



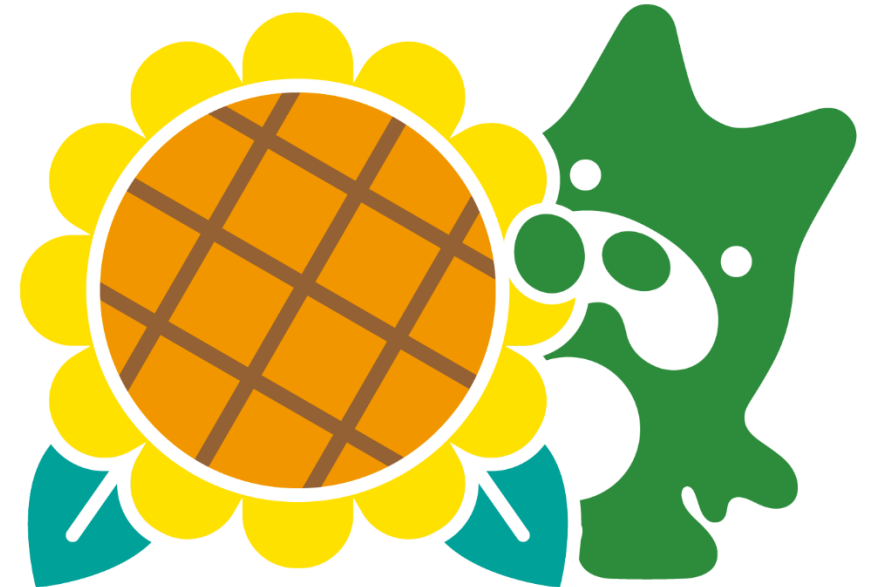
3Q FY2026

PRESENTATION MATERIAL

April to June 2026

ENGLISH

August 7, 2026





[Forward-looking statement]

The future information, such as earnings forecast, written in this document is based on our expectations and assumptions as of the date the forecast was made. Our actual results could differ materially from those described in this forecast because of various risks and uncertainties.

1. Summary (April - June 2026)
2. Forecast
3. Media & IP Business
4. Internet Advertisement Business
5. Game Business
6. Medium to Long-Term Strategy

Summary

FY2026 Third Quarter Ended June 30, 2026

FY2026 Q3

Sales marked a record high for Q3
FY2026 forecast is revised upward largely

Sales **230.6** billion yen up **9.4%** YoY
OP **14.9** billion yen down **23.6%** YoY

Media & IP

Multi-layered revenue streams grew continuously
ABEMA celebrated 10th anniversary
Viewership of its original programs increased

Sales **59.1** billion yen up **5.2%** YoY
OP **2.7** billion yen up **22.1%** YoY

Ad

Sales maintained high growth rate from the previous quarter and reached a record high for Q3
OP grew double digit YoY

Sales **121.3** billion yen up **8.9%** YoY
OP **4.1** billion yen up **14.2%** YoY

Game

Major and casual games performed well
Nine-month OP significantly increased to **50.9** billion yen

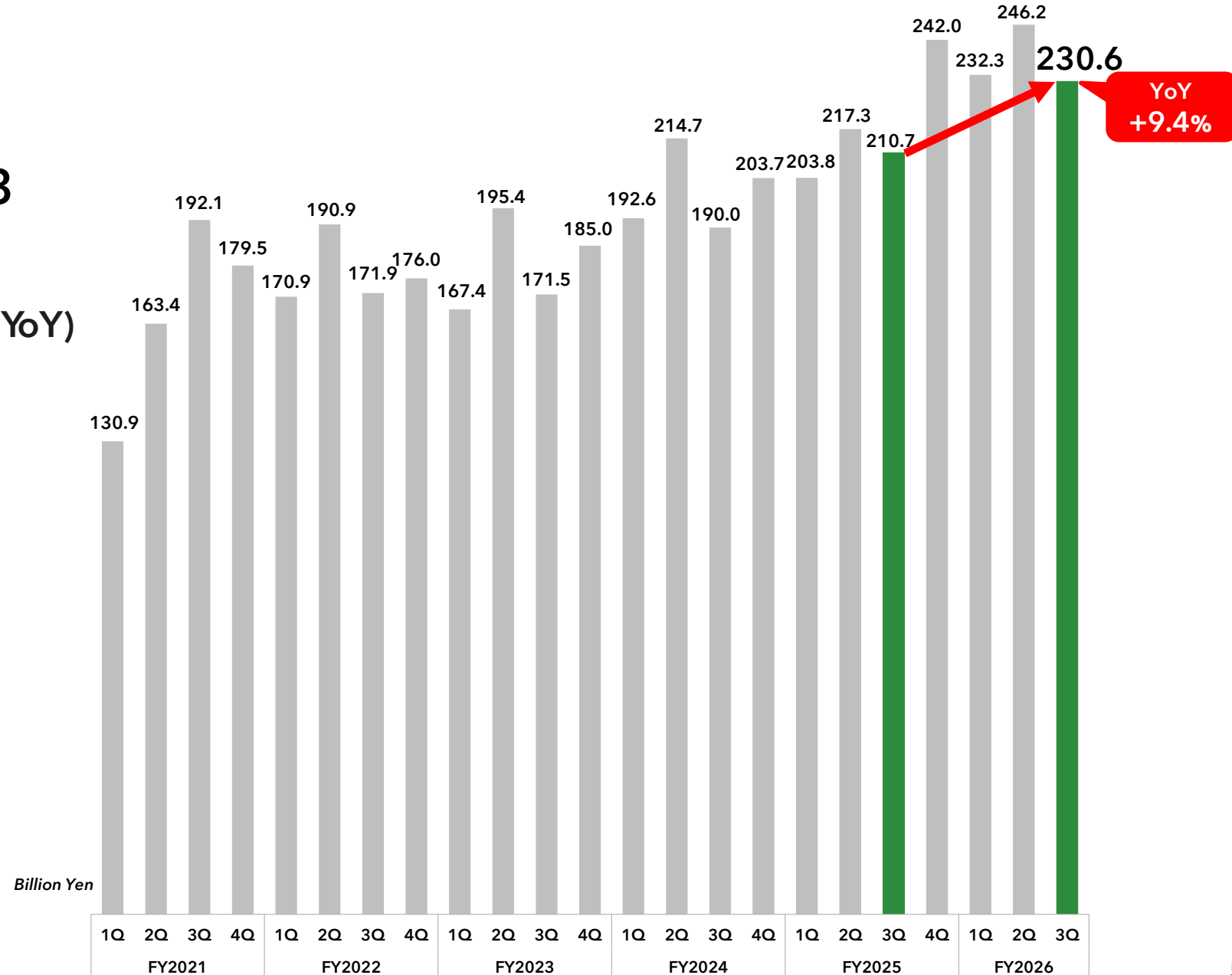
Sales **61.1** billion yen up **20.8%** YoY
OP **12.3** billion yen down **25.1%** YoY

1. Summary

[Consolidated Sales]

New record high sales for Q3

Q3 **230.6** billion yen (up **9.4%** YoY)

