

Mid-term Business Plan (FY2026/3-FY2028/3)

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TOKYO SEIMITSU CO., LTD.

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- Tokyo Seimitsu has established the Three-year Mid-term Business Plan (hereinafter referred to as MTP) which ends in FY2028/3. Today, I would like to explain about an outline of this MTP.

Agenda

- Review of Previous Mid-term Business Plan (MTP)
- Tokyo Seimitsu's Purpose and Long-term Vision
- Positioning, Policy, and Quantitative Target of MTP FY2026/3-FY2028/3
- Business Opportunity per Segment in MTP FY2026/3-FY2028/3
- Sustainability Management for MTP FY2026/3-FY2028/3

- My agenda today is shown on page 2.
- First, I would like to review previous MTP from FY2023/3 to FY2025/3, and as our long-term picture, I will explain the Purpose and our long-term vision.
- Then, I will introduce the positioning, basic policies and quantitative targets of the MTP, the business opportunities, and lastly, our sustainability initiatives that form the basis of the MTP.

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- First, I will review the results of previous MTP.

Review of Previous MTP – Quantitative Targets

Sales, OP (and OP Margin) were below MTP targets owing to slower-than-expected consumer demand.

3-years average ROE reached targets of 15%.

Recorded historical sales and net profit in FY2025/3, OP in FY2023/3.

	FY2022/3 Results ^(*)	FY2023/3- FY2025/3 MTP Target	FY2023/3 Results	FY2024/3 Results	FY2025/3 Results	Reviews
Sales	¥130.7B SPE ¥101.1B Metr. ¥29.6B	¥170.0B SPE ¥132.0B Metr. ¥38.0B	¥146.8B SPE ¥112.4B Metr. 34.4B	¥134.6B SPE ¥100.1B Metr. ¥34.6B	¥150.5B SPE ¥113.5B Metr. ¥37.1B	<ul style="list-style-type: none">● SPE Sales : Sales were below than MTP targets mainly owing to sluggish growth in consumer demand, but HPC-related including Gen. AI (logic, HBM, etc.) and demand in China., supported recording the previous peak.● Metrology Sales : Despite wane trend in both the manufacturing market and demand for NEVs, sales increased due to diversification of sales into growth industries and product price revisions, reaching an all-time peak.● OP : Sales increase supported reaching historical peak in FY2023/3 (OP margin met MTP targets) but there was headwind from higher component procurement costs and expenditures.● ROE : 3-years average ROE was above MTP target.
Operating Profit (OP)	¥28.5B SPE¥24.7B Metr. ¥3.6B	¥37.5B	¥34.5B SPE ¥29.9B Metr. ¥4.6B	¥25.3B SPE ¥19.9B Metr. ¥5.4B	¥29.7B SPE ¥24.3B Metr. ¥5.4B	
OP Margin	22% SPE 24% Metr. 12%	22%	23% SPE 27% Metr. 13%	19% SPE 20% Metr. 16%	20% SPE 21% Metr. 15%	
ROE	17%	15% or more	3-years average 15% ^{(*)2}			

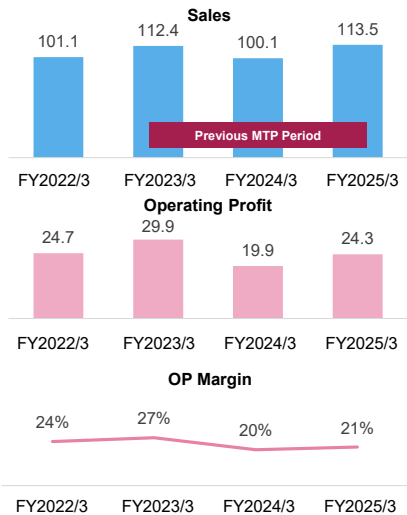
(*) Effective from FY2023/3, income and expenses of foreign subsidiaries are converted to Japanese Yen using the average rate during the period, instead of the previous end-of-period rate. Accordingly, the figures for FY2022/3 shown in this page are retroactively applied to the average rate for the period.

