電通総研

Presentation Material of Financial Results for the Third Quarter of FY2026 (from January 1, 2026 to September 30, 2026)

Note: This English translation is solely for reference purposes and not a legally definitive translation of the original Japanese text. In the event a difference arises regarding the meaning herein, the original Japanese version will prevail as the official authoritative version.



DENTSU SOKEN INC.

October 30, 2026

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Summary for Q3 FY2026

YoY

- Net sales increased +10.4% year on year, driven by Financial Solutions, Business Solutions, and Communication IT.
- Operating profit increased +9.9% on higher sales, despite a lower gross profit margin due to weaker Consulting Services and higher SG&A expenses, mainly R&D.

Orders

- Orders received increased +8.7% and order backlog increased +20.7%.

Progress

- Progress against the full-year forecast was net sales at 73.5% and operating profit at 70.2% (Q3 FY2025: net sales 73.5%, operating profit 71.1%).

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Consolidated Results for Q3 FY2026

(Unit: Millions of yen)	Q3 FY2025	Q3 FY2026	YoY		Q3 FY2025 Progress (Vs. full-year actual)	Q3 FY2026 Progress (Vs. full-year forecast)
Net sales	121,151	133,752	+12,601	+10.4%	73.5%	73.5%
Gross profit	43,801	47,997	+4,196	+9.6%	-	-
Gross profit margin	36.2%	35.9%	-0.3pt	-	-	-
Selling, general and administrative expenses	27,524	30,107	+2,583	+9.4%	-	-
Operating profit	16,277	17,890	+1,613	+9.9%	71.1%	70.2%
Operating margin	13.4%	13.4%	-0.0pt	-	-	-
Ordinary profit	16,892	18,559	+1,667	+9.9%	71.5%	71.1%
Profit attributable to owners of parent	11,716	13,115	+1,399	+11.9%	71.6%	72.9%
Number of employees (people)*	4,604	4,860	+256	+5.6%		

