# Financial Results for 1H FY2026

November 5, 2026

Oki Electric Industry Co., Ltd.

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# Agenda

1 Financial Results for 1H FY2026

2 Financial Forecasts for FY2026

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## Executive Summary

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### 1. Financial Results for 1H FY2026

- Overall performance is progressing broadly in line with the plan toward achieving the full-year forecast.

### 2. Financial Forecasts for FY2026

- Reflecting the impact of the joint venture for ATMs and other automated equipment businesses, which commenced operations on October 1, net sales and operating profit forecasts have been revised upward by ¥60.0 billion and ¥3.0 billion, respectively, from the initial forecast.

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In the first half of FY2026, performance varied across businesses.

Overall, however, results progressed broadly in line with the plan toward achieving the annual performance targets.

Net sales increased year on year, driven by the strong performance of the Public Solutions Segment.

Although operating profit was affected by component procurement issues, including semiconductor memory, progress remained broadly in line with expectations toward achieving the annual targets.

For the full-year forecast, we incorporated the impact of the joint venture for automated equipment businesses, which commenced operations on October 1, and revised the initial forecast upward by ¥60.0 billion in net sales and ¥3.0 billion in operating profit.

# 1 Financial Results for 1H FY2026

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## 1 Summary of Financial Results for 1H FY2026

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- **Net sales increased year on year, and operating profit progressed broadly in line with expectations despite supply chain impacts.**
- **Recorded special retirement payments related to the Special Measures for the Second Career Support Program.**

| (Billion Yen) | FY2025 1Q | FY2026 1Q | YoY Change Amount | FY2025 2Q | FY2026 2Q | YoY Change Amount | FY2025 1H | FY2026 1H | YoY Change Amount | YoY Change Percentage |
|---|---|---|---|---|---|---|---|---|---|---|
| Net sales | 85.1 | **86.1** | +1.0 | 94.3 | **102.5** | +8.2 | 179.4 | **188.6** | +9.2 | +5% |
| Operating profit | (1.4) | **(1.9)** | (0.5) | 2.6 | **0.9** | (1.7) | 1.2 | **(1.0)** | (2.2) | – |
| *Operating margin* | *(1.6%)* | ***(2.2%)*** | *(0.6%)* | *2.7%* | ***0.9%*** | *(1.8%)* | *0.7%* | ***(0.5%)*** | *(1.2%)* | |
| Ordinary profit | (1.6) | **(1.5)** | +0.1 | 2.5 | **(0.3)** | (2.8) | 0.9 | **(1.8)** | (2.7) | – |
| Extraordinary income *1 | 0.0 | **5.1** | +5.1 | 1.2 | **2.2** | +1.0 | 1.2 | **7.3** | +6.1 | +508% |
| Extraordinary loss *2 | 0.0 | **0.0** | ±0.0 | 0.7 | **10.1** | +9.4 | 0.7 | **10.1** | +9.4 | +1,343% |
| Profit attributable to owners of parent | (1.6) | **2.5** | +4.1 | 2.2 | **(6.0)** | (8.2) | 0.6 | **(3.5)** | (4.1) | – |

*1 Extraordinary income in 1H FY2026 (¥7.3 billion): Gain on sale of investment securities
*2 Extraordinary loss in 1H FY2026 (¥10.0 billion): Special retirement payments related to the Special Measures for the Second Career Support Program

| Exchange Rate | FY2025 | FY2026 |
|---|---|---|
| USD/JPY | 146.0 | 159.4 |
| EUR/JPY | 168.1 | 184.4 |

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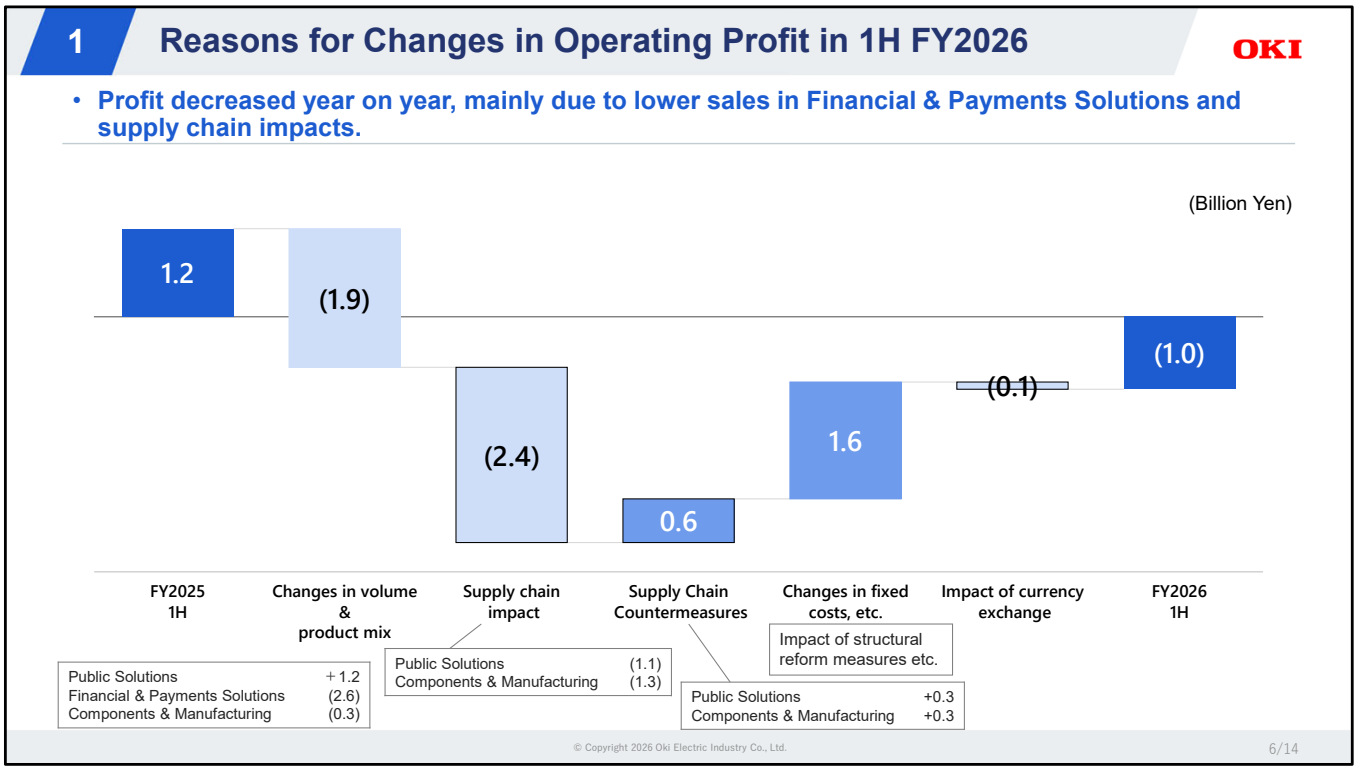

For 1H FY2026, net sales were ¥188.6 billion, operating loss was ¥1.0 billion, ordinary loss was ¥1.8 billion, and loss attributable to owners of parent was ¥3.5 billion.

Operating profit and ordinary profit for the first half were lower than those of the same period of the previous fiscal year, reflecting continued supply chain impacts, including rising component prices.
However, quarterly operating profit improved from a loss of ¥1.9 billion in the first quarter to a profit of ¥0.9 billion in the second quarter.
This improvement was supported by approximately 9% year-on-year growth in net sales in the second quarter, driven by higher sales volumes and price optimization measures.

In the first half, we recorded extraordinary income of ¥7.3 billion, mainly consisting of gains on sales of investment securities associated with the reduction of cross shareholdings. At the same time, we recorded extraordinary loss of ¥10.0 billion, reflecting special retirement payments related to the Special Measures for the Second Career Support Program implemented as part of our efforts to optimize human capital.

As a result of these special measures, we expect annual fixed costs to decrease by approximately ¥6.0 billion from FY2027 onward.

Overall, performance is progressing broadly in line with the plan toward achieving the annual performance targets.




Next, I will explain the factors behind the change in operating profit for the first half.

Changes in volume and product mix had a negative impact of ¥1.9 billion on operating profit.
Within this amount, profit in Financial & Payments Solutions decreased by ¥2.6 billion, mainly due to the absence of large-scale ATM replacement projects recorded in the same period of the previous fiscal year.
In contrast, profit in Public Solutions increased by ¥1.2 billion.