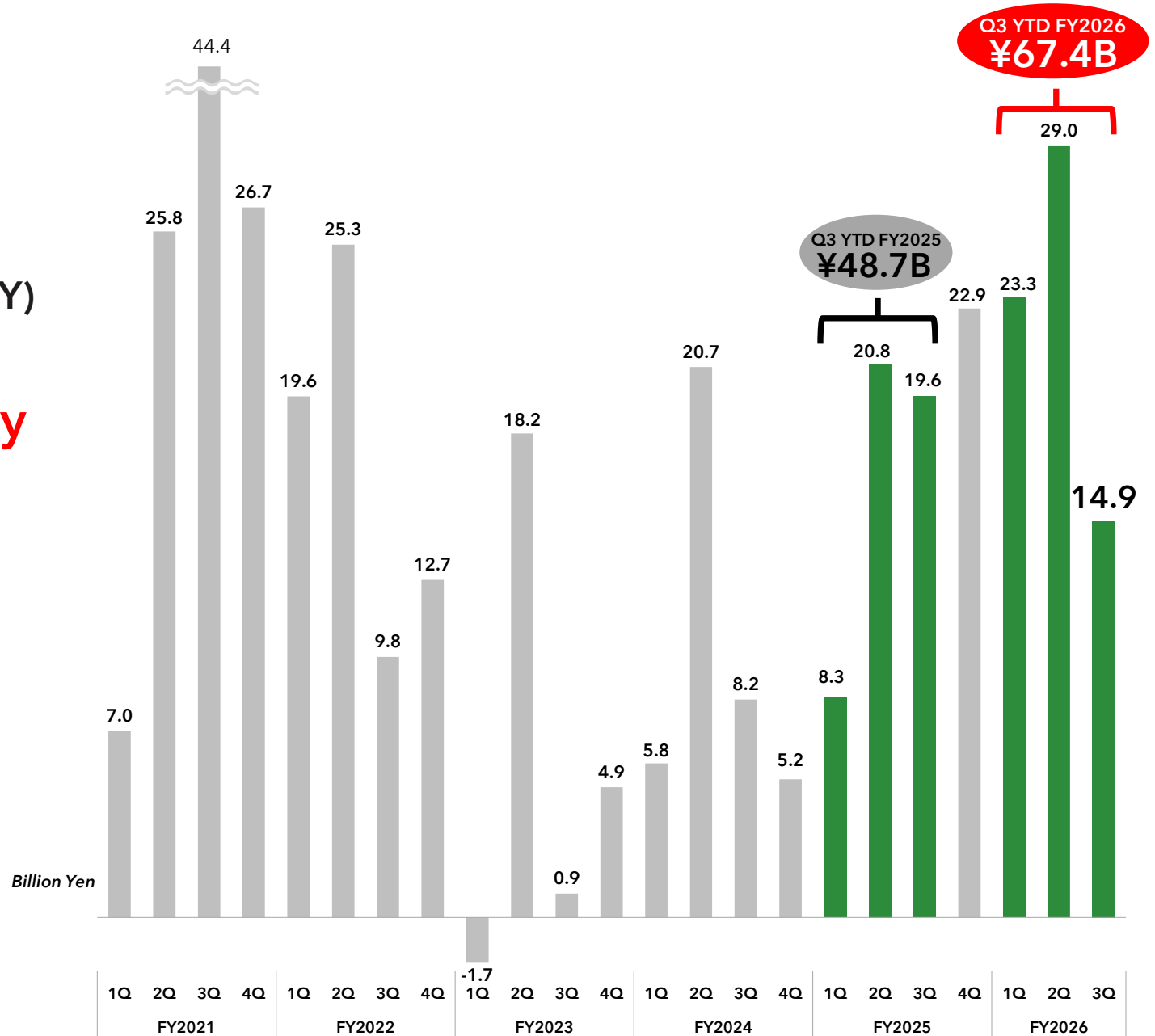


1. Summary

[Consolidated OP]

Q3 **14.9** billion yen (down **23.6%** YoY)

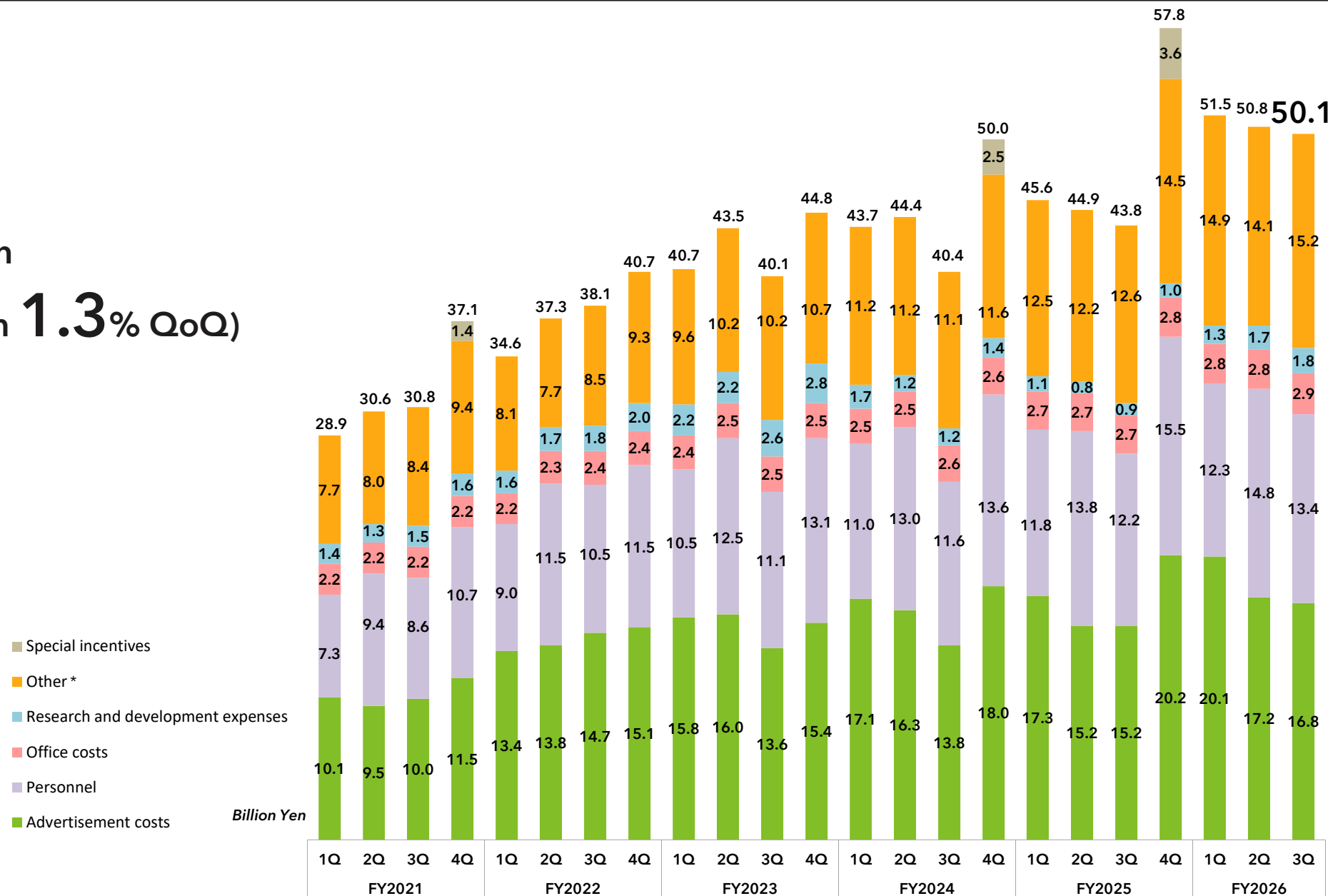
Nine-month OP grew significantly



1. Summary

[SG&A Expenses]

Q3 50.1 billion yen
(up 14.4% YoY, down 1.3% QoQ)



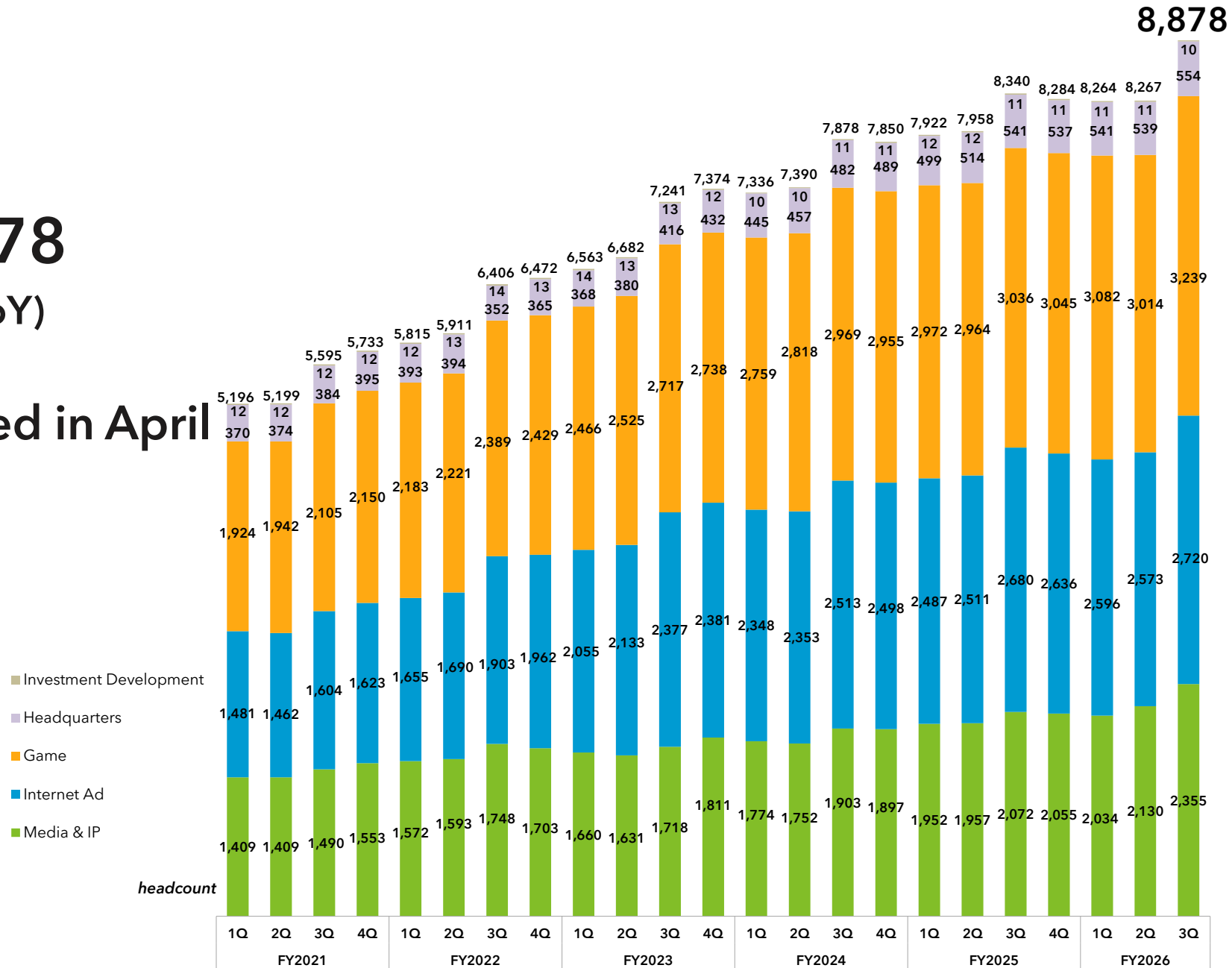
* Other: Outsourcing expenses, system-related expenses, payment fees, entertainment expenses, selling expenses, and others.