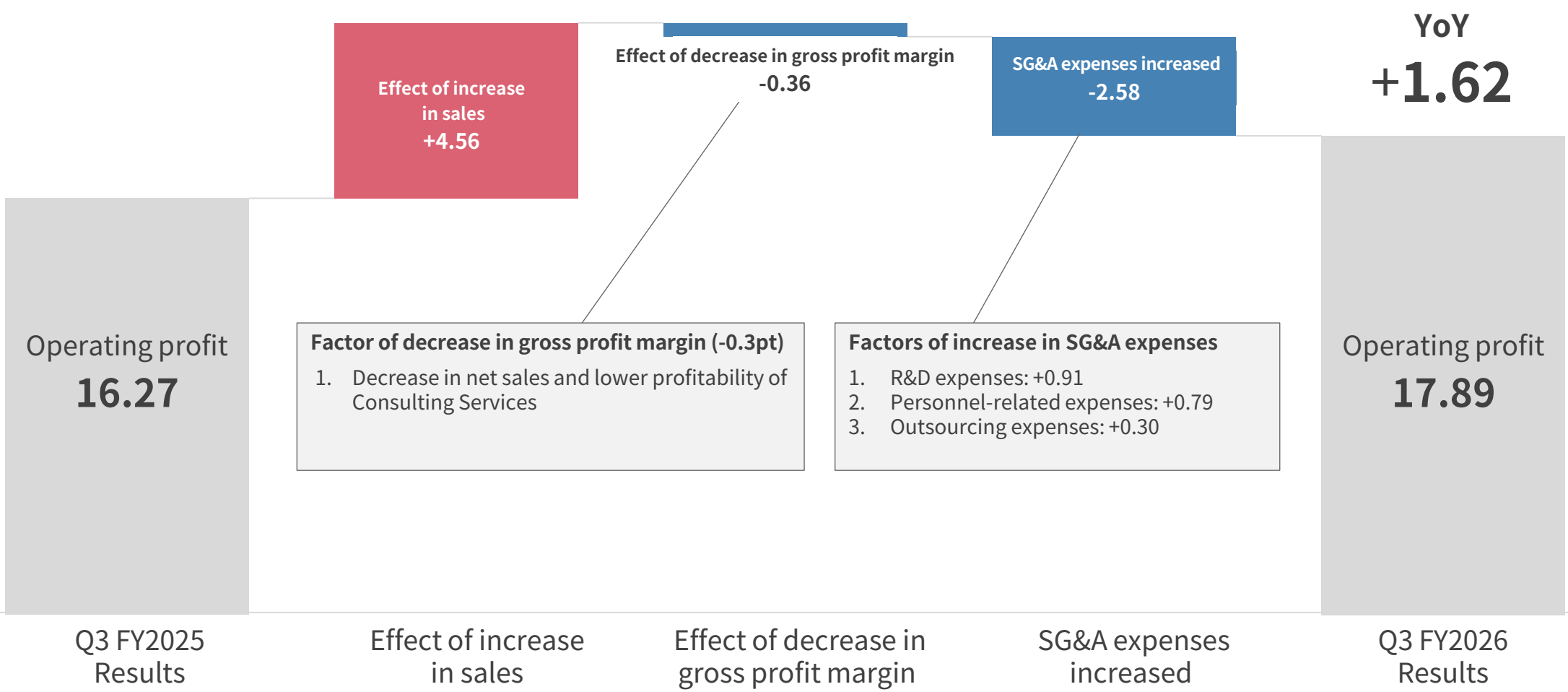
* At the end of the third quarter

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Factors of Increase/Decrease in Operating Profit for Q3 FY2026 [YoY]

- Operating profit increased mainly due to increased sales despite a decline in the gross profit margin and an increase in SG&A expenses.

(Unit: Billions of yen)



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Non-Operating Income/Expenses and Extraordinary Income/Losses for Q3 FY2026

(Unit: Millions of yen)	Q3 FY2025	Q3 FY2026	YoY	
Operating profit	16,277	17,890	+1,613	+9.9%
Non-operating income	650	907	+257	+39.5%
Non-operating expenses	34	237	+203	+597.1%
Ordinary profit	16,892	18,559	+1,667	+9.9%
Extraordinary income	-	20	+20	-
Extraordinary losses	-	20	+20	-
Profit before income taxes	16,892	18,559	+1,667	+9.9%
Total income taxes	5,176	5,452	+276	+5.3%
Profit attributable to non-controlling interests	-	-8	-8	-
Profit attributable to owners of parent	11,716	13,115	+1,399	+11.9%

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Net Sales and Operating Profit by Reportable Segment for Q3 FY2026

(Unit: Millions of yen)		Q3 FY2025	Q3 FY2026	YoY	
Financial Solutions	Net sales	25,240	27,975	+2,735	+10.8%
	Operating profit	3,068	3,819	+751	+24.5%
	Operating margin	12.2%	13.7%	+1.5pt	-
Business Solutions	Net sales	20,317	23,150	+2,833	+13.9%
	Operating profit	4,871	5,516	+645	+13.2%
	Operating margin	24.0%	23.8%	-0.2pt	-
Manufacturing Solutions	Net sales	45,644	46,495	+851	+1.9%
	Operating profit	5,771	4,692	-1,079	-18.7%
	Operating margin	12.6%	10.1%	-2.5pt	-
Communication IT	Net sales	29,949	36,131	+6,182	+20.6%
	Operating profit	2,565	3,861	+1,296	+50.5%
	Operating margin	8.6%	10.7%	+2.1pt	-

FS: [Higher sales & profit] Expanded Custom System Development (trust, mega banks), and BANK R* implementations (government-affiliated, regional financial institutions).
BS: [Higher sales & profit] Expanded implementations of POSITIVE* (trading companies, electric power); STRAVIS* (trading companies, real estate); Ci*X* (food industry).
MS: [Higher sales, lower profit] Declined Consulting (transportation equipment), but net sales increased on expanded ALM* and PLM*. Operating profit decreased due to higher personnel and R&D expenses.
CIT: [Higher sales & profit] Expanded Custom System Development for the Dentsu Group and the transportation industry.