Within Public Solutions, profit in the Social Infrastructure Solutions business declined, mainly due to the completion of demand related to firefighting systems through the previous fiscal year. However, strong performance in the Defense Systems business and the capture of telecommunications equipment projects for communications carriers in the Network Infrastructure business more than offset this decline, resulting in higher profit for the segment as a whole.

Regarding supply chain impacts, including rising semiconductor memory prices, we have been implementing countermeasures such as advance procurement based on market price trends and passing costs on through price optimization.
In the first half, supply chain impacts amounted to ¥2.4 billion, while mitigation measures contributed ¥0.6 billion, resulting in a negative impact of ¥1.8 billion on operating profit.
We will continue our efforts to minimize the impact through measures including further price optimization.

Changes in fixed costs and other items contributed ¥1.6 billion to profit improvement.
In addition to the benefits from integrating the printer business development and manufacturing functions into ETRIA CO., LTD. in the previous fiscal year, the effects of various cost structure reforms have steadily materialized.

This concludes the explanation of the factors behind the change in operating profit for the first half.

## 1 Overview by Segment Public Solutions

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- **Driven by strong growth in the Defense Systems and Network Infrastructure businesses, net sales and profit increased year on year despite lower demand in the Social Infrastructure Solutions business.**

| (Billion Yen) | FY2025 1H | FY2026 1H | YoY Change Amount | YoY Change Percentage | FY2025 Results | FY2026 Previous Forecast Announced May 13 | FY2026 Current Forecast Announced Nov. 5 (Unchanged) | YoY Change Amount | YoY Change Percentage |
|---|---|---|---|---|---|---|---|---|---|
| **Net sales** | **53.4** | **63.5** | **+10.1** | **+19%** | **146.4** | **147.0** | **147.0** | **+0.6** | **+0%** |
| Defense Systems | 17.9 | 22.2 | +4.3 | +24% | 51.5 | 55.5 | 55.5 | +4.0 | +8% |
| Social Infrastructure Solutions | 23.9 | 22.9 | (1.0) | (4%) | 66.2 | 57.5 | 57.5 | (8.7) | (13%) |
| Network Infrastructure | 11.7 | 18.5 | +6.8 | +58% | 28.7 | 34.0 | 34.0 | +5.3 | +18% |
| **Operating profit** | **3.1** | **3.6** | **+0.5** | **+16%** | **20.3** | **18.0** | **18.0** | **(2.3)** | **(11%)** |
| ***Operating margin(%)*** | ***5.8%*** | ***5.7%*** | ***(0.1%)*** | | ***13.9%*** | ***12.2%*** | ***12.2%*** | ***(1.7%)*** | |

* FY2025 results have been reclassified to reflect the changes in reportable segments effective from FY2026.

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Next, I will explain the performance of each segment.

First, let me discuss the Public Solutions Segment.

In 1H FY2026, net sales increased by ¥10.1 billion year on year to ¥63.5 billion, while operating profit rose by ¥0.5 billion year on year to ¥3.6 billion.

In Defense Systems, net sales increased by ¥4.3 billion, or 23%, year on year, driven primarily by underwater acoustics (sonar)-related business amid expanding defense demand.

In Social Infrastructure Solutions, net sales declined mainly due to a significant decrease in sales related to firefighting systems following the completion of demand that had continued through the previous fiscal year.

In Network Infrastructure, net sales increased by ¥6.8 billion, or 58%, year on year, mainly due to the expansion of telecommunications equipment projects for communications carriers.

Operating profit also increased, as growth in the Defense Systems and Network Infrastructure businesses more than offset the decline in Social Infrastructure Solutions, particularly in firefighting systems.

There is no change to the full-year forecast.
Performance is progressing steadily toward achieving the annual targets.

1 Overview by Segment **Financial & Payments Solutions**

OKI

- **Although net sales and profit decreased year on year due to lower sales volumes of hardware and solutions, the service business continued to expand steadily.**
- **Full-year forecasts were revised upward to reflect the benefits of the business integration of automated equipment businesses with Hitachi, Ltd..**

| (Billion Yen) | FY2025 1H | FY2026 1H | YoY Change | |
|---|---|---|---|---|
| | | | Amount | Percentage |
| **Net sales** | **63.6** | **60.9** | **(2.7)** | **(4%)** |
| Hardware/Solutions | 26.7 | 23.1 | (3.6) | (14%) |
| Service Business | 36.9 | 37.8 | +0.9 | +2% |
| **Operating profit** | **4.2** | **1.5** | **(2.7)** | **(64%)** |
| ***Operating margin(%)*** | ***6.6%*** | ***2.5%*** | ***(4.1%)*** | |

| (Billion Yen) | FY2025 Results | FY2026 | | YoY Change | |
|---|---|---|---|---|---|
| | | Previous Forecast Announced May 13 | Current Forecast Announced Nov. 5 | Amount | Percentage |
| **Net sales** | **141.2** | **147.0** | **207.0** | **+65.8** | **+47%** |
| Hardware/Solutions | 61.9 | 64.5 | 64.5 | +2.6 | +4% |
| Service Business | 79.3 | 82.5 | 82.5 | +3.2 | +4% |
| Integration of ATMs and Other Automated Equipment | 0.0 | 0.0 | 60.0 | +60.0 | – |
| **Operating profit** | **9.3** | **11.0** | **14.0** | **+4.7** | +51% |
| ***Operating margin(%)*** | ***6.6%*** | ***7.5%*** | ***6.8%*** | ***+0.2%*** | |

* FY2025 results have been reclassified to reflect the changes in reportable segments effective from FY2026.

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Next, I will discuss the Financial & Payments Solutions Segment.

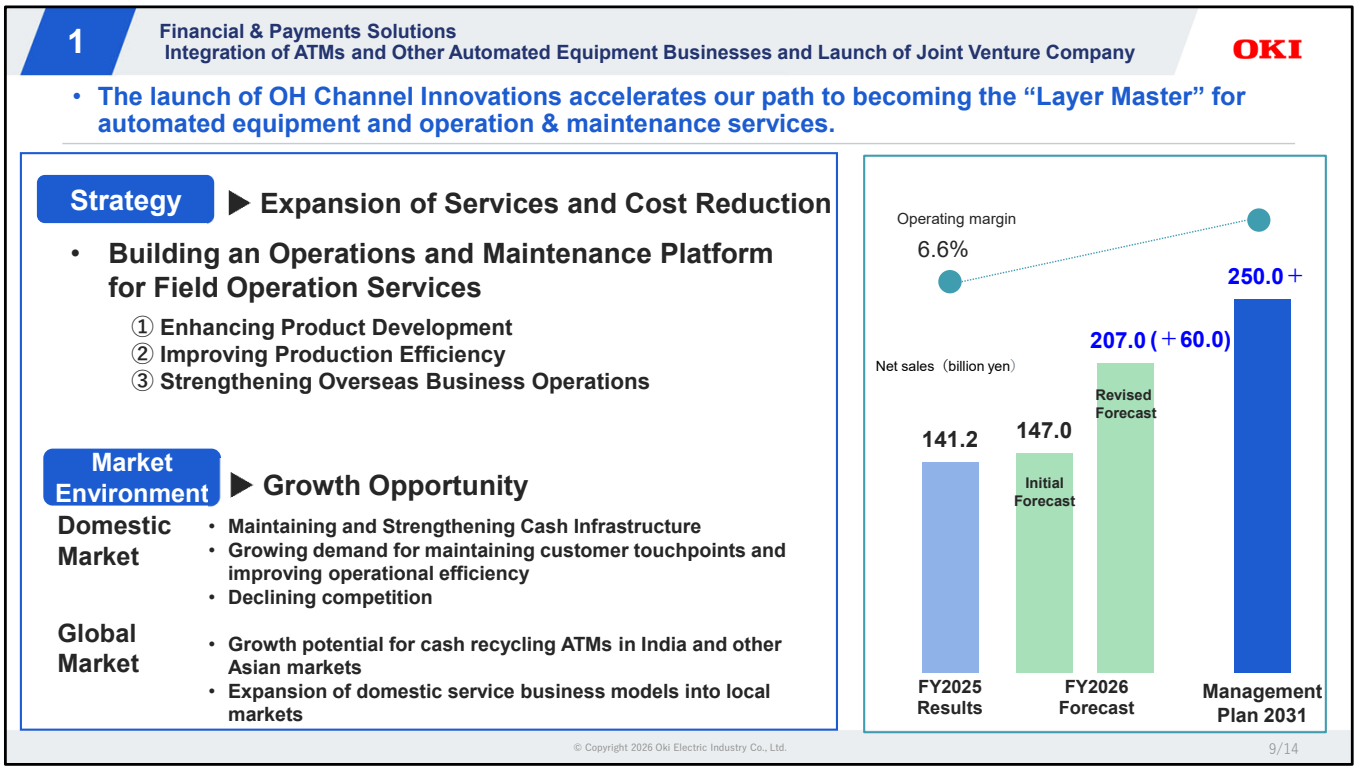
In 1H FY2026, net sales were ¥60.9 billion, down ¥2.7 billion year on year. Operating profit was ¥1.5 billion, a decrease of ¥2.7 billion compared with the same period of the previous fiscal year.