(*) 3-years average ROE = Net profit attributable of the parent (average for FY2023/3-FY2025/3) ÷ Shareholder's Equity (average for FY2022/3-FY2025/3)

- Page 4 shows the previous MTP targets and actual results. The highlighted figures are the peak figures during the period.
- In terms of sales, SPE sales fell short of MTP target mainly owing to sluggish demand for consumer applications, which had been a growth driver, but demand for HPC-related, including Gen. AI related devices (such as AI Logic devices and HBM), and demand from China drove sales, and exceeded historical peak in FY2025/3.
- In terms of Metrology, while new investment demand across the manufacturing market remained sluggish, diversification of sales and other factors enabled this segment to also surpass the previous peak in the FY2025/3.
- OP margin achieved the target in the FY2023/3, but rising material costs and labor expenses put pressure on profit growth.
- ROE achieved the target of 15% on a three-year average basis.

Review of Previous MTP – SPE Segment

Revenue peaked in FY2023/3, and profit peaked in FY2023/3. The increased semis' functionality and complexity created certain opportunities, but limited ones from unit growth and SiC.

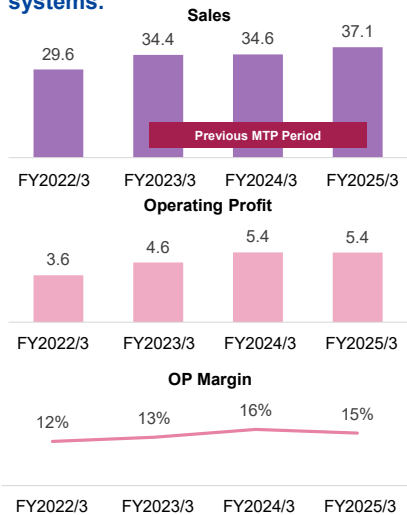


Premises	Our Opportunities	Reviews
<ul style="list-style-type: none"> ● Increase in device functionality and complexity ● Increase in more reliable devices 	<ul style="list-style-type: none"> ● Increase test importance ● Testing-time expansion ● Testing conditions widening 	<ul style="list-style-type: none"> ● Test importance increased ● Testing-time extended (Miniaturization, Bit Growth, and number of tests) ● High precision temperature control became the focusing technology
<ul style="list-style-type: none"> ● Stable Semis unit growth (mass production and consumption) 	<ul style="list-style-type: none"> ● Evolution of 3D Packages ● Increase in Assembly SPE demand 	<ul style="list-style-type: none"> ● Demand for packaging centered on AI has increased, benefiting assembly equipment. ● Testing demand also increased ● Stagnation in consumer applications; Weaker than expected market performance
<ul style="list-style-type: none"> ● Evolution of SiC/GaN Power devices for Carbon neutrality 	<ul style="list-style-type: none"> ● Market Expansion ● New assembly processing ● Reliability-first testing 	<ul style="list-style-type: none"> ● Secured certain demand, it slowed down after FY2024/3
<ul style="list-style-type: none"> ● Increasing demand for device testing and processing accuracy 	<ul style="list-style-type: none"> ● Synergy with our Metrology Products 	<ul style="list-style-type: none"> ● Unveiled "Prober w/Optical Microscope", and "Dicer w/Optical Microscope" products to market

- Page 5 reviews the SPE business.
- The left side shows the trends in Sales, Operating profit, and OP margin, while the right side shows the market premises at of the MTP has made, the Company's business opportunities, and a review of those opportunities.
- The increasing device functionality and complexity (top row) and the increasing demand for device testing and processing accuracy (bottom row) have created certain business opportunities for the Company's SPE business.
- On the other hand, the increase in assembly equipment demand given a stable Semis unit growth and an evolution in power semis as SiC provided limited us limited efforts.

Review of Previous MTP – Metrology Segment

With limited new investment in the manufacturing market and a slowdown in the transition to NEVs, sales increased for three consecutive years through expansion of target markets and development of charge/discharge testing systems.



