



Financial Results for the First Three Months of FY3/26

Careerlink Co., Ltd. (6070)

Note: This document has been translated from the Japanese original for reference purposes only. In the event of any discrepancy between this translated document and the Japanese original, the original shall prevail.



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Net sales

10.31
billion yen
Y/y Change +1.1%

Operating profit

9.6 billion yen
Y/y Change +17.0%

Operating profit to net sales

9.4%
Y/y Change +1.3pt

Number of orders for BPO projects

125 Projects
Y/y Change +20.2%

Number of local governments with which we have transactions*

202
Y/y Year-End to Q1 Change
+3.6%

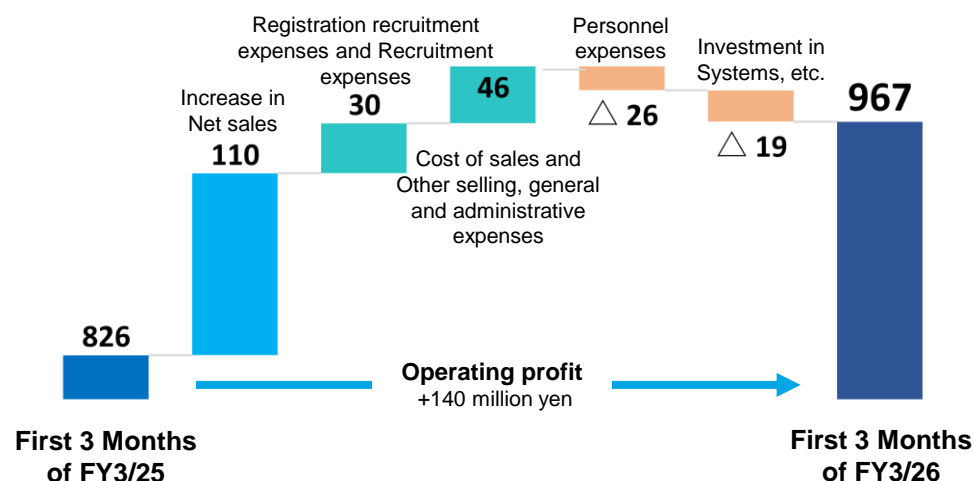
*The increase rate of the number of local governments with which we have transactions in the clerical human resources business is calculated based on the difference between the actual results for the first 3 months of quarter of the period from FY3/24 to FY3/26 and the actual results for the period from FY3/23 to FY3/25.

(Unit: Millions of yen)

First Three Months	First 3 Months of FY3/25	First 3 Months of FY3/26	Y/y Change	
Consolidated	Net sales	10,201 (100%)	10,311 (100%)	101.1%
	Operating profit	826 (8.1%)	967 (9.4%)	117.0%
	Ordinary profit	827 (8.1%)	967 (9.4%)	116.8%
	Profit attributable to owners of parent	564 (5.5%)	647 (6.3%)	114.7%

- In the first quarter of the term ending March 31, 2026, despite a reduction in the scale of large-scale BPO projects that were in operation in the previous fiscal year, proactive efforts to win orders in the BPO-related business, among other initiatives, in the manufacturing human resource services, the volume of orders progressed steadily, resulting in net sales increasing by 110 million yen year-on-year.
- In terms of profit, although personnel expenses and investments in systems increased compared in year-on-year sales, operating profit increased by 140 million yen year-on-year, supported by sales growth and efforts to reduce costs such as efficient staff allocation and expenses for recruiting registered staff workers.

(Unit: Millions of yen)





(Unit: Millions of yen)

Each segment		First 3 Months of FY3/25	First 3 Months of FY3/26	Y/y Change
Clerical human resources	Net sales	8,392	8,252	98.3%
	Segment profit	758 (9.0%)	901 (10.9%)	118.9%
Manufacturing human resources	Net sales	1,735	1,993	114.8%
	Segment profit	59 (3.4%)	57 (2.9%)	96.2%
Others	Net sales	72	66	91.4%
	Segment profit	9 (12.7%)	9 (13.6%)	97.9%

BPO-related business segment

- In transactions with local governments, we proactively worked to develop new clients, focusing mainly on benefit payment projects and social security and tax number projects. Additionally, we emphasized expanding the scope of orders, including resident counter operations and projects related to the amendment to the Family Registration Act. As a result, orders for new projects progressed steadily.
- With regard to transactions with private enterprises, we received orders for projects involving central government agencies through leading BPO operators, as well as large-scale orders from new clients.
- However, due to factors such as a significant reduction in the scale of large-scale projects that had operated in the previous fiscal year, there was a year-on-year decrease.

