Financial Results for the First Three Months of FY3/27

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.

Contents

Contents

Executive Summary for the First Three Months of FY3/27

Net sales	Operating profit	Operating profit to net sales
11.36 billion yen	**1.58** billion yen	**14.0**%
Y/y Change +10.2%	Y/y Change +64.2%	Y/y Change +4.6pt

Number of orders for BPO projects	Number of local governments with which we have transactions*
127 Projects	**188**
Y/y Change +1.6%	Y/y Year-End to Q1 Change ▲8.7%

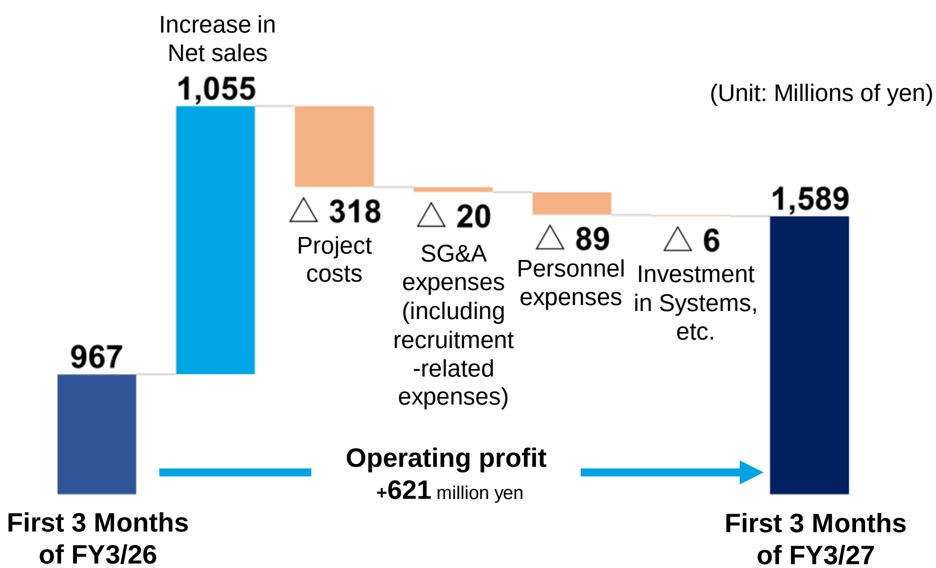
*The increase rate of the number of local governments with which we have transactions in the clerical human resources business is calculated based on the difference between the actual results for the period from FY3/25 to FY3/27 (first quarter) and the actual results for the period from FY3/24 to FY3/26.

Performance Highlights for the First Three Months of FY3/27

(Unit: Millions of yen)

First Three Months		First 3 Months of FY3/26(April–June)	First 3 Months of FY3/27(April–June)	Y/y Change
Consolidated	Net sales	10,311 (100%)	11,366 (100%)	110.2%
	Operating profit	967 (9.4%)	1,589 (14.0%)	164.2%
	Ordinary profit	967 (9.4%)	1,589 (14.0%)	164.3%
	Profit attributable to owners of parent	647 (6.3%)	1,082 (9.5%)	167.1%

- During the first quarter of the fiscal year ending March 31, 2027, despite the completion of short-term projects for local governments and projects for private enterprises that had been in operation in the previous fiscal year in the BPO-related business, order volumes remained strong in the core BPO-related business for local governments and in the manufacturing human resource services business. As a result, net sales increased by 10.2% year on year to 11.36 billion.
- In terms of profit, because the proportion of operations performed during the first quarter was relatively small, cost of sales decreased year on year. In selling, general and administrative expenses, personnel expenses increased due to active hiring efforts; however, we strived to reduce expenses such as advertising expenses and to improve operational efficiency. As a result, operating profit increased by 64.2% year on year to 1.58 billion.



