

Financial Results for FY'26/3 Q3

February 5, 2026

Ad-Sol Nissin Corporation (TSE Prime 3837)



This presentation will provide an overview of the financial results for the third quarter of the fiscal year ending March 31, 2026.



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1. Performance Highlights
2. FY'26/3 Q3 Financial Results
3. Progress on the FY'26/3 Growth Strategy
4. FY'26/3 Operating Results Forecast / Dividend Forecast

Today, I will explain these items.

01

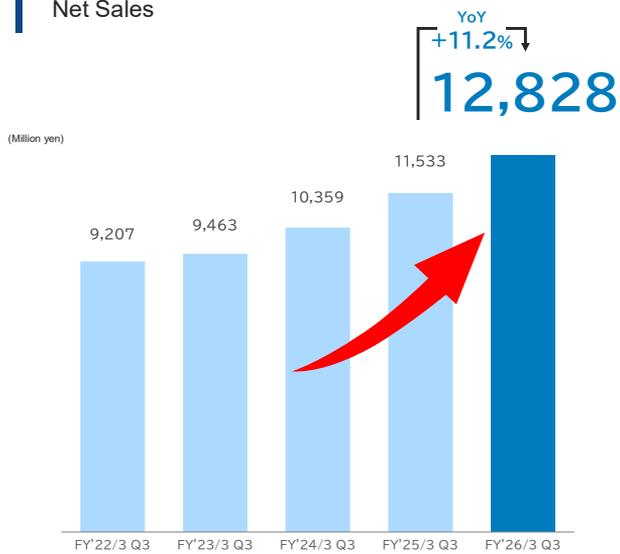
Performance Highlights

- Key Points of FY'26/3 Q3
- Revision of Year-end Dividend Forecast for FY'26/3
(50th Anniversary Commemorative Dividend)

Let me begin by explaining the performance highlights.

Key Points of FY'26/3 Q3 (Net Sales)

Net Sales



Net Sales Reached a Record High

[Social Infrastructure Business]

- The Energy (Electric Power) sector performed well.
- The Transportation and Public Works (National Security) sectors performed steadily.

[Advanced Industry Business]

- Digital transformation projects related to data management for Service sector (Payment and Credit Card) expanded.

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[Key Points of Q3 Results (Net Sales)]

- Achieved a record high.

Net Sales: 12,828 million yen (up 11.2% YoY)

- Continued growth in ICT investment by clients. Themes include digital transformation, AI, digital data utilization, and system modernization, which are less susceptible to economic conditions.

Key Points of FY'26/3 Q3 (Operating Income)



Record Highs in Both Operating Income / OP Margin

The gross profit margin improved due to an increase in unit price and high-margin projects such as consulting (28.6% in FY'25/3 Q3 to 30.4% in FY'26/3 Q3).

This improvement more than offset the increase in SG&A expenses resulting from three consecutive compensation revisions, new-graduate hiring, and new-employee training.

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[Key Points of Q3 Results (Operating Income / OP Margin)]

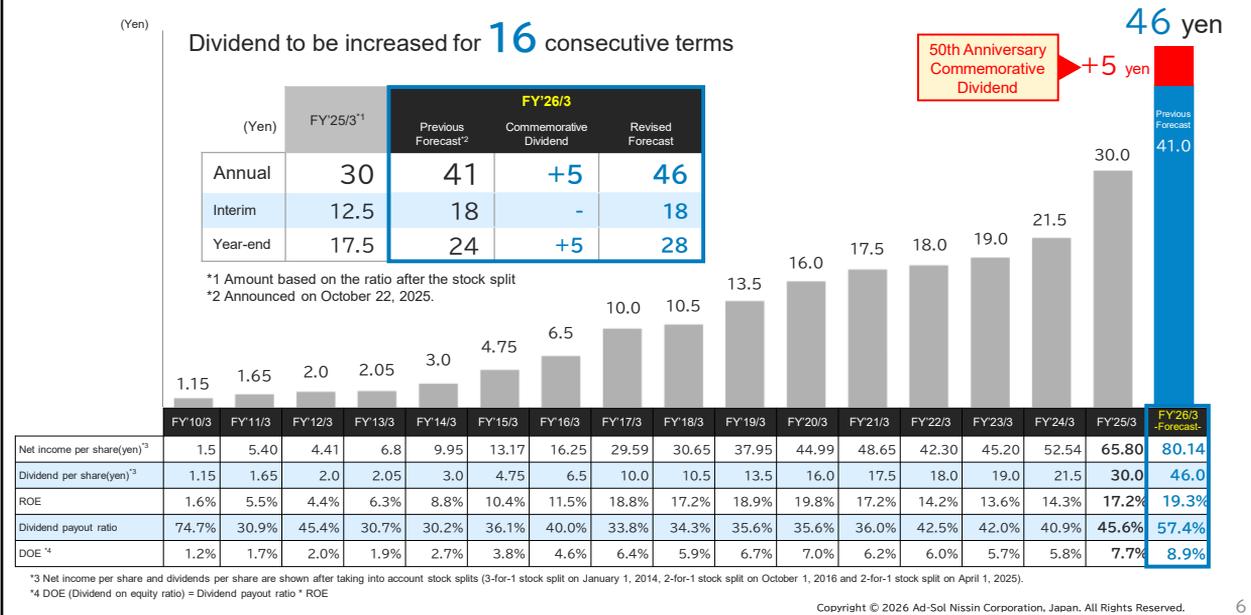
- Record highs in both operating income and OP margin.

