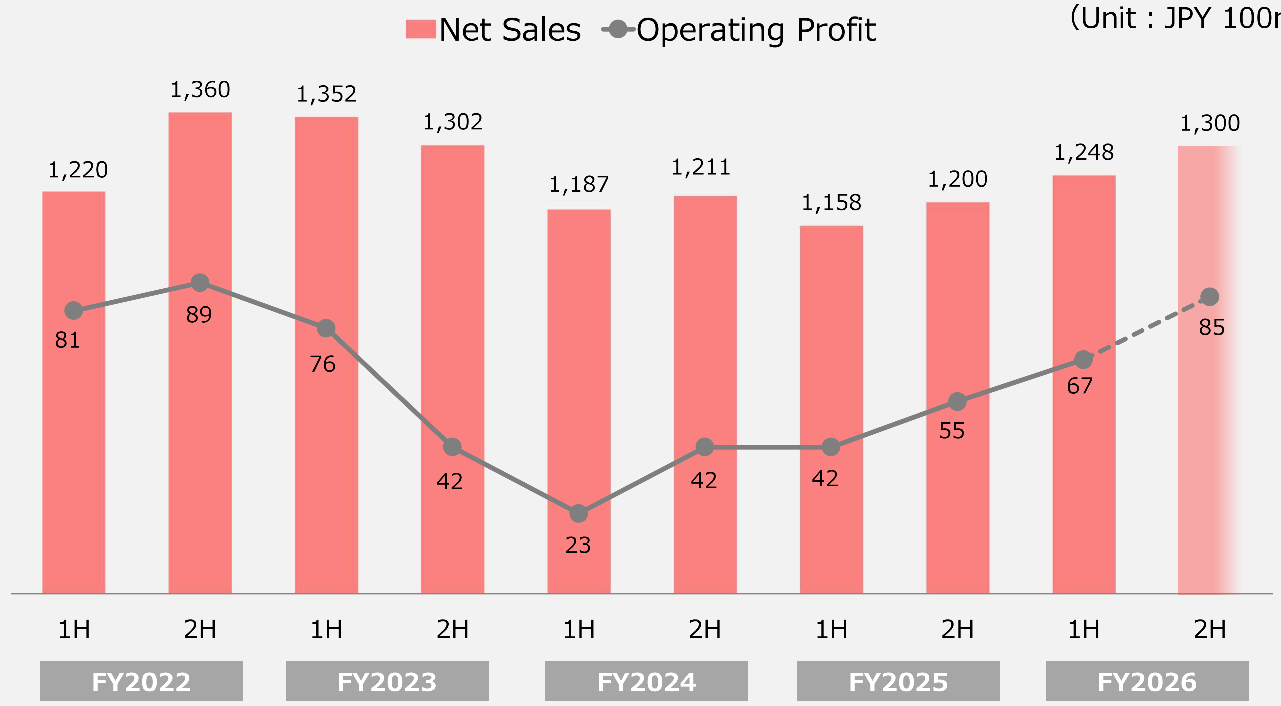
FY2026 Financial Outlook

(Unit : JPY 100millions)

		FY2025 (A)	FY2026(Plan) (B)	YoY Change (%)	YoY Change B-A
Net Sales		2,359	**2,550**	(+8.1%)	+191
Operating Profit		97	**153**	(+56.6%)	+55
%		4.1%	**6.0%**	-	+1.9pt
Ordinary Profit		83	**133**	(+58.9%)	+49
%		3.5%	**5.2%**	-	+1.7pt
Net Profit attributable to owners of the parent		52	**75**	(+42.8%)	+22
Exchange rate	USD	149	**154**	-	5 JPY depreciation
	EUR	167	**180**	-	13 JPY depreciation
	CNY	20.7	**21.7**	-	1 JPY depreciation
Cash Dividends per share		JPY 100	**JPY 110**	-	JPY +10

FY2026 Performance by half-year

(Unit : JPY 100millions)