Segment performance Highlights for the First Three Months of FY3/27

(Unit: Millions of yen)

First Three Months Each segment		First 3 Months of FY3/26(April–June)	First 3 Months of FY3/27(April–June)	Y/y Change
Clerical human resources	Net sales	8,252	8,814	106.8%
	Segment profit	901 (10.9%)	1,449 (16.4%)	160.8%
Manufacturing human resources	Net sales	1,993	2,495	125.2%
	Segment profit	57 (2.9%)	133 (5.4%)	234.9%
Others	Net sales	66	56	84.6%
	Segment profit	9 (13.6%)	5 (10.1%)	62.8%

Clerical Human Resources Service Business

BPO-related business segment

- Regarding transactions with local governments, although short-term contract projects related to the amendment to the Family Register Act were completed, we worked to expand the volume of orders received for projects related to social security and tax numbers while focusing on broadening our order portfolio for long-term contract projects, including citizen services desk operations. As a result, the monetary amount of orders received increased steadily.
- Meanwhile, regarding transactions with private enterprises, although we worked to acquire new clients for field business projects and other projects, the volume of projects involving central government agencies as end clients through leading BPO operators declined.
- As a result, net sales in the BPO-related business segment increased by 6.5% year on year.

CRM-related business segment

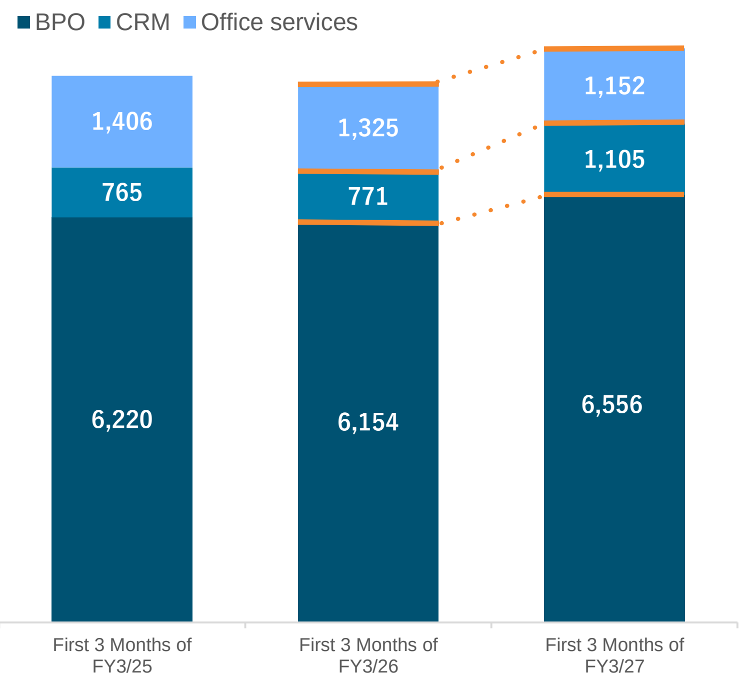
- The organizational structure enhancements implemented since the previous fiscal year proved effective, resulting in an increase in the volume of new orders received for call center staffing projects from existing clients, particularly leading telemarketing operators. New orders from financial institutions and other clients also expanded. As a result, net sales increased by 43.3% year on year.

Office services business segment

- The order volume declined due to the completion or scaling back of dispatching projects for local governments, including projects related to social security and tax numbers, as well as dispatching projects received from public corporations associated with local governments.
- Additionally, regarding private enterprises, the order volume declined due to the scaling back or completion of operations by existing clients, including financial institutions. As a result, net sales decreased by 13.0% year on year.

Variation and breakdown in net sales of clerical human resources service

(Unit: Millions of yen)



Variation in the number of BPO projects

(Unit: Projects)