Premises	Our Opportunities	Reviews
<ul style="list-style-type: none"> Expansion of NEV and renewable energy market toward carbon neutrality 	<ul style="list-style-type: none"> Change in materials or components toward NEVs Increase in demand for high precision measurement Battery testing for NEVs 	<ul style="list-style-type: none"> Slower NEV transition than expected Business opportunity for battery testing increased
<ul style="list-style-type: none"> Manufacturing automation trend 	<ul style="list-style-type: none"> Combination of robot + measuring instruments High precision parts measuring to all parts 	<ul style="list-style-type: none"> Certain business opportunities obtained Expect a growth in the market
<ul style="list-style-type: none"> Expansion of non-automotive market (Semis, Aerospace, Medical, Robots) 	<ul style="list-style-type: none"> Semis (non-contact) Core parts for Aerospace machines (High precision) Collaborative Robots 	<ul style="list-style-type: none"> Obtained business opportunities in various fields It was also supported by government subsidy policies

- Page 6 reviews the Metrology business.
- In the measurement market, we had anticipated the early expansion of the NEV and renewable energy markets.
- Looking back, while the transition to NEVs has been slower than anticipated, we have secured increased business opportunities in charge/discharge testing systems, as well as demand from automation trends in manufacturing and non-automotive sectors, achieving three consecutive years of sales growth.

Review of Previous MTP – Company-wide actions

Results were largely in line with plans, establishing a platform for the MTP for FY2026/3 – FY2028/3.

Item	Initiatives	Reviews
R&D	<ul style="list-style-type: none"> Reinforce development of leading-edge technologies and customer needs 	<ul style="list-style-type: none"> Total R&D costs during the period : ¥27.9B Developed and deployed core products for next MTP <ul style="list-style-type: none"> Prober w/ High precision temperature control High-end Grinding machines Charge/discharge battery testing systems
Expand MFG capacity	<ul style="list-style-type: none"> Launch the <i>Hanno</i> Plant (<i>Saitama</i>, Japan) 	<ul style="list-style-type: none"> Total Capex during the period : ¥31.6B Secured SPE capacity of ¥140.0B+α per year <ul style="list-style-type: none"> Launched Hanno Plant Renovated existing Hachioji Plant Commenced construction of Nagoya plant (ready in July, 2025)
Environment	<ul style="list-style-type: none"> Decrease CO₂ emissions by 50% at CY2030 from FY2019/3 ; Investment also to be considered 	<ul style="list-style-type: none"> Adopted CO₂-free electricity at major plants Reduction of CO₂ emissions at existing plants^(*) by approximately 40% compared to FY2019/3
KPIs for investment	<ul style="list-style-type: none"> Consider adopting ROIC for assessment to investment opportunities 	<ul style="list-style-type: none"> Applied ROIC assessment per segment from FY2023/3
Application enhancement	<ul style="list-style-type: none"> Strengthen demonstration capacity world-wide 	<ul style="list-style-type: none"> New facilities or expanded line-up of demo-equipment at 5 sites
Non-financial initiatives (ESG initiatives)	<ul style="list-style-type: none"> Strengthen ESG initiatives 	<ul style="list-style-type: none"> Strengthening human rights activities and supply chain CSR activities Strengthening initiatives for human assets ESG score improved (MSCI: BB → A, FTSE 3.1 → 3.57) ^(*)

(*) Scope: Plants holding by a parent company (Tokyo Seimitsu), excluding *Hanno* plant (launched in FY2024/3) and *Furudono* plant (transferred in FY2025/3)
(**) Changes from June 2022 to June 2024

- Page 7 provides a review of the Company-wide actions.
- In terms of R&D activities, we invested ¥27.9B during the MTP period and developed/launched new products that will form the core of our next MTP, including Prober with high-precision temperature control function, High-end grinding machines, charge/discharge battery testing systems.
- In terms of manufacturing capacity expansion, we invested ¥31.6B during the period and completed the construction of the Hanno Plant, consequently, we increased annual SPE manufacturing to ¥140.0B + α. Additionally, we commenced construction of the Nagoya Plant in preparation for future growth.
- Other initiatives, including environmental investments, KPIs for investment, application enhancement, and non-financial initiatives, are detailed as outlined.

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- Next, I would like to explain our Purpose and Long-term Vision.
- This information is also contained in the Integrated Report.

