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#### On **October 10, 2018,** Aeon Fantasy, Co., Ltd. announced earnings results for 1H FY02/19.

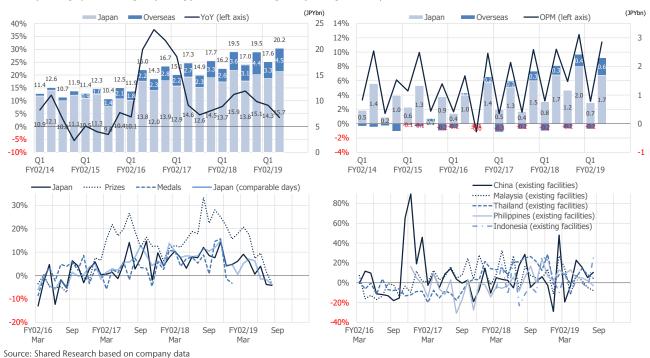
	earnings	FY02/1				FY02/17			FY02/1			FY02/19	FY02/18	FY02/19	or can	FY02/17 FY02/1	FY02/19 FY02/20			YoY chang	
(JPYmn) Sales		11,853		Q3 14,258	Q4 16,713	15,070	Q2 17,334	Q3 Q 14,908 17,74		Q2 19,494	Q3 Q4 16,964 19,468	Q1 Q2 17,586 20,177	35,743	1H Init Est 9 37,763 38,000	% of FY 99.4%	Cons. Cons 65,059 72,174	77,700 83,000			Q1 Q2 +1,337 +684	
Japan												14,318 15,658	29,529	29,976		54,575 58,820	60,600 61,500	62,100 49	19.5%	+652 -204	
Overse												3,268 4,520	6,214				17,600 22,250	27,500 4	4.2%	+685 +888	
	China ASEAN	1,163			778	1,433 766	752	1,524 2,25 806 1.00			1,917 2,938 1,203 1,455		4,185 2,029	5,070 2,717		7,176 9,040 3,325 4,688				+331 +555	
YoY			29.9%		33.4%		8.3%	4.6% 6.29			13.8% 9.7%		10.3%	5.7% 6.3%		10.6% 10.9%		7.0%			
Japan Oversi	eac	-3.6% 84.7%			33.7%	27.4%	5.9%	5.0% 4.3° 2.5% 15.4°			10.1% 4.1%	4.8% -1.3% 26.5% 24.4%	7.4% 26.5%	1.5%		9.4% 7.8%	3.0% 1.5% 28.2% 26.4%	1.0%			
Overs	China					23.2%						20.8% 21.4%	23.3%	21.2%		11.7% 26.0%		-			
C+	ASEAN	40.4%				30.2%			% 29.1%		49.2% 45.4%		33.7%			26.4% 41.0%		-		11176 122	
Cost of sal YoY	ies		34.6%		28.2%		6.4%	1.8% 4.89		9.1%	8.4% 6.9%	15,715 16,538 8.1% 2.0%	30,745 7.3%	4.9%		57,082 61,363 9.2% 7.5%				+1,176 +33	1 +1,5
Gross prof	it	1,046	2,048	854	2,596	1,277	2,485	1,259 2,95	6 1,710	3,287	2,161 3,653	1,871 3,639	4,997	5,511		7,977 10,812		-		+161 +352	2 +51
YoY GPM		-17.7%	5.0% 12.8%		71.4% 15.5%			47.5% 13.99 8.4% 16.79			71.7% 23.6% 12.7% 18.8%		32.8% 14.0%			21.9% 35.5% 12.3% 15.0%		-		+0.1pp +1.2pp	
SG&A exp	enses	850		1.016	953			1.019 1.12		1.259	1.162 1.227		2,452	2.659		4,208 4,84				+129 +79	
YoY		13.5%		35.4%			2.4%	0.4% 17.59		25.8%	14.0% 9.6%		18.5%	8.5%		10.8% 15.0%		-			
SG&A Operating		7.2%		7.1%	5.7% 1.642	7.1%	5.8% 1.484	6.8% 6.3° 239 1.83		6.5% 2.028	6.8% 6.3% 1.000 2.426		6.9% 2.545	7.0% 2.851 2.800	101 994	6.5% 6.7% 3.769 5.97		8,000 43	13 20%	+0.2pp +0.2pp +32 +274	
Japan		354		-131	1,446	499	1,265	425 1,49		1,703	1,168 1,992		2,469	2,425	101.070	3,687 5,628		6,400 4		-31 -13	
Overse	eas	-158		-31	196	-289	219	-186 33		327	-168 435		79	429		83 347	700 1,150			+63 +286	
	China ASEAN	-117 -41		41 -72	144 52	-241 -48	249 -29	-120 31 -66 2	.1 -237 18 -11	366 -38	-195 371 28 64		129 -49	337 92		198 304 -115 43		1		+1 +201 +62 +79	
YoY	ASLAN		-12.6%		135.3%				% 146.6%		318.1% 32.1%			12.0% 10.0%			10.5% 10.6%	9.6%		TU2 T/:	9 71
Japan		-38.3%	-23.6%	-	53.9%			- 3.6			174.6% 33.0%		40.0%	-1.8%		37.4% 52.7%					
Overse	eas China	-	-	-	-		287.0%	- 72.3°		49.2% 46.9%	- 28.5% - 19.4%			441.4% 162.0%		27.5% 319.99	101.9% 64.3%	39.1%			
	ASEAN							-46.59		40.5%	- 128.7%		-	102.070							
OPM		1.7%			9.8%	1.4%	8.6%	1.6% 10.39	% 3.2%	10.4%	5.9% 12.5%	3.1% 11.4%	7.1%	7.6% 7.4%		5.8% 8.3%		9.0%		-0.1pp +1.0pp	
Japan		3.5%			10.4%	3.9%	8.7%	3.4% 10.39		10.7%	8.4% 13.2%		8.4%	8.1%		6.8% 9.6%				-0.5pp +0.1pp	
Overs	eas China		2.6%	_	7.0%		8.1%	- 10.49 13.79		9.0% 14.1%	- 9.9% - 12.6%		1.3% 3.1%	5.5% 6.6%		0.8% 2.5%	4.0% 5.2%	5.8%			op +4.2 op +3.6
	ASEAN							2.89			2.3% 4.4%		J.176	3.4%							
	erating income (expenses)	204		-60	153	-73	-60	-48 -9		-218	-82 -46	-82 -116	-244	-198		-271 -372		-800		-56 +102	
Recurring YoY	profit	401 -16.4%		-222	1,796	137 -65,8%	1,424	191 1,74		1,811 27.1%	917 2,380 380.8% 36.3%		2,301	2,654 2,550 : 15.3% 10.8%	104.1%	3,499 5,598		7,200 44	4.2%	-24 +376	6 +35
RPM		3.4%			10.7%	0.9%	8.2%	1.3% 9.89		9.3%	5.4% 12.2%		6.4%	7.0% 6.7%		5.4% 7.8%		8.1%		-0.4pp +1.5pp	p +0.6
Extraord	dinary gains (losses)	-	-86	-44	-46	-71	2	-132 -13	·94	-151	-218 -55	-41 -376	-245	-418		-338 -518	-6,600	-7,200		+53 -226	26 -17
Pre-tax pre Income		401 349				66 221	1,426 464	58 1,61 201 56		1,660 578	699 2,325 430 692		2,057 977	2,236 866		3,161 5,080 1,450 2,099		-		+29 +150 -86 -25	
	taxes d tax rate	87.2%			28.7%			201 56 343.7% 35.1°			61.6% 29.8%		47.5%			45.9% 41.3%		-		-86 -25	25 -11
	interests	-2		-3	15	0	2		1 -20	-2	5 12		-22	9		13		-		24	7 3
	ne attrib. to owners of parent	53				-155	960	<b>-140</b> 1,03			264 1,621	108 1,252		1,361 1,550	87.8%	1,698 2,986		4,200 4	1.2%	+91 +168	8 +25
YoY Net m	nargin		-30.2% 2.9%		154.7% 7.4%		107.0% 5.5%	16.39 - 5.89		13.0%	- 56.9% 1.6% 8.3%	532.8% 15.5% 0.6% 6.2%		23.5% 40.7% 3.6% 4.1%		14.7% 75.9% 2.6% 4.1%	10.5% 12.1%				
Netin	largin	FY02/1			7.470	FY02/17		5.0	FY02/1		1.0 % 0.5 %	FY02/19		FY02/19		FY02/17 FY02/1			FY02/19	YoY change	e
		Q1	. Q2		Q4	Q1	Q2	Q3 Q	4 Q1	Q2	Q3 Q4	Q1 Q2	1H	1H [		Cons. Cons			% of FY	Q1 Q2	2 1
Existing	Japan Time-based	-4.5% 4.5%	-6.1% 4.9%	2.5% 19.5%	3.3% 20.6%		6.8% 3.8%	6.6% 6.9° 2.4% -6.2°		9.6%	10.0% 4.8% 1.2% 1.0%		8.4%	1.4%		5.2% 7.8%	< +0-2% (* Japan: FY02/19 Est. +	->			
	Physical activities	16.1%					-9.7%	-6.3% -6.69		-6.4%	-7.4% -9.6%	-7.5% -0.8%					( Separe 11 to 25 East 1	3,6 101)			
	Cards	-14.4%		-1.0%			-5.2%	8.9% 7.69		-6.9%	-5.5% -7.0%										
	Medals Prizes	-2.3% -2.5%		5.3% 2.1%	2.4% 6.4%			0.2% 5.29		7.5%	9.9% -1.3% 24.9% 18.0%										
	Stickers		-23.1%		-14.6%			-0.9% -13.19			-20.5% -16.3%										
	China			10.6%				-6.3% -1.89		15.1%	1.1% 7.4%		10.3%	6.2%		0.3% 7.4%					
	Malaysia Thailand	-7.2%	-10.5% -4.9%		1.2% -9.9%	5.8% -14.4% -	9.4%	11.4% 3.6° -1.8% 13.0°		11.3% 22.5%	5.5% 9.2% 20.2% 11.1%		12.8% 17.1%	-0.1% 6.3%		7.4% 9.8% -5.0% 16.2%	( C- T4-370				
	Philippines	1 -10.1					-17.0% -	15.1% -5.69	% -4.2%		12.4% 6.9%	8.9% -	-1.6%	4.9%		-10.0% 5.1%	1 102/19 LSC. +3	% YOY			