Operating Income: 1,795 million yen (up 30.6% YoY)

Operating Income Margin: 14.0% (up 2.1 points YoY)

- Gross profit margin improved to 30.4% (up 1.8 points YoY) due to higher unit prices and an increase in consulting and other high-profit projects.
→ This improvement more than offset the increase in SG&A expenses resulting from three consecutive compensation revisions, new-graduate hiring, and new-employee training.
- We have made steady progress towards achieving the upwardly revised targets announced in October 2025 and delivered record-high performance for the third consecutive period.

Revision of Year-end Dividend Forecast for FY'26/3 (50th Anniversary Commemorative Dividend)



[Revision of Year-end Dividend Forecast for FY'26/3] 50th Anniversary Commemorative Dividend

- Dividend Policy
 - Dividend payout ratio of 50% or higher / DOE of 6% or higher
 - Progressive and consecutive dividend increases (at least 1 yen per year)
 - Dividends paid twice a year (interim and year-end)
- Announced the implementation of a 50th anniversary commemorative dividend of 5 yen in December 2025.
- Annual dividend for FY'26/3
 - Significant dividend increase to 46 yen expected (up 16 yen YoY)
- Dividend is expected to increase for 16 consecutive terms.

02

FY'26/3 Q3 Financial Results

- Consolidated Statement of Income
- Performance by Segment
- Quarterly Trends
- Ordinary Income
- Balance Sheet

Next, I will explain our consolidated results for the third quarter of the fiscal year ending March 31, 2026.

FY'26/3 Q3 Consolidated Statement of Income

POINT

(Million yen)	FY'25/3 Q3 Results	FY'26/3 Q3		
		Results	Increase /decrease	Ratio of change %
Net Sales	11,533	12,828	1,294	11.2
Social Infrastructure Business	7,275	8,319	1,044	14.4
Advanced Industry Business	4,258	4,509	250	5.9
Solution Business	923	893	(30)	(3.3)
Gross Profit	3,301	3,893	592	18.0
Gross Profit Margin (%)	28.6	30.4	-	-
SG&A Expenses	1,926	2,098	171	8.9
SG&A Ratio (%)	16.7	16.4	-	-
Operating Income	1,374	1,795	421	30.6
Operating Income Margin (%)	11.9	14.0	-	-
Ordinary Income	1,401	1,839	437	31.2
Ordinary Income Margin (%)	12.2	14.3	-	-
Net Income Attributable to Owners of Parent	924	1,210	286	31.0
Net Income Margin (%)	8.0	9.4	-	-

Net Sales

Record-high sales

Continued growth in ICT investment by clients. Growth driven by Energy (Electric Power), Transportation and Public Works sectors in Social Infrastructure Business, and Service sector in Advanced Industry Business.

Gross Profit

Gross profit margin continued to improve

In addition to higher unit prices, high-margin projects, including consulting projects, increased.

Operating Income

Record highs in both operating income / OP margin

Improvement in gross profit margin exceeded the increase in SG&A expenses driven by company-wide three consecutive compensation revisions, new-graduate hiring, and new-employee training.

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[Consolidated Statement of Income]

- Net sales and profits reached record highs for all quarters.
→ Factors and trends of fluctuations are as shown.

FY'26/3 Q3 Performance by Segment (Net Sales)

(Million yen)	FY25/3 Q3		FY'26/3 Q3			
	Results	Ratio to sales %	Results	Ratio to sales %	Increase /decrease	Ratio of change %
Entire company	11,533	100.0	12,828	100.0	1,294	11.2
Social Infrastructure Business	7,275	63.1	8,319	64.9	1,044	14.4
Energy	5,598	48.5	6,166	48.1	567	10.1
Transportation	591	5.1	928	7.2	336	56.9
Public Works	742	6.5	949	7.4	206	27.8
Communication / Network	342	3.0	275	2.2	(67)	(19.6)
Advanced Industry Business	4,258	36.9	4,509	35.1	250	5.9
Manufacturing	1,168	10.1	1,041	8.1	(126)	(10.8)
Service	2,260	19.6	2,699	21.0	438	19.4
Enterprise	829	7.2	767	6.0	(61)	(7.4)
Solution Business	923	8.0	893	7.0	(30)	(3.3)

POINT

Social Infrastructure Business

Strong performance in digital transformation (DX) and modernization projects

[Energy (Electric Power & Gas)]

- The Electric Power field continued to perform strongly supported by ongoing large-scale DX and modernization projects.
 - Next-generation smart meters
 - Power transmission and distribution equipment-related systems
 - Renewable energy-related systems etc.

[Transportation]

- Railway-related systems expanded significantly.

[Public Works]

- National security-related systems performed steadily.

Advanced Industry Business

Aggressive expansion of digital transformation and data utilization

[Service (Payment & Credit Card)]

- DX projects related to data management for credit card companies proceeded steadily.
- Built a data analysis platform and rebuilt payment systems using AgileLeap for payment service providers.

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[Performance by Segment (Net Sales)]

- Social Infrastructure Business: 8,319 million yen (up 14.4% YoY)
 - Continued strong performance mainly in Energy (Electric Power), Transportation (Railroads), and Public Works (National Security).
- Advanced Industry Business: 4,509 million yen (up 5.9% YoY)
 - Expanded DX projects related to data management in Service (Payment and Credit Card).
- Solution Business: 893 million yen (down 3.3% YoY)
 - Geographic Information System solutions delivered strong performance. We have secured multiple projects for the period leading up to the end of this fiscal year and for the next fiscal year.

FY'26/3 Q3 Performance by Segment (Orders Received / Order Backlog)

Orders Received: Reached a record high for the cumulative third-quarter period.

Order Backlog: Large-scale projects in the Electric Power field continued to progress steadily, as planned.