1. Summary

[No. of Employees]

Total headcount was **8,878**
at the end of June (+538 YoY)

402 new graduates joined in April



1. Summary

[PL]

million yen	FY2026 Q3	FY2025 Q3	YoY	FY2026 Q2	QoQ
Net Sales	230,688	210,778	9.4%	246,206	-6.3%
Gross profit	65,183	63,499	2.7%	79,928	-18.4%
SG&A expenses	50,193	43,869	14.4%	50,864	-1.3%
Operating income	14,990	19,629	-23.6%	29,064	-48.4%
Operating margin	6.5%	9.3%	-2.8pt	11.8%	-5.3pt
Ordinary income	15,262	19,452	-21.5%	29,708	-48.6%
Extraordinary income	0	41	-98.5%	92	-99.3%
Extraordinary loss	655	2,442	-73.2%	1,527	-57.1%
Income before income taxes and non-controlling interests	14,606	17,050	-14.3%	28,274	-48.3%
Net income attributable to owners of the parent *	8,698	8,239	5.6%	14,874	-41.5%

* Net income attributable to owners of the parent is affected by non-controlling equity interest (minority interest) of Cygames, Inc.

1. Summary

[BS]

Unit: million yen	End of Jun. 2026	End of Jun. 2025	YoY	End of Mar. 2026	QoQ
Current assets	374,093	367,676	1.7%	384,557	-2.7%
(Cash deposits)	212,081	209,030	1.5%	211,281	0.4%
Fixed assets	177,047	163,214	8.5%	171,918	3.0%
Total assets	551,172	530,931	3.8%	556,509	-1.0%
Current liabilities	147,059	153,511	-4.2%	166,062	-11.4%
(Income tax payable)	7,737	10,020	-22.8%	16,173	-52.2%
Fixed liabilities	106,215	103,765	2.4%	106,062	0.1%
Shareholders' equity	194,902	158,398	23.0%	185,132	5.3%
Net Assets	297,897	273,654	8.9%	284,384	4.8%
(Reference) Net Cash *	113,401	111,099	2.1%	113,416	0.0%

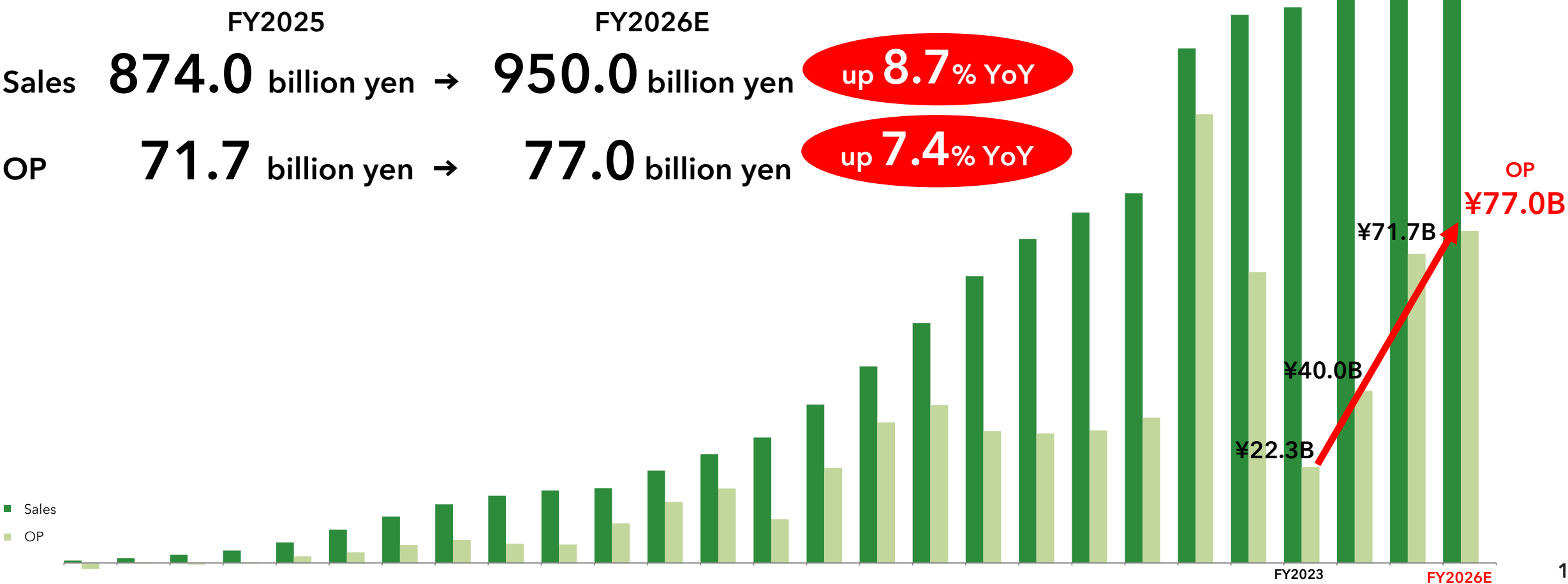
* Net Cash definition: (Cash and cash equivalents + Time deposits) - (Long-term bank loans + convertible bond + short-term bank loans)

FY2026

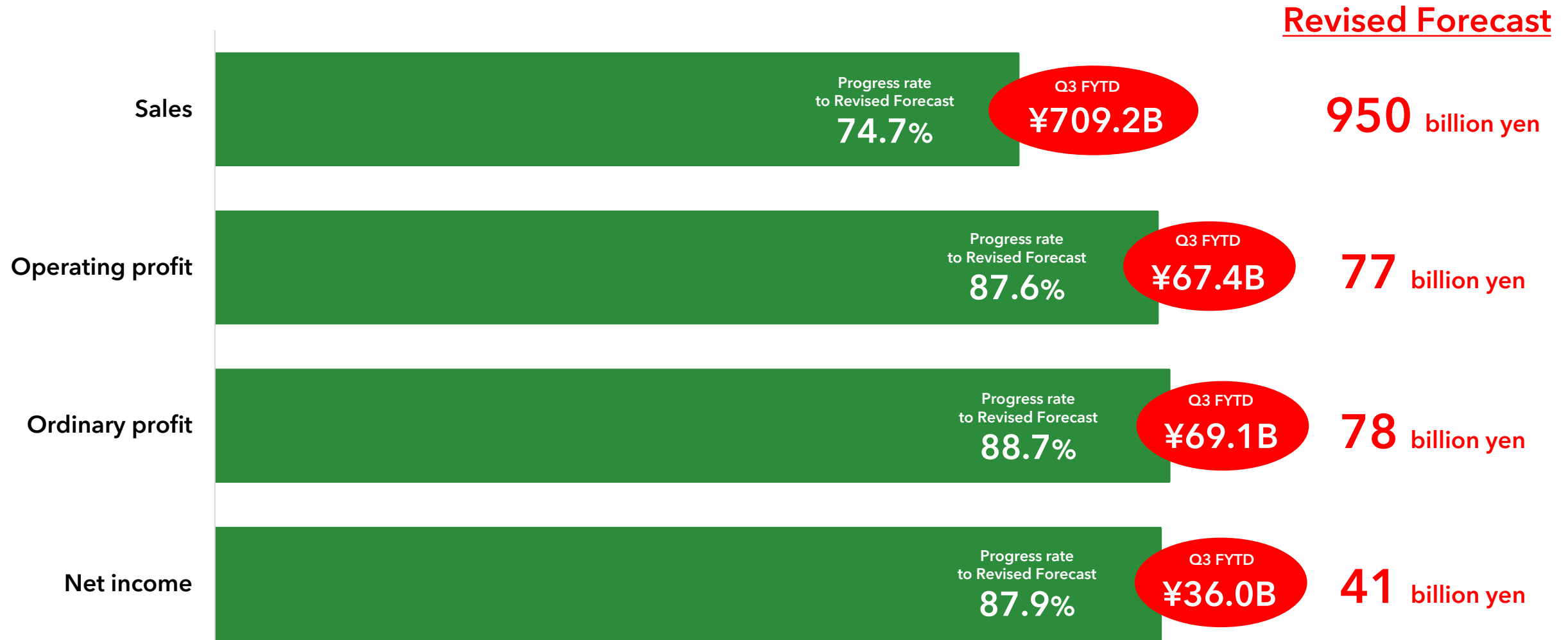
Forecast

October 2025 - September 2026

FY2026 forecast revised upward
Profit forecast turned from a decline to an increase,
resulting from strong performance of three key businesses



[Progress to Forecast]



[Upward Revision]

Dividend forecast increased from 19 yen to 20 yen according to the management guidance of DOE 5%

Unit: billion yen	FY2026 Original Forecast (Released on Nov. 14, 2025)		FY2026 Revised Forecast (Released on Aug. 7, 2026)	Difference (Amount)		Difference (%)		FY2025	YoY
	Minimum	Maximum		Minimum	Maximum	Minimum	Maximum		
Net Sales	880		950	70		8.0%		874.0	8.7%
Operating income	50	60	77	27	17	54.0%	28.3%	71.7	7.4%
Ordinary income	50	60	78	28	18	56.0%	30.0%	71.7	8.7%
Net income attributable to owners of the parent *	25	30	41	16	11	64.0%	36.7%	31.6	29.5%
Dividend	19 yen		20 yen	1 yen		5.3%		17 yen	17.6%