CRM-related business segment

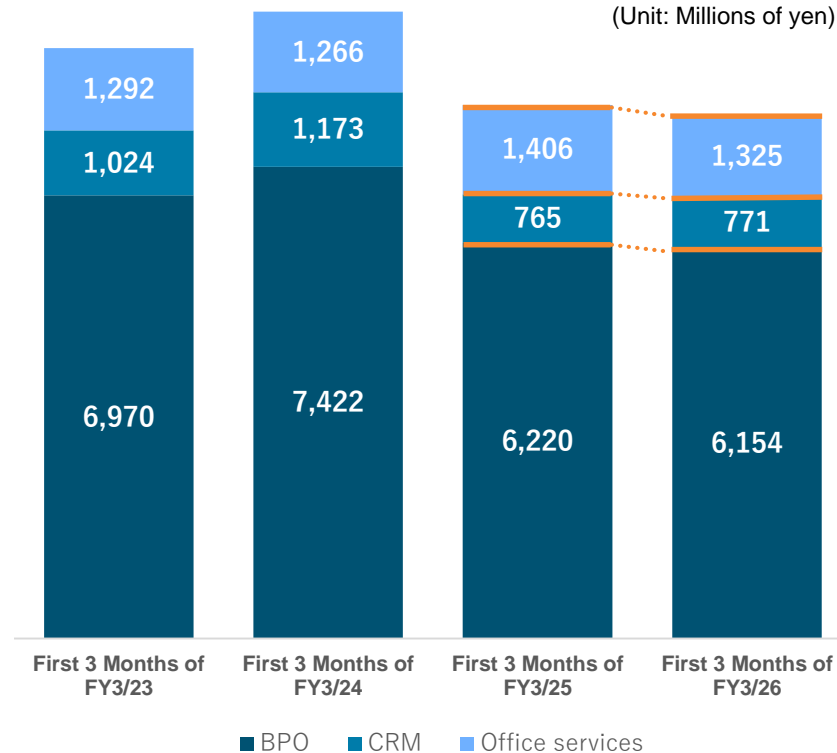
- At each local branch office, net sales increased year on year due to the expansion of transactions with existing clients and the development of new clients.

Office services business segment

- Orders for projects for local governments remained steady, and orders for existing projects for private enterprises also remained steady.
- However, the conclusion and scaling back of short-term dispatching projects that were in operation in the previous fiscal year, as well as a decrease in orders from financial institutions, had an impact, resulting in a year-on-year decrease.

Variation and breakdown in net sales of clerical human resources service

(Unit: Millions of yen)



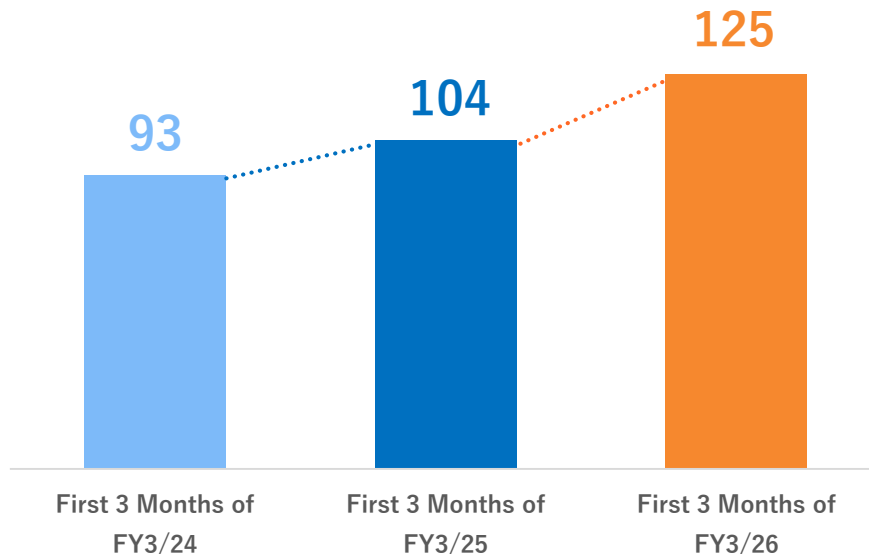
*we integrated the sales human resources service business into the BPO-related business segment in the clerical human resources service business as of the first quarter of FY3/24. For year-on-year comparability, net sales for the BPO-related business in the first quarter of FY3/23 and before include those for the sales human resources service business