	Orders Received				Order Backlog			
	FY'25/3 Q3 Results	FY'26/3 Q3 Results	Increase /decrease	Ratio of change %	FY'25/3 Q3 Results	FY'26/3 Q3 Results	Increase /decrease	Ratio of change %
Entire company	11,241	12,488	1,246	11.1	3,044	2,909	(135)	(4.4)
Social Infrastructure Business	7,033	8,101	1,068	15.2	1,972	1,907	(65)	(3.3)
Energy	5,394	5,854	460	8.5	1,598	1,462	(135)	(8.5)
Transportation	620	968	348	56.1	124	171	47	37.9
Public Works	691	988	297	43.0	175	195	19	11.4
Communication / Network	327	289	(37)	(11.5)	73	77	3	4.7
Advanced Industry Business	4,207	4,386	178	4.2	1,072	1,002	(69)	(6.5)
Manufacturing	1,113	1,047	(66)	(5.9)	228	212	(16)	(7.2)
Service	2,225	2,630	404	18.2	665	654	(10)	(1.6)
Enterprise	868	708	(159)	(18.4)	178	135	(42)	(24.1)

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[Performance by Segment (Orders Received / Order Backlog)]

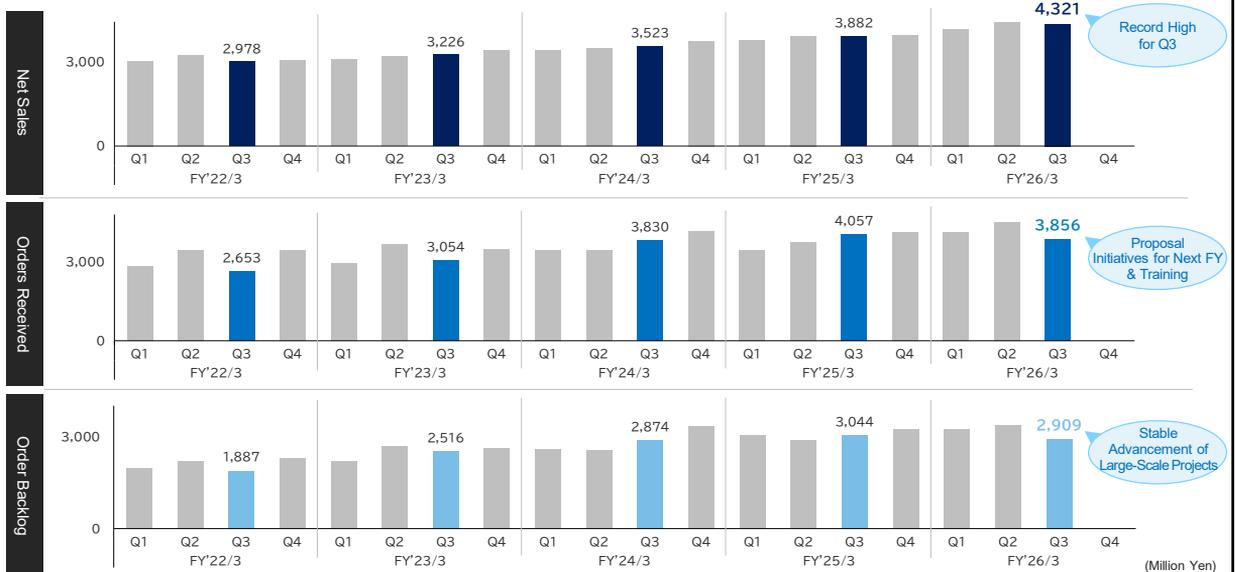
- Orders received reached a record high for the cumulative third-quarter period.

Orders Received: 12,488 million yen (up 11.1% YoY)

- The order backlog has been reduced as large-scale projects in the Electric Power field have progressed steadily, as planned. We are now actively pursuing new proposal opportunities to secure projects beyond the fiscal year ending March 2027.

Order Backlog: 2,909 million yen (down 4.4% YoY)

Quarterly Trends (Net Sales / Orders Received / Order Backlog)



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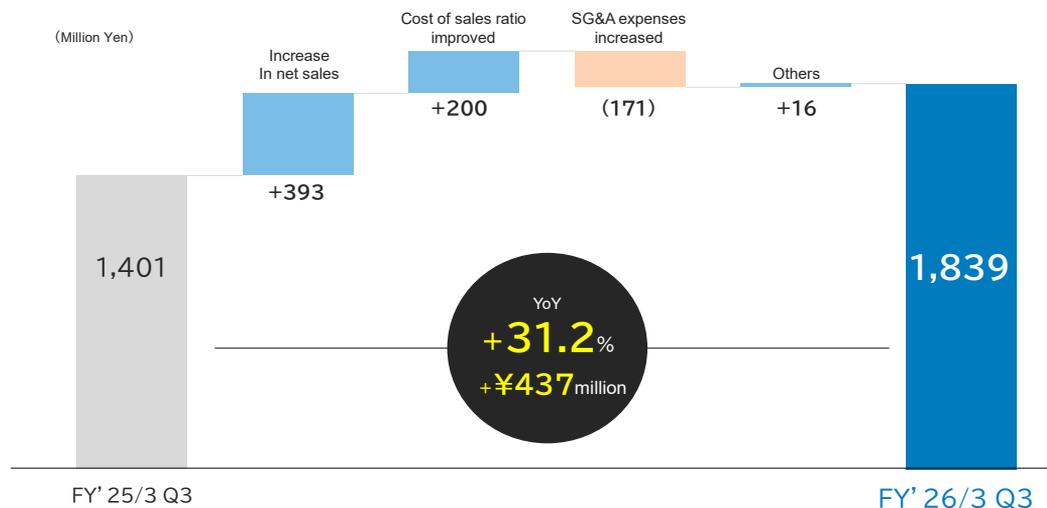
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[Quarterly Trends (Net Sales / Orders Received / Order Backlog)]

- Net sales reached record high as third quarter.
- Orders received reflected a shift in sales activities toward future fiscal years, as well as the strengthening of education and training initiatives aimed at medium- to long-term growth.
- The order backlog has been reduced as ongoing large-scale projects in the Electric Power field progressed steadily, as planned.