*BANK R: loan solution, POSITIVE: integrated HCM solution, STRAVIS: consolidated accounting solution, Ci*X: integrated group accounting solution, ALM: Application Lifecycle Management, PLM: Product Lifecycle Management

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Net Sales by Service Category and to the Dentsu Group for Q3 FY2026

Net Sales by Service Category

(Unit: Millions of yen)	Q3 FY2025	Q3 FY2026	YoY	
Consulting Services	8,120	6,966	-1,154	-14.2%
Custom System Development	25,381	30,754	+5,373	+21.2%
In-house Software	24,482	28,596	+4,114	+16.8%
Third-party Software	40,425	42,946	+2,521	+6.2%
Outsourcing, Operation and Maintenance Services	15,479	17,255	+1,776	+11.5%
IT Equipment Sales and Others	7,263	7,233	-30	-0.4%

Net Sales to the Dentsu Group

(Unit: Millions of yen)	Q3 FY2025	Q3 FY2026	YoY	
Dentsu Group Inc. and its subsidiaries	16,205	19,186	+2,981	+18.4%

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Consolidated Results for Q3 FY2026 (July-September)

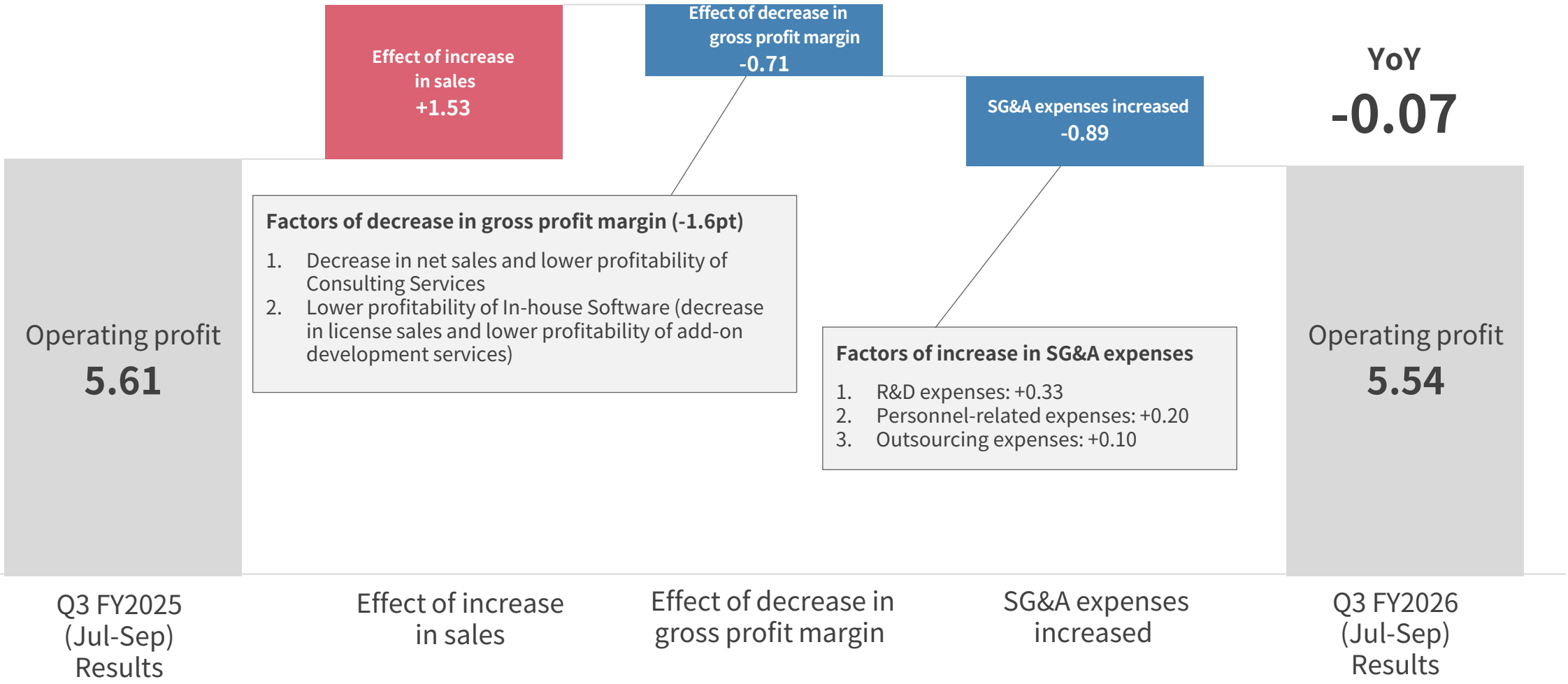
(Unit: Millions of yen)	Q3 FY2025 (Jul-Sep)	Q3 FY2026 (Jul-Sep)	YoY	
Net sales	40,912	45,102	+4,190	+10.2%
Gross profit	15,015	15,844	+829	+5.5%
Gross profit margin	36.7%	35.1%	-1.6pt	-
Selling, general and administrative expenses	9,400	10,296	+896	+9.5%
Operating profit	5,615	5,548	-67	-1.2%
Operating margin	13.7%	12.3%	-1.4pt	-
Ordinary profit	5,783	5,832	+49	+0.8%
Profit attributable to owners of parent	4,031	4,227	+196	+4.9%