Variation in the number of orders for BPO projects and increase in the number of local governments with which we have transactions

- The actual number of orders for BPO projects was 125, representing a 20.2% increase compared to the same period last year.
- The number of local governments clients with which we have transactions increased by 18.8% compared to the same period of the previous year, as a result of proactively working to develop new clients, focusing mainly on benefit payment projects and social security and tax number projects. This led to the expansion of our client base.

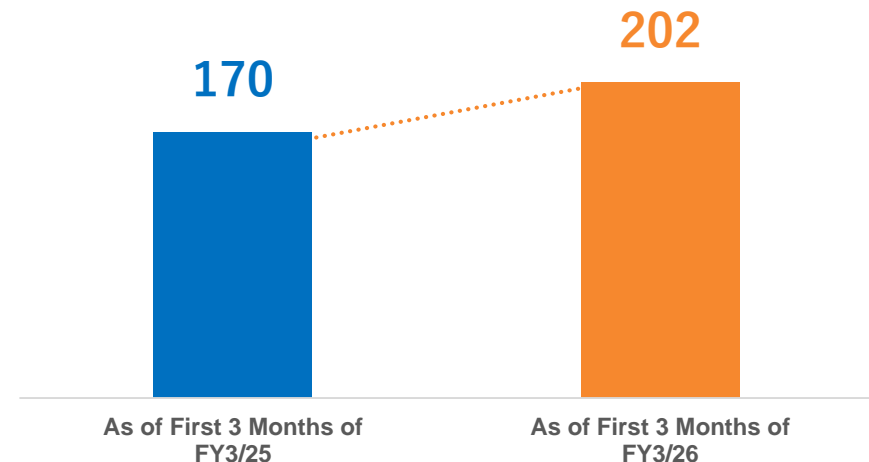
Variation in the number of BPO projects

(Unit: Projects)



Number of local governments with which we have transactions

(Unit: Number of Local Governments)



*The number of local governments clients with which we have transactions for the clerical human resources service business as of the first 3 months of FY3/25 is based on the performance from FY3/23 to the first 3 months of FY3/25. Similarly, the number as of the first 3 months of FY3/26 is based on the performance from FY3/24 to the first 3 months of FY3/26.



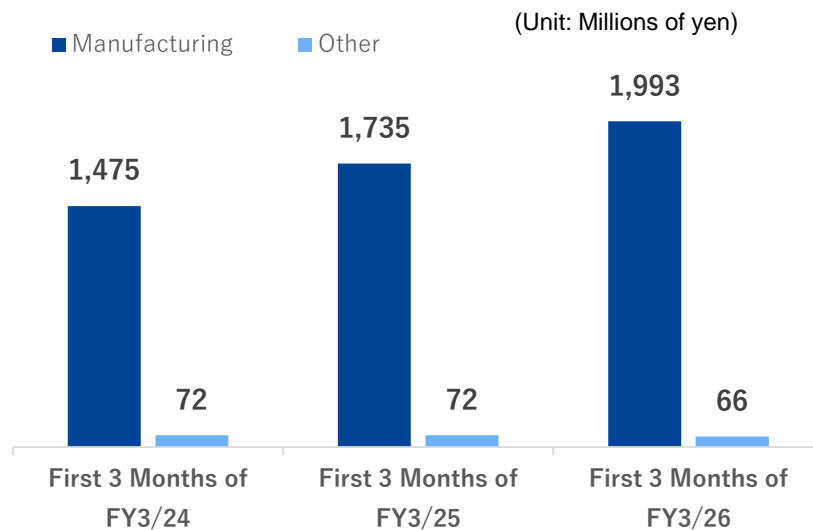
Manufacturing human resources service business saw increased sales and decreased profit

- In the food processing category, in addition to an increase in orders from existing clients, new orders in areas such as food for commercial use and boxed lunch manufacturing led to an increase in sales.
- In the manufacturing and processing category, an increase in orders from clients in comprehensive electrical equipment manufacturing, plant manufacturing, and machinery manufacturing, as well as contributions from new client development in areas such as housing equipment manufacturing, led to an increase.
- In terms of profit, due to the increase in personnel expenses and recruitment expenses associated with the resumption of recruitment of new employees for future business expansion, the profit margin temporarily declined.