In the Hardware and Solutions business, domestic net sales declined due mainly to the absence of large-scale ATM replacement projects recorded in the same period of the previous fiscal year, as anticipated at the beginning of the fiscal year.
At the same time, overseas net sales increased.
As a result of these changes in sales mix, profitability declined.

In the Services business, maintenance service projects outsourced from Fujitsu have been launched successfully, and net sales have expanded broadly in line with expectations.

The joint venture company for ATMs and other automated equipment businesses with Hitachi, Ltd., OH Channel Innovations Ltd., commenced operations as scheduled on October 1.

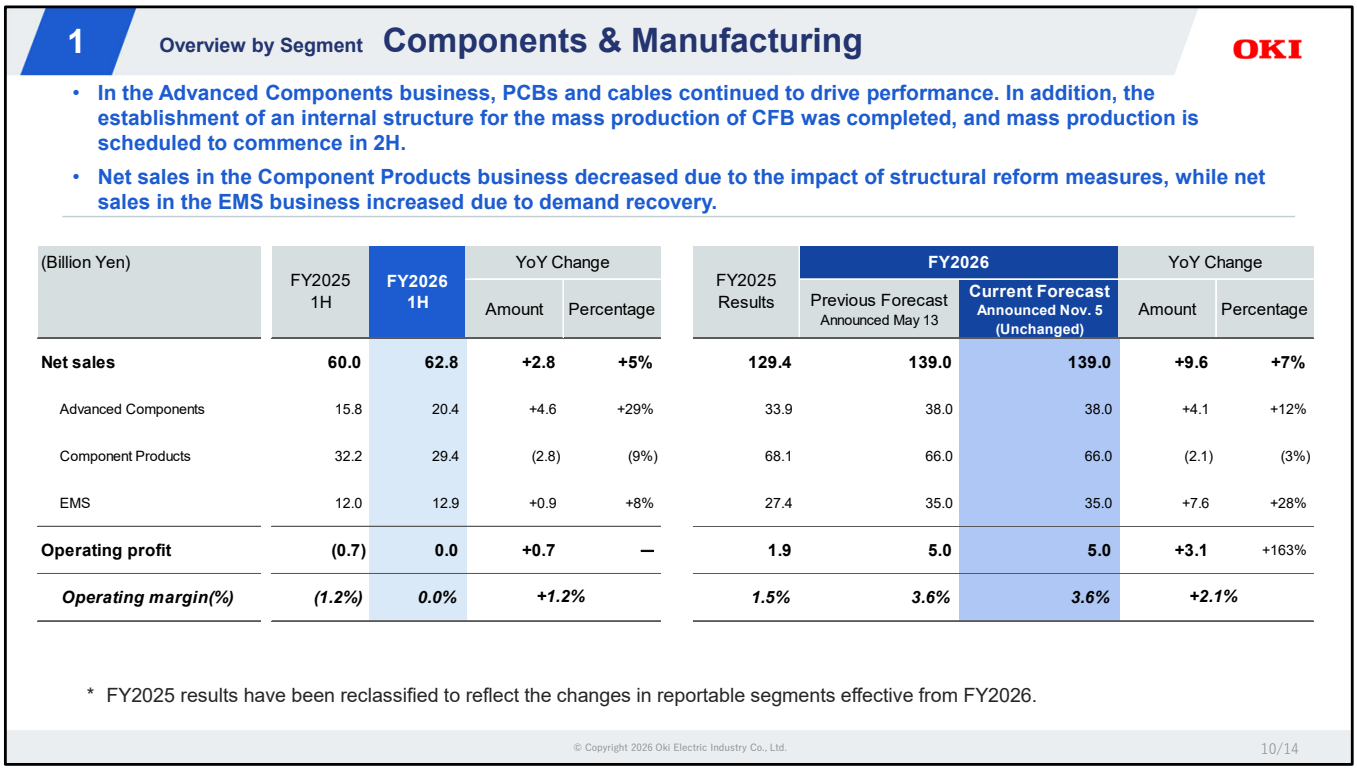
Reflecting the impact of the business integration, we revised the FY2026 forecast upward.
Net sales are now forecast at ¥207.0 billion, an increase of ¥60.0 billion from the initial forecast.
Operating profit is now forecast at ¥14.0 billion, an increase of ¥3.0 billion, after incorporating one-time expenses associated with the establishment of the joint venture company.




With regard to the Financial & Payments Solutions business, I would like to briefly discuss the future direction of the business following the launch of OH Channel Innovations Ltd..
Leveraging the establishment of the joint venture, we aim to enhance product development, improve production efficiency, and strengthen overseas business operations.
Through these initiatives, we target net sales of more than ¥250.0 billion by FY2031 and plan to improve the operating margin by several percentage points from the current level.
We have recently begun formulating the business plan to achieve these goals.

In field operation services, we plan to expand from our traditional maintenance- and call center-centered businesses into full outsourcing services.

We began examining our business strategy immediately after the launch of the joint venture and are currently developing detailed business plans.
We plan to explain the strategies for achieving this growth and other related initiatives at the Business Strategy Briefing scheduled for early December.



1 Overview by Segment **Components & Manufacturing**

OKI

- **In the Advanced Components business, PCBs and cables continued to drive performance. In addition, the establishment of an internal structure for the mass production of CFB was completed, and mass production is scheduled to commence in 2H.**
- **Net sales in the Component Products business decreased due to the impact of structural reform measures, while net sales in the EMS business increased due to demand recovery.**

| (Billion Yen) | FY2025 1H | FY2026 1H | YoY Change | | FY2025 Results | FY2026 | | YoY Change | |
|---|---|---|---|---|---|---|---|---|---|
| | | | Amount | Percentage | | Previous Forecast Announced May 13 | Current Forecast Announced Nov. 5 (Unchanged) | Amount | Percentage |
| **Net sales** | **60.0** | **62.8** | **+2.8** | **+5%** | **129.4** | **139.0** | **139.0** | **+9.6** | **+7%** |
| Advanced Components | 15.8 | 20.4 | +4.6 | +29% | 33.9 | 38.0 | 38.0 | +4.1 | +12% |
| Component Products | 32.2 | 29.4 | (2.8) | (9%) | 68.1 | 66.0 | 66.0 | (2.1) | (3%) |
| EMS | 12.0 | 12.9 | +0.9 | +8% | 27.4 | 35.0 | 35.0 | +7.6 | +28% |
| **Operating profit** | **(0.7)** | **0.0** | **+0.7** | **—** | **1.9** | **5.0** | **5.0** | **+3.1** | +163% |
| ***Operating margin(%)*** | ***(1.2%)*** | ***0.0%*** | ***+1.2%*** | | ***1.5%*** | ***3.6%*** | ***3.6%*** | ***+2.1%*** | |

* FY2025 results have been reclassified to reflect the changes in reportable segments effective from FY2026.

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Finally, I will discuss the Components & Manufacturing Segment.

In 1H FY2026, net sales were ¥62.8 billion, an increase of ¥2.8 billion year on year. Operating profit improved by ¥0.7 billion compared with the same period of the previous fiscal year, reaching break-even.

In the Advanced Components business, printed circuit boards (PCBs) for the AI-related semiconductor market and cables for the FA and robotics markets continued to benefit from the recovery in demand that began in the previous fiscal year. Demand remained strong, resulting in a year-on-year increase in net sales of ¥4.6 billion.

Meanwhile, net sales in the Component Products business declined, partly due to the impact of structural reform measures, including the closure of operations in Europe.
In contrast, net sales in the EMS business increased, supported by the resumption of orders from major customers following the completion of inventory adjustments, as well as the start of mass production for projects in the industrial infrastructure and machine tool and robotics markets that were secured in the previous fiscal year.

As a result, both net sales and operating profit for the segment progressed largely in line with expectations.