FY'26/3 Q3 Ordinary Income

The increase in net sales and the improvement in the cost-of-sales ratio more than offset the rise in SG&A expenses, resulting in higher ordinary income. (The SG&A increase was driven by compensation revisions and new-graduate hiring and training.)



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[Ordinary Income]

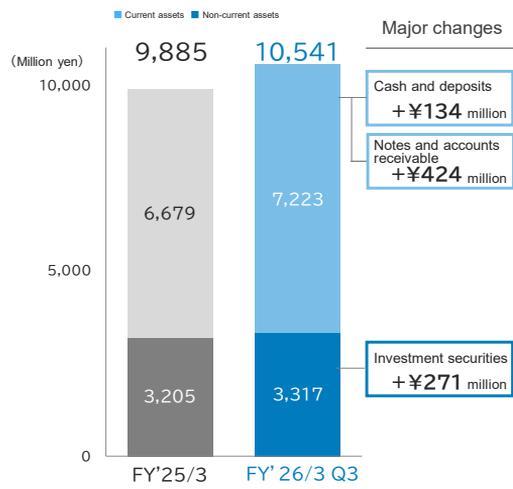
- The increase in net sales and the improvement in the cost-of-sales ratio more than offset the rise in SG&A expenses.

Ordinary income: 1,839 million yen (up 31.2% YoY)

Balance Sheet

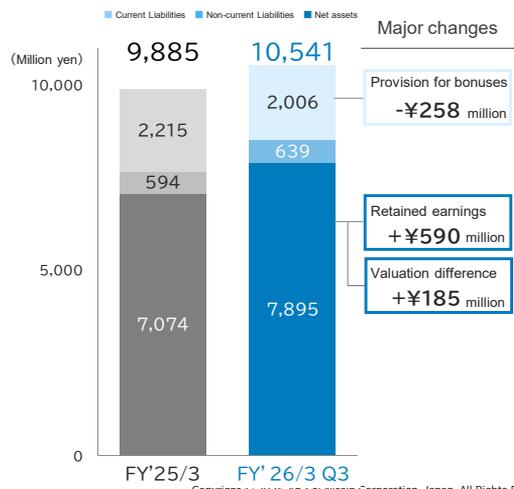
Asset

• Total Assets **10.5** billion yen



Liabilities and Net Assets

• Equity Ratio **72.9%**



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The balance sheet is shown on the slide.

03

Progress on the FY'26/3 Growth Strategy

- Focus Points for FY'26/3
- Establishing the Next Generation SI Business Model

Next, I will explain our growth strategy for the fiscal year ending March 31, 2026.

Establish Next Generation SI Business Model to shift to growth businesses



Consulting

Strengthen consultant training for upstream process expansion



Agile Development

Strengthen AgileLeap's services and deployment



Data Utilization

Expand Data Utilization Business by training data scientists



AI

Accelerate the development of advanced AI talent to become AI-driven Ad-Sol

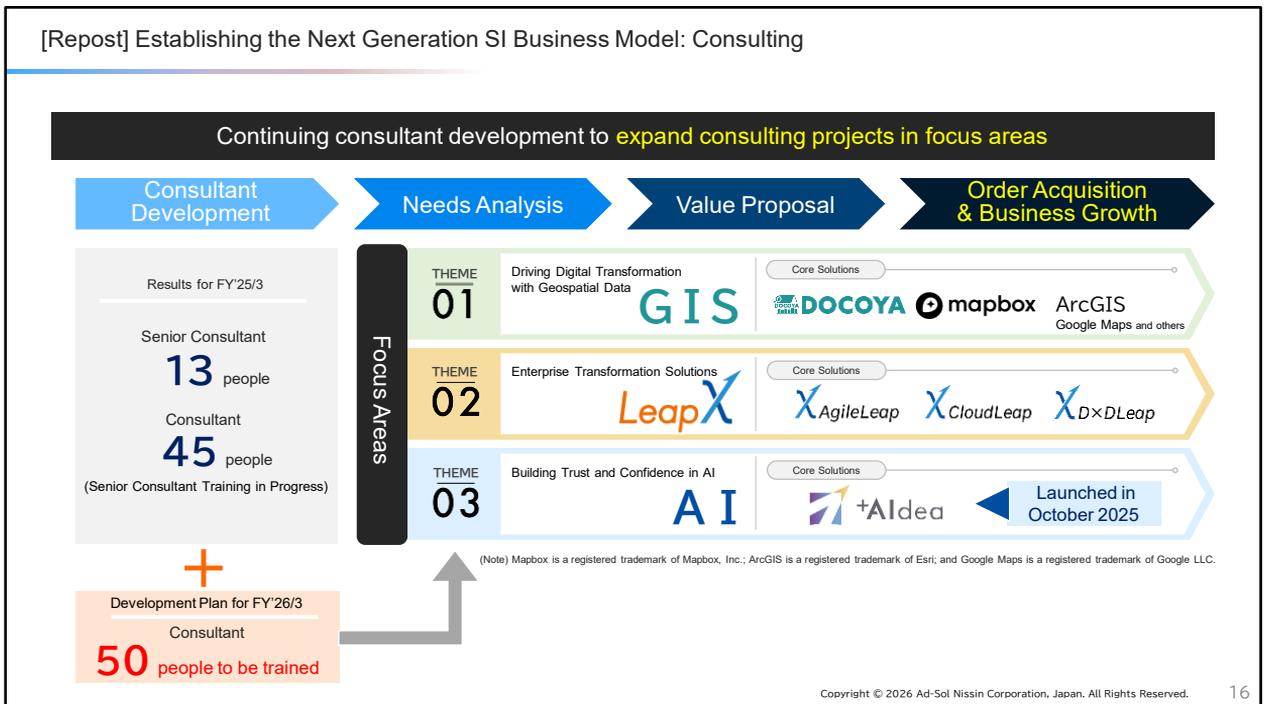


Development Team

Strengthen the global development system and collaboration with partner companies

[Focus Points for FY'26/3]

- Toward establishment of Next Generation SI (systems integration) Business Model to shift to growth businesses.
- Focus on five key points in the fiscal year ending March 2026.