104 ▶ 125 ▶ 127

Manufacturing human resources service business saw increased sales and profit

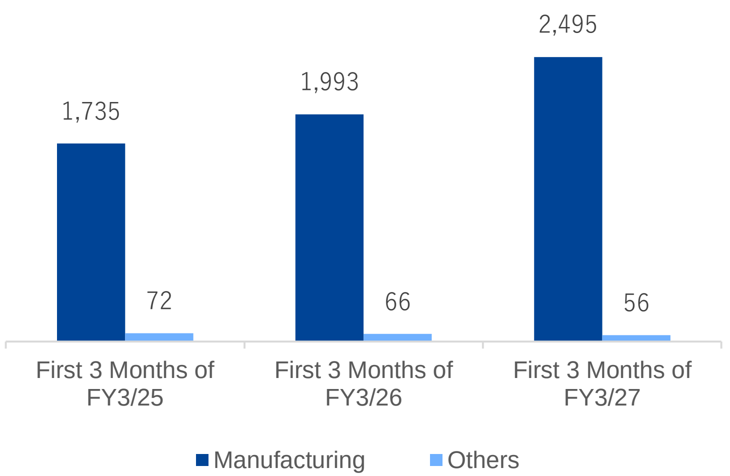
- In the food processing category, although the order volume decreased at some corporate clients due to production adjustments driven by soaring raw material prices and a shift from the use of dispatched workers to direct employment, the order volume from existing clients, primarily companies manufacturing western-style confectionery, remained steady.
- In the manufacturing and processing category, in addition to large-scale government policy-related dispatching projects from a housing equipment manufacturing client, the monetary amount of orders received remained strong, particularly in electrical equipment and semiconductor manufacturing equipment-related fields, driven by growing demand associated with AI and data centers. As a result, net sales increased year on year. In terms of profit, we worked to revise unit prices for dispatching projects and reduce expenses. As a result, profit increased year on year.

Others saw decreased sales and profit

- Due to organizational restructuring and other changes at client companies, efforts to acquire new clients were insufficient to offset the decline in order volume, resulting in decreases in both net sales and profit compared with the same period of the previous fiscal year.

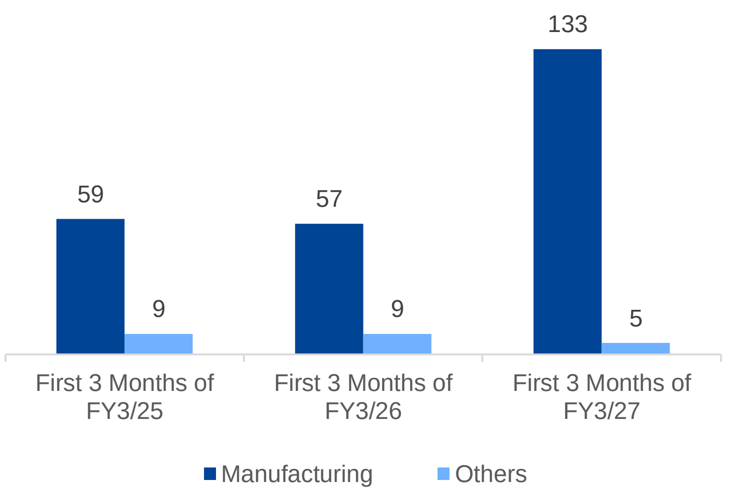
Manufacturing human resources service and others Net sales trends

(Unit: Millions of yen)



Manufacturing human resources service and others Operating profit trends

(Unit: Millions of yen)



Contents

Full-Year Earnings Forecast for FY3/27

Earnings forecasts for the first half and full year, announced May 14, 2026, 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 contract projects with local governments in the BPO-related business, 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.