There is no change to the full-year forecast.

## 1 Segment-Specific Key Initiatives for FY2026

OKI

- **As the first year of Management Plan 2031, each segment will focus on key initiatives to steadily advance the shift in management from defense to offense.**

| Segment | Key FY2026 Initiatives | 1H Progress | 2H Initiatives |
|---|---|---|---|
| **Public Solutions** | • Responding to rising defense demand by expanding production capacity.<br>• Promoting overseas defense equipment exports.<br>• Expanding into telecommunications equipment and large-scale private network businesses. | • Won the contract for Australia's new-general purpose frigate program.<br>• 1H net sales in the Network Infrastructure business increased by ¥6.8 billion (+58%) year on year, driven by expansion of HGW and ONU projects. | • Preparing to expand sales offices to strengthen defense-related maintenance and support businesses.<br>• In the Network Infrastructure business, expanding orders through the rollout of new products and the development of new customers. |
| **Financial & Payments Solutions** | • Strengthening ATMs, maintenance and operations, and services as an integrated offering, leveraging the business integration with Hitachi, Ltd. | • OH Channel Innovations Ltd. commenced operations on October 1. | • Leveraging the launch of OH Channel Innovations to formulate plans for expanding field operation services from ATMs through maintenance and operation services. |
| **Components & Manufacturing** | • CFB mass production launch and expansion of products for high-growth markets, including PCBs and cables.<br>• In the printer business, ETRIA integration benefits and expansion of recurring revenue through product lineup enhancement.<br>• Focusing on expanding orders from existing customers and securing orders from new customers in the EMS Business. | • Established an internal structure for the mass production of CFB.<br>• 1H net sales of PCBs and cables increased by ¥4.7 billion (+30%) year on year.<br>• Expanded the product lineup and re-entered the overseas MFP market.<br>• Expanded production driven by new orders for industrial equipment and increased demand in the machine tools and robotics markets. | • Orders for CFB mass production have already been secured, with mass production scheduled to commence in 2H.<br>• Continuing efforts to expand PCB and cable sales in 2H.<br>• Resumed sales of MFPs in Japan and will drive sales growth through the launch of upgraded existing models.<br>• Advancing full-scale mass production of secured orders and expanding production capacity for industrial equipment. |

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Next, I will explain the progress of key initiatives and priority themes for FY2026 by segment.

In Defense Systems within the Public Solutions Segment, we are steadily advancing activities related to the contract awarded for Australia's new general-purpose frigate program.
In the second half, we will also strengthen our maintenance and support business, including the opening of new operational sites.

In Network Infrastructure, we continue to capture demand for access terminals associated with telecommunications carriers' migration from analog to IP networks, including HGW and ONU projects.
At the same time, we are promoting the rollout of new products and the development of new customers to expand orders.

In Financial & Payments Solutions, following the launch of OH Channel Innovations Ltd., we will develop detailed plans to expand field operation services and strengthen integrated operations covering ATMs, maintenance, operations, and related services.

In Advanced Components within the Components & Manufacturing Segment, the commercialization of mass production using CFB is progressing as planned, with production scheduled to commence within the current fiscal year.
We are also pursuing new business opportunities in printed circuit boards (PCBs) for AI-related semiconductors and aerospace applications.
In the cable business, we will continue to focus on capturing demand in the FA and robotics markets.

In Component Products, we aim to expand sales through our re-entry into the MFP and printer market in collaboration with ETRIA CO., LTD..
In EMS, we will advance full-scale mass production of projects already secured. In both businesses, we will continue structural reform initiatives and focus on strengthening our business foundation.

# 2 Financial Forecasts for FY2026

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## 2 Potential Supply Chain Risks and Our Response

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- **Despite rising component prices, various countermeasures, including price optimization, are being implemented.**

| Business Environment | | Potential Risks | Our response and impact on performance |
|---|---|---|---|
| Semiconductor Memory and Related Products | Price increases | Higher costs due to rising component prices | • Although supply chain impacts have increased, countermeasures, including price optimization, are being implemented.<br>(The impact on 1H operating profit was negative ¥1.8 billion.) |
| | Supply-demand tightening | Delivery delays due to longer procurement lead times | • Expanding negotiations with suppliers and procurement of alternative components.<br>• Promoting the standardization of components. |
| Increasing Instability in the Middle East | | Delays in the delivery of factory production materials and indirect materials | • The impact remains limited through advance procurement of critical components and continued implementation of alternative sourcing measures. |

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Next, I would like to discuss potential supply chain risks and our response.

With respect to the procurement of semiconductor memory, servers, and other components, we are implementing measures such as advance procurement and price optimization in response to rising prices and tight supply-demand conditions.

In the first half, supply chain impacts had a negative effect of approximately ¥1.8 billion on operating profit.
For the full year, we expect the impact to be approximately ¥3.0 billion.
In addition to price optimization, we are implementing various measures to minimize the impact on business performance, including negotiations with suppliers, expanded procurement of alternative components, and the standardization of components.

At this point, we expect the impact of the situation in the Middle East on our business performance to be limited.

## 2 Financial Forecasts for FY2026 by Segment

OKI

- **Reflecting the impact of the business integration of automated equipment businesses in Financial & Payments Solutions (launch of OH Channel Innovations), net sales, operating profit and ordinary profit forecasts were revised upward.**

| (Billion Yen) | | FY2025 Results | FY2026 Previous Forecast Announced May 13 | FY2026 Current Forecast Announced Nov. 5 | YoY Change Amount | YoY Change Percentage | vs. Previous Forecast Amount | vs. Previous Forecast Percentage |
|---|---|---|---|---|---|---|---|---|
| Public Solutions | Net sales | 146.4 | **147.0** | **147.0** | +0.6 | +0% | ±0 | ±0% |
| | Operating profit | 20.3 | **18.0** | **18.0** | (2.3) | (11%) | ±0 | ±0% |
| | Operating margin | 13.9% | **12.2%** | **12.2%** | (1.7%) | | ±0.0% | |
| Financial & Payments Solutions | Net sales | 141.2 | **147.0** | **207.0** | +65.8 | +47% | +60.0 | +41% |
| | Operating profit | 9.3 | **11.0** | **14.0** | +4.7 | +51% | +3.0 | +27% |
| | Operating margin | 6.6% | **7.5%** | **6.8%** | +0.2% | | (0.7%) | |
| Component & Manufacuring | Net sales | 129.4 | **139.0** | **139.0** | +9.6 | +7% | ±0 | ±0% |
| | Operating profit | 1.9 | **5.0** | **5.0** | +3.1 | +163% | ±0 | ±0% |
| | Operating margin | 1.5% | **3.6%** | **3.6%** | +2.1% | | ±0.0% | |
| Others | Net sales | 4.7 | **7.0** | **7.0** | +2.3 | +49% | ±0 | ±0% |
| | Operating profit | (1.6) | **(1.0)** | **(1.0)** | +0.6 | - | ±0 | ±0% |
| Corporate/Eliminations | Operating profit | (10.9) | **(11.0)** | **(11.0)** | (0.1) | - | ±0 | ±0% |
| Total | Net sales | 421.6 | **440.0** | **500.0** | +78.4 | +19% | +60.0 | +14% |
| | Operating profit | 18.8 | **22.0** | **25.0** | +6.2 | +33% | +3.0 | +14% |
| | Operating margin | 4.5% | **5.0%** | **5.0%** | +0.5% | | ±0.0% | |
| | Ordinary profit | 20.8 | **22.0** | **23.0** | +2.2 | +11% | +1.0 | +5% |
| | Profit attributable to owners of parent | 21.5 | **18.0** | **18.0** | (3.5) | (16%) | ±0 | ±0% |
| Dividend per share (yen) | | 65 | **65** | **65** | ±0 | ±0% | ±0 | ±0% |

* FY2025 results have been reclassified to reflect the changes in reportable segments effective from FY2026.

| Exchange Rate | FY2025 Results | FY2026 Forecasts |
|---|---|---|
| USD/JPY | 150.8 | 157.9 |
| EUR/JPY | 174.8 | 182.3 |

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Next, I will explain the revision to our FY2026 financial forecast.

We have revised our forecast for net sales upward by ¥60.0 billion from the initial forecast to ¥500.0 billion.
We have also revised operating profit upward by ¥3.0 billion to ¥25.0 billion and ordinary profit upward by ¥1.0 billion to ¥23.0 billion.