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Factors of Increase/Decrease in Operating Profit for Q3 FY2026 (July-September) [YoY]

- Operating profit decreased due to a decline in the gross profit margin and an increase in SG&A expenses, despite the effect of increased sales.

(Unit: Billions of yen)



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Net Sales and Operating Profit by Reportable Segment for Q3 FY2026 (July-September)

(Unit: Millions of yen)

		Q3 FY2025 (Jul-Sep)	Q3 FY2026 (Jul-Sep)	YoY	
Financial Solutions	Net sales	8,884	9,485	+601	+6.8%
	Operating profit	1,163	1,273	+110	+9.5%
	Operating margin	13.1%	13.4%	+0.3pt	-
Business Solutions	Net sales	7,211	7,523	+312	+4.3%
	Operating profit	1,940	1,490	-450	-23.2%
	Operating margin	26.9%	19.8%	-7.1pt	-
Manufacturing Solutions	Net sales	14,642	15,505	+863	+5.9%
	Operating profit	1,649	1,505	-144	-8.7%
	Operating margin	11.3%	9.7%	-1.6pt	-
Communication IT	Net sales	10,173	12,588	+2,415	+23.7%
	Operating profit	861	1,278	+417	+48.4%
	Operating margin	8.5%	10.2%	+1.7pt	-

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Net Sales by Service Category and the Dentsu Group for Q3 FY2026 (July-September)

Net Sales by Service Category

(Unit: Millions of yen)	Q3 FY2025 (Jul-Sep)	Q3 FY2026 (Jul-Sep)	YoY	
Consulting Services	2,508	2,079	-429	-17.1%
Custom System Development	8,912	10,722	+1,810	+20.3%
In-house Software	8,403	9,445	+1,042	+12.4%
Third-party Software	13,570	14,605	+1,035	+7.6%
Outsourcing, Operation and Maintenance Services	5,282	5,874	+592	+11.2%
IT Equipment Sales and Others	2,235	2,374	+139	+6.2%

Net Sales by the Dentsu Group

(Unit: Millions of yen)	Q3 FY2025 (Jul-Sep)	Q3 FY2026 (Jul-Sep)	YoY	
Dentsu Group Inc. and its subsidiaries	5,664	6,888	+1,224	+21.6%

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Net Sales by Industry for Q3 FY2026

(Unit: Millions of yen)	Q3 FY2025	Q3 FY2026	YoY		Composition ratio Q3 FY2026
Financial	25,132	28,636	+3,504	+13.9%	21.5%
Banks	18,108	20,406	+2,298	+12.7%	15.3%
Other financial institutions	7,024	8,230	+1,206	+17.2%	6.2%
Manufacturing	50,865	52,418	+1,553	+3.1%	39.1%
Transportation equipment	22,650	22,593	-57	-0.3%	16.9%
Electric appliances, Precision instruments	12,325	13,429	+1,104	+9.0%	10.0%
Machinery	7,821	8,081	+260	+3.3%	6.0%
Other products	8,068	8,313	+245	+3.0%	6.2%
Services and public offices	33,385	38,036	+4,651	+13.9%	28.4%
Distributions and others	11,767	14,659	+2,892	+24.6%	11.0%

* As we reviewed some of our client industries, we used reclassified figures for comparison with the same period last year.

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Orders Received and Order Backlog for Q3 FY2026

- Q3 (Jul-Sep) orders received: -14.3% YoY, due to large orders for Third-party Software (subscription contracts) in Manufacturing Solutions in Q3 FY2025.