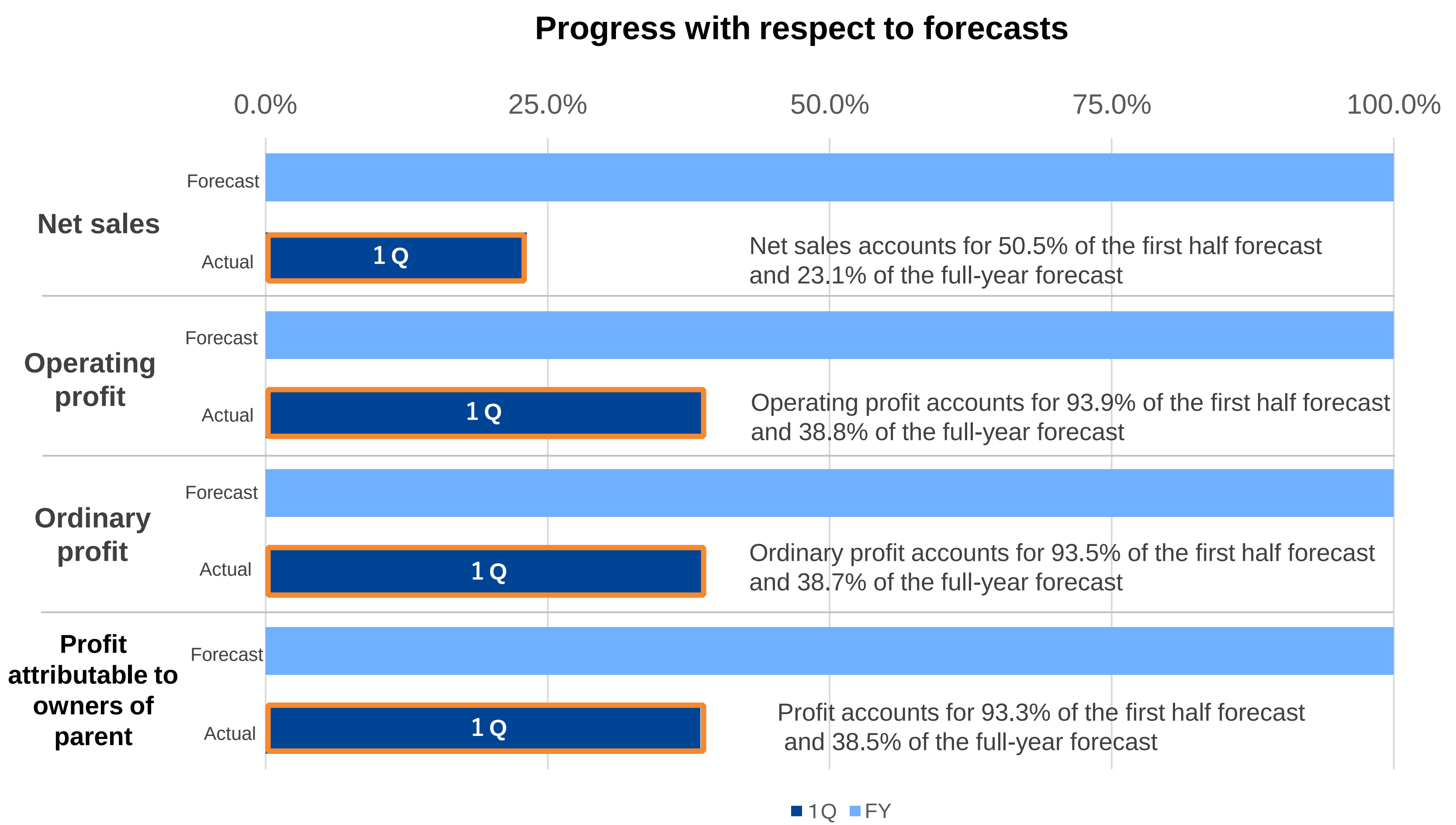
(Unit: Millions of yen)

		Results for the First 3 Months of FY3/27	Forecast for the First Half of FY3/27	Progress Rates Toward the First Half Forecast
Consolidated	Net sales	11,366	22,516	50.5%
	Operating profit	1,589 (14.0%)	1,692 (7.5%)	93.9%
	Ordinary profit	1,589	1,700	93.5%
	Profit attributable to owners of parent	1,082	1,160	93.3%

Progress Rates Toward the Earnings Forecast

Progress rates toward the earnings forecast as of the first three months of FY3/27

- Achieving 50.5% of the first half forecast for net sales and 93.9% of the first half forecast for operating profit.
- Progress toward the full-year forecast was 23.1% for net sales and 38.8% for operating profit.