These upward revisions to net sales, operating profit, and ordinary profit reflect the impact of the launch of OH Channel Innovations Ltd., the joint venture company for ATMs and other automated equipment businesses in the Financial & Payments Solutions Segment.

As for profit attributable to owners of parent, we have maintained our initial forecast of ¥18.0 billion, reflecting conservative assumptions for non-operating income and expenses as well as extraordinary gains and losses.

As the first year of Management Plan 2031, we will steadily advance the shift in management from defense to offense and remain focused on achieving our annual performance targets.




Finally, I would like to announce our upcoming Business Strategy Briefing.

At the briefing, the heads of each business will explain their strategies for Innovation in Core Businesses and Taking on High-Growth Markets, focusing on the following businesses:

- Financial & Payments Solutions, which aims to expand business scale and improve profitability by leveraging the launch of OH Channel Innovations Ltd., the joint venture company for ATMs and other automated equipment businesses.
- Defense Systems, which is actively responding to expanding defense demand and growing opportunities for overseas defense equipment exports.
- Advanced Components, which is leveraging its strengths in PCBs and cables while accelerating the commercialization of CFB technology in the photonics-electronics convergence and GaN power semiconductor markets.

Details regarding the briefing, including registration information, will be provided separately.

This concludes my presentation on the financial results for the second quarter of FY2026 and the revised FY2026 financial forecast.

Thank you very much for your attention.

# Supplementary Materials

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# Supplementary Materials Agenda

## Segment supplementary materials

- Disclosure segments from FY2026 （major changes）
- Business Strategy: Segment Structure
- Manufacturing Footprint
- OH Channel Innovations 【Background / Objectives / Overview】
- Defense Systems Business / Advanced Components Business
- Major Products and Services / Key Press Releases in 1H

## Supplementary Materials for 1H FY2026 and Earnings Forecast

- Progress in Reducing Cross Shareholdings
- Segment sales and operating profit by quarter
- Public Solutions Secured Orders
- Balance Sheet as of September 30, 2026 / Cash Flows for 1H FY2026 / Investments for 1H FY2026
- Financial Forecasts for FY2026

## Supplementary Materials for Prior Years

- Segment sales breakdown by quarter
- KPI Trends by Fiscal Year

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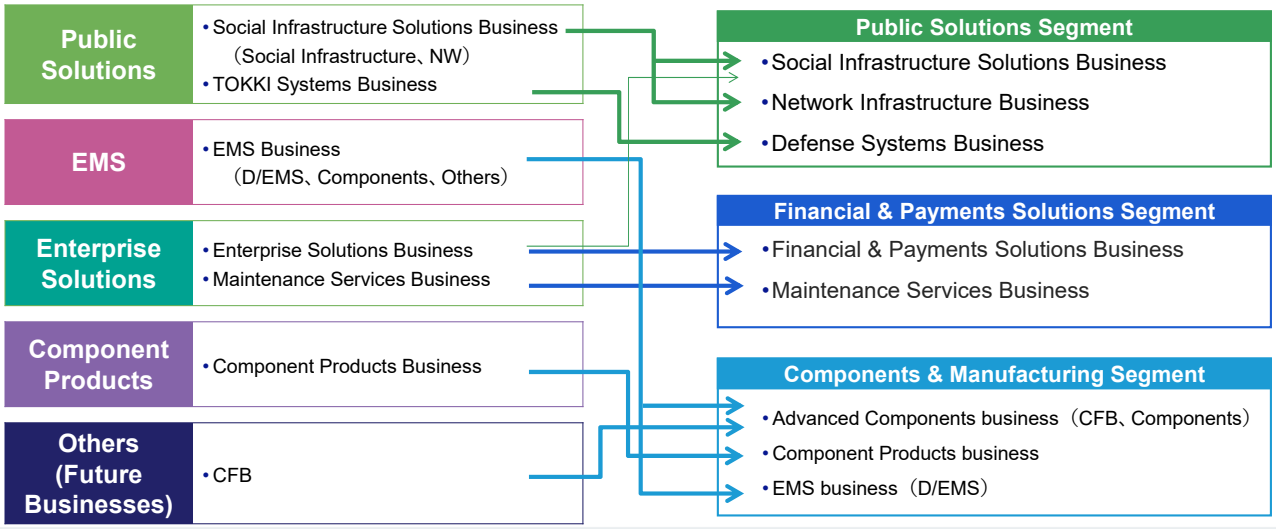
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# Disclosure segments from FY2026 （major changes）

(Reproduced from the FY2026 Q1 Financial Results Presentation)

## Revision of disclosure segments

- Strengthening competitiveness in strategic public and financial markets
- Promoting structural reform in manufacturing and accelerating growth in high-growth markets



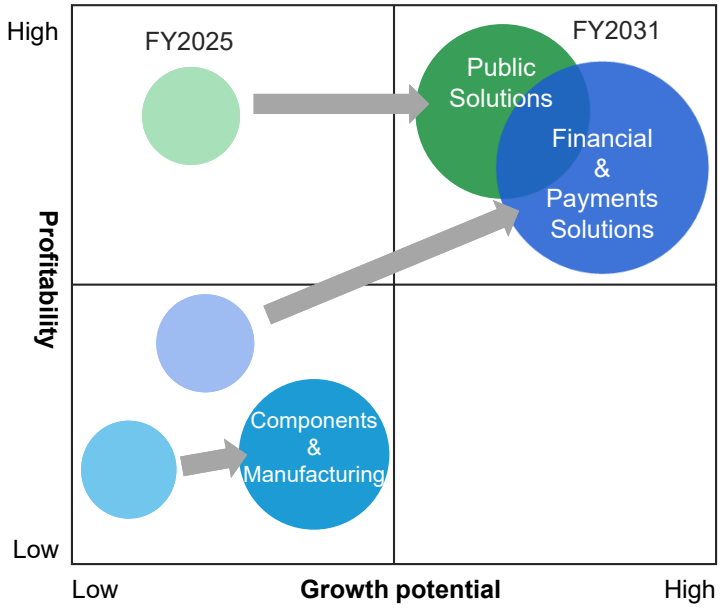

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# Business Strategy: Segment Structure

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(Reproduced from the FY2026 Q1 Financial Results Presentation)




**Public Solutions Segment**

- **Growth in scale**

Achieve growth in sectors aligned with Japanese government policy priorities while maintaining high profitability

**Financial & Payments Solutions Segment**

- **Growth in scale and profitability**

Achieve growth and improve profitability through the “Layer Master” strategy

**Components & Manufacturing Segment**

- **Structural reforms**

Transition to a business structure centered on the Advanced Components business

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Ref.

# Manufacturing Footprint and Expansion Plan

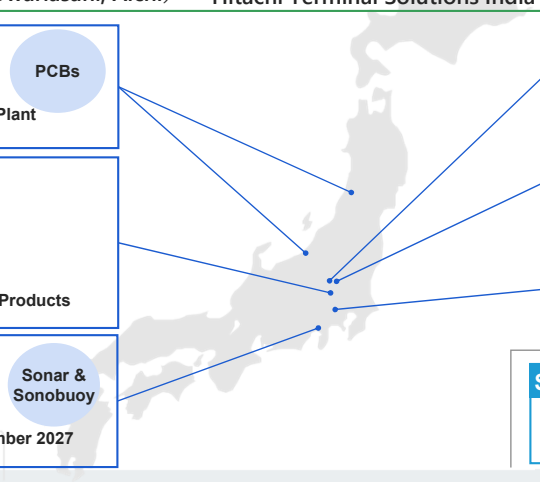
- **The launch of OH Channel Innovations, an ATM joint venture, expands our domestic and overseas production network.**

## OH Channel Innovations

【Domestic Production Sites】
OKI TOMIOKA Manufacturing（Tomioka, Gunma）
OHCI Terminal Mechatronics（Owariasahi, Aichi）

【Overseas Production Sites】
OKI VIET NAM CO., LTD.（Vietnam）
Hitachi Terminal Solutions India Private Limited（India）

ATMs & Cash processing machines



## OKI Circuit Technology

PCBs

Advanced Components Business
・**High-Value-Added PCBs Manufacturing Plant**

## OKI Honjo Plant

Social Infrastructure Solutions Business
Network Infrastructure Business
Component Products Business (IoT)
EMS Business
・**Manufacturing Site for a Wide Range of Products**

## OKI Numazu Plant

Sonar & Sonobuoy

Defense Systems Business
・**New building under construction**
**Operations scheduled to begin in December 2027**

## OKI Nishiyokote Plant

CFB

Advanced Components Business
・**Preparing for FY2026 Mass Production of CFB-Based Products**

## OKI Electric Cable

Cable FPC

Advanced Components Business
・**High-Quality Cable Manufacturing Plant**

## OKI Komine Plant

Defense Aviation

Defense Systems Business

## Singapore

Commercial Aviation

Defense Systems Business

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Ref.