No. of faci	Indonesia	701	722	766	778	804	813	820 81		-5.1% 820	3.3% 5.3% 836 848		<del>-3.0%</del> 820	2.6% 844		815 848		1,200 -	-5.6%	+34 +24	24 +2
Japan	III.C3	502			496	497	495	488 48		470	470 459		470	458		481 459			100.0%	-16 -13	
Overs		199			282	307	318	332 33		350	366 389		350	386		334 389			-4.2%	+50 +36	36 +3
Openings		23			26	34	14		2 15	18 2	27 26	10 19							26.4%		
Japan Oversi		17		1 46	2	7	2	2	1 3				33	29		82 86					
China	Sales	1.163				27	12		1 12		3 - 24 26	3 2	5	5		12	10 10	10 50			
	YoY Facility profit		1,588	1,627	24 2,045			20 1 1,524 2,25		16 2,591	24 26 1,917 2,939	3 2 7 17 1,923 3,147	5 28 4,184	5 24 5,070		12 1 70 78 7,175 9,040	3 10 10 3 100 140			+330 +556	6 +88
		119.8%	1,588 180.6%	1,627 81.2%	2,045 33.0%	1,432 23.1%	1,960 23.4%	20 1 1,524 2,25 -6.3% 10.59	9 1,593 % 11.2%	16 2,591 32.2%	24 26 1,917 2,939 25.8% 30.1%	3 2 7 17 1,923 3,147 20.7% 21.5%	5 28 4,184 23.3%	5 24 5,070 21.2%		70 70 7,175 9,040 11.7% 26.0%	3 10 10 3 100 140 0	10 50			
	Profit margin		1,588 180.6% 283	1,627 81.2% 220	2,045	1,432 23.1% -55	1,960	20 1 1,524 2,25	9 1,593 % 11.2% 6 -34	16 2,591	24 26 1,917 2,939	3 2 7 17 1,923 3,147 20.7% 21.5% 10 869	5 28 4,184	5 24 5,070 21.2% 879		12 1 70 78 7,175 9,040	8 10 10 8 100 140 0 5	10 50		+330 +556	
	Profit margin SG&A expenses	119.8% 28 2.4% 146	1,588 180.6% 283 17.8% 165	1,627 81.2% 220 13.5% 179	2,045 33.0% 379 18.5% 235	1,432 23.1% -55 - 185	1,960 23.4% 417 21.3% 169	20 1 1,524 2,25 -6.3% 10.5° 19 49 1.2% 22.0° 139 18	9 1,593 % 11.2% 6 -34 % - 35 202	16 2,591 32.2% 627 24.2% 262	24 26 1,917 2,939 25.8% 30.1% 22 678 1.1% 23.1% 218 307	3 2 7 17 1,923 3,147 20.7% 21.5% 10 869 0.5% 27.6% 245 297	5 28 4,184 23.3% 593 14.2% 464	5 24 5,070 21.2% 879 17.3% 542		12 8 70 78 7,175 9,04 11.7% 26.0% 877 1,29 12.2% 14.3% 678 989	3 10 10 3 100 140 0 3 5	10 50			12 +28
	Profit margin SG&A expenses YoY	119.8% 28 2.4% 146 78.0%	1,588 180.6% 283 17.8% 165 68.4%	1,627 81.2% 220 13.5% 179 82.7%	2,045 33.0% 379 18.5% 235 5.4%	1,432 23.1% -55 - 185 26.7%	1,960 23.4% 417 21.3% 169 2.4% -	20 1 1,524 2,25 -6.3% 10.5° 19 49 1.2% 22.0° 139 18 -22.3% -21.3°	59 1,593 % 11.2% 106 -34 % - 105 202 106 9.2%	16 2,591 32.2% 627 24.2% 262 55.0%	24 26 1,917 2,939 25.8% 30.1% 22 678 1.1% 23.1% 218 307 56.8% 65.9%	3 2 7 17 1,923 3,147 20.7% 21.5% 10 869 0.5% 27.6% 245 297 21.3% 13.4%	5 28 4,184 23.3% 593 14.2% 464 31.1%	5 24 5,070 21.2% 879 17.3% 542 16.8%		12 8 70 78 7,175 9,04 11.7% 26.0% 877 1,29 12.2% 14.3% 678 989 -6.5% 45.9%	3 10 10 3 100 140 0 5 6 7	10 50		+44 +242	12 +28 35 +7
	Profit margin SG&A expenses	119.8% 28 2.4% 146	1,588 180.6% 283 17.8% 165 68.4%	1,627 81.2% 220 13.5% 179	2,045 33.0% 379 18.5% 235	1,432 23.1% -55 - 185 26.7% -241	1,960 23.4% 417 21.3% 169	20 1 1,524 2,25 -6.3% 10.5° 19 49 1.2% 22.0° 139 18 -22.3% -21.3° -119 31	39 1,593 36 11.2% 16 -34 36 - 35 202 36 9.2% 0 -236	2,591 32.2% 627 24.2% 262 55.0% 364	24 26 1,917 2,939 25.8% 30.1% 22 678 1.1% 23.1% 218 307	3 2 7 17 1,923 3,147 20.7% 21.5% 10 869 0.5% 27.6% 245 297 21.3% 13.4%	5 28 4,184 23.3% 593 14.2% 464	5 24 5,070 21.2% 879 17.3% 542		12 8 70 78 7,175 9,04 11.7% 26.0% 877 1,29 12.2% 14.3% 678 989	3 10 10 3 100 140 0 5 6 7 8 9	10 50		+44 +242	12 +28 35 +7
Malaysia	Profit margin SG&A expenses YoY Operating profit OPM Sales	119.8% 28 2.4% 146 78.0% -117	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 379	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 448	1,432 23.1% -55 - 185 26.7% -241 - 396	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393	20 1 1,524 2,25 -6.3% 10.5% 19 49 1.2% 22.0% 139 18 -22.3% -21.3% -119 31 - 13.7% 434 50	59 1,593 % 11.2% 106 -34 % -35 202 % 9.2% 9.2% -236 % -	16 2,591 32.2% 627 24.2% 262 55.0% 364 14.0%	24 26 1,917 2,939 25.8% 30.1% 22 678 1.1% 23.1% 218 307 56.8% 65.9% -194 370 - 12.6% 582 673	3 2 7 17 17 1,923 3,147 20.7% 21.5% 10 869 0.5% 27.6% 245 297 21.3% 13.4% -235 572 -18.2% 593 594	5 28 4,184 23.3% 593 14.2% 464 31.1% 128 3.1% 991	5 24 5,070 21.2% 879 17.3% 542 16.8% 337 6.6% 1,187		12 70 71 7,175 9,044 11.7% 26.0% 877 1,29; 12.2% 14.3% 678 989 -6.5% 45.9% 198 300 2.8% 3.4% 1,728 2,244	3 10 10 3 100 140 	10 50		+44 +242	12 +28 35 +7 08 +20
Malaysia	Profit margin SG&A expenses YoY Operating profit OPM Sales YoY	119.8% 28 2.4% 146 78.0% -117 - 362 15.3%	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 379 9.9%	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380 -0.3%	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 448 3.0%	1,432 23.1% -55 - 185 26.7% -241 - 396 9.4%	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393 3.7%	20 1 1,524 2,25 -6.3% 10.5° 19 45 1.2% 22.0° 139 18 -22.3% -21.3° -119 31 - 13.7° 434 50 14.2% 12.7°	59 1,593 % 11.2% 66 -34 % - 85 202 % 9.2% 60 -236 % - 15 472 19.2%	16 2,591 32.2% 627 24.2% 262 55.0% 364 14.0% 519 32.1%	24 26 1,917 2,939 25.8% 30.1% 22 678 1.1% 23.1% 218 307 56.8% 65.9% -194 370 12.6% 582 673 34.1% 33.3%	3 2 7 17 1,923 3,147 20.7% 21.5% 10 869 0.5% 27.6% 245 297 21.3% 13.4% -235 572 - 18.2% 593 594 25.6% 14.5%	5 28 4,184 23.3% 593 14.2% 464 31.1% 128 3.1% 991 25.6%	5 24 5,070 21.2% 879 17.3% 542 16.8% 337 6.6% 1,187 19.8%		12 70 71 71 71 72 72 72 72 72 72 72 72 72 72 72 72 72	3 10 10 3 100 140 5	10 50		+44 +242 +43 +35 +1 +208 +121 +75	12 +28 35 +7 08 +20 75 +19