Tokyo Seimitsu's Purpose

We aim to realize a “future full of dreams” through the fusion of technology, wisdom, and information from all over the world by deeply focusing on the technology inherited since the Company’s founding and inheriting the “soil to cultivate technology and achieve innovation”



- Our Purpose, showing in this page, is “Gaging the Future with Metrology, Creating the Future with Semiconductors”.
- Since our foundation in 1949, the Company has been providing equipment with advanced measurement technology, which it has also utilized in SPE.
- The Company, which is the only SPE manufacturer with a Metrology business” makes us unique and serves as the source of our strength.
- Our aim to realize a “future full of dreams” through the fusion of technology, wisdom, and information from all over the world and inheriting the “soil to cultivate technology and achieve innovation”.
- is to achieve a future of dreams through the fusion of technology, wisdom and information from all over the world, and by maintaining our "soil for pursuing technology and achieving technological innovation".

Tokyo Seimitsu Group Long-term Vision 2050

Tokyo Seimitsu Group Long-term Vision 2050

**Pioneer a Future that We Have Yet to Experience Using
Advanced Technology and Our High Level of Creativity**



- Page 10 describes our Long-term Vision 2050.
- We formulate the to ensure that we continue to change and grow in response to times of uncertainty and changes in the business environment, and we are identifying the actions we need to take and examining our growth strategy.
- The MTP I explain today is defined as the first phase of realizing the items in this vision, especially those to be acquired or strengthened over the next 10 years.

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- Next, I would like to explain about Positioning, Policy, and Quantitative Target of MTP.

Positioning of the MTP (FY2026/3-FY2028/3)

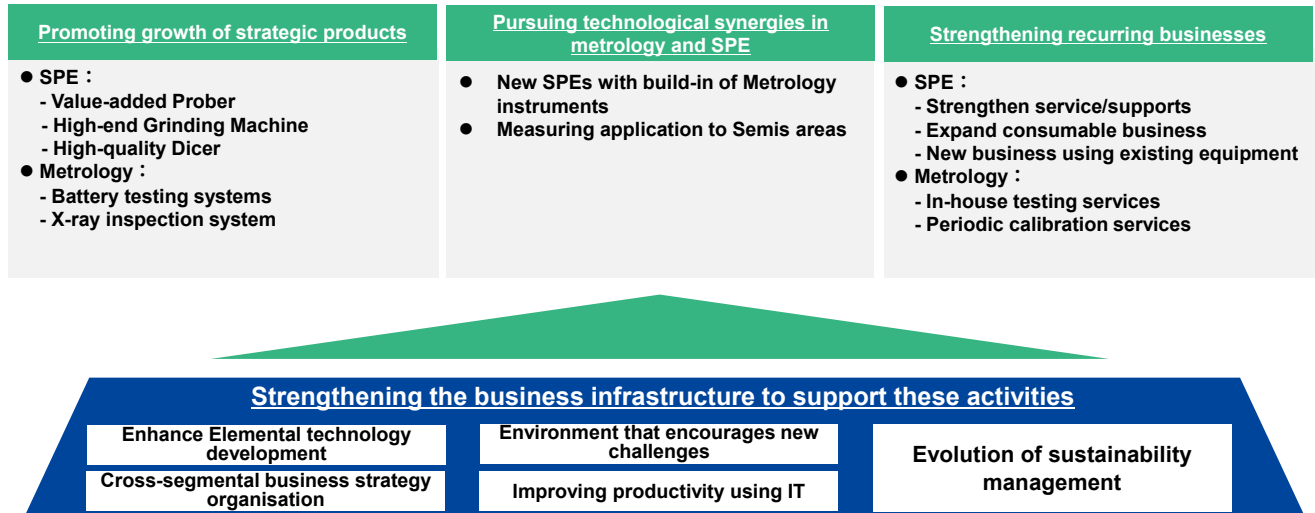
The MTP (FY2026/3-FY2028/3) aims to achieve both “preparation for long-term growth” and “growth during the period.”



- Page 12 shows the positioning of the MTP.
- The Company aims to establish a position in which, in 10 years, “things cannot be made or measured without our products and services.”
- The previous MTP was “Groundwork” toward that goal.
- Current MTP is positioned as a phase to strengthen activities to solidify the foothold and build the infrastructure necessary to establish the position we aim to achieve in 10 years, also aim to achieve growth during the period.