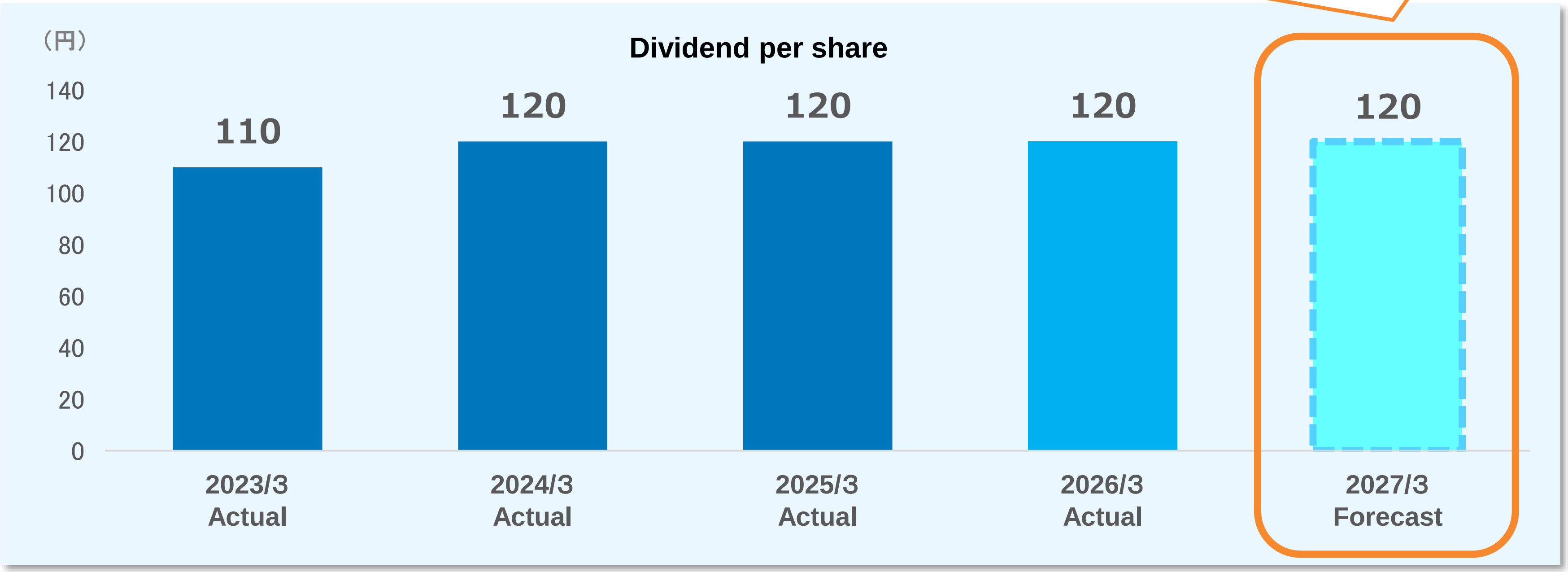
Contents

Shareholder Return（dividend）

Based on the fundamental policy of stable dividends, we anticipate a year-end dividend of 120 yen per share for FY3/27

- 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 FY3/27 is at 120 yen (with an expected dividend payout ratio of 50.7%).
- In our medium-term plan outlined in , “Financial Results for FY3/26” 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).

Contents

CAREERLINK

Promote the strengthening of the business foundation through upselling to existing clients

- 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.