FY2026 Demand Trends by Industry

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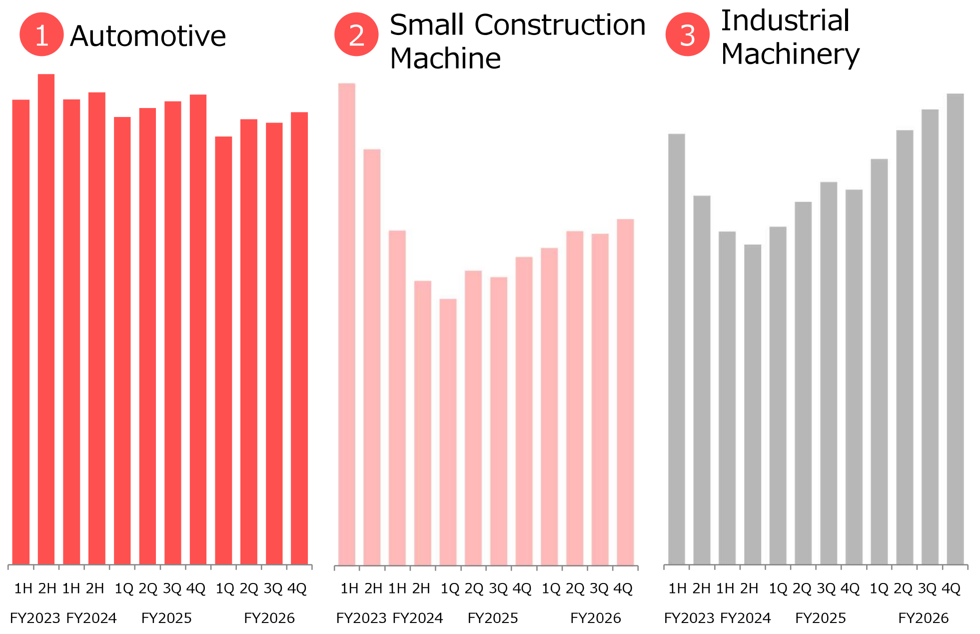
Trend by Industry : Production of main customers



Review

1. Automotive
While demand for gasoline-powered vehicles is declining, demand for HEV remains solid.

2. Small Construction Machine
The recovery trend is expected to continue.

3. Industrial Machinery
Demand recovery will continue in the aerospace and power generation sectors in 2H FY2026.

FY2026 Sales by Business Segment and Region

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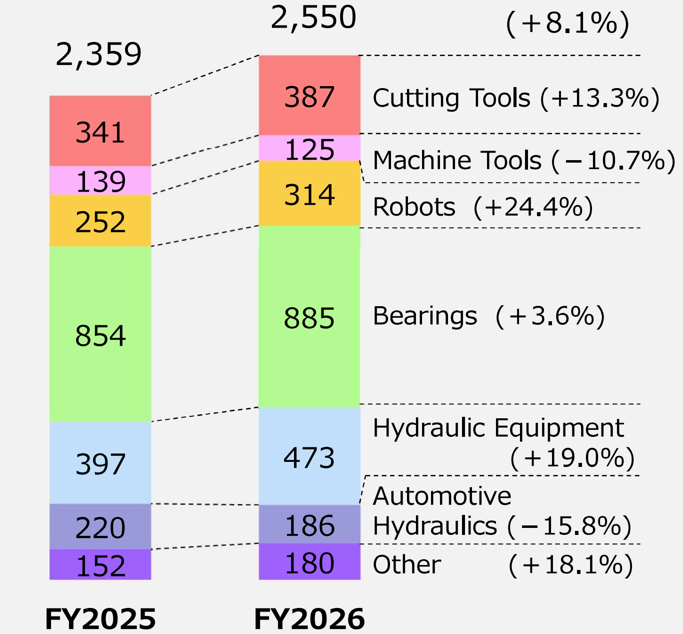
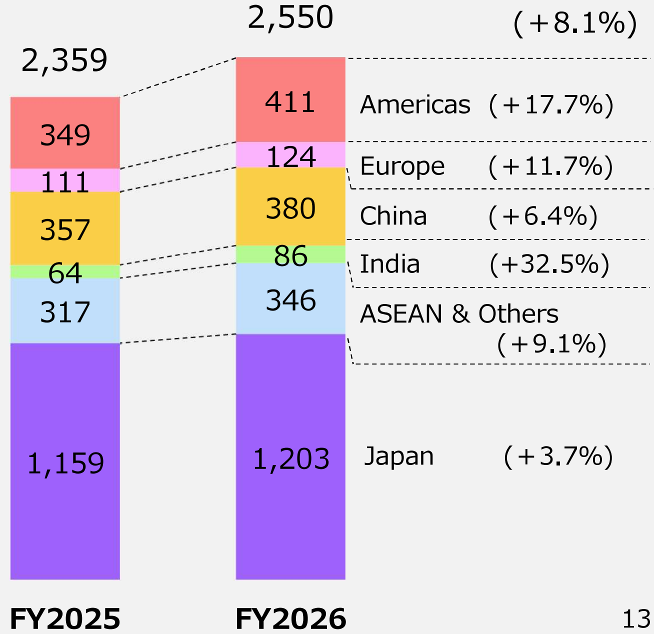
(Unit : JPY 100millions)

<Sales by Business Segment> (YoY)



<Sales by Region> (YoY)