Policy of the MTP (FY2026/3-FY2028/3)

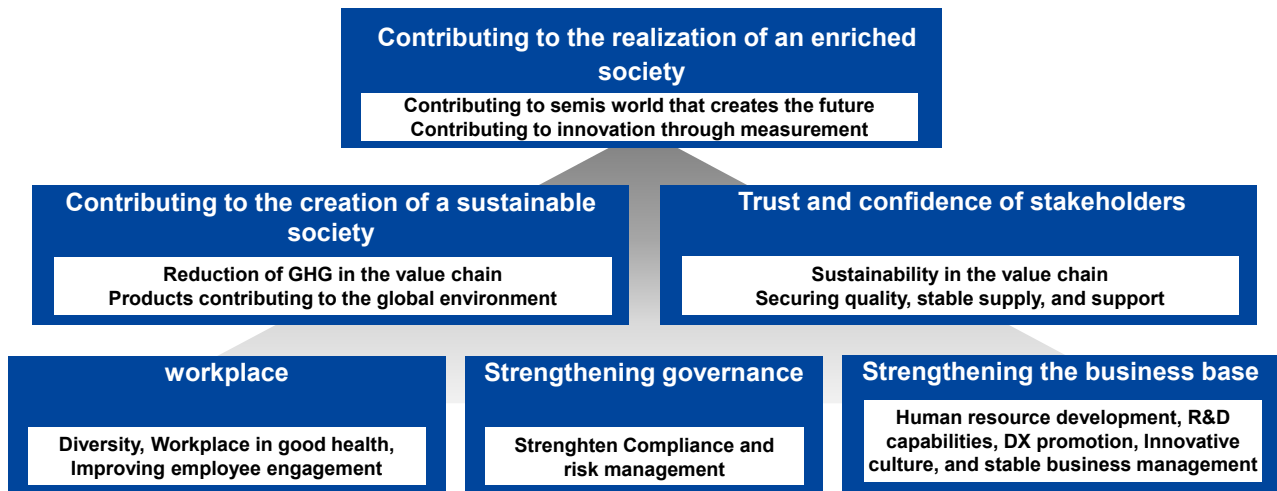
Strengthening both the business and the business infrastructure itself.



- Page 13 outlines the Policy of the MTP.
- The three major policies are “promoting growth of strategic products,” “Pursuing technological synergies in metrology and SPE”, and “strengthening recurring businesses.” The specific details are as described.
- To support these policies, we have established the following five items to strengthen our business foundation.

Tokyo Seimitsu's Materiality

Identified materialities to be addressed to realize the long-term vision and develop them into strategies for the MTP.



- Page 14 summarizes the new materiality identified for the realization of this long-term vision.
- Specifically, it consists of 6 themes and 23 materiality items, and we will contribute to the realization of a prosperous society by achieving them
- Details of the materiality are attached to this document as an appendix.

MTP (FY2026/3-FY2028/3) Quantitative Targets

Approx 20% increase in sales, 50% increase in Operating profits compared to FY2025/3 results have been set.

	FY2025/3 Results	Single FY during MTP period (FY2026/3-FY2028/3)	Premises
Sales	¥150.5B SPE ¥113.5B Metr. ¥37.1B	¥185.0B SPE ¥140.0B Metr. ¥45.0B	<ul style="list-style-type: none"> ● Set as single-year targets (considering market volatility) ● SPE: Outperform the target market's CAGR assumption of +5% ● Metrology: Sustained recovery in market conditions for non-automotive (semis, aerospace, etc.) ● OP : Sales growth (including value-added products) Progress in gross cost reduction, promotion of recurring business ● ROE : Increase in net profit ● Risk Factors : <ul style="list-style-type: none"> ● Uncertainty in consumer application demand ● Geopolitical risks (China's equipment demand, competition, etc.) ● Slowdown in machine tool orders
Operating Profit	¥29.7B SPE ¥24.3B Metr. ¥5.4B	¥45.0B	
OP Margin	20% SPE 21% Metr. 15%	24%	
ROE	15%	15%	