[Consulting]

- Starting in the fiscal year ended March 2025, we launched a consultant development program and are strengthening our efforts this fiscal year with the goal of building a 100-consultant organization.
- We are focusing on three key areas—**GIS**, **LeapX**, and **AI**—and delivering value proposals based on an in-depth analysis of client challenges.
 → This initiative aims to expand our consulting business and enhance profitability.

Alliance with DG Business Technology, a Digital Garage Group Company



Joint development and launch of **Restaurant DOCOYA**,
a SaaS-based trade area analysis tool for the food service industry



▲ Display and analyze InsiteStream's food service industry dataset directly on DOCOYA



Visualization of approximately 900,000 restaurant data points
(including seating capacity and ratings) on maps via DOCOYA

Achieves higher-precision area analysis and sales target analysis

[Geographic Information System - Data Management and AI -]

- Alliance with DG Business Technology, a Digital Garage Group Company
- Joint development and launch of Restaurant DOCOYA, a SaaS-based trade area analysis tool for the food service industry
- Integration of Digital Garage's industry-specialized data collection platform InsiteStream—with its extensive restaurant industry dataset—into Ad-Sol Nissin's SaaS-based trade area analysis solution DOCOYA
→ Achieves higher-precision area analysis by combining maps and food service industry data

<DG Business Technology, Inc. (DGBT)>

Business Integration (Merger / Trade Name Change): April 2025

Representative: Representative Director, President & CEO Kazunori Shimizu

Address: DG Bldg., 3-5-7 Ebisu Minami, Shibuya-ku, Tokyo

Shareholder: Digital Garage, Inc.

<Digital Garage, Inc. (DGBT's Parent Company)>

Date founded: August 1995

Representative: Representative Director, President Executive Officer and Group CEO
Kaoru Hayashi

Address: DG Bldg., 3-5-7 Ebisu Minami, Shibuya-ku, Tokyo

Shibuya PARCO DG Bldg., 15-1 Udagawa-cho, Shibuya-ku, Tokyo

* Service website: <https://www.dgbt.jp/insitestream> (Only in Japanese)

Building a 1,000-person Da Nang Development Center



The timeline features a vertical stack of seven photographs, each representing a key event. From top to bottom: 1. A group photo at an IT Training Center opening ceremony. 2. A group photo at an industry-academia partnership ceremony with the University of Da Nang. 3. A group photo at a capital and business alliance ceremony with Techzen Co., Ltd. 4. A group photo at the establishment of Adsol Asia Corporation. 5. A group photo at the opening of the Da Nang Development Center. 6. A group photo at a business alliance ceremony with Unitech. 7. A group photo at a business alliance ceremony with 3S Intersoft JSC. The text on the left side of the slide is partially obscured by the images.

- 2025 - Launched a global IT Service **+Global**
- 2024 - Started collaboration with GKI and advanced IT training programs
 - Co-established an **IT Training Center** with the University of Da Nang
- 2023 - Established Industry-academia partnership with **the University of Da Nang**
 - Formed a capital and business alliance with **Techzen Co., Ltd.**
- 2020 - Established **Adsol Asia Corporation** (wholly owned subsidiary)
- 2018 - Opened a Da Nang Development Center
- 2016 - Formed a business alliance with Unitech
 - Formed a business alliance with 3S Intersoft JSC
- 2013 - Formed a business alliance with Individual Systems Co., Ltd.

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[Expansion of Global Development - Initiatives in Vietnam, a Global Hub for IT Talent -]

- For over a decade, we have been promoting initiatives to strengthen our global development capabilities, with the aim of building a 1,000-strong advanced IT talent organization at our Da Nang Development Center.
 - Capital and business alliance with Techzen, a group company founded by a former employee
 - Industry-academia collaboration agreement with the University of Da Nang
 - Establishment and joint operation of an IT Training Center

Extensive experience in system development, from agile to modernization

Covered Areas

Agile with Global Team

Client Categories

Social Infrastructure

Overview of the Project



Leveraging Global Teams

- End-to-end delivery—from requirements definition to development and operations—by Japan–Vietnam agile teams
- Continuous post-release improvement through agile practices

Covered Areas

Cloud Migration with Global Team

Client Categories

Social Infrastructure

Overview of the Project



Leveraging Global Teams

- Provision of global cloud-specialized resources
- Support for server and database upgrades, refactoring, testing, and deployment

Covered Areas

Modernization with Global Team

Client Categories

Aviation

Overview of the Project



Leveraging Global Teams

- Broad coverage from web UI development to data integration and automated processing
- Shortened development timelines through global delivery

[Expansion of Global Development - IT Development Track Record -]

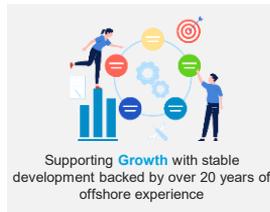
- The Da Nang Development Center has become a core hub for agile development and cloud migration initiatives. It is further evolving into a key base for the development of talent capable of handling advanced IT systems.

Powered by Global Expertise, Delivering Proven Results

A global IT service that comprehensively supports **Value**, **Safety**, and **Growth**—the key drivers of digital transformation (DX).