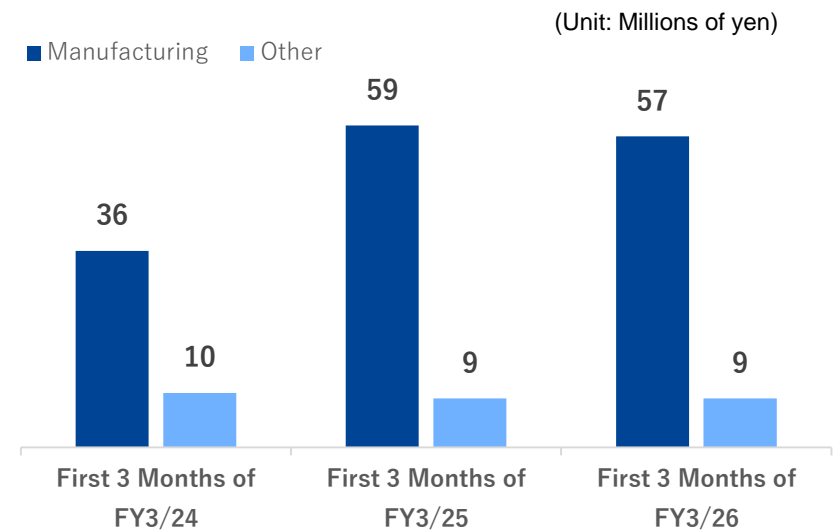
Others saw decreased profit

- Although there was a decrease in sales due to the delay in replacing retired employees, efforts to reduce selling, general, and administrative expenses helped maintain profits at the same level as the previous year.

Manufacturing human resources service and others **Net sales** trends



Manufacturing human resources service and others **Operating profit** trends



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Earnings forecasts for the first half and full year, announced May 14, 2025, remain unchanged

- Earnings forecasts announced at the beginning of the fiscal year have not been revised, leaving the first half and full-year forecasts unchanged.
- Also, the operating profit margin for the second quarter is expected to be lower than that for the first quarter. This is mainly because, in many of the economic measure-related projects (contract projects), the proportion of services to be performed during the second quarter is expected to be larger relative to the total services to be performed throughout the contract period.