Financial & Payments Solutions Segment

# OH Channel Innovations 【Background】

OKI

## Changes in the Market Environment Surrounding Customer Touchpoints

### Declining Birthrate and Aging Population, and Labor Shortages

Worsening Labor Shortages

**(29.2)%**

Working-Age Population in 2050 (Compared with 2021)

**Growing Need for Labor-Saving and Operational Efficiency**

### The Expansion of Cashless Payments and Digitalization

The Expansion of Cashless Payments

**42.8%**

Cashless Payment Ratio in 2024

**Diversification of Payment Methods**

### Acceleration of Contactless and Self-Service Operations

Diversification of Customer Touchpoints

**Branches・ATMs・Digital**

**Growing Use of Both In-Person and Contactless Channels**

### Domestic Market

- The ATM market is expected to decline gradually
- Growing need for greater operational efficiency and more sophisticated services

### Global Markets

- Shift in Demand Toward Cash-Recycling ATMs
- Growing Demand for Service-Based Solutions

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Ref.

Financial & Payments Solutions Segment

# OH Channel Innovations 【Objectives】

OKI

## Sustaining Social Infrastructure and Pursuing New Growth

Pooling the Two Companies' Management Resources, Including Their Technologies, Customer Bases, and Manufacturing and Operational Capabilities

### OKI's Strengths

- Enhancing product value through operational services
- Quality control through integrated production

A Service Model Combining Manufacturing Expertise, a Maintenance Network, and Administrative Outsourcing



### Hitachi Channel Solutions' Strengths

- Enhancing the Value of Manufacturing and Products through Solutions
- Ability to design and manufacture products using a component-sourcing-based development approach

(Enables the easy adoption of the latest technologies)

A Range of Solutions that Enhance Hardware Functionality

**Continue and Strengthen the Financial Business Centered on ATMs and Branches**
**Expand the Value We Deliver Across Customer Touchpoints that Bridge the Physical and Digital Worlds**

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Ref.

Financial & Payments Solutions Segment

## OH Channel Innovations 【Overview】

As of October 1, 2026

| | |
|---|---|
| Company Name | OH Channel Innovations Ltd. |
| Commencement Date | October 1, 2026 |
| Established | October 1, 2004 |
| Capital | 8.6 billion yen |
| Equity Ownership | Oki Electric Industry Co., Ltd. 60% / Hitachi, Ltd. 40% |
| Number of Employees | Approx. 3,800(Consolidated) Approx. 1,500(Non-consolidated) |
| Location | Shibaura, Minato-ku, Tokyo 108-8551 Japan |
| Core Business | Planning, development, manufacturing, sales, maintenance, operation, and monitoring services for ATMs and other automated equipment and solutions |
| URL | https://www.oh-ci.com |

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Ref. **Defense Systems Business**

(Reproduced from the FY2026 Q1 Financial Results Presentation)

- **Responding to rising defense demand by expanding production capacity while promoting overseas defense equipment exports.**

**Q1 Results**

▶ **OKI secures contract for Australia's new general-purpose frigates**



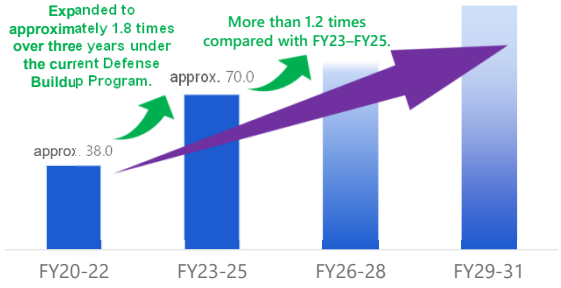
Upgraded Mogami-class Frigate (Image)
Courtesy of Mitsubishi Heavy Industries, Ltd.

Press Release：OKI Signs Supply Contract with Mitsubishi Heavy Industries for Towed Passive Sonar for Australia's New General-Purpose Frigates | OKI

▶ **Strengthening production capabilities for underwater acoustic sensors and other products in rising demand in the defense and ocean sectors through the construction of a new building at the Numazu Plant.**

**Three-year sales trend for underwater acoustics (sonar/sonobuoy-related)**
(Billion Yen)

**Production capacity will be expanded, and net sales will be further increased.**
(New building scheduled to begin operations around December 2027)




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Ref.

# Business Overview and Topics: Advanced Components Business — Taking on High-Growth Markets —

OKI

- **Taking on high-growth markets through the creation and delivery of high-value-added products and solutions, leveraging advanced technologies such as CFB and high-quality, high-reliability components including printed circuit boards and cables.**

## Business Overview

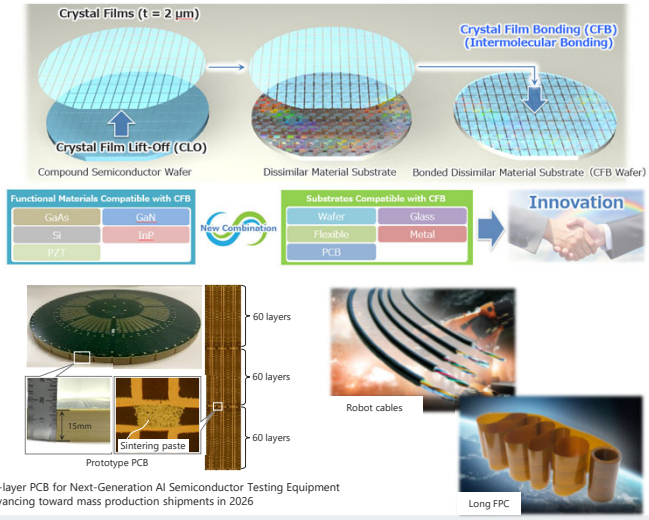
### CFB

- Enhancing the value of compound semiconductors through CFB technology
- CFB is OKI's proprietary technology that separates only the functional layer ("Crystal Film") from a compound semiconductor wafer and bonds it to a different substrate
- Enabling diverse material combinations and contributing to the development of next-generation devices

### Components

- Printed Circuit Boards（PCBs）：
  Providing high-value-added PCBs, including ultra-high multilayer boards, and accelerating expansion into the data center, semiconductor, and aerospace markets.
- Cables：
  Providing highly reliable robot cables, FPCs, and other products to enhance our contribution to high-growth fields such as factory automation (FA) equipment and semiconductors.

## CFB Technology Overview







180-layer PCB for Next-Generation AI Semiconductor Testing Equipment
Advancing toward mass production shipments in 2026

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Ref.

# Major Products and Services

OKI

## Public Solutions

**Social Infrastructure Solutions Business**
- Road-related systems (ETC, VICS),
- Aviation-related systems (Air traffic control)
- Firefighting and disaster preparedness systems
- Government systems
- Railway ticket issuance systems, airport check-in systems

**Network Infrastructure Business**
- Networks from terminal to backbone (CenterStage, 5G routers)

**Defense Systems Business**
- Defense systems (underwater acoustics, information)
- Aviation equipment

## Financial & Payments Solutions

**Financial & Payments Solutions Business**
- ATMs, cash handling equipment, Bank branch terminals
- ATM monitoring/operation services
- Bank branch systems, system to centralized back-office operations
- Ticket reservations issuing terminals, check-in terminals

**Maintenance Services Business**
- Construction and Maintenance Services

## Components & Manufacturing

**Advanced Components Business**
- CFB
- Printed circuit boards, Cables

**EMS Business**
- Consigned designing and manufacturing services
- Manufacturing systems (ERP, IoT)

**Component Products Business**
- LED Printer
- PBXs, business phones, contact centers
- Zero Energy IoT Series

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# Ref. Key Press Releases in 1H

| Products & Services | | 【Related Businesses】 |
|---|---|---|
| April | OKI Develops 180-Layer 15 mm-Thick PCB Technologies for Next-Generation AI Semiconductor Testing Equipment | Advanced Components Business |
| June | OKI Signs Strategic Partnership Agreement with US-Based Lazarus AI | Defense Systems Business |
| June | OKI Selected as Representative Organization for JAXA Space Strategy Fund Project Proposed Jointly with LTS | Component Products Business |
| July | OKI Signs Supply Contract with Mitsubishi Heavy Industries for Towed Passive Sonar for Australia's New General-Purpose Frigates | Defense Systems Business |