Accelerating DX for Japanese companies through **Next-generation Offshore Services** that address the shortage of advanced IT talent



[Expansion of Global Development - Global IT Service +Global -]

- By leveraging offshore development in Vietnam—together with agile development and advanced technologies such as AI and data management—we deliver IT system development that addresses the challenges faced by Japanese companies.
- In collaboration with the University of Da Nang and Techzen, a group company with strong agile development expertise, we have established a development framework staffed by advanced IT talent trained in accordance with Ad-Sol Nissin's quality and education standards.
- Through a hybrid approach combining Ad-Sol Nissin's consulting and solution capabilities, we propose well-balanced solutions aligned with clients' goals, optimizing quality, development speed, and cost efficiency.
- Service website: <https://adniss.jp/sol-top/plusglobal.html> (Only in Japanese)

04

FY'26/3 Operating Results Forecast / Dividend Forecast

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I will now explain our operating results forecast for the fiscal year ending March 31, 2026, based on these growth strategies.

Achieving record-high sales and profits for three consecutive terms

- Ongoing digital transformation driven by digital and AI initiatives
- In addition to strategic investments in AI initiatives and solution development, we will proceed with planned talent investments, including compensation and development, to drive growth from the next fiscal year onward.

(Million Yen)	FY'25/3 Results	Initial Forecast Announced in May 2025	Revised Forecast Announced in Oct. 2025	Revised Forecast Increase/Decrease YoY	Revised Forecast Ratio of Change(%) YoY
Net sales	15,463	16,400	17,100	1,636	10.6
Operating income	1,710	1,900	2,100	389	22.7
Operating income margin (%)	11.1	11.6	12.3	1.2P	-
Ordinary income	1,766	1,950	2,160	393	22.3
Ordinary income margin (%)	11.4	11.9	12.6	1.2P	-
Net income attributable to owners of parent	1,209	1,260	1,400	190	15.7
Net income margin (%)	7.8	7.7	8.2	0.4P	-
Annual Dividend (Yen) ^{*1,2}	30	37	46	16	-

*1 The dividend forecast was revised on December 17, 2025, to include a commemorative dividend for the Company's 50th anniversary.
*2 The annual dividend amount for the fiscal year ended March 2025 is shown after taking into account stock splits.

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[Full-year Forecasts / Announcement of a Commemorative Dividend]

■ Operating Results Forecast

- No change from the forecast announced on October 22, 2025.
We have made steady progress, in line with expectations, toward delivering record-high performance for the third consecutive period.
- Demand for digital transformation initiatives continues, particularly in the energy and service (payments and card) sectors, driven by the key themes of digitalization and AI.
- We will proceed with planned talent investments, including compensation and development, to drive growth from the next fiscal year onward.

■ Dividend Forecast

- Announced the implementation of a 50th anniversary commemorative dividend of 5 yen in December 2025.
- Annual dividend for FY'26/3
→ Significant dividend increase to 46 yen expected (up 16 yen YoY)
- Dividend is expected to increase for 16 consecutive terms.



Appendix

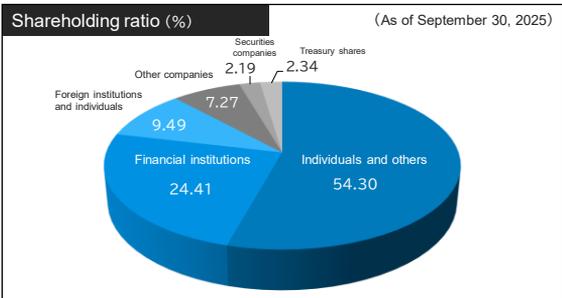
Company Profile

Company Profile	
Corporate Name	Ad-Sol Nissin Corporation
Head Office	Rivarge Shinagawa 4-1-8 Konan Minato-ku, Tokyo 108-0075
Branch	Osaka, Fukuoka, Nagoya, Sendai, San Jose (USA)
Establishment	March 13, 1976
Representative	Tomizo Ueda, Chairman and CEO Toshiaki Shinozaki, President and COO
Number of employees	Consolidated : 676 (as of April 1, 2025)
Sales	15.46 billion yen (FY'25/3)
Listing Market	Tokyo Stock Exchange Prime Market Stock code: 3637
Shares outstanding	17,889,930 shares (As of September 30, 2025)
Affiliated Company	Domestic Ad-Sol Asia Corporation. (Offshore development base: Vietnam) USA Adsol-Nissin San Jose R&D Center, Inc.