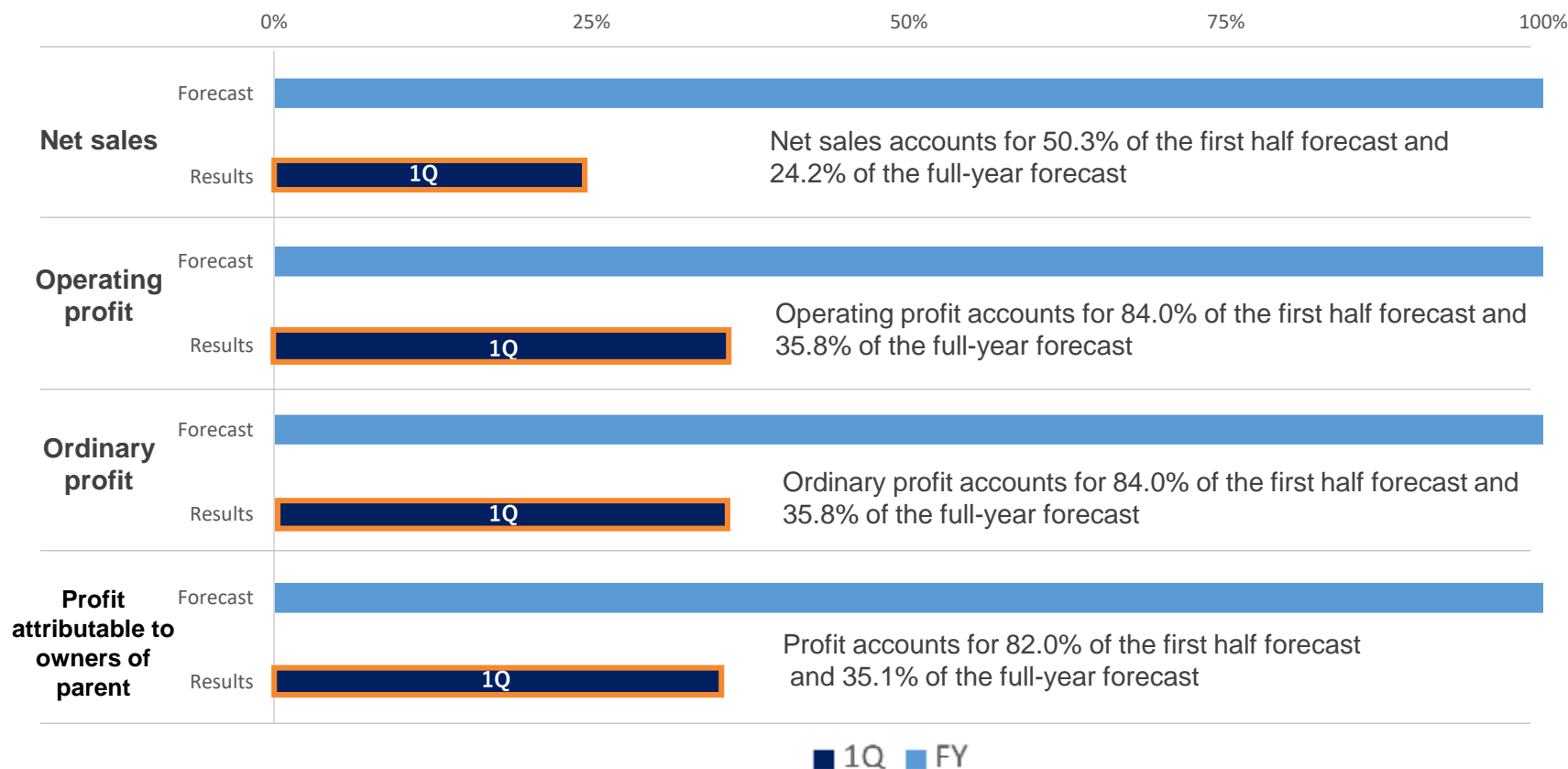
(Unit: Millions of yen)

		Results for the First 3 Months of FY3/26	Forecast for the First Half of FY3/26	Progress Rates Toward the First Half Forecast
Consolidated	Net sales	10,311	20,515	50.3%
	Operating profit	967 (9.4%)	1,152 (5.6%)	84.0%
	Ordinary profit	967	1,151	84.0%
	Profit attributable to owners of parent	647	789	82.0%

Progress rates toward the earnings forecast as of the first three months of FY3/26

- Achieving 50.3% of the first half forecast for net sales and 84.0% of the first half forecast for operating profit.
- Progress toward the full-year forecast was 24.2% for net sales and 35.8% for operating profit.