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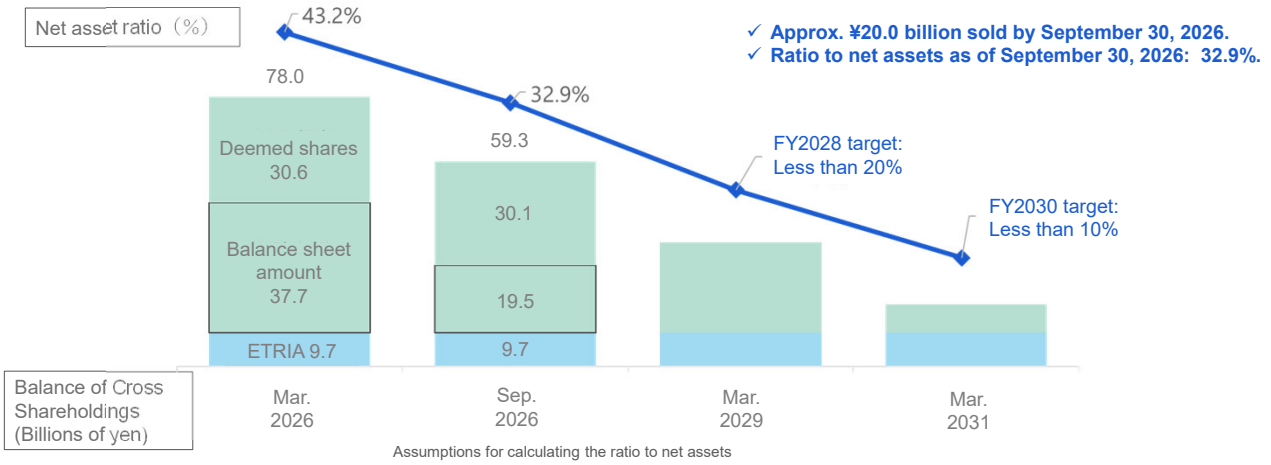
Ref.

# Progress in Reducing Cross Shareholdings

OKI

## Progressing steadily toward achieving the targets.

**Management Plan 2031**
**(Net asset ratio excludes deemed shareholdings and ETRIA shares.)**




- ✓ **Approx. ¥20.0 billion sold by September 30, 2026.**
- ✓ **Ratio to net assets as of September 30, 2026: 32.9%.**

Assumptions for calculating the ratio to net assets
- Equity valuation: Market prices as of September 30, 2026.
- Consolidated net assets: Consolidated net assets as of March 31, 2026.

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# Segment sales and operating profit by quarter

OKI

| (Billion yen) | | FY2025 | | | | | FY2026 | | FY2026 |
|---|---|---|---|---|---|---|---|---|---|
| | | Q1 | Q2 | Q3 | Q4 | Total | Q1 | Q2 | Forecasts Announced Nov. 5 |
| Public Solutions | Net sales | 23.0 | 30.4 | 37.1 | 55.8 | 146.4 | 28.2 | 35.3 | 147.0 |
| | Operating profit | 0.2 | 2.9 | 5.5 | 11.7 | 20.3 | 1.1 | 2.5 | 18.0 |
| | ***Operating margin*** | ***0.8%*** | ***9.5%*** | ***14.9%*** | ***21.0%*** | ***13.9%*** | ***3.9%*** | ***7.1%*** | ***12.2%*** |
| Financial & Payments Solutions | Net sales | 31.5 | 32.1 | 33.8 | 43.8 | 141.2 | 27.4 | 33.5 | 207.0 |
| | Operating profit | 1.6 | 2.6 | 2.0 | 3.0 | 9.3 | 0.2 | 1.3 | 14.0 |
| | ***Operating margin*** | ***5.1%*** | ***8.2%*** | ***6.0%*** | ***6.8%*** | ***6.6%*** | ***0.7%*** | ***3.9%*** | ***6.8%*** |
| Components & Manufacturing | Net sales | 29.2 | 30.8 | 31.0 | 38.4 | 129.4 | 29.9 | 32.9 | 139.0 |
| | Operating profit | (0.5) | (0.2) | 0.2 | 2.4 | 1.9 | (0.6) | 0.6 | 5.0 |
| | ***Operating margin*** | ***(1.8%)*** | ***(0.6%)*** | ***0.6%*** | ***6.3%*** | ***1.4%*** | ***(2.0%)*** | ***1.8%*** | ***3.6%*** |
| Others | Net sales | 1.4 | 1.0 | 0.9 | 1.4 | 4.7 | 0.7 | 0.8 | 7.0 |
| | Operating profit | (0.2) | (0.3) | (0.3) | (0.8) | (1.6) | (0.0) | (0.8) | (1.0) |
| Corporate/Eliminations | Operating profit | (2.4) | (2.5) | (2.6) | (3.5) | (10.9) | (2.6) | (2.6) | (11.0) |
| **Total** | **Net sales** | **85.1** | **94.3** | **102.8** | **139.4** | **421.6** | **86.1** | **102.5** | **500.0** |
| | **Operating profit** | **(1.4)** | **2.6** | **4.9** | **12.8** | **18.8** | **(1.9)** | **0.9** | **25.0** |
| | ***Operating margin*** | ***(1.6%)*** | ***2.7%*** | ***4.7%*** | ***9.2%*** | ***4.5%*** | ***(2.2%)*** | ***0.9%*** | ***5.0%*** |

* FY2025 results have been reclassified to reflect the changes in reportable segments effective from FY2026.

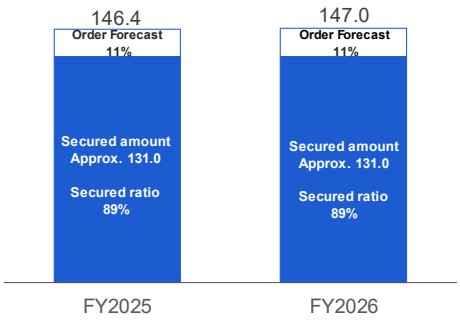
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# Ref. Public Solutions Secured Orders

| (Billion Yen) | FY2025 Results | FY2026 | | YoY Change | |
|---|---|---|---|---|---|
| | | Previous Forecast Announced May 13 | Current Forecast Announced Nov. 5 (Unchanged) | Amount | Percentage |
| **Net sales** | **146.4** | **147.0** | **147.0** | **+0.6** | **+0%** |
| Defense Systems | 51.5 | 55.5 | 55.5 | +4.0 | +8% |
| Social Infrastructure Solutions | 66.2 | 57.5 | 57.5 | (8.7) | (13%) |
| Network Infrastructure | 28.7 | 34.0 | 34.0 | +5.3 | +18% |
| **Operating profit** | **20.3** | **18.0** | **18.0** | **(2.3)** | **(11%)** |
| *Operating margin(%)* | *(13.9%)* | *(12.2%)* | *(12.2%)* | *(1.7%)* | |

**Progress toward annual sales target [As of End of October]**

(Billion Yen)




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## Balance Sheet as of September 30, 2026

| (Billion Yen) | End of Mar. 2026 | **End of Sep. 2026** | Change from Mar. 2026 |
|---|---|---|---|
| Current Assets | 244.6 | **227.5** | (17.1) |
| Fixed Assets | 200.7 | **184.0** | (16.7) |
| Assets | 445.2 | **411.6** | (33.6) |
| Current Liabilities | 171.8 | **171.3** | (0.5) |
| Fixed Liabilities | 93.0 | **75.0** | (18.0) |
| Liabilities | 264.8 | **246.2** | (18.6) |
| Equity | 180.3 | **165.2** | (15.1) |
| Others | 0.1 | **0.1** | ±0.0 |
| Net Assets | 180.4 | **165.3** | (15.1) |
| Total liabilities & net assets | 445.2 | **411.6** | (33.6) |

| | | | |
|---|---|---|---|
| Equity ratio (%) | 40.5 | **40.1** | (0.4) |
| D/E ratio (Times) | 0.5 | **0.5** | ±0.0 |

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Ref.