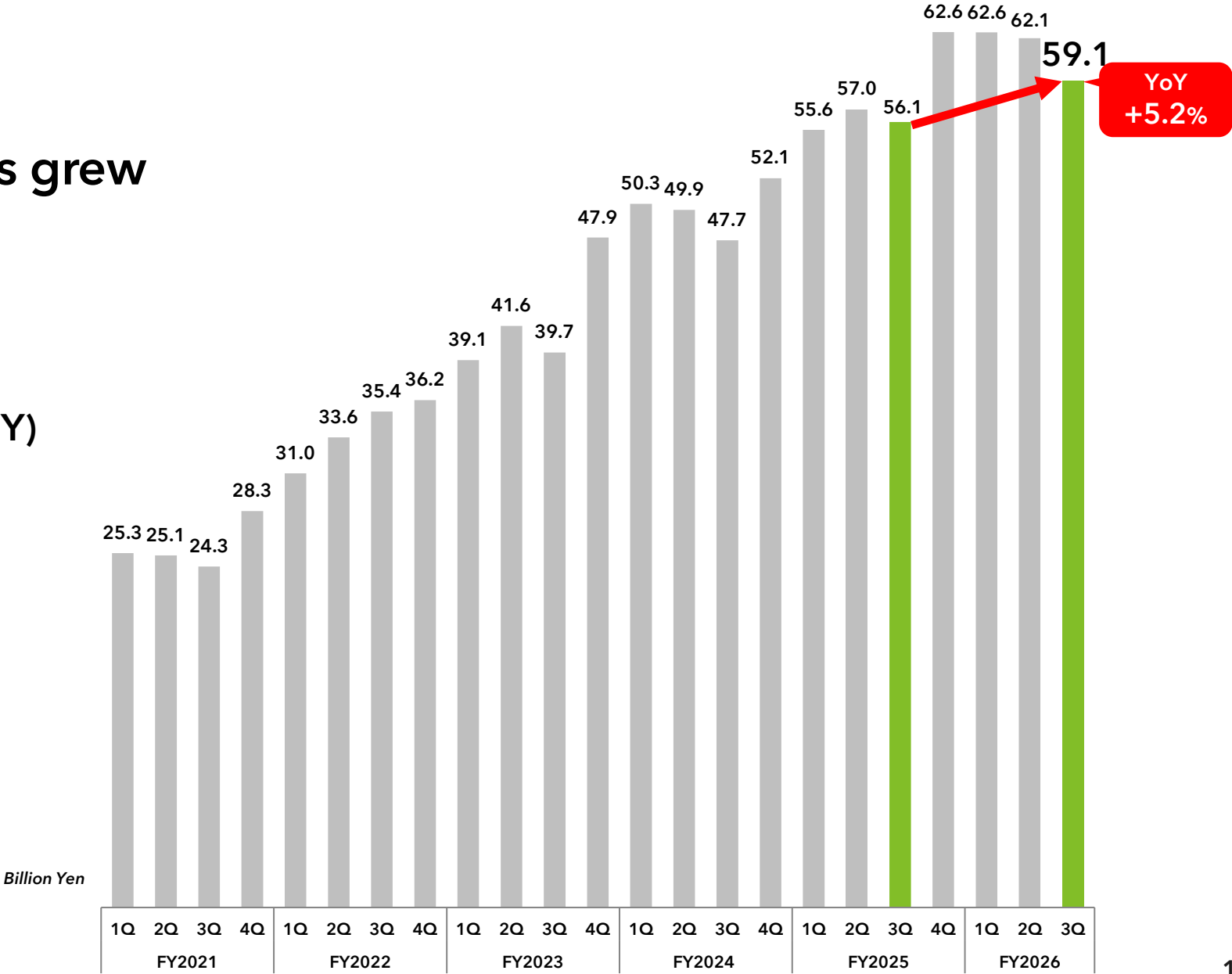
* Net income attributable to owners of the parent is affected by non-controlling equity interest (minority interest) of Cygames, Inc.

Media & IP

[Quarterly Sales]

Multi-layered revenue streams grew steadily

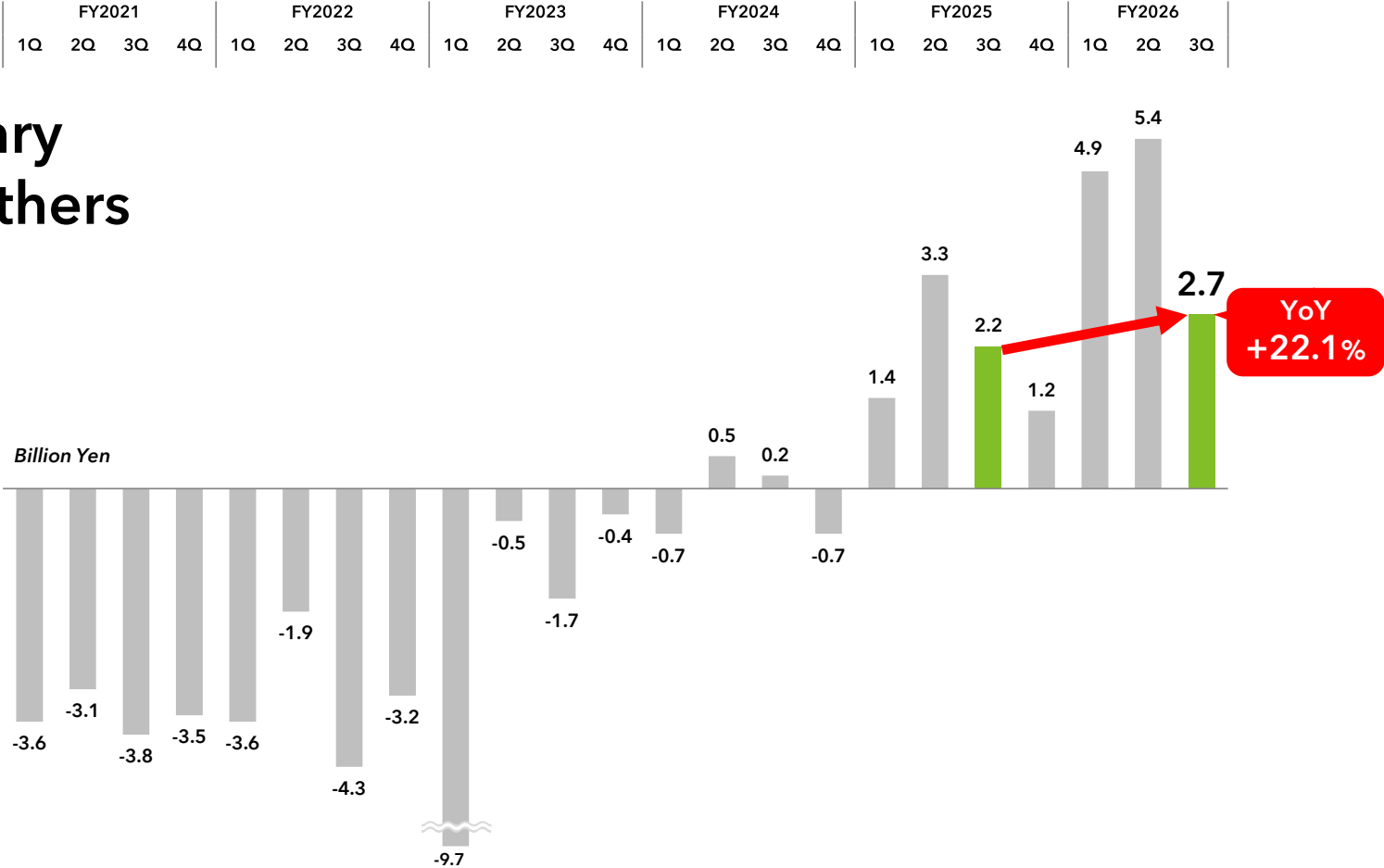
Q3 59.1 billion yen (up 5.2% YoY)



[Quarterly OP]

ABEMA celebrated 10th Anniversary
Investing actively in content and others

Q3 2.7 billion yen (up 22.1% YoY)



* Quarterly OP: Special incentives in FY2021 and FY2024 and FY2025 are excluded.

3. Media & IP Business

[ABEMA] Special programs and events are streamed in April to celebrate the 10th anniversary



ABEMA^{ORIG.} **4.11(土)** **30-HOUR LIMIT BREAK FEST** **LIVE**

DAY1 TIMETABLE

15:00	グランドオープニング	
15:30	第1部 ウルファロンから3カウント取ったら1000万円	
18:00	限界突破企画スタート	
19:00	今日好きダンスバトル 一夜限りアーティストとコラボSP	
21:00	第2部 ウルファロンから3カウント取ったら1000万円	
23:00	愛のハイエナ特別版 あつまれハイエナの森	
25:00	チーム対抗! 芸能人朝まで徹マン決定戦	
06:00		

山本裕典 オファー待ち30時間マラソン

コムドット 30時間パイから逃げ切れば1億円!