- Page 15 shows the quantitative targets of the MTP. The KPIs set are sales, operating profit, OP margin, and ROE. There are no changes from the previous plan.
- Specifically, net sales are projected to increase by approximately 20% from the FY2025/3 results to ¥185.0B, with breakdown of SPE of ¥140.0B and Metrology of ¥45.0B. Operating profit is projected to increase by approximately 50% from the FY2025/3 results to ¥45.0B, with an OP margin of 24%. ROE is set at 15%, as well as previous MTP.
- We have set targets for one single fiscal year during the period given the volatility of the SPE.
- In SPE, the Company's product market CAGR premise has set to +5%, with the Company outperforming this through its own efforts, and in Metrology, sustained recovery in the target market for measurement products are premised.
- In terms of profitability, not only increasing sales of high-value-added products, advance cost reduction efforts, but also strengthen recurring businesses such as consumable sales to increase Based on these initiatives, we aim to improve the OP margin, increase net profit, and maintain the ROE level.

Cash allocation

Balancing R&D, capital investment and shareholder returns.



R&D

Expect ¥35.0B-¥40.0B over 3 years through strengthening R&D

Including development of strategic products, elemental technologies, synergy technology between Metrology and SPE, and Joint development with third parties



Capex

Except ¥30.0B-40.0B^(*) over 3 years with an eye of future

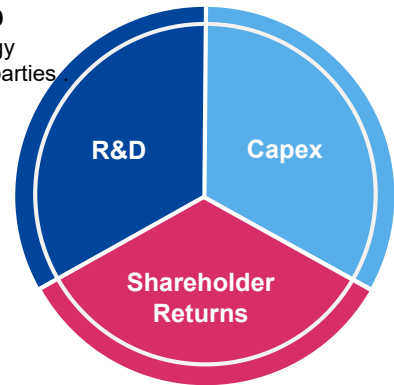
- For growth : *Nagoya* plant, *Hachioji* new plant (acquire land within FY2026/3), South Korea demo center, and battery testing services
- For business base: IT, operational efficiency, and for ESG



Shareholder returns

Target dividend payout ratio : 40%

Regard share buyback as a flexible profit return policy that complements the payment of dividends



(*) Subject to change due to construction progress

- Page 16 explains cash allocation based on quantitative targets
- R&D expenditure will be limited to 10% of sales, with a cumulative total of ¥35.0B to ¥40.0B over three years, to be used for the development of strategic products and core technologies, the development of synergistic technologies for Metrology and SPE, and the promotion of joint R&D with third parties.
- Capex will be used for both growth investment and strengthening the business foundation. Regarding growth investment, this fiscal year, we will acquire land for the construction of a new factory in Hachioji, Tokyo. In addition, we plan to invest a total of ¥30.0B to ¥40.0B over three years in the construction of a factory in Nagoya and a demonstration center in South Korea.
- We plan to maintain an appropriate level of cash and cash equivalents to achieve these goals.
- Regarding shareholder returns, we will maintain our policy of distributing profits primarily through dividends, with a target dividend payout ratio of 40%. Additionally, we will continue to position share buybacks as a flexible profit distribution measure complementary to dividends.

Agenda

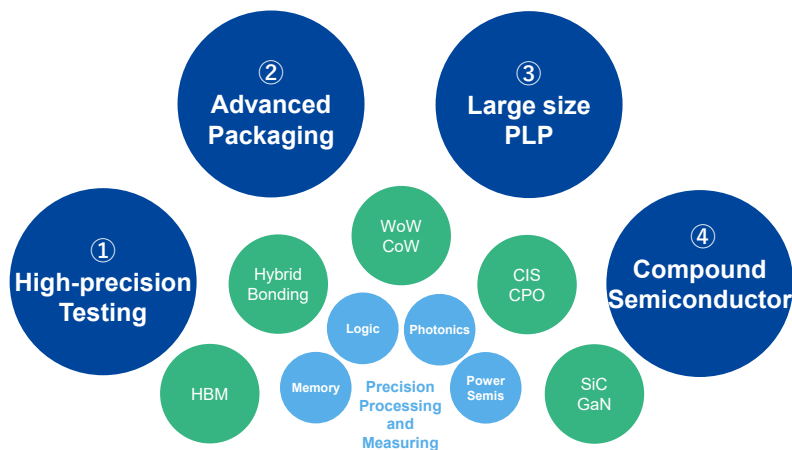
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- Please let me explain our business opportunities per business segment during the MTP.