Malaysia	Profit margin SG&A expenses YoY Operating profit OPM Sales	119.8% 28 2.4% 146 78.0% -117	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 379 9.9%	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380 -0.3% 43	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 448 3.0% 168	1,432 23.1% -55 - 185 26.7% -241 - 396 9.4% 60	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393 3.7% 73	20 1 1,524 2,25 -6.3% 10.5% 19 49 1.2% 22.0% 139 18 -22.3% -21.3% -119 31 - 13.7% 434 50	39 1,593 36 11.2% 36 -34 37 -38 38 202 39 9.2% 9.2% 9.2% -236 30 -236 31 472 472 49 19.2% 19.2%	16 2,591 32.2% 627 24.2% 262 55.0% 364 14.0%	24 26 1,917 2,939 25.8% 30.1% 22 678 1.1% 23.1% 218 307 56.8% 65.9% -194 370 - 12.6% 582 673	3 2 7 17 1,923 3,147 20.7% 21.5% 10 869 0.5% 27.6% 245 297 21.3% 13.4% -235 572 - 18.2% 593 594 25.6% 14.5% 113 104	5 28 4,184 23.3% 593 14.2% 464 31.1% 128 3.1% 991 25.6% 205	5 24 5,070 21.2% 879 17.3% 542 16.8% 337 6.6% 1,187		12 70 71 7,175 9,044 11.7% 26.0% 877 1,29; 12.2% 14.3% 678 989 -6.5% 45.9% 198 300 2.8% 3.4% 1,728 2,244	8 10 10 8 100 140 0	10 50		+44 +242 +43 +35 +1 +208	12 +28 35 +7 08 +20 75 +19
Malaysia	Profit margin SG&A expenses YoY Operating profit OPM Sales YoY Facility profit Profit margin SG&A expenses	119.8% 28 2.4% 146 78.0% -117 - 362 15.3% 46 12.7% 32	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 379 9.9% 55 14.5%	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380 -0.3% 43 11.3% 33	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 448 3.0% 168 37.5% 69	1,432 23.1% -55 - 185 26.7% -241 - 396 9.4% 60 15.2%	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393 3.7% 73 18.6%	20 1 1,524 2,25 -6.3% 10.5° 19 45 1.2% 22.0° 139 18 -22.3% -21.3° -119 31 - 13.7° 434 50 14.2% 12.7° 77 13 17.7% 25.7° 48 4	59 1,593 11.2% 16 -34 15 202 16 9.2% 9.2% 9.2% 9.2% 19.2% 19.2% 19.2% 19.2% 19.2% 19.2% 20.3% 20.3%	16 2,591 32.2% 627 24.2% 262 55.0% 364 14.0% 519 32.1% 109 21.0%	24 26 1,917 2,939 25.8% 30.1% 22 678 1.1% 23.1% 218 307 - 194 370 - 12.6% 582 65,93 34.1% 33.3% 138 162 23.7% 24.1%	7 1,923 3,147 20.7% 21.5% 10 869 0.5% 27.6% 245 297 21.3% 13.4% -235 572 - 18.2% 593 594 25.6% 14.5% 113 104 19.1% 17.5% 70 71	5 28 4,184 23.3% 593 14.2% 464 31.1% 991 25.6% 205 20.7% 111	54 42 5,070 21.2% 879 17.3% 542 16.8% 337 6.6% 1,187 19.8% 217 18.3% 141		12 70 77 77 77 77 77 77 77 77 77 77 77 77	10 10 100 140 1	10 50		+44 +242 +43 +35 +1 +208 +121 +75 +17 -5	12 +28 35 +7 08 +20 75 +19 -5 +1
Malaysia	Profit margin SG&A expenses YoY Operating profit OPM Sales YoY Facility profit Profit margin SG&A expenses YoY	119.8% 28 2.4% 146 78.0% -117 	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 379 9.9% 55 14.5% 31	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380 -0.3% 43 11.3%	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 448 3.0% 168 37.5% 69 91.7%	1,432 23.1% -55 -185 26.7% -241 -396 9.4% 60 15.2% 45 40.6%	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393 3.7% 73 18.6% 42 35.5%	20 1 1,524 2,25 -6.3% 10.5° -19 49 1.2% 22.0° 1.39 18 -22.3% -21.3° -119 31 - 13.7° 434 50 14.2% 12.7° 77 13 17.7% 25.7° 48 4 45.5% -39.1°	59 1,593 11.2% 16 -34 % - 202 55 202 66 9.2% 9.2% 19.2% 19.2% 19.2% 19.2% 20.3% 20.3% 20.3% 20.3%	16 2,591 32.2% 627 24.2% 262 55.0% 364 14.0% 519 32.1% 109 21.0% 54 28.6%	24 26 1,917 2,939 25.8% 30.1% 22 678 1.1% 23.1% 218 307 56.8% 65.9% -194 370 - 12.6% 582 673 34.1% 33.3% 162 23.7% 24.1% 64 73 33.3% 73.8%	3 2 7 17 1,923 3,147 20.7% 21.5% 21.5% 27.6% 24.5 297 21.3% 13.4% -235 572 25.6% 14.5% 113 104 19.1% 17.5% 70 71 22.8% 31.5%	5 28 4,184 23.3% 593 14.2% 464 31.1% 128 3.1% 991 25.6% 205 20.7% 111 27.6%	5 24 5,070 21.2% 879 17.3% 542 16.8% 337 6.6% 1,187 19.8% 217 18.3% 141 27.0%		12 77 77 77 77 77 77 77 77 77 77 77 77 77	3 10 10 100 140 3	10 50		+44 +242 +43 +39 +1 +200 +121 +79 +17 -3 -1.3pp -3.5pp +13 +13	35 +7 35 +7 38 +20 75 +19 -5 +1 -5 +1 -7 +2
Malaysia	Profit margin SG&A expenses YoY Operating profit OPM Sales YoY Facility profit Profit margin SG&A expenses	119.8% 28 2.4% 146 78.0% -117 - 362 15.3% 46 12.7% 32	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 379 9.9% 55 14.5% 31	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380 -0.3% 43 11.3% 33	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 448 3.0% 168 37.5% 69 91.7%	1,432 23.1% -55 - 185 26.7% -241 - 396 9.4% 60 15.2%	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393 3.7% 73 18.6% 42 35.5%	20 1 1,524 2,25 -6.3% 10.5' 19 49 1.2% 22.0' 139 18 -22.3% -21.3' -119 31 - 13.7' 434 50 14.2% 12.7' 77 13 17.7% 25.7' 48 4 45.5% -39.1' 29 8	59 1,593 % 11.2% 166 -34 % 202 % 9.2% 100 -236 % -35 19.2% 19.2% 19.2% 19.2% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3%	16 2,591 32.2% 627 24.2% 262 55.0% 364 14.0% 519 32.1% 109 21.0% 54 28.6%	24 26 1,917 2,939 25.8% 30.1% 22 678 1.1% 23.1% 218 307 56.8% 65.9% -194 370 12.6% 582 673 34.1% 33.3% 138 162 23.7% 24.1% 64 73 33.3% 73.8% 74 89	3 2 7 1,923 3,147 20.7% 21.5% 10 869 27.6% 245 297 21.3% 13.4% -235 572 - 18.2% 25.6% 14.5% 113 10.4 19.1% 17.5% 70 71 22.8% 31.5% 43 33	5 28 4,184 23.3% 593 14.2% 464 31.1% 991 25.6% 205 20.7% 111	54 42 5,070 21.2% 879 17.3% 542 16.8% 337 6.6% 1,187 19.8% 217 18.3% 141		12 70 77 77 77 77 77 77 77 77 77 77 77 77	3 10 10 10 100 140 10 100 140 10 10 10 10 10 10 10 10 10 10 10 10 10	10 50		+44 +242 +43 +3! +1 +208 +121 +7! +17 -! -1.3pp -3.5p +13 +11 +5 -22	35 +7 35 +7 38 +20 75 +19 -5 +1 -5 +1 -7 -7 -7 -7 -7 -7 -7
	Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM Sales	119.8% 28 2.4% 146 78.0% -117 -127 -138 46 12.7% 32 14.3% 13 3.63% 176	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 55 14.5% 31 	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380 -0.3% 43 11.3% 33 -10 2.6%	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 448 3.0% 168 37.5% 69 91.7% 99 22.1%	1,432 23.1% -55 185 26.7% -241 - 396 9.4% 60 15.2% 45 40.6% 14 3.5%	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393 3.7% 73 18.6% 42 35.5% 31 7.9% 141	20 1 1,524 2,25 -6.3% 10.5' 19 45 1.2% 22.0' 139 18 -22.3% -21.3' -119 31 -13.7' 434 50 14.2% 12.7' 77 13 17.7% 25.7' 48 4 45.5% -39.1' 29 8 6.7% 17.4' 141 20	99 1,593 11.2% 11.2% 12.5 202 15 202 16 9.2% 16 9.2% 17 19.2% 18 19.2% 19 20.3% 20.3% 20.3% 20.3% 19 20.3% 10 8 1.3% 10 8 1.3%	16 2,591 32.2% 627 24.2% 262 55.0% 364 14.0% 519 32.1% 109 21.0% 54 28.6% 55 10.6%	24 26 1,917 2,939 25.8% 30.1% 22 678 218 307 5-194 370 - 12.6% 582 673 34.1% 33.3% 138 162 23.7% 24.1% 64 73 33.3% 73.33% 74 89 12.7% 13.2%	3 2 7 17 17 1,923 3,147 20.7% 21.5% 21.5% 27.6% 27.6% 27.6% 27.5 21.3% 13.4% -235 25.5% 11.3 104 19.1% 17.2 2.8% 31.5% 43 33 2.3% 5.6% 192 180	5 28 4,184 23,3% 593 14,2% 464 31.1% 128 3.1% 991 25.6% 205 20,7% 111 27.6% 93 9,4% 384	5 24 5,070 21.2% 879 17.3% 542 16.8% 337 6.6% 1,187 19.8% 217 18.3% 141 27.0% 6.4% 372		12 17 77 77 77 77 77 77 77 77 77 77 77 77	3 10 10 10 10 10 10 10 10 10 10 10 10 10	10 50		+44 +242 +43 +39 +1 +200 +121 +79 +17 -3 -1.3pp -3.5pp +13 +13	35 +7 35 +7 38 +20 75 +19 -5 +1 -5 +1 -7 -7 -7 -7 -7 -7 -7
	Profit margin SGBA expenses YoY Operating profit OPM Sales YoY Facility profit Profit margin SGBA expenses YoY Operating profit OPM Sales YoY YoY OPM	119.8% 28 2.4% 146 78.0% -117 -3 362 15.3% 46 12.7% 32 14.3% 13 3.66% 69.2%	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 379 9.9% 55 14.5% 31 - 25 6.6% 153	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380 -0.3% 43 11.3% 33 -10 2.6% 148 22.3%	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 448 3.0% 69 91.7% 99 22.1% 157 6.8%	1,432 23,1% -55 - 185 26,7% -241 - 396 9,4% 60 15,2% 45 40,6% 14 3,5% 182 3,4%	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393 3.7% 42 35.5% 31 7.9% 141 -7.8%	20 1 1,524 2,25 -6,3% 10.5' 19 45 1.2% 22.0' 139 18 22.3% -21.3' -119 31 -119 31 17.7% 25.7' 77 13 17.7% 25.7' 48 45.5% -39.1' 29 8 6.7% 17.4' 141 29 -4.7% 29.9'	99 1,593 11.2% 11.2% 16 -34 15 202 202 203 9.2% 9.2% 19.2% 19.2% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.	16 2,591 32.2% 627 24.2% 262 55.0% 364 14.0% 519 32.1% 109 21.0% 54 28.6% 55 10.6% 184 30.5%	24 26 1,917 2,939 25.8% 30.1% 22 678 1.1% 23.1% 56.8% 65.9% -194 37.3 34.1% 33.3% 138 162 23.7% 24.1% 46 73 33.3% 73.8% 74 89 12.7% 13.2% 12.91 3.9%	3 2 7 17 1,923 3,147 20.7% 21.5% 10 869 0.5% 27.6% 245 297 21.3% 13.4% -235 572 - 18.2% 593 594 25.6% 14.5% 113 104 19.1% 17.5% 70 71 22.8% 31.5% 43 33 7.3% 5.6% 192 180	5 28 4,184 23.3% 593 14.2% 464 31.1% 991 25.6% 205 20.7% 111 27.6% 93 9,4% 48.9%	5 24 5,070 21.2% 879 17.3% 542 16.8% 337 6.6% 1,187 19.8% 217 18.3% 141 27.0% 76 6.4% 372 3.1%		12 17 77 77 77 77 77 77 77 77 77 77 77 77	3 10 10 140 140 140 140 140 140 140 140 1	10 50		+44 +24: +43 +3: +1 +20: +121 +7: +17 -: -1.3pp -3.5pi +13 +1: +5 -2: -0.8pp -5.0pi	12 +28 15 +7 108 +20 175 +19 17 +3 12 -1 100 -3.00 14 -1
	Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM Sales	119.8% 28 2.4% 146 78.0% -117 -127 -138 46 12.7% 32 14.3% 13 3.63% 176	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 379 9.9% 55 14.5% 31 25 6.6% 153 66.1%	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380 -0.3% 43 11.3% 33 -10 2.6%	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 448 3.0% 168 37.5% 69 91.7% 99 22.1%	1,432 23.1% -55 185 26.7% -241 - 396 9.4% 60 15.2% 45 40.6% 14 3.5%	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393 3.7% 42 35.5% 141 7.9% 141 -7.8% -32	20 1 1,524 2,25 6-6.3% 10.5° 19 45 1.2% 22.0° 139 18 22.3% 21.3° -119 31 -13.7° 77 13 14.2% 12.7° 77 12 14.2% 12.7° 77 22 45.5% 39.1° 29 6.7% 17.4° 45.5% 39.1° 29 6.7% 17.4° 41.1° 29.9° -54 -5°	99 1,593 11.2% 11.2% 12.5 202 15 202 16 9.2% 16 9.2% 17 19.2% 18 19.2% 19 20.3% 20.3% 20.3% 20.3% 19 20.3% 10 8 1.3% 10 8 1.3%	16 2,591 32.2% 627 24.2% 262 55.0% 364 14.0% 519 32.1% 109 21.0% 54 28.6% 55 10.6%	24 26 1,917 2,939 25.8% 30.1% 22 678 218 307 5-194 370 - 12.6% 582 673 34.1% 33.3% 138 162 23.7% 24.1% 64 73 33.3% 73.33% 74 89 12.7% 13.2%	3 2 7 17 17 1,923 3,147 20.7% 21.5% 21.5% 27.6% 27.6% 27.6% 27.5 21.3% 13.4% -235 25.5% 11.3 104 19.1% 17.2 2.8% 31.5% 43 33 2.3% 5.6% 192 180	5 28 4,184 23,3% 593 14,2% 464 31.1% 128 3.1% 991 25.6% 205 20,7% 111 27.6% 93 9,4% 384	5 24 5,070 21.2% 879 17.3% 542 16.8% 337 6.6% 1,187 19.8% 217 18.3% 141 27.0% 6.4% 372		12 17 77 77 77 77 77 77 77 77 77 77 77 77	3 10 10 140 140 140 140 140 140 140 140 1	10 50		+44 +24; +43 +3; +1 +20; +121 +7; +17 -; -1.3pp -3.5p; +13 +1; +5 -2; -0.8pp -5.0pp	12 +28 15 +7 108 +20 175 +19 17 +3 12 -1 100 -3.00 14 -1
	Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit OPM Sales YOY Facility profit Profit margin SGBA expenses	119.8% 28 2.4% 146 78.0% -117 362 15.3% 46 12.7% 32 14.3% 13 3.6% 27 176 69.2% 27 15.3%	1,588 180.6% 283 17.8% 165 68.4% 379 9.9% 55 14.5% 31 - 25 6.6% - 21 22 22	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380 -0.3% 43 11.3% 33 -10 2.6% 148 22.3% -26	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 448 3.0% 168 37.5% 69 91.7% 99 22.1% 6.8% -22 -28	1,432 23,1% -55 26,7% -241 - 396 9,4% 60 15,2% 45 40,6% 14 3,5% 182 3,4% -7 -3 30	1,960 23,4% 417 21,3% 169 2,4% - 2,4% - 393 3,7% 318,6% 42 35,5% 111 -7,8% -32 17	20 1 1,524 2,25 6-6.3% 10.5° 19 46 1.2% 22.0° 139 16 22.3% -21.3° -119 31 -13.7° 434 55 14.2% 12.7° 77 11 17.7% 25.7° 445.5% 39.1° 29 8 6-7% 17.4° 141 20.2° -4.7% 29.9° -54 -54 -54 -54 -54 -54 -54 -54 -54 -54	99 1,593 11.2% 11.2% 12.20 15.5 202 20.2 2.2% 19.2% 19.2% 19.2% 19.2% 19.2% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 20.3% 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23.3% 593 14.2% 464 31.1% 28 2.5% 20.7% 201 27.6% 384 18.9% -79 50	5 24 5,070 21.2% 879 17.39% 542 16.89% 337 6.69% 11,187 19.89% 217 18.39% 76.69% 372 3.19% 76 6.49% 372 3.19% -12 60		12 1 70 77 7,175 9,044 11.7% 26,0% 877 1,22 12.2% 14.3% 6.5% 45,9% 1,728 2,244 10,1% 30,0% 1,728 2,244 10,1% 30,0% 1,728 2,244 10,1% 30,0% 1,728 2,244 10,1% 30,0% 1,728 2,244 10,1% 30,0% 1,728 2,244 10,1% 30,0% 1,73% 40,1% 668 76.5 5,4% 14.19 1,43 -143 -124 1,43 -124 96 10.1	3 10 10 10 10 10 10 10 10 10 10 10 10 10	10 50		+44 +24: +43 +3: +1 +20: +121 +7: +17 -: -1.3pp -3.5pi +13 +1: +5 -2: -0.8pp -5.0pi	12 +28 15 +7 108 +20 175 +19 17 +3 12 -1 100 -3.00 14 -1
	Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY YOY Facility profit Profit margin SGBA expenses YOY	119.8% 28 2.4% 146 78.0% -117 362 15.3% 46 12.7% 32 14.3% 176 69.2% 27 15.3% 23 35.3%	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 379 9.5% 14.5% 31 25 6.6% -21	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380 -0.3% 43 11.3% 33 -10 2.6% 148 22.3% -26 -17	2,045 33.0% 379 18.5% 235 5.4% 47.0% 448 3.0% 168 37.5% 69 91.7% 22.1% 157 6.8% -22 -28	1,432 23,1% -55 - 185 26,7% -241 - 396 9,4% 60 15,2% 45,6% 14 3,5% 182 3,4% -7 - 30 30,4% -	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393 3.7% 73 18.6% 42 35.5% 31 7.9% -32 - 17	20 1 1,524 2,25 6-6.3% 10.5° 19 45 1.2% 22.0° 139 18 222.3% -21.3° -119 33 - 13.7° 434 55 14.2% 12.7° 77 13 17.7% 25.7° 48 4 45.5% 39.1° 45.5% 39.1° 47.5% 29.9° -54 -5 22 22,4% -3.6°	99 1,593 11,296 16 -34 16 -34 17 -34 18 -202 18 9,296 19 -296 10 96 10 96 10 96 10 203 10	16 2,591 32.2% 627 24.2% 262 55.0% 364 14.0% 109 21.0% 54 28.6% 55 10.6% 184 30.5% -50 -22 29.4%	24   256 27   27   27   27   27   27   27   27	3 2 7 17 17 1923 3.147 20.7% 21.5% 10 869 0.5% 27.6% 225 5.27 2.13% 13.4% 2.55% 14.5% 13 10 4.5% 13 10 4.5% 13 10 4.5% 13 10 4.5% 13 10 4.5% 14.5% 14.5% 15.5% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 15.2% 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+6 108 +20 109 -2.4 109 -3.0 109 -3.0 109 -4 109 -1 109 -1
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Thailand	Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Focility profit Profit margin SGBA expenses YOY OPM Sales YOY Focility profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Operating profit OPM Sales YOY Operating profit OPM Sales YOY	119.8% 28 2.4% 146 78.0% -117 -3622 15.3% 46 12.7% 32 14.3% 13 3.66% 27 15.3% 23 35.3% 44 2.3%	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 55 14.5% 31 - 25 6.6% -21 - 37.5% -42	1,627 81.2% 220 13.5% 41 2.5% 380 -0.3% 43 11.3% 33 10 2.6% 148 22.3% -26 17 -10.5% 47	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 448 3.0% 69 91.7% 69 92.1% 157 6.8% -22 28 -33.3% 47 -	1,432 23.1% -55 - 185 26.7% -241 - 396 9.4% 60 0 15.2% 45 40.6% 14 3.5% 182 3.4% -7 - 30 30.4% -37 - 141 271.1%	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393 3.7% 73 18.6% 42 35.5% 31 7.9% 141 -7.8% -32 -17 -22.7% 49 -164 173.3%	20 1 1,524 2,25 6,3% 10.5' 19 45 1.2% 22.0' 139 18 22.3% 21.3' 1-19 31 1-13,7' 434 5 14.2% 12.7' 48 48 5 45.5% 39.1' 29 6.7% 17.4' 141 22 2 29 4.7% 29.9' -54 -54 -54 -54 -54 -54 -54 -54 -54 -54	99 1,593 % 11,296 % 11,296 % 11,296 % 12,207 % 19,296 % 19,296 % 19,296 % 19,296 % 19,296 % 20,336 % 20,336 % 20,336 % 20,336 % 20,336 % 20,376 % 20,376 % 20,376 % 20,376 % 20,376 % 20,376 % 20,376 % 20,376 % 20,376 % 20,376 % 20,376 % 20,376 % 20,376 % 21,77 % 22,77 % 23,77 % 24,77 % 27 % 28,77 % 29,77 % 29,77 % 21,77 % 21,77 % 22,77 % 23,77 % 24,77 % 25,77 % 26,776 % 27 % 28 % 29,976 % 29,976 % 29,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 % 20,976 %	16 2,591 32.2% 627 24.2% 262 55.0% 364 14.0% 519 32.1% 109 21.0% 54 28.6% 55 10.6% -50 22 29.4% -73 - 236 43.9%	24 25 1,917 2,939 25,8% 30.1% 21,92 2,678 1,1% 23,1% 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,748 21,8 30,7 30,7 30,7 30,7 30,7 30,7 30,7 30,7	3 2 7 17 17 1923 3,147 2 1923 3,147 2 192	5 28 4,184 23,3% 593 14.2% 464 11.1% 205 20.7% 111 27.6% 384 18.9% -79 50 6.4% -130 1 -464 52.1%	5 24 5,070 212.5% 24 5,070 212.5% 2879 212.5% 2879 542 16.68% 337 6.6.69% 217 217 218.3% 217 217 21.2% 27.09% 76 6.49% 372 21.2 6.47 21.2 6.47 39.39.49%		12 1 70 77 7,175 9,044 11,79 26,09 877 1,292 877 1,292 878 1898 678 989 65,59 45,99 198 30 2,289 3,49 1,728 2,244 1,728 2,244 1,728 2,244 1,728 2,244 1,738 40,19 162 25 9,4% 11,49 668 76 5,4% 14,19 143 -122 6,7% 6,5% 240 -22 65,7% 6,5% 1,77 241 7,3% 40,19 162 25 9,4% 11,40 1,20 1,20 1,20 1,20 1,20 1,20 1,20 1,2	3 10 10 10 10 10 10 10 10 10 10 10 10 10	10 50		+44 +242 +43 +33 +1 +201 +121 +73 +17 -3 -1.30p 3.5p +13 +13 +13 +13 +5 -22 -0.8pp 5.0p -8 -4 +20 +43 +4 +4 +15 +43 +102 +83	+282 +285 +755 +1955 +775 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +1955 +195