Progress with respect to forecasts



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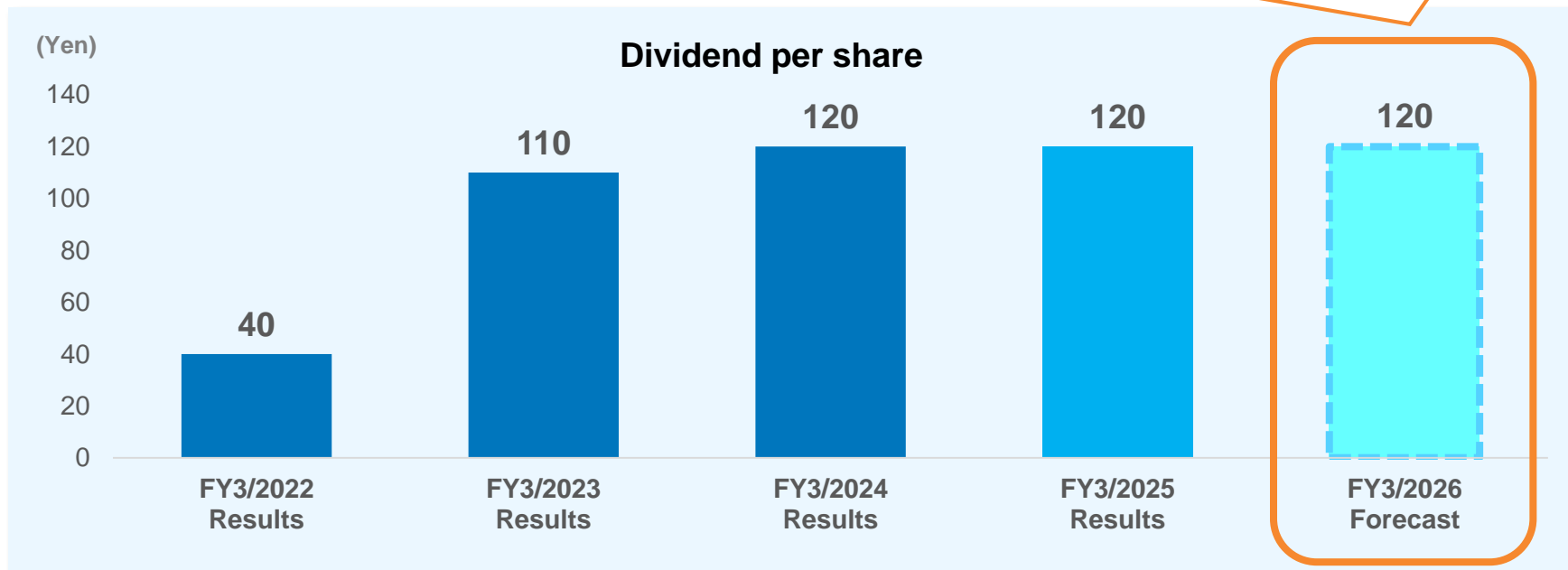
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Based on the fundamental policy of stable dividends, we anticipate a year-end dividend of 120 yen per share for FY3/26

- The Company's basic policy is to **continue to pay appropriate and stable dividends** based on a comprehensive assessment of business performance and overall management, while securing the internal reserves necessary for business development for sustainable growth and strengthening the management base.
- The expected year-end dividend for FY3/26 remains unchanged at 120(with an expected dividend payout ratio of 77.1%).
- In our medium-term plan outlined announced May 14, 2025,we anticipate securing a baseline profit, thus intending to maintain the dividend **at 120 yen throughout the period of the medium-term management plan.**

We anticipate sustaining the dividends due to the expected continued growth even in the upcoming periods.



➤ Shareholder Return (Shareholder Benefits)

To give Quo Cards according to the number of shares held and the number of years of shareholding

We present Quo Cards as shareholder benefits to shareholders who hold 1 trading lot (100 shares) or more as of September 30 once every year.



Number of shares held	Held for less than 3 years	Held continuously for 3 years or longer
100-199 shares	Quo Card (worth 500 yen)	Quo Card (worth 500 yen)
200-299 shares	Quo Card (worth 1,000 yen)	Quo Card (worth 2,000 yen)
300-399 shares	Quo Card (worth 1,000 yen)	Quo Card (worth 3,000 yen)
400-499 shares	Quo Card (worth 1,000 yen)	Quo Card (worth 4,000 yen)
500 shares or over	Quo Card (worth 2,000 yen)	Quo Card (worth 5,000 yen)

Benefits of long-term holding

* The number of shares held for the shareholder benefit program shall be determined based on the Company's shareholder register as of the record date (September 30) of each year.

** "Held continuously for 3 years or longer" means that a shareholder has held the above number of shares for 3 or more years (as of record date (September 30), the same shareholder number is listed or recorded in the Company's shareholder register for 7 consecutive times or more on each of March 31 and September 30 every year).