Business opportunity per segment - SPE

Technological advances in testing and processing are remarkable.

We continue to provide products that meet the latest requirements and offer high added value.



CPO: Co-packaged Optics, WoW : Wafer on Wafer, CoW : Chip on Wafer, HBM: High Bandwidth Memory

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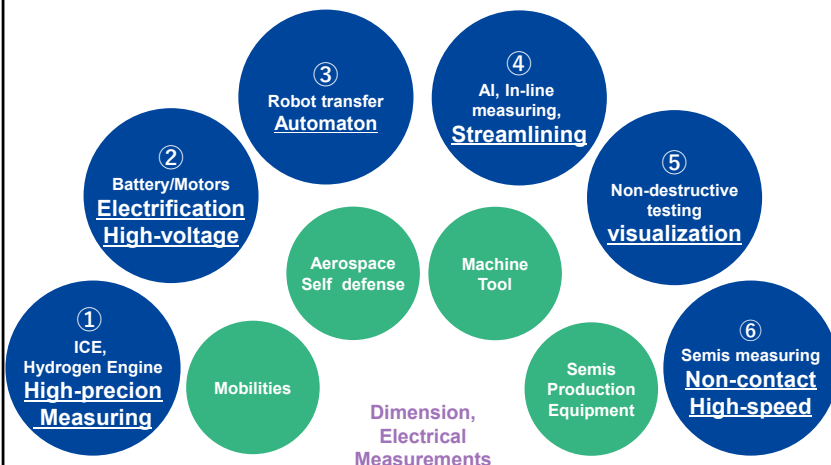
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- ① High-precision testing
 - High-precision temperature control during testing
- ② Advanced Packaging
 - High-end dicing
 - Increase in processes and requirements toward grinding
 - Increase in testing demands through increase in chips
 - High-end egde-trimming
- ③ Large size PLP
 - Grinding and dicing for large substrates
 - PLP direct probing
- ④ Compound semiconductor
 - Non-silicon substrate grinding

- Page 18 explains business opportunities in SPE.
- This diagram shows the Company's core technologies at the center, followed by semiconductor device types, specific technology trends, and the Company's business opportunities.
- As shown in this diagram, the Company's business opportunities are linked to high-precision testing requirements, namely the addition of high value to probers, advanced packaging, large PLP, compound semiconductors, and other high-performance assembly equipment.
- We believe that we can capture these business opportunities by leveraging our core technologies of precision processing and precision measurement.
- In the medium to long term, there is a risk of competition from emerging manufacturers. The Company plans to expand its business by providing high value-added back-end equipment based on its core technologies.
- At this point, we don't expect any major changes to the sales mix during the MTP period, with testing equipment, namely probers making up about 60% and assembly equipment about 40%.

Business opportunity per segment - Metrology

Measurement needs are expanding more than ever before,
The Company will expand its solutions among our equipment meet various measurement needs.



① High-precision measuring for existing technologies

② Electrification of Batteries/Motors

- The necessity of high-end CMMs
- Replacement of equipment due to transition from low to high current
- In-house battery testing service

③ Automation

- Automated transfer from/to machine tools and measuring equipment

④ Streamlining

- Change in measuring requirement due to “on-site testing”
- 24 hours machine tool monitoring

⑤ Visualization

- Non-destructive testing using X-ray CT

⑥ Non-contact, High-speed measuring

- Non-contact surface texture measuring
- Testing of Semis and SPE components
- Built-in to SPE

(Note) CMM: Coordinate Measuring Machine, CT: Computed Tomography

- Page 19 explains business opportunities in Metrology segment.
- When the previous MTP was formulated, demand for ICE accounted for more than half of our business, and growth areas and mature areas were relatively clear for each industry. Therefore, we have formulated strategies tailored to these conditions.
- However, the proportion of ICE has now fallen to around 40%, and measurement needs are becoming increasingly diverse. Therefore, we have decided to adopt a strategy of expanding our solutions without distinguishing between products and industries in order to respond to a wide range of measurement needs.
- In addition to our general-purpose measurement products, automatic measurement products, and charge/discharge testing systems, we will expand our solutions with X-ray CT systems, which we have recently started manufacturing in-house, to meet various needs and expand our business.