Thailand	Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM SGBA expenses YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit	119.8% 28 2.4% 146 78.0% -117 3622 15.3% 32 14.3% 13 3.6% 176 69.2% 27 15.3% 4 2.3% 38	1,588 180.6% 283 17.8% 165 68.4% 117 7.4% 55 14.5% 31 - 25 6.6% 153 56.1% -21 - 22 37.5% -42	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 43 11.3% 33 10 2.6% 148 22.3% -2.6 -1.7 -10.5% -47 -2.8 -88 -7	2,045 33.0% 379 18.5% 235 5.4% 448 3.0% 488 3.0% 168 37.5% 69 91.7% 99 22.1% 157 6.8% -22 28 -33.3% -47 124 490.5% 22	1,432 23.1% -55 - 185 26.7% -241 -396 9.4% 60 15.2% 45 40.6% 14 3.5% 182 3.4% -7 - 30 30.4% -37 - 141 271.1%	1,960 23.4% 417 21.3% 169 2.4% - 248 12.7% 393 3.7% 42 35.5% 42 35.5% 31 7.9% -32 -17 -22.7% -49 -164 173.3% 1	20 1 1,524 2,25 6.3% 10.55 19 46 11.2% 22.0° 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18.3° 18.	99 1,593 1,593 1,12% 6166 -3-4 617 617 617 617 617 617 617 617 617 617	166 2,591 32.2% 627 24.2% 262 55.0% 364 14.09% 519 32.1% 54 10.99 21.0% 54 30.5% -50 22 29.4% -73 236 43.9% 27	24   256   25.8%   30.1%   25.8%   30.1%   25.8%   30.1%   25.8%   30.1%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8%   25.8% 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Thailand	Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM STATE TO STATE	119.8% 28 2.4% 146 78.0% -117 3622 15.3% 32 14.3% 13 3.6% 176 69.2% 27 15.3% 4 2.3% 38	1,588 180.6% 283 17.8% 17.8% 117 7.4% 379 9.9% 31	1,627 81.2% 220 13.5% 179 82.7% 41 2.5% 380 -0.3% 43 11.3% 33 3 10 2.6% 148 22.3% -10 -10.5% -47 -88 88 88 -7 8.0%	2,045 33.0% 379 18.5% 235 5.4% 144 7.0% 468 37.5% 69 91.7% 99 22.1% 157 6.8% 47	1,432 23.1% -55 - 185 26.7% -241 -396 9.4% -60 15.2% -45 40.6% 14 3.5% 182 3.4% -7 - 30 30.4% -37 - 141 271.1%: 19 13.5% 266	1,960 23.4% 417 21.3% 169 2.4% - 169 2.4% - 393 3.7% 42 35.5% - 31 7.9% 141 - 7.8% - 49 - 177 - 22.7% - 164 173.3% 19 11.6% 21	20 1 1,524 2,25 6-3% 10.5' 11.2% 22.0' 13.9 16 22.3% 21.3' 1-119 31 1-119 31 1-12,25 14.2% 12.7' 77 11 17.7% 25.7' 48 4 45.5% 39.1' 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184 30,5% 22 29,4% 236 43,9% 27 11,4% 36	24   256   25.8%   30.1%   25.8%   30.1%   25.8%   30.1%   25.8%   30.1%   25.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   26.8%   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Thailand	Profit margin SGA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGA expenses YOY Operating profit OPM Sales YOY Operating profit OPM Sales YOY Facility profit Facility profit Profit margin SGA expenses YOY Facility profit OPM Sales YOY Operating profit OPM Sales YOY Operating profit OPM Sales YOY Facility profit Profit margin SGA expenses YOY Facility profit Profit margin SGA expenses YOY	119.8% 28 2.4% 146 78.0% -117 362 15.3% 46 12.7% 22 14.3% 176 69.2% 27 15.3% 38 38 21 5.3% 21	1,588 (283 180.6%) 283 17.8% (283 17.8%) 283 17.8% (283 17.8%) 283 17.8% (283 18.6%) 283 18.6% (283 18.6%) 285 14.5% (283 18.6%) 285 14.5% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 18.6%) 285 18.6% (283 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Thailand	Profit margin SGBA expenses YOY Operating profit OPPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPPM Sales YOY Facility profit Profit margin SGBA expenses YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPPM Sales YOY Operating profit OPPM Solas YOY Operating profit OPPM Solas YOY Operating profit OPPM Solas YOY Operating profit OPPM Operating profit OPPM Operating profit Operating profit	119.8% 28 2.4% 146 78.0% 3622 15.3% 46 12.7% 32 14.3% 13 3.6% 176 69.2% 27 15.3% 4 2.3% 38 38 38	1,586 (283 180.6%) 283 17.8% 17.8% 17.8% 17.8% 17.8% 17.8% 17.8% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 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Thailand Philippines	Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Operating profit OPM SGBA expenses YOY Operating profit OPM SGBA expenses YOY Facility profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPM SGBA expenses YOY Operating profit OPM	119.8% 28 2.4% 146 78.0% -117 362 15.3% 46 12.7% 22 14.3% 176 69.2% 27 15.3% 38 38 21 5.3% 21	1,586 (283 180.6%) 283 17.8% 17.8% 17.8% 17.8% 17.8% 17.8% 17.8% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 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+2855 +75 +1655 +75 +175 +175 +175 +175 +175 +175 +17
Thailand Philippines	Profit margin SGBA expenses YOY Operating profit OPPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPPM SGBA expenses YOY Operating profit OPPM SGBA expenses YOY Operating profit OPPM Sales YOY Operating profit OPPM Solab expenses YOY Operating profit OPPM	119.8% 28 2.4% 146 78.0% -117 362 15.3% 46 12.7% 22 14.3% 176 69.2% 27 15.3% 38 38 21 5.3% 21	1,586 (283 180.6%) 283 17.8% 17.8% 17.8% 17.8% 17.8% 17.8% 17.8% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 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Thailand Philippines	Profit margin SGBA expenses YOY Operating profit OPPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPPM SGBA expenses YOY Operating profit OPPM SGBA expenses YOY Operating profit OPPM Solacs YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPPM Sales YOY Facility profit Profit margin SGBA expenses YOY Operating profit OPPM Sales YOY Facility profit Profit margin SGBA expenses YOY Sales YOY Facility profit Profit margin SGBA expenses	119.8% 28 2.4% 146 78.0% -117 362 15.3% 46 12.7% 22 14.3% 176 69.2% 27 15.3% 38 38 21 5.3% 21	1,586 (283 180.6%) 283 17.8% 17.8% 17.8% 17.8% 17.8% 17.8% 17.8% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 17.4% 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1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593   1,593	16.6 2,2,591 3,2,2% 627 24,2% 262 25,10 364 14.0% 519 32,1% 54 28.6% 510.6% 184 30.5% 22 22 29.4% 36 43.9% 36 43.9% 36 71.4% 36 71.4% 36 30.3% 32,7% 10101	24   256 1,119   2,939 25,898   30,198 25,898   30,198 21,198   23,198 218   307 218   307 218   307 219   307 218   307 219   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   307 218   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### 1H FY02/19 results (out October 10, 2018)