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By proactively developing new clients, we aim to further increase transactions with local governments

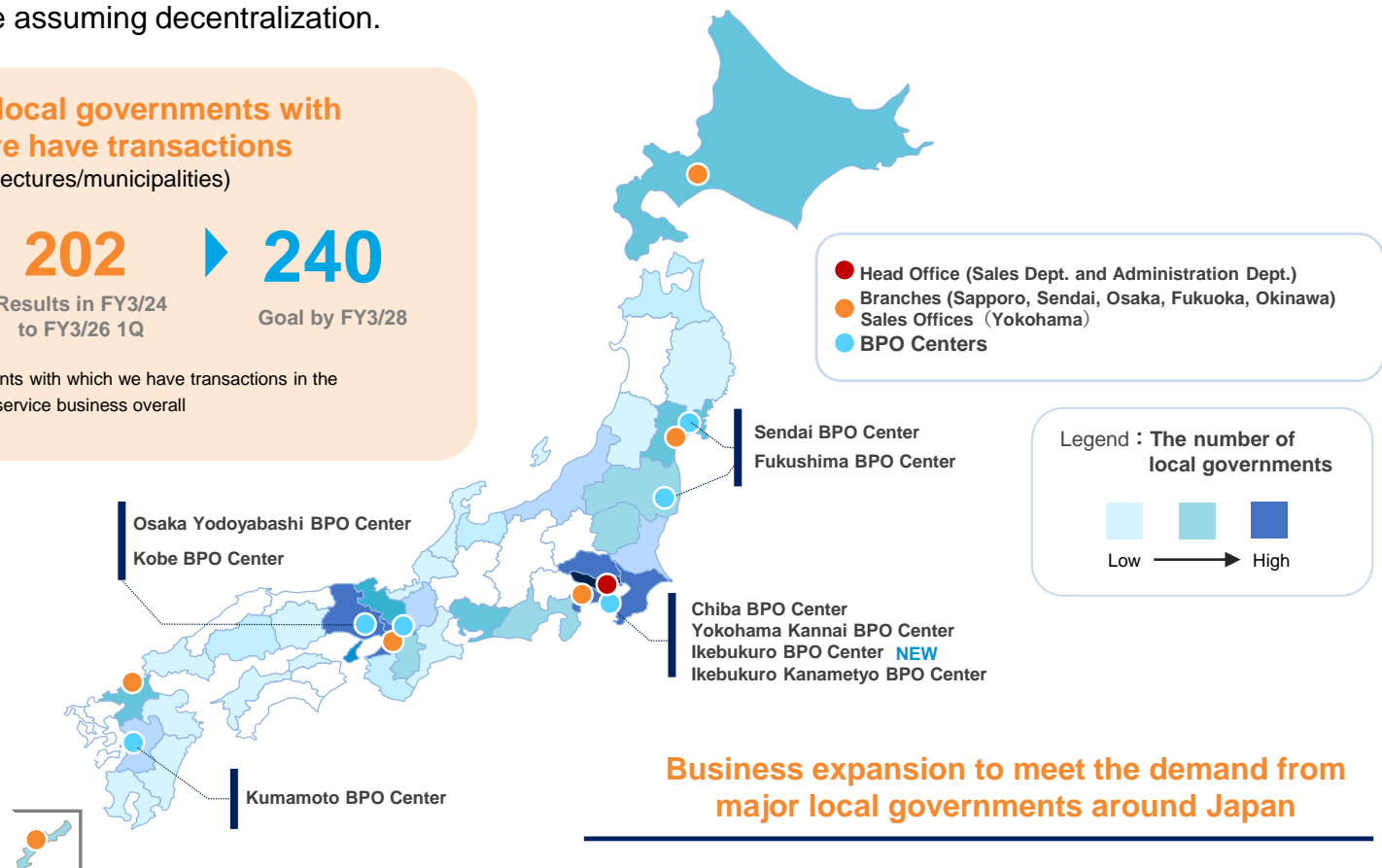
- We will increase the number of local governments with which we have transactions and the size of those transactions and maintain them by promoting the wide-area deployment of BPO in local governments and acquisition of multiple projects.
- We will promote strengthening of quality control, recruitment and training of core personnel, and the construction of a service structure assuming decentralization.

Number of local governments with which we have transactions (Prefectures/municipalities)

195 ▶ **202** ▶ **240**

Results in FY3/23 to FY3/25 Results in FY3/24 to FY3/26 1Q Goal by FY3/28

- * Number of local governments with which we have transactions in the clerical human resources service business overall
- * Including subcontractors



Business expansion to meet the demand from major local governments around Japan

Aiming to increase the number of local governments with which we have transactions while expanding the scope of business domains with public BPOs

- The business domains that we can handle internally are increasing year by year.
- In addition to increasing the number of new local governments, we aim to further expand our business domains.
- We will expand alliance partnerships with leading companies in each area in addition to business operations by ourselves.