ABEMA^{ORIG.} **4.12(日)** **30-HOUR LIMIT BREAK FEST** **LIVE**

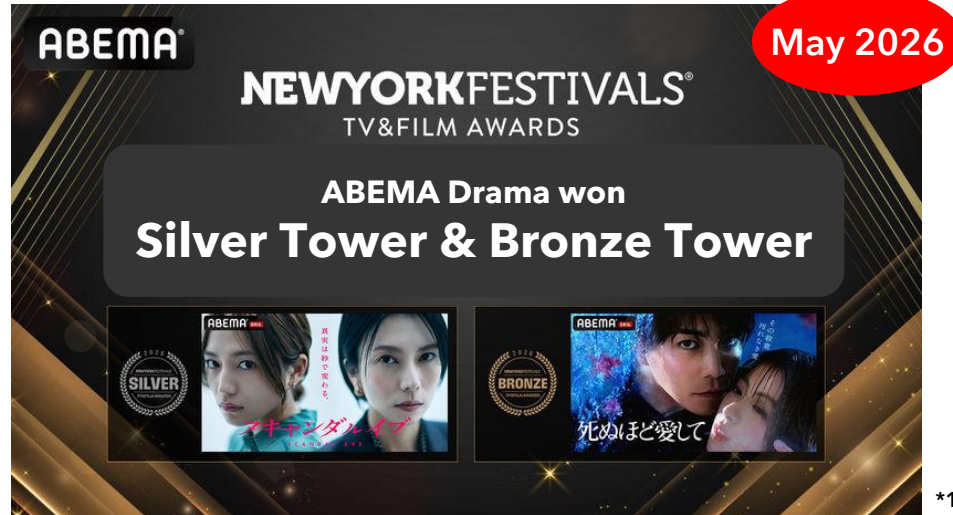
DAY2 TIMETABLE

06:00	ReHacQ 特別企画	
09:00	『ナオキマンの都市伝説ワイドショー』 ~今日好きメンバー襲来! 明日、学校で話したい都市伝説SP~	
10:00	あざとくて何が悪いの? 特別版 令和の最強あざカワソングSP	
11:00	ダメってられない女たち ~激動人生を生告白SP~	
13:00	完徹 ~不眠最強芸人決定戦~	
15:00	「チャンスの時間」 ノブの好感度を下げておこう 30時間フェスver.	
16:00	今日好きダンスバトル 大反省会	
17:00	市川團十郎を笑わせたら1000万	
19:00	最強バズリソング歌謡祭	
21:30		
22:00	グランドフィナーレ	

山本裕典 オファー待ち30時間マラソン

コムドット 30時間パイから逃げ切れば1億円!

[ABEMA] Our original programs are highly acclaimed, winning numerous international and domestic awards



*1 New York Festivals: One of the world's largest competitions, judging and honoring video productions across all genres held in May 2026.

*2 World Media Festival: One of Europe's largest competitions, recognizing outstanding productions across a range of genres held in May 2026.

*3 Global OTT Awards 2026: One of Asia's largest competitions, covering television, OTT, and online content worldwide held in June 2026.

*4 The 42nd ATP Award is Television Grand Prix: The only award in Japan judged and selected by producers and directors from production companies themselves held in July 2026.

[ABEMA] WAU reached 31.37 million, driven by new episodes and programs*



3. Media & IP Business

[IP Business] Expanding our anime content lineup with three anime studios

CYPiC



CA Soa

NEW

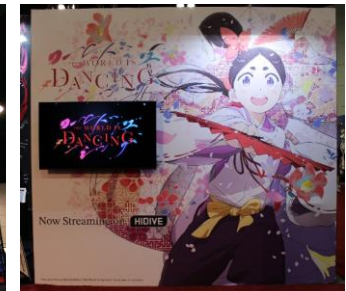


Studio Kurup
スタジオクーム

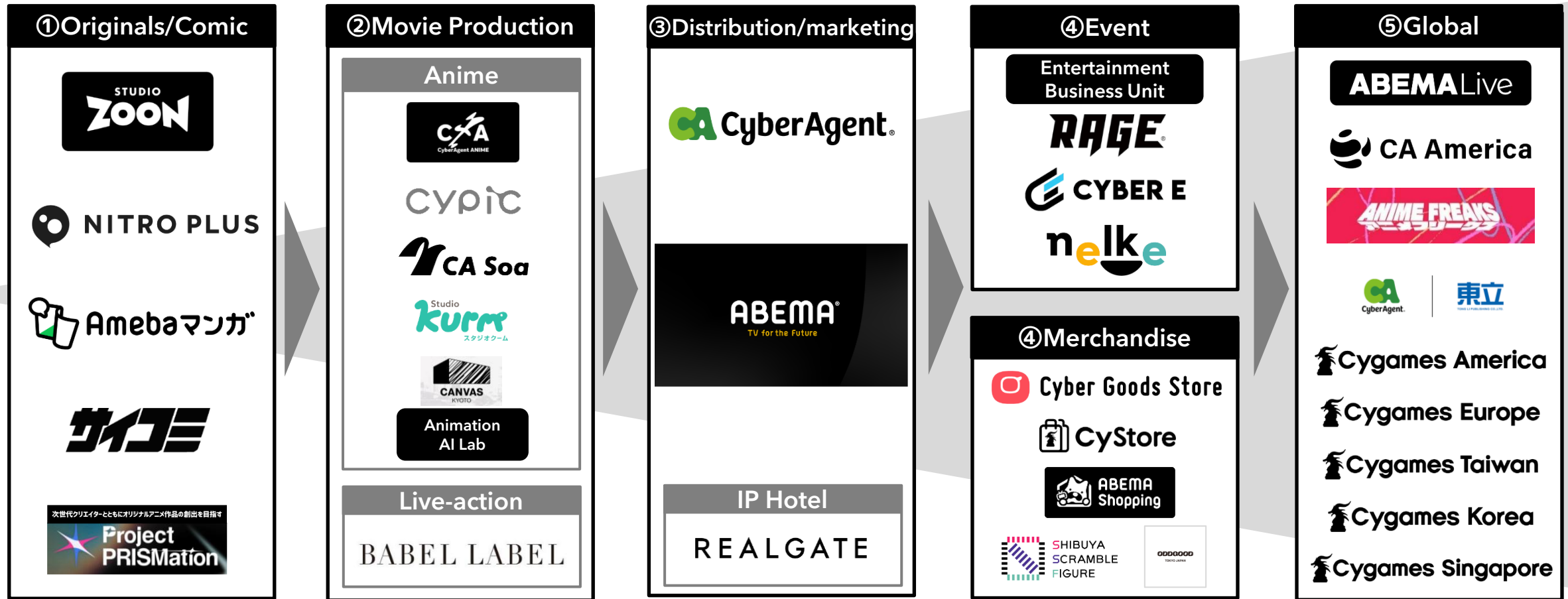
Coming
Soon

3. Media & IP Business

[IP Business] Strengthening global marketing through major anime events in the US, including Anime Expo 2026, and Europe



[IP Business] We are building a system that can handle an entire process from original work to monetization



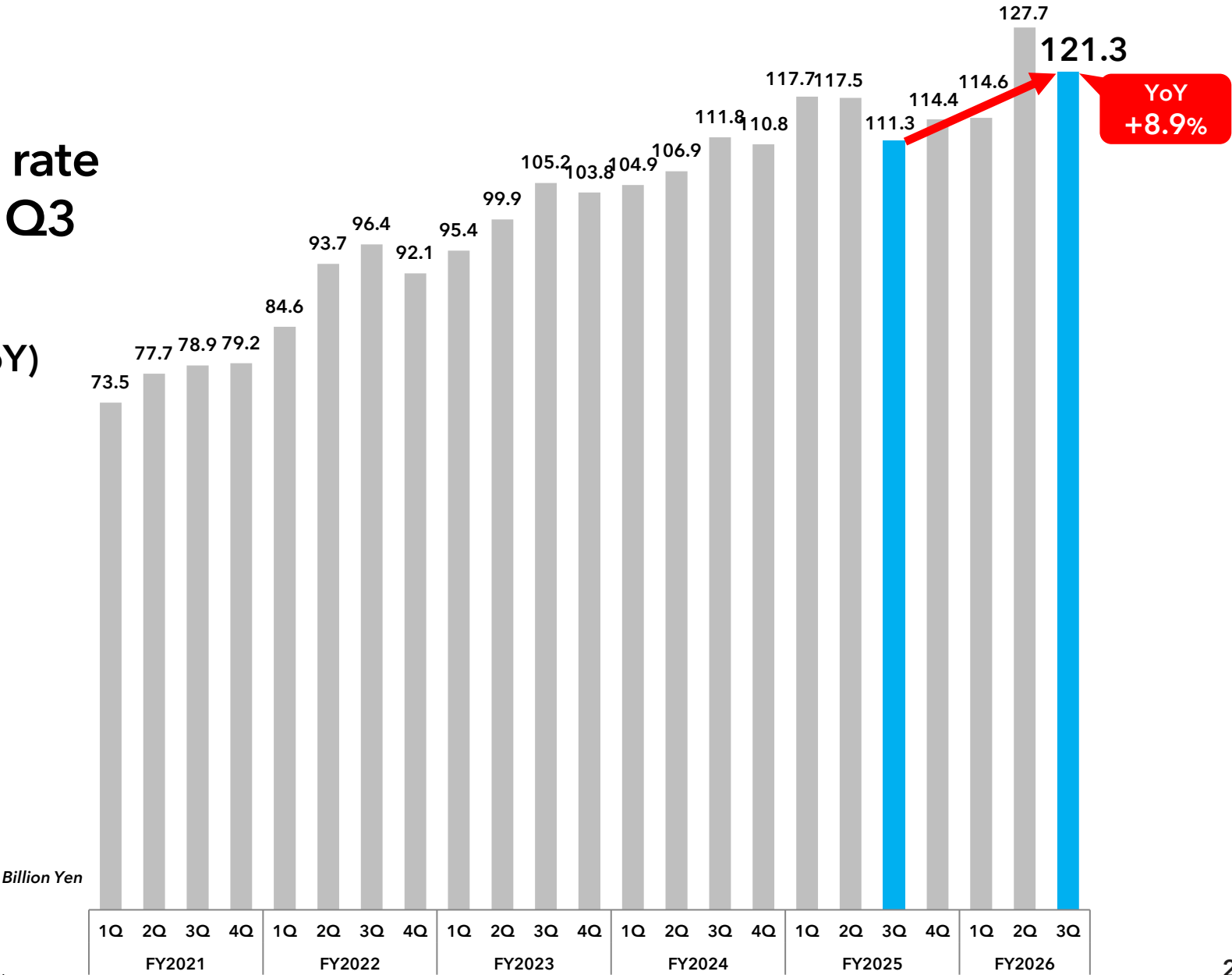
Developing original IP aimed at global success