- Q2 FY02/19: Continued strong sales at existing facilities in Japan, aggressive overseas expansion and revitalization boosted sales (+5.7% YoY). Operating profit up 12.0% YoY, due in part to closing of unprofitable facilities
  - ➤ Versus forecasts: Sales were largely in line with plan (0.6% under forecast), operating profit finished marginally (1.8%) above forecast
  - ➤ Increase in expenses: Strategy-related costs such as those for developing new businesses increased by JPY206mn, the bulk of which were increase in costs to revitalize existing facilities ahead of schedule, and onetime costs including startup expenses for new businesses in Q1
  - > Japan: The prizes division saw sales continue to grow with help of increased lineup of unique limited-edition prizes and promotional effects of YouTube and other media
  - ➤ China: Sales up 21.2% YoY, operating profit increased by 2.6x. Revitalization measures implemented at 15 facilities proved effective, increasing sales by 15.9% YoY (+9.7pp versus facilities that did not undergo revitalization)
  - > ASEAN: Sales up 33.9% YoY. Operating profit increased in Philippines, Indonesia, and Vietnam while operating loss narrowed in Thailand
- The online claw game Molly.Online (launched in March 2018) recorded a strong increase in members. Sales have been trending well ahead of the company's forecast
- Topics: The company opened its second Molly WAKA facility, in Beijing, China, and opened a New Kidzooona facility in Indonesia
- Full-year plan: The company has left the full-year plan largely unchanged, but has reduced the number of new facilities opening plan from an initial target of 110 to 90
- The company announced its strategic direction for the medium- to long-term: a) customers; focus on children and their families, b) business; offer "entertainment spaces where parents and children gather," and c) business area; global (50%)