Main achievements in local governments projects



Counter-related operations

- Counter-related operations at citizen's section
- Counter-related operations for general inquiries
- Municipality facility administration operations
- Census-related operations
- Operations related to immigration and quarantines
- Residency status-related operations
- Passport issuance operations
- Civil registration-related administrative services
- Administrative operations for health checkups
- Immunization-related operations
- Childbirth and childcare-related operations
- Childcare and nursing care personnel support operations
- Operations related to various benefits for childcare
- Nationwide free school lunch operations
- National pension and employee pension-related operations
- National health insurance-related operations
- Taxation-related operations
- Nursing care insurance-related operations



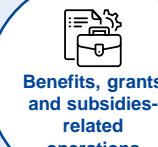
Social welfare-related operations

- Latter-stage elderly healthcare system-related operations
- Elderly support operations
- Designated intractable disease medical care-related operations
- Disability and welfare-related operations
- Individual Number issuance desk operations
- Social Security and Individual Number promotion operations
- Social Security and Individual Number Point-related operations
- Individual Number Business trip application support
- Garbage collection center reception operations
- Election-related operations
- Dispatch of substitutes when staff members take a leave
- Public assistance-related operations (including health support for protected persons)
- Zero carbon promotion measure operations
- Job seeker support operations
- ICT support operations
- Operations related to various benefits for economic measures
- Childrearing support-related operations
- SME support-related operations



Application-related operations

- Energy saving support operations
- Operations providing support due to price increases for electricity, gas, and groceries (for residents / businesses)
- Operations for governmental offices operating digital coupons
- Welfare-related consultation center operations
- Operations supporting smartphone distributions for seniors
- Test support operations
- License office operations
- Bank transfer scam prevention operations
- BPR support operations
- School support-related operations
- General affairs and Human resources administrative-related operations
- Hospital administrative-related operations
- Cashless payment point rebate operations
- Evacuation plan preparation-related operations
- Amendment to the family registration act-related operations



Benefits, grants and subsidies-related operations



Municipality DX and Social Security and Individual Number operations

We aim to steadily expand our business areas through the accumulation of contracted achievements

Progress against the image of net sales in the BPO-related business segment and Y/y Change

		Local governments (a)			Private enterprises(b)			Overview of BPO sales (a) + (b)	
(Unit: Millions of yen)		Unit price	Number of local government projects	Multiple project indicator	Total BPO sales	Unit price	Number of projects	Total BPO sales	Ratio of local government sales to BPO sales
Annual plan	FY3/26	82	× 110	× 1.5	13,547	171	× 70	12,013	25,560 53%
	First 3 Months of FY3/26 (Progress against annual plan)	39 ^{*1} (47.6%)	× 63 ^{*2} (57.3%)	× 1.4	3,431 (25.3%)	74 (43.3%)	× 37 (52.9%)	2,723 (22.7%)	6,154 (24.1%) 56%
Reference		45	× 44	× 1.5	2,986	85	× 38	3,234	6,220 48%

- Progress as a percentage of BPO sales was 25.3% for local governments and 22.7% for private enterprises.
- In transactions with local governments, in addition to expanding the scope of orders from existing local government clients, we also focused on winning orders for short-term contracts related to the amendment to the Family Registration Act, resulting in a steady progression in the number of projects.
- With regard to transactions with private enterprises, we received orders for projects involving central government agencies through leading BPO operators, as well as large-scale orders from new clients. However, the impact of the downsizing of large-scale short-term projects that had operated in the same period of the previous fiscal year was significant.

*1: Calculated as the average sales value per project *2: Except subcontracting projects through BPO providers from local governments (including Private enterprises (b))

The forecasts, plans, and business developments of Careerlink Co., Ltd. discussed in this document are based on judgments made with reference to information available as of the date of the announcement of the financial results.

This information contains known and unknown risks and uncertainties related to macroeconomics, industry trends relevant to our company, advancements in new technologies, etc., which could lead to significant changes in the outcomes.

Accordingly, please be aware that there are risks and uncertainties that could cause actual results, etc., to differ materially from those presented in this document.

If there are any major changes, we will make an announcement accordingly.



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We Believe the joy of work

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