Internet Advertisement

[Quarterly Sales]

Sales maintained high growth rate and reached a record high for Q3

Q3 **121.3** billion yen (up **8.9%** YoY)

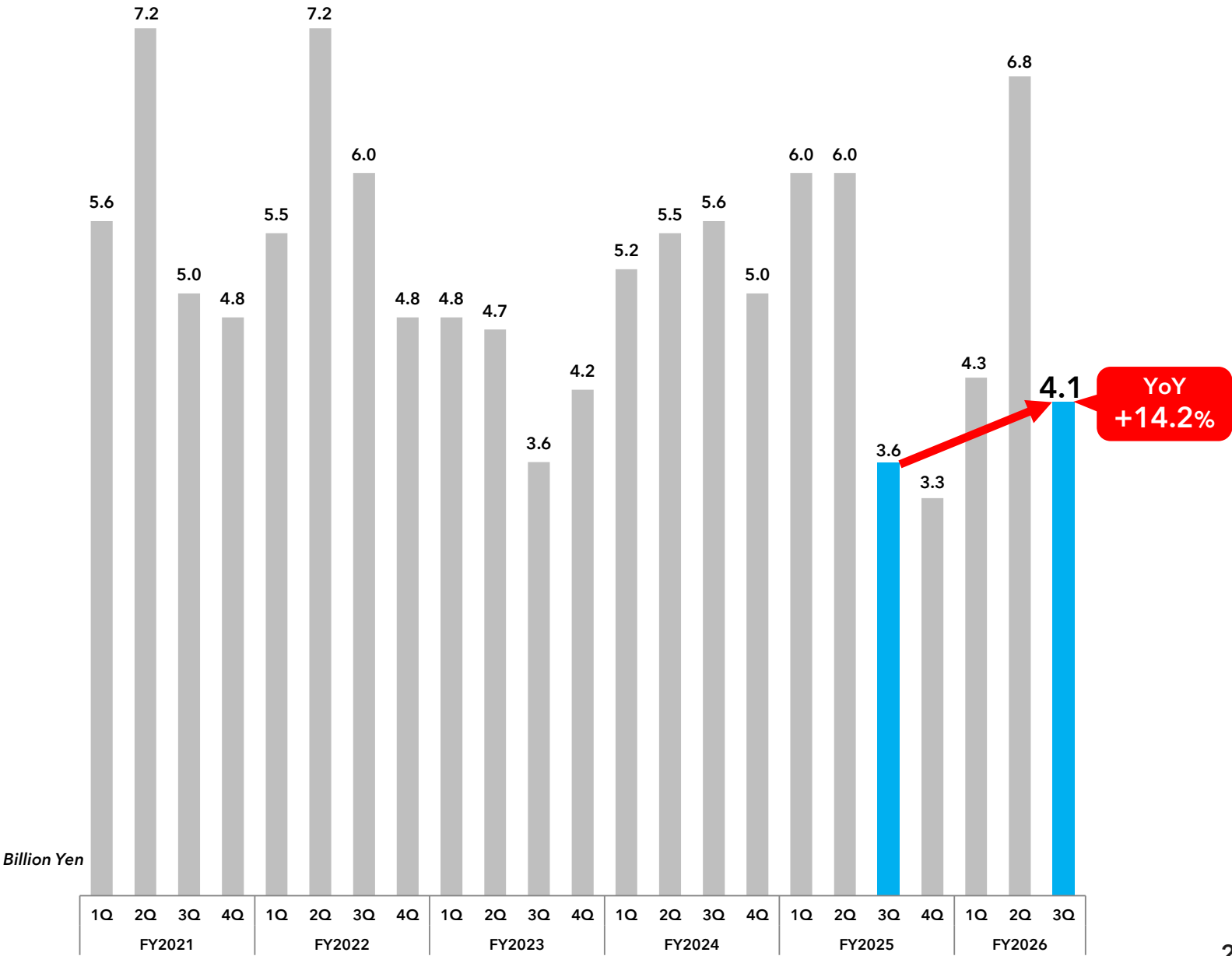


* Sales in FY 2021 and 2022 exclude MicroAd, Inc. which became unconsolidated subsidiary.

[Quarterly OP]

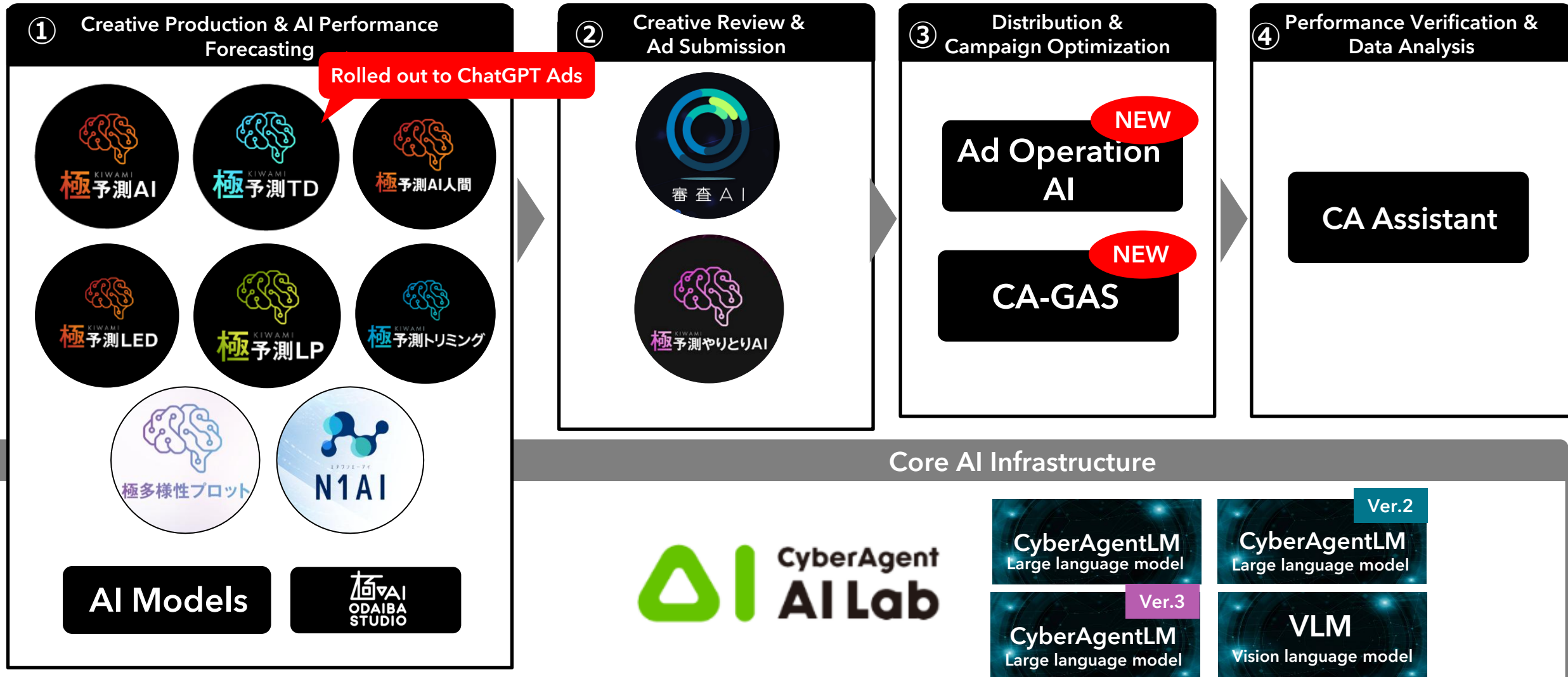
Delivered double-digit year-over-year growth in OP

Q3 **4.1** billion yen (up **14.2%** YoY)