FY2026 Factors Affecting Operating Profit

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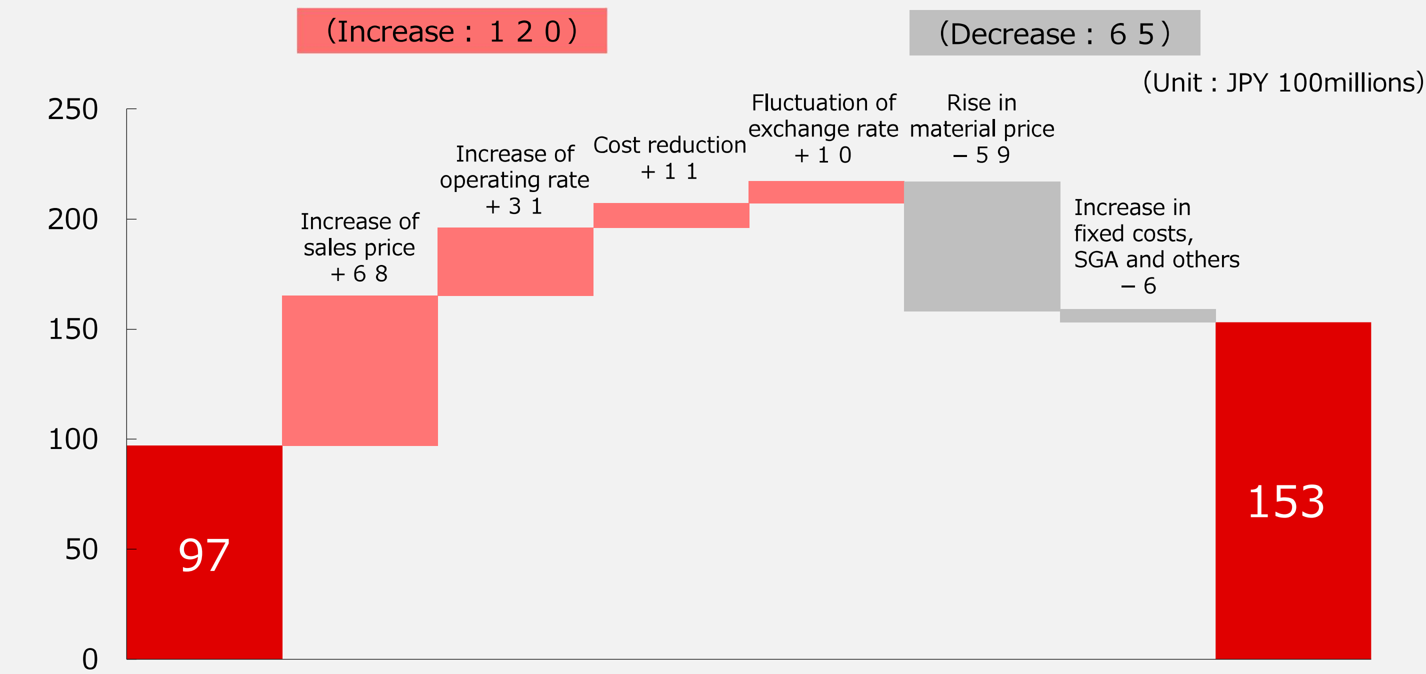

FY2026 Sales & Operating Profit by Business Segment

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(Unit : JPY 100millions)

		FY2025 (A)	FY2026(Plan) (B)	YoY Change %	YoY Change B-A
Machinery & Tools	Cutting Tools	341	387	＋13.3%	＋45
	Machine Tools	139	125	－10.7%	－15
	Robots	252	314	＋24.4%	＋61
	Net Sales	734	826	＋12.5%	＋92
	Operating Profit	42	61	＋42.5%	＋18
	%	5.8%	7.4%	-	+1.6pt
Components	Bearings	854	885	＋3.6%	＋31
	Hydraulic Equipment	397	473	＋19.0%	＋76
	Automotive Hydraulic	220	186	－15.8%	－35
	Net Sales	1,472	1,544	＋4.9%	＋71
	Operating Profit	49	76	＋52.0%	＋26
	%	3.4%	4.9%	-	+1.5pt
Other	Net Sales	152	180	＋18.1%	＋28
	Operating Profit	4	16	＋232.7%	＋11
	%	3.2%	8.9%	-	+5.7pt
Total Net Sales		2,359	2,550	＋8.1%	＋191
Total Operating Profit		97	153	＋56.6%	＋55
%		4.1%	6.0%	-	+1.9pt

FY2026 Financial Outlook

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(Unit : JPY 100millions)

	FY2025 (A)	FY2026(Plan) (B)	YoY Change (B-A)
ROE	3.2%	**4.3%**	+1.1pt
Total Assets	3,312	**3,412**	+112
Total Equity	1,705	**1,820**	+114
Equity Ratio	51.5%	**53.3%**	+1.8pt
Interest-bearing Debts	832	**883**	+51
Net D/E ratio	0.32	**0.31**	−0.01
Facility Investment	99	**160**	+61
Depreciation and Amortization	187	**185**	−2
Regular Employees	6,532	**6,500**	−32