## Cash Flows for 1H FY2026

| (Billion Yen) | FY2025 1H Results | **FY2026 1H Results** | YoY Change |
|---|---|---|---|
| Ⅰ Cash flows from operating activities | 3.1 | **13.7** | +10.6 |
| Ⅱ Cash flows from investing activities | (6.1) | **4.8** | +10.9 |
| Free cash flows ( Ⅰ + Ⅱ ) | (3.0) | **18.5** | +21.5 |
| Ⅲ Cash flows from financing activities | (4.6) | **(14.3)** | (9.7) |

| | | | |
|---|---|---|---|
| Purchase of PP&E and intangible assets | 8.2 | **9.4** | +1.2 |
| Depreciation | 7.6 | **7.8** | +0.2 |

| (Billion Yen) | End of Mar. 2026 | **End of Sep. 2026** | Variance |
|---|---|---|---|
| Cash and cash equivalents | 35.8 | **39.7** | +3.9 |

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## Investments for 1H FY2026

| Investments (Billion Yen) | FY2025 1H Results | **FY2026 1H Forecasts** | YoY Variance |
|---|---|---|---|
| Capital Expenditure | 6.3 | **6.0** | (0.3) |
| Depreciation | 6.5 | **6.6** | +0.1 |
| R&D | 4.2 | **3.7** | (0.5) |

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# Ref. Financial Forecasts for FY2026

- **The first year of the "Management Plan 2031," which shifts management from defense to offense**
  **A plan for higher sales and profit, with an operating profit margin of 5% or higher**

| (Billion Yen) | FY2025 Results | FY2026 | | YoY Change | | vs. Previous Forecast | |
|---|---|---|---|---|---|---|---|
| | | Previous Forecast Announced May 13 | Current Forecast Announced Nov. 5 | Amount | Percentage | Amount | Percentage |
| Net sales | 421.6 | 440.0 | **500.0** | +78.4 | +19% | +60.0 | +14% |
| Operating profit | 18.8 | 22.0 | **25.0** | +6.2 | +33% | +3.0 | +14% |
| *Operating margin* | *4.5%* | *5.0%* | ***5.0%*** | *+0.5%* | | *±0.0%* | |
| Ordinary profit | 20.8 | 22.0 | **23.0** | +2.2 | +11% | +1.0 | +5% |
| Profit attributable to owners of parent | 21.5 | 18.0 | **18.0** | (3.5) | (16%) | ±0 | ±0% |
| *Profit attributable to owners of parent* * | *16.4* | *18.0* | ***18.0*** | *+1.6* | *+10%* | *±0* | *±0%* |
| ROE (%) | 13.2% | 10.0% | **10.0%** | (3.2%) | | ±0% | |
| *ROE (%)* * | *10.1%* | *10.0%* | ***10.0%*** | *(0.1%)* | | *±0%* | |
| Equity ratio (%) | 40.5% | 40.0% | **40.0%** | (0.5%) | | ±0% | |
| Dividend per share (yen) | 65 | 65 | **65** | ±0 | (±0%) | ±0% | (±0%) |

** Figures after excluding the one-time factor of extraordinary income associated with participation in ETRIA*

| Exchange Rate | FY2025 Results | FY2026 Forecasts |
|---|---|---|
| USD/JPY | 150.8 | 157.9 |
| EUR/JPY | 174.8 | 182.3 |

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# Ref. Segment sales breakdown by quarter

(Reproduced from the FY2026 Q1 Financial Results Presentation)

| (Billion Yen) | | | FY2023 | | | | | FY2024 | | | | | FY2025 | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Q1 | Q2 | Q3 | Q4 | Total | Q1 | Q2 | Q3 | Q4 | Total | Q1 | Q2 | Q3 | Q4 | Total |
| **Public Solutions** | **Net sales** | | **19.9** | **20.9** | **25.6** | **31.3** | **97.7** | **20.4** | **23.7** | **30.1** | **62.1** | **136.2** | **23.0** | **30.4** | **37.1** | **55.8** | **146.4** |
| | | Defense Systems | 6.4 | 6.7 | 8.4 | 10.4 | 31.9 | 6.9 | 8.0 | 9.7 | 30.5 | 55.2 | 8.0 | 9.9 | 13.3 | 20.3 | 51.5 |
| | | Social Infrastructure Solutions | 6.5 | 8.0 | 10.6 | 14.3 | 39.5 | 8.1 | 10.6 | 13.3 | 22.7 | 54.6 | 10.1 | 13.7 | 17.0 | 25.3 | 66.2 |
| | | Network Infrastructure | 6.9 | 6.2 | 6.6 | 6.6 | 26.3 | 5.4 | 5.1 | 7.1 | 8.8 | 26.4 | 4.9 | 6.8 | 6.8 | 10.2 | 28.7 |
| **Financial & Payments Solutions** | **Net sales** | | **26.2** | **35.0** | **49.8** | **62.1** | **173.2** | **43.2** | **39.6** | **43.4** | **44.4** | **170.7** | **31.5** | **32.1** | **33.8** | **43.8** | **141.2** |
| | | Hardware/Solutions | 10.3 | 19.6 | 29.1 | 40.3 | 99.2 | 26.9 | 20.5 | 21.6 | 24.8 | 93.8 | 13.3 | 13.4 | 13.6 | 21.6 | 61.9 |
| | | Service Business | 16.0 | 15.5 | 20.7 | 21.8 | 74.0 | 16.3 | 19.0 | 21.9 | 19.7 | 76.9 | 18.2 | 18.7 | 20.2 | 22.2 | 79.3 |
| **Components & Manufacturing** | **Net sales** | | **34.5** | **36.3** | **35.5** | **40.5** | **146.8** | **33.6** | **35.6** | **34.6** | **37.5** | **141.3** | **29.2** | **30.8** | **31.0** | **38.4** | **129.4** |
| | | Advanced Components | 7.7 | 7.4 | 6.7 | 6.7 | 28.5 | 6.5 | 7.1 | 7.0 | 7.5 | 28.0 | 7.8 | 8.0 | 8.6 | 9.5 | 33.9 |
| | | Component Products | 17.0 | 17.9 | 18.5 | 20.0 | 73.4 | 17.9 | 18.8 | 19.1 | 20.0 | 75.8 | 15.6 | 16.6 | 15.9 | 20.0 | 68.1 |
| | | EMS | 9.8 | 11.1 | 10.3 | 13.7 | 44.9 | 9.2 | 9.7 | 8.6 | 10.0 | 37.5 | 5.8 | 6.2 | 6.5 | 8.9 | 27.4 |

＊FY2023–FY2025 results have been reclassified to reflect the change in reportable segments effective from FY2026.

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Ref.

# KPI Trends by Fiscal Year

OKI

| (Billion Yen) | FY2022 Results | FY2023 Results | FY2024 Results | FY2025 Results | FY2026 Forcasts Announced Nov. 5 |
|---|---|---|---|---|---|
| Net sales | 369.1 | 421.9 | 452.5 | 421.6 | **500.0** |
| Operating profit | 2.4 | 18.7 | 18.6 | 18.8 | **25.0** |
| *Operating margin* | *0.7%* | *4.4%* | *4.1%* | *4.5%* | ***5.0%*** |
| *Operating profit ** | *2.4* | *14.6* | *22.5* | *19.1* | ***25.0*** |
| *Operating margin ** | *0.7%* | *3.5%* | *5.0%* | *4.5%* | ***5.0%*** |
| Ordinary profit | (0.3) | 18.3 | 16.8 | 20.8 | **23.0** |
| Profit attributable to owners of parent | (2.8) | 25.6 | 12.5 | 21.5 | **18.0** |
| ROE (%) | (2.7%) | 21.4% | 8.7% | 13.2% | **10.0%** |
| Equity ratio (%) | 25.4% | 33.3% | 35.4% | 40.5% | **40.0%** |
| Dividend per share (yen) | 20 | 30 | 45 | 65 | **65** |

* Operating performance after excluding one-time factor, which was reversing/recording of allowance for doubtful accounts related to accounts receivable from the China ATM project

| FY2031 targets (OKI 150th) | |
|---|---|
| Credit rating | A |
| Net sales | ¥600.0B+ |
| Op. margin | 7%+ |
| ROE | 10%+ |
| Shareholders' equity ratio | 40%+ |
| Dividend payout ratio | 35%+ |

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# Notice

- ✓The projections and plans in this material are based on information currently available to OKI as of the date of publication and certain assumptions judged as rational, therefore actual results are subject to change depending upon the changes of business environments and other conditions.
- ✓Indication method of amounts in hundred millions (yen) are as follow:
  Amounts in each item are rounded to the nearest hundred million yen. Variances are calculated in the hundred millions.

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