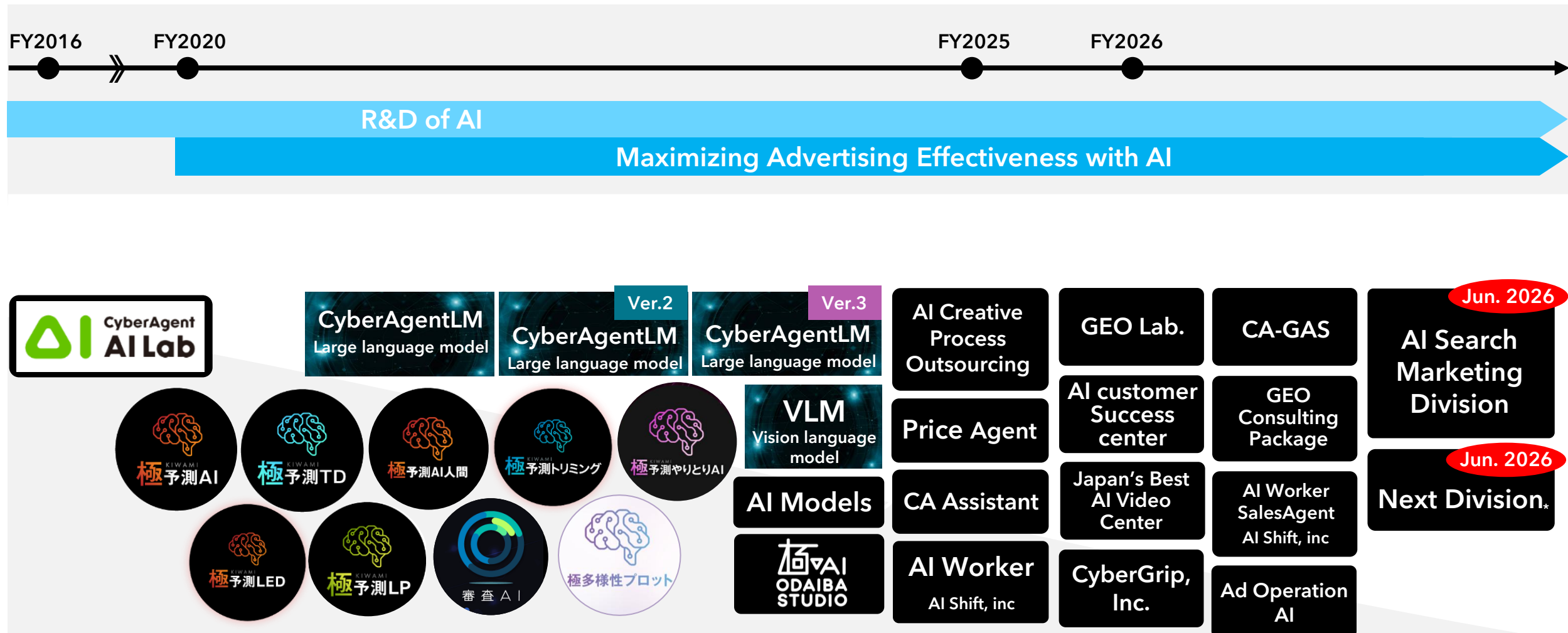
* Quarterly OP : Year-end bonuses in FY2021, FY2024, and FY2025 are excluded.

[Technological Capability] Leveraging in-house AI across every stage of internet Advertising



4. Internet Advertisement Business

[Change Capability] Launched new organization in June to capitalize on AI trends



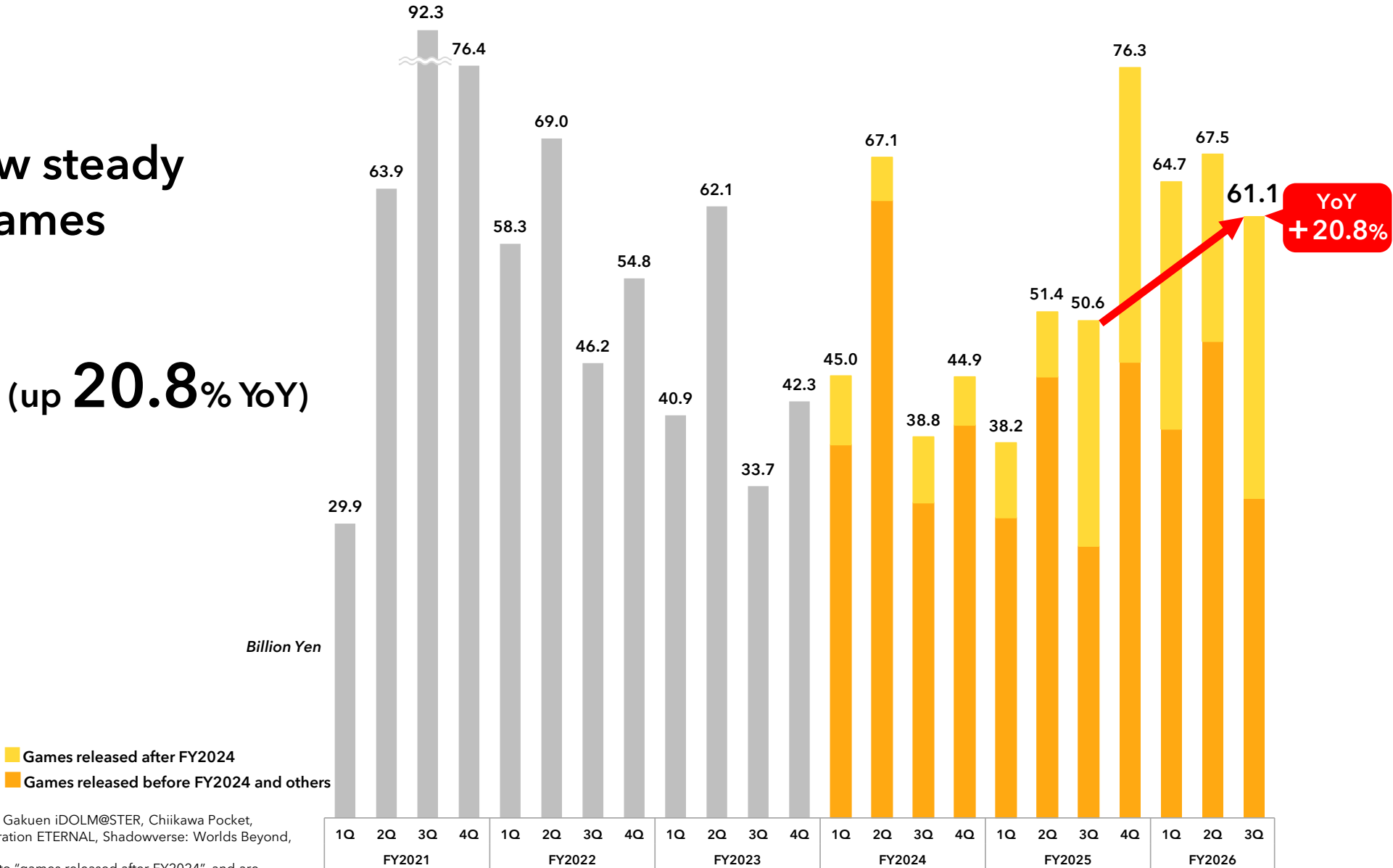
* Next Division: A new organization dedicated to focus area

Game

[Quarterly Sales]

Casual games grew steady as well as major games

Q3 61.1 billion yen (up 20.8% YoY)