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- Lastly, I would like to explain our sustainability management.

Infrastructure to support business

Deepening efforts toward “things that are considered important as factors supporting business development.”

Enhance Elemental technology development	<ul style="list-style-type: none">● Promote innovation through technological exchange between business divisions● Enhance elemental technology development capabilities through deeper industry-government-academia collaboration● Pioneer next-generation technologies
Cross-segmental business strategy organisation	<ul style="list-style-type: none">● Promotion of adopting measuring instruments on SPE● Pursuit of “unique added value” and “differentiation” through technology integration● Promotion of new business planning through a company-wide organization
Environment that encourages new challenges	<ul style="list-style-type: none">● Clarification of technical skill sets and increased motivation to learn new technologies● Implementation of education that fosters innovative ideas● Creation of opportunities for young employees to take on challenges
Improving productivity using IT	<ul style="list-style-type: none">● Promotion of business sophistication and efficiency through IT utilization● Improvement of productivity through production system sophistication● Promotion of information sharing through global IT infrastructure standardization

- As I explained, the Company will engage in proactive activities for future growth.
- In addition, we will actively pursue the initiatives outlined on page 21, which we consider to be important supporting factors.
- In particular, we believe that the development of elemental technologies, as mentioned in the upper section, should be conducted separately from product development and is crucial for future differentiation.
- Furthermore, we will promote an environment that encourages new challenges and efficiency improvements using IT.

Deepening sustainability management

Practicing ESG management that is integral to business development.

E Promotion of corporate activities aimed at carbon neutrality	<ul style="list-style-type: none">● Reducing environmental impact through the provision of our products and services● Reducing GHG emissions in our business activities● Promoting sustainable procurement activities
S Strengthening our corporate stance of utilizing human assets and enhancing social trust	<ul style="list-style-type: none">● Create a workplace environment where employees can maintain physical and mental health and maximize their abilities● Improve employee engagement to increase motivation and strengthen organizational unity● Improve customer satisfaction by providing high-quality products and services
G Strengthening governance as the foundation for fair corporate activities	<ul style="list-style-type: none">● Fostering high corporate ethics and compliance throughout the Group● Promoting timely and appropriate information disclosure● Strengthening risk management

- Page 22 summarizes our ESG-related activity plans.
- Some of the content overlaps with what was explained earlier, but it is also important to implement ESG management that is integral to the development of our business. We will promote the initiatives described above and strive to become a company that achieves more sustainable growth.
- The above is an explanation of our MTP for FY2026/3-FY2028/3. Thank you very much for your attention.

質疑応答 / Q&A

(Appendix) Tokyo Seimitsu Materiality

Theme (Total 6)	Materiality (Total 23)
Contributing to the realization of an enriched society	Creation and provision of products that resolve social issues
	Contributing to semiconductor manufacturing that creates the future and enriches society
	Contributing to innovation in manufacturing through precision measurement
Promotion of business activities that contribute to the creation of a sustainable society	Reduction of greenhouse gas emissions in the value chain
	Creation and provision of products contributing to the global environment
	Optimisation of environmental conservation and resource management
	Realising a circular economy
	Advanced environmental management system
Maintaining and strengthening a corporate attitude that responds to the trust and confidence of stakeholders	Promoting Sustainability in the Value Chain
	Securing product quality and stable supply, and enhancing customer support
	Promotion of stakeholder engagement
Creating a workplace where diverse people can work positively and energetically	Promoting Diversity, Equity, and Inclusion (DE&I)
	Creating a workplace where people can work in good health, both physically and mentally
	Improving employee engagement
Strengthening governance as the basis for fair corporate activities	Strengthening corporate governance
	Strengthening the compliance
	Promotion of risk management
Strengthening the business base	Promotion of human resource development
	Strengthening R&D capabilities
	Management and utilization of intellectual property
	Promotion of digital transformations(DX)
	Creating a corporate culture that supports innovation
	Realization of sustainable and stable business management