FY2026 Sales Expansion in the U.S. and India

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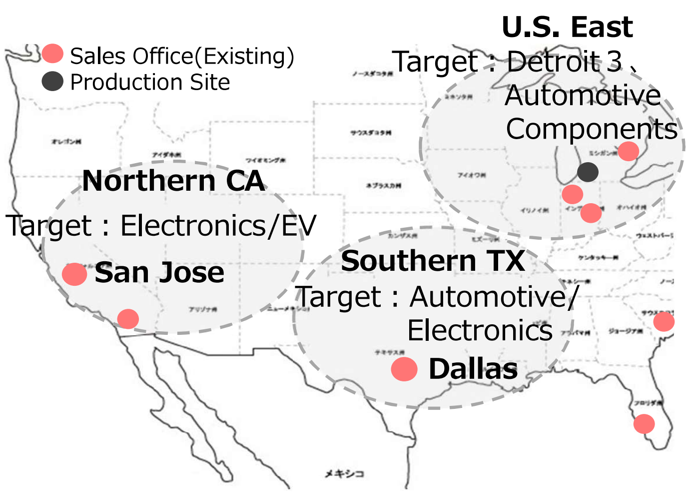
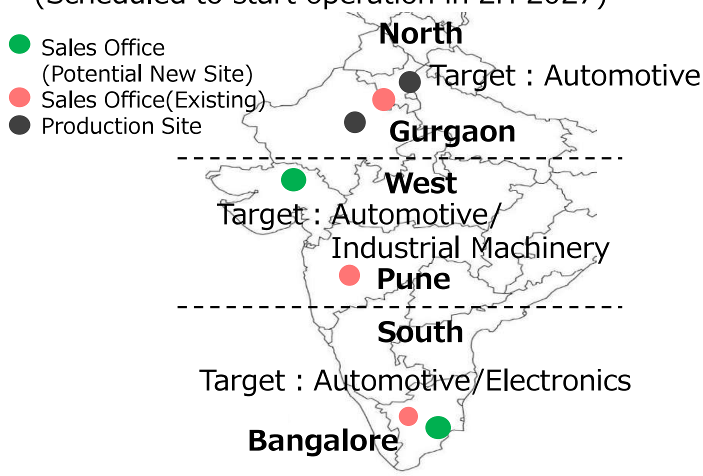
Action in the U.S.

- Expand sales offices and strengthen engagement with targeted customers
- Drive sales expansion by strengthening aftermarket and distribution policies



Action in India

- Expand sales offices in the northern and southern regions in 2026
- Expand the bearing production plant and increase radial bearing production capacity (Scheduled to start operation in 2H 2027)



FY2026 Initiatives in Robotics Business

Development of Robot

・Expand the lineup of the new collaborative robots「COPARO MZS Series」

・Launch the new MZS12 and MZS18, featuring higher payload capacities and extended operating ranges

ＣＯＰＡＲＯ ＭＺＳ Series

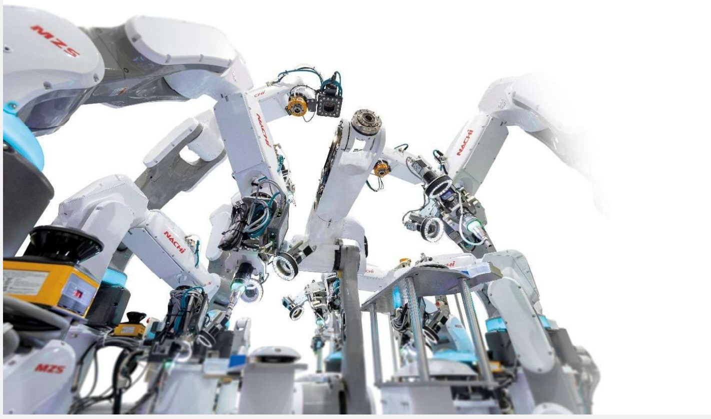
「ＭＺＳ０５」 「ＭＺＳ１２」 「ＭＺＳ１８」

Strengthen System Solution Proposals

・Strengthen our robot systems business, a unique strength to the Company

・Provide expertise gained through the robotization and automation of in-house production lines

・Deliver solution proposals leveraging application technologies



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This document includes forward-looking statements concerning future performance and business plans. These statements are based on assumptions regarding the economic environment and business strategies as of the time of preparation. As a result, actual performance may differ materially from such forecasts due to various factors, including changes in demand and foreign exchange fluctuations.