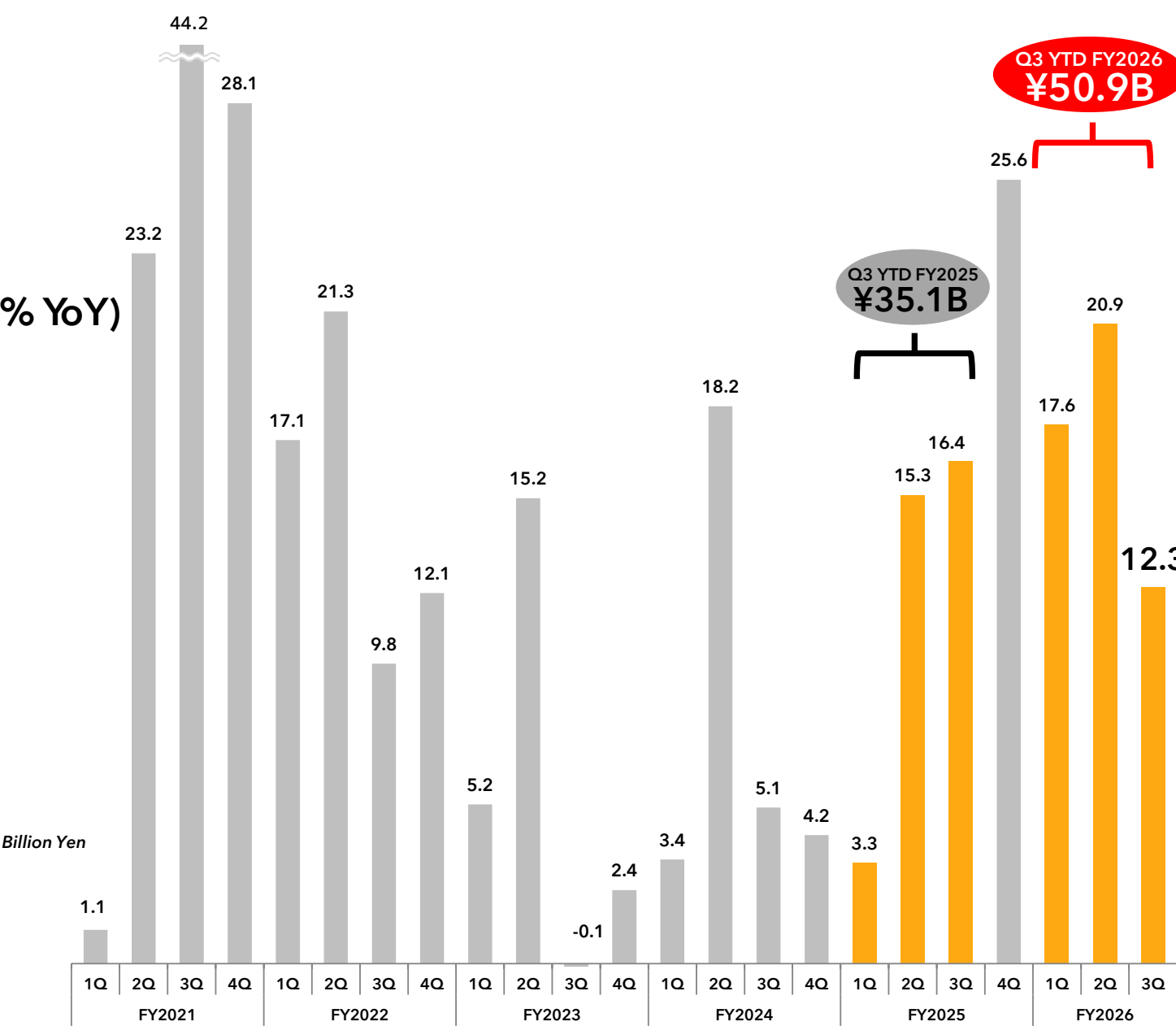


*1 Released after FY2024: Jujutsu Kaisen Phantom Parade, Gakuen iDOLM@STER, Chiikawa Pocket, SAKAMOTO DAYS Dangerous Puzzle, SD Gundam G Generation ETERNAL, Shadowverse: Worlds Beyond, Hello Kitty Merch Match, FAIRY TAIL Wizard Chronicle
*2 Hexa Away, CubeAway, and Bus Rush Fever! are added to "games released after FY2024", and are retroactively reflected from Q3 FY2024.

[Quarterly OP]

Q3 12.3 billion yen (down 25.1 % YoY)

Nine-month OP grew significantly
to 50.9 billion yen



*Quarterly OP : Year-end bonuses in FY2021, FY2024 and FY2025 are excluded.

hololive Dreams

Simultaneous Global Release on July 23 ^{*1}
Surpassed 1M Downloads on Day 1
Ranked #1 Top Grossing Across All Stores ^{*2}
**Strong Sales Performance in Japan,
 North America & Asia**
Outstanding User Reviews with a ★4.8 Rating ^{*3}



^{*1} hololive Dreams is released worldwide (except for certain regions) for mobile and Steam®

^{*2} Stores at launch: App Store, Google Play, Steam®

^{*3} User reviews: ratings on the App Store, as of July 2026

^{*4} hololive Dreams: © COVER / © QualiArts, Inc.

GRANBLUE FANTASY

Relink

ENDLESS RAGNAROK



Simultaneous Global Release on July 9 ^{*1}
Ranked High on Steam Alongside Previous Title
"Granblue Fantasy: Relink" ^{*2}
High Ratings Both Domestically & Internationally ^{*3}



^{*1} Available on Nintendo Switch™ 2, PlayStation®5, PlayStation®4, and Steam®. Certain regions are excluded.

^{*2} "Granblue Fantasy: Relink", "Granblue Fantasy: Relink - Endless Ragnarok": © Cygames, Inc.

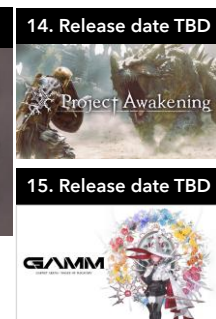
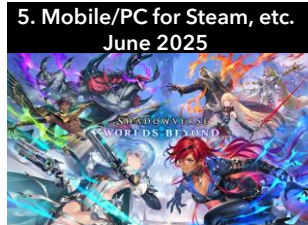
^{*3} Metascore of "PC 83/100" as calculated by Metacritic, as of July 2026

[Outlook] Maximizing game longevity through sustained buzz while targeting global hits

FY2025

FY2026 onward

NEW



Jul. 2026
in theater

Movie
Adaptation



NEW



confidential

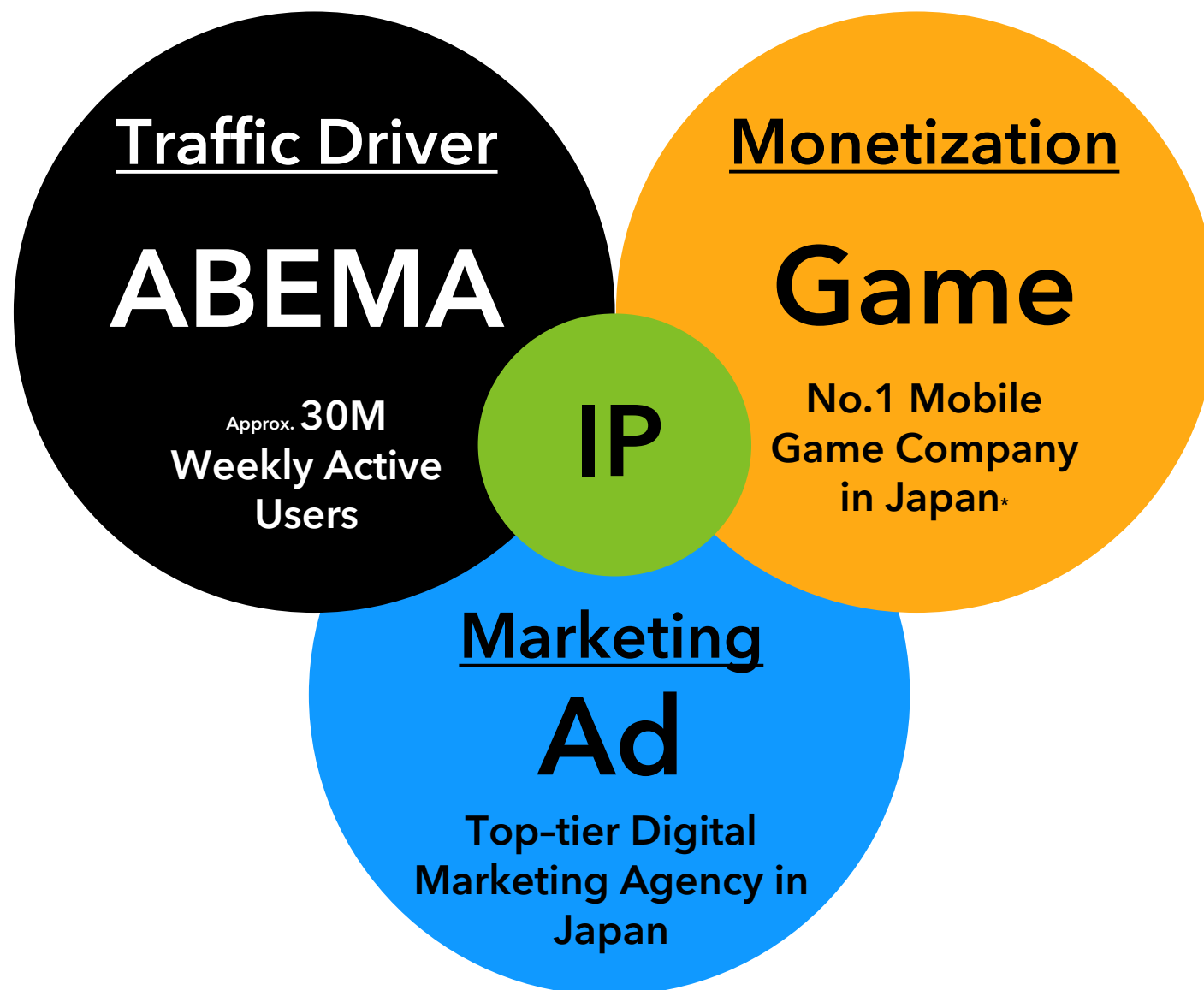
Owned
IP

Third
Party
IP



Medium to Long-Term Strategy

We aim to develop original IPs by leveraging our unique strengths



* The comparison is based on publicly available information from companies providing mobile games in Japan from January to March 2026.



**Aiming to be a company with
medium to long-term
supporters**



This year's report features interviews with two of our Outside Directors on the leadership transition from founder Susumu Fujita to the second-generation President, Takahiro Yamauchi, and the outlook for further corporate value enhancement. The report also introduces the growth strategies and competitive advantages of our three main businesses: the Media & IP business, centered on ABEMA; the Internet Advertising business, leveraging advanced AI capabilities; and the Game business, which continually creates hit titles.

Integrated Report
CyberAgent Way 2025

<https://report.cyberagent.co.jp/en/>



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