(Unit: Millions of yen)	Orders Received						Order Backlog		
	Q3 FY2025 (Jul-Sep)	Q3 FY2026 (Jul-Sep)	YoY	Q3 FY2025	Q3 FY2026	YoY	As of September 30, 2025	As of September 30, 2026	YoY
Reportable segment	47,823	41,001	-14.3%	137,870	149,873	+8.7%	76,577	92,461	+20.7%
Financial Solutions	9,368	10,009	+6.8%	28,921	32,471	+12.3%	12,298	17,311	+40.8%
Business Solutions	6,170	5,362	-13.1%	22,592	20,924	-7.4%	9,453	9,696	+2.6%
Manufacturing Solutions	24,768	14,337	-42.1%	54,890	53,672	-2.2%	37,880	42,811	+13.0%
Communication IT	7,516	11,291	+50.2%	31,466	42,805	+36.0%	16,945	22,641	+33.6%
Service category	47,823	41,001	-14.3%	137,870	149,873	+8.7%	76,577	92,461	+20.7%
Consulting Services	2,262	2,078	-8.1%	8,010	7,004	-12.6%	2,131	1,720	-19.3%
Custom System Development	9,276	9,927	+7.0%	28,377	32,741	+15.4%	8,682	10,423	+20.1%
In-house Software	7,006	7,817	+11.6%	27,262	28,484	+4.5%	11,950	13,744	+15.0%
Third-party Software	23,050	14,698	-36.2%	51,102	55,979	+9.5%	40,819	51,779	+26.9%
Outsourcing, Operation and Maintenance Services	4,248	4,356	+2.5%	16,603	18,592	+12.0%	7,617	7,782	+2.2%
IT Equipment Sales and Others	1,979	2,122	+7.2%	6,514	7,071	+8.6%	5,377	7,010	+30.4%

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Note: Forecasts of business results in this document are based on judgments and assumptions made in light of industry trends, customer conditions, and other information currently available, and are not intended as a guarantee that they will be achieved. Actual results may differ from these forecasts due to uncertainties inherent in forecasts, changes in internal and external conditions, and other factors.

Forecast for FY2026

- There are no changes from the announcement on February 12, 2026. An impairment loss on non-current assets (including goodwill and customer-related assets) of our consolidated subsidiary Mitsue-Links Co., Ltd. may need to be recorded; whether it will be recorded, its likelihood, and its amount are undetermined at this time.

Full year

(Unit: Millions of yen)	FY2025 (Full Year)	FY2026 (Full Year)	YoY	
Net sales	164,865	182,000	+17,135	+10.4%
Operating profit	22,888	25,500	+2,612	+11.4%
Operating margin	13.9%	14.0%	+0.1pt	-
Ordinary profit	23,618	26,100	+2,482	+10.5%
Profit attributable to owners of parent	16,365	18,000	+1,635	+10.0%

Q4 (Full-year forecast − Q3 actual)

(Unit: Millions of yen)	Q4 FY2025 (Oct-Dec)	Q4 FY2026 (Oct-Dec)	YoY	
Net sales	43,713	48,247	+4,534	+10.4%
Operating profit	6,611	7,609	+998	+15.1%
Operating margin	15.1%	15.8%	+0.7pt	-
Ordinary profit	6,725	7,540	+815	+12.1%
Profit attributable to owners of parent	4,648	4,884	+236	+5.1%

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Timely Disclosures Regarding the Tender Offer

Disclosed on August 28, 2026

- **Notice Regarding Expression of Opinion in Support of the Planned Commencement of, and Recommendation to Tender Shares in, the Tender Offer for Company Shares by G.K. VIC**

- **Notice of Revision of Dividend Forecast for Fiscal Year Ending December 2026 (No Dividend)**

Disclosed on August 31, 2026

- **(Correction) Partial Correction to the “Notice Regarding Expression of Opinion in Support of the Planned Commencement of, and Recommendation to Tender Shares in, the Tender Offer for Company Shares by G.K. VIC”**

Disclosed on October 30, 2026

- **Notice Regarding Expression of Opinion in Support of, and Recommendation to Tender Shares in, the Tender Offer for Company Shares by G.K. VIC**

* For details of the above timely disclosures, please refer to IR News on our website.

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