Our Mission

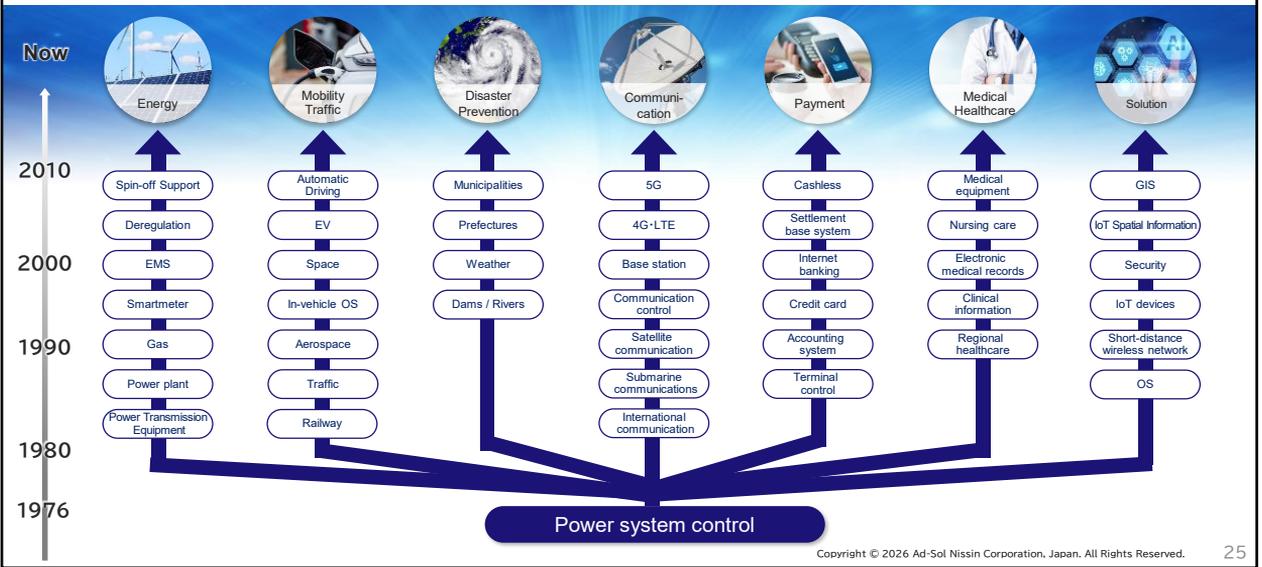
Corporate Philosophy

At Ad-Sol Nissin, by creating and providing high value-added services, we contribute to customer satisfaction and the development of a prosperous society.



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Expansion and Evolution of Business Domains



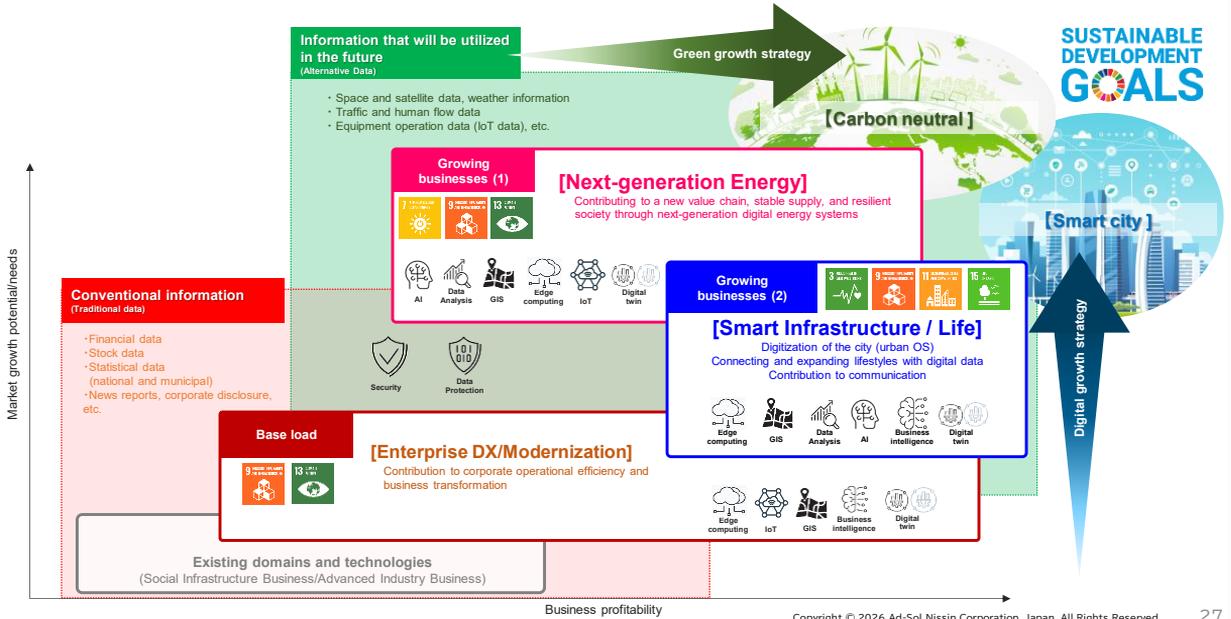
Global Expansion

Provide cutting-edge DX solutions by fully utilizing the global Ad-Sol network.



Framework for the Medium-term Business Strategy

(Evolution and Expansion of Business Areas, and Expansion and Enhancement of DX Solutions)



Challenges in new core businesses

NEW

For consumers: Challenge to new business, co-creation with new players

Micro Grid / Energy Management



Smart city



Mall



Data center



Factory

POINT
Alliance / Consulting
Analysis & Management

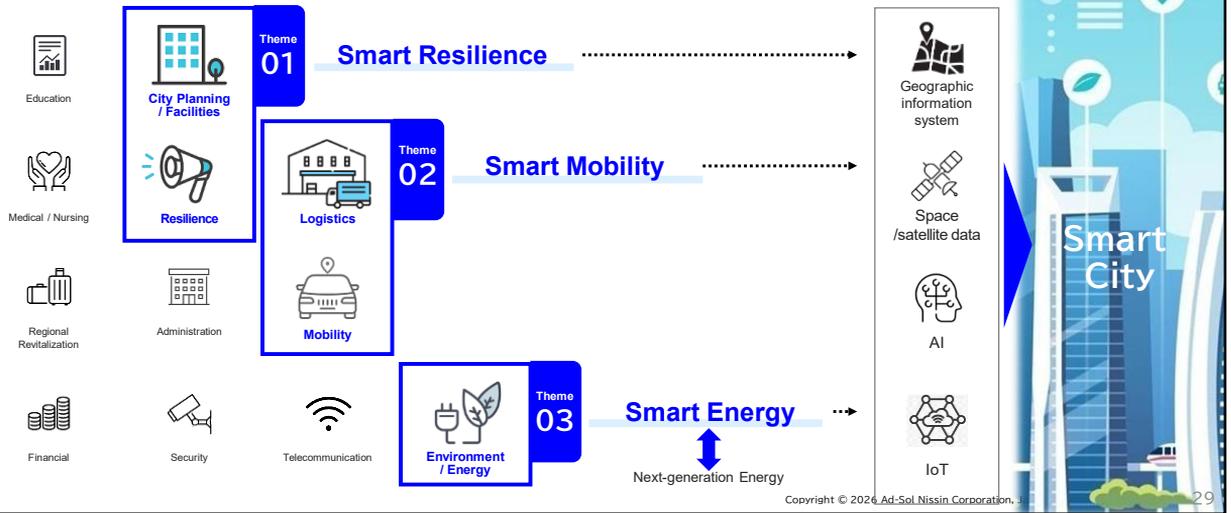
Major Energy Companies Next generation of the existing energy infrastructure