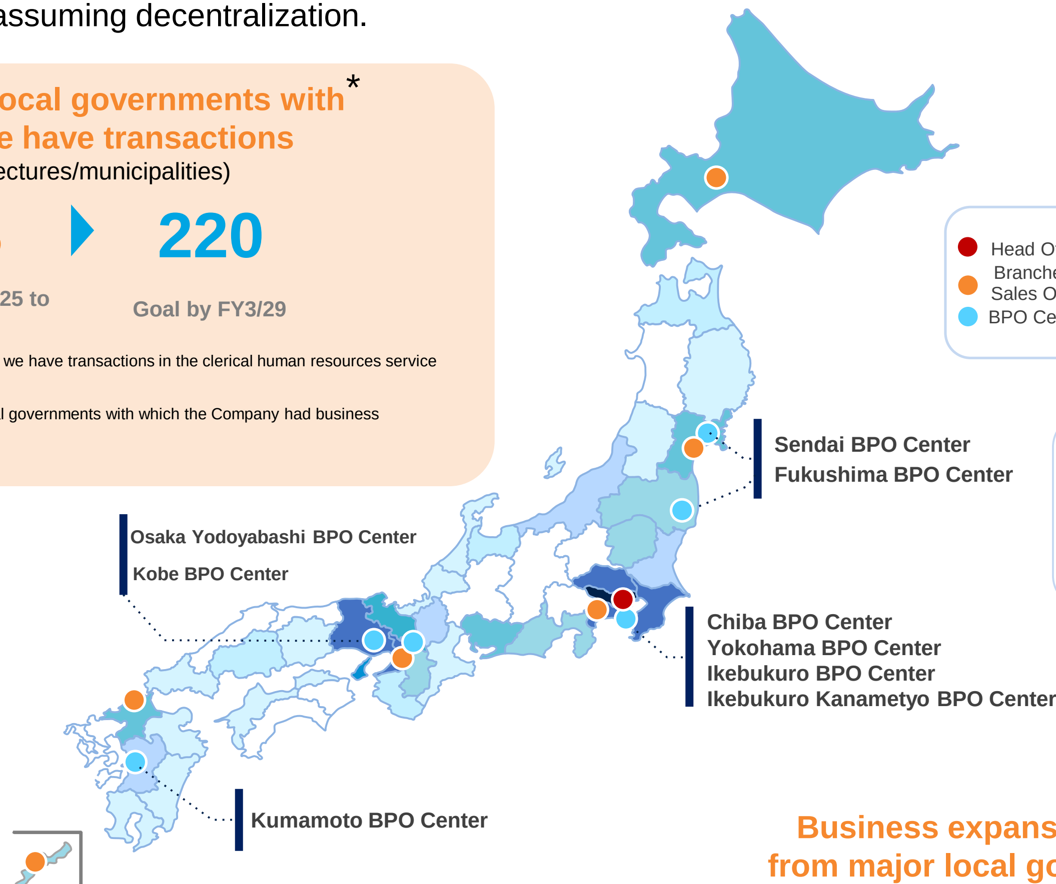
Number of local governments with which we have transactions*

(Prefectures/municipalities)

188 ▶ **220**

Results in FY3/25 to FY3/27 1Q	Goal by FY3/29
188	220

* Number of local governments with which we have transactions in the clerical human resources service business overall
* The figures represent the number of local governments with which the Company had business transactions during the respective period
* Including subcontractors



- Head Office (Sales Dept. and Administration Dept.)
- Branches (Sapporo, Sendai, Osaka, Fukuoka, Okinawa) Sales Offices（Yokohama）
- BPO Centers

Legend：The number of local governments

Low → High

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

Growth Strategy

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.
- 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 / Social welfare-related operations / Application-related operations / Benefits, grants and subsidies-related operations / Municipality DX and Social Security and Individual Number 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
- 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
- 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

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

Transition of Net Sales in the BPO-related Business Segment

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

(Unit: Millions of yen)

		Local governments (a)				Private enterprises(b)			Overview of BPO sales (a) + (b)	
		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	FY3/27 (Initial Plan)	94	×106	× 1.8 =	17,850	156	× 80 =	12,450	30,300	59%
Actual	First 3 Months of FY3/27 (Progress against annual plan)	45 *1 (47.9%)	× 61 *2 (57.5%)	× 1.5 =	4,077 (22.8%)	67 *1 (42.9%)	× 37 = (46.3%)	2,479 (19.9%)	6,556 (21.6%)	62%
Reference	First 3 Months of FY3/26	39	× 63	× 1.4 =	3,431	74	× 37 =	2,723	6,154	56%

- The progress against the initial BPO net sales plan was 22.8% for local governments and 19.9% for private enterprises.
- For local government clients, in addition to projects related to social security and tax numbers, we focused on securing orders for various citizen services desk operations. As a result, although the number of projects decreased slightly, total BPO net sales exceeded the level of the same period of the previous fiscal year, owing to an increase in the Unit price per project and an improvement in the Multiple project indicator.
- For private enterprises, total net sales were slightly lower than those of the same period of the previous fiscal year, as the decrease in the Unit price resulting from the completion of a large-scale project, combined with a flat number of projects year on year.

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

Disclaimer for Handling Materials

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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