Concentrating on three themes that support **smart city infrastructure**

Overall theme of Smart City (created by Ad-Sol Nissin) and the themes we are focusing on

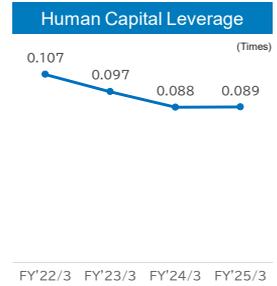
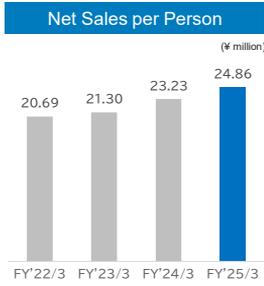
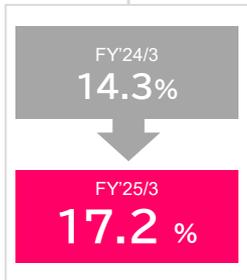
Technology



Implement strategies to enhance each indicator to achieve a **22% ROE**

— Ad-Sol's Unique Breakdown Formula —

$$ROE = \frac{\text{Net Income}}{\text{Net Sales}} \times \frac{\text{Net Sales}}{\text{Number of Employees}} \times \frac{\text{Number of Employees}}{\text{Shareholders' Equity}^*}$$



— Aiming to further improve net sales and income margin —

Continue to explore value enhancement strategies by leveraging human capital.

* Average Shareholders' Equity

Point
01 San Jose R&D Center



Promoting cutting-edge R&D in Silicon Valley

Our employees and U.S. engineers work together to promote the research and investigation of the latest technologies.

Global HQ for IoT Security

We focus on the research and development of cutting-edge IoT security solutions and on strengthening our technical capabilities. We are providing full deployment support to manufacturers and infrastructure companies in Japan.

Point
02 The AI Research Institute



Leading our DX business through AI technology

The AI Research Institute is focusing on research on advanced AI technology, the construction of AI systems, and the development of AI engineers in order to contribute to our clients' DX and business transformation.

Cutting-edge AI research activities

We are participating in an AI quality improvement project by the National Institute of Advanced Industrial Science and Technology. In addition, we have started joint research with the University of Tokyo related to the utilization of space/satellite data for the purpose of developing space IT personnel and space innovation. As part of this, we are fully supporting the university's new course in the AI/IoT field.

Point
03 Industry-academia collaboration



The creation of innovation and new key technologies

We contribute to the development of a prosperous society through industry-academia collaboration, joint research, and academic activities.

- The University of Tokyo (Space and satellite data utilization),
- Waseda University (EMS: energy management system),
- Keio University (GIS: geographic information system)
- Ritsumeikan University (IoT Security)

Point
04 Patents



Promoting patenting of proprietary technologies

In order to strengthen and expand our competitive advantage through the creation of new key technologies, we are actively working on intellectual property relating to our proprietary technologies, including new technologies acquired through research and development activities and our accumulated know-how.

Strengthening of **space × AI talent & AI business development.**, centered on the AI Research Institute

Graduate School of Engineering, The University of Tokyo
Joint Research on **Space/Satellite Data x AI**



● Overview of the collaboration

- We have been cooperating with the Practical Space Data Utilization lecture at the Graduate School of Engineering, the University of Tokyo, since 2022, utilizing our knowledge of AI and IoT.
- In addition to explanations of cutting-edge technologies, including generative AI, we offer lectures utilizing PBL (Problem-Based Learning).



▲ Exhibiting at GEO EXPO 2025 on July 2, 2025

Space Data Exploration Workshop

On July 25–26, 2025, the Space Data Exploration Workshop was held at Cross U, a co-creation platform for space business.

This hands-on program was primarily designed for high school students and focused on the practical use of satellite data. In addition to lectures, workshops were conducted to help nurture the next generation of IT professionals in the space sector.



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List of our Solution

GIS geographic information system	 COCOYA	Store information mapping service
	 DOCOYA	SaaS-type commercial area analysis solution with AI functions
	ArcGIS	Advanced analysis and simulation used by governments, universities, research institutes, etc.
	 mapbox	Development platform for digital maps with excellent visualization
IoT spatial information	 uLocation	On-site management of factories and warehouses through the use of digital data
	 uSIGMA	Seamless visualization of indoor and outdoor location information
Security	 SECURITY	Security upgrading support services to realize Safety and Security
Enterprise Transformation Solutions LeapX	 AgileLeap	Contribute to business transformation and speedy value proposition through digital transformation
	 CloudLeap	Build sustainable and efficient IT systems in the cloud
	 DXDL Leap	Supporting the acceleration and advancement of business transformation through data-driven
AI	 +Aldea	Enabling Trusted and Reliable AI — AI Consulting & Engineering Services
Global	 +Global	A global IT service that comprehensively supports Value, Safety, and Growth—the key drivers of DX

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