#### Quarterly earnings (left: sales, right: operating profit, bottom: existing facility sales growth rate)

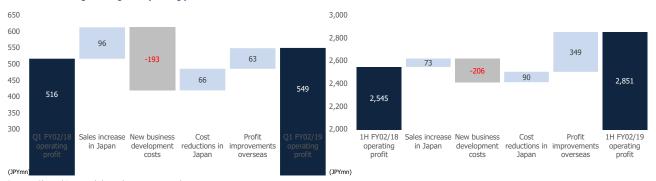


Seasonality: The company's business is prone to large fluctuations in earnings due to seasonal factors in each quarter. Q2 and Q4 are periods of high demand, while demand tends to decline in Q1 and Q3. Q1 (March–May) is affected by a lack of school holidays and restraint in purchasing following the Chinese New Year, with March marking a low point. Q3 includes the Mid-Autumn Festival (15th day of the 8th month of the lunar calendar, which corresponds to late September to early October of the Western calendar) and the National Foundation holidays (October), with September marking



the low point. Conversely, Q4 coincides with the Chinese New Year holidays (first month of the lunar calendar, which corresponds to the period from late January to early February of the Western calendar), which affect monthly sales. (When the holiday period shifts into February, January sales worsen.)

#### Factors contributing to changes in operating profit



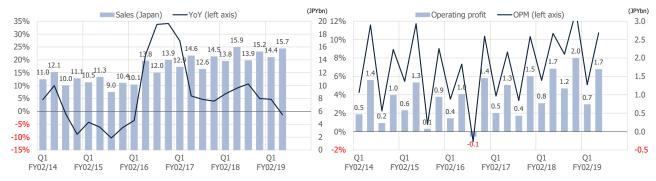
Source: Shared Research based on company data

#### **Earnings summary**

In 1H FY02/19, sales were JPY37.8bn (+5.7% YoY, +JPY2.0bn YoY) and operating profit was JPY2.9bn (+12.0%, +JPY306mn). The pattern of strong momentum at existing facilities in Japan driving earnings and sales growth from aggressive overseas expansion continued in Q1. We note that investment in new business formats and upfront spending on revitalization measures for existing facilities eroded profits. Sales reached a record high for the eighth year running, and operating profit, recurring profit, and net income attributable to owners of parent all finished at record highs.

Operating profit was depressed by an increase in strategy-related costs such as those for developing new businesses, but this was a onetime expense for only Q1 (JPY193mn) that was almost eliminated in Q2 (1H total of JPY206mn). Costs increased as revitalization of existing facilities was brought forward to coincide with shopping center refurbishments, and due to aggressive expansion in floor space. Of this cost increase the bulk was shipping costs for newly procured fixtures and replacement machines supporting facility revitalization, and for startup costs including those for establishing a manga (comic) corner inside the hot bath facility Oyugiwa opened in April. Launched in March, the online claw game Molly.Online struggled initially, but the number of members steadily increased. Sales exceeded forecast by a large margin, supported increased popularity of unique prizes. Going forward, the company plans to expand further, adding claw game machines.

#### **Domestic** earnings



#### Factors contributing to operating profit change

	FY02/15	FY02/16 I	FY02/17	FY02/16				FY02/17				FY02/18		FY02/19				
(JPYmn)	FY	FY	FY	FY	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
OP (previous year)	2,536	2,627	2,748	3,769	522	1,226	180	698	196	1,071	-162	1,642	210	1,484	239	1,836	517	2,028
Sales increase in Japan	-1,089	-73	733	1,868	-170	-140	-97	334	130	183	434	-14	356	343	677	492	96	-23
Cost reductions in Japan	1,051	183	270	307	<u>47</u>	<u>54</u>	35	47	35	47	123	65	31	128	78	70		24
Profits overseas	-78	343	624	398	-107	53	-89	349	-132	31	-124	18	41	149	168	264	63	350
Other	206	-332	-606	-372	-96	-121	-192	215	-20	152	-32	125	-121	-76	-162	-237	-193	-77
OP (current year)	2,627	2,748	3,769	5,970	196	1,071	-162	1,642	210	1,484	239	1,836	517	2,028	1,000	2,425	549	2,302

Source: Shared Research based on company data

Domestic: Prizes division maintained growth in sales; expanded unique limited-edition prizes and promotions on YouTube contributed In Japan sales were JPY30.0bn (+1.5% YoY) and operating profit was JPY2.4bn (-1.8% YoY). Sales at existing amusement machine facilities remained solid (+2.7% YoY) on continued strength in the prizes division (+7.1% YoY), facility renovation effects (+8.8% YoY, +8.1pp versus facilities that did not undergo renovation) and increasing floor space, all of which boosted consolidated



earnings. Operating profit was JPY2.4bn (-1.8% YoY) due to a JPY208mn YoY increase in SG&A expenses and up 0.2pp of the SG&A expense ratio, because the company invested in new store brands and booked upfront expenses on renovating existing facilities and other measures. We consider this spending to be investment for growth.

In the prizes division, which accounted for around 45% of sales in FY02/18, strengthening limited-edition prizes in collaboration with a confectionery company and YouTubers and the effect of a promotional YouTube video that recorded 91.8mn views in March—August 2018, exceeding the number of views for the entire FY02/18, lifted sales. Unique limited-edition prizes continued to account for around 30% of all prizes as of Q1, but growing expertise at the company appeared to have raised the likelihood of creating a hit from these prizes (the company has also increased the number of machines by roughly 10% since March). Sales in Q2 lost steam in part due to robust results (+ over 30% YoY thanks to collaboration with a hit movie) in the previous year, but the company plans to implement countermeasures to recover.

#### Revitalization

The company also renovated 30 facilities in 1H FY02/19 (versus 21 facilities in Q1 FY02/19 and 22 in 1H FY02/18). As a result, sales at existing facilities grew 8.8% (up 8.1pp) YoY after the changes (versus the 0.7% YoY growth recorded prior to the renovations in the previous year). As of Q1 FY02/19: a) The company still planned to renovate 30–35 facilities in FY02/19, down somewhat from the 42 facilities renovated over the course of FY02/18, and b) As the company also was acquiring new knowledge it believed that overall the renovations gradually were yielding results; although the benefits of renovation differed between facilities, some had seen sales subsequently increase by 35% YoY. Shared Research would like to confirm the details at interviews with the company, considering the big impact of revitalization. As a further measure to increase sales, Aeon Fantasy also is actively hunting out idle areas within shopping centers in effort to boost floor base. By filling this additional space with the most popular prize machines, the company is continuing to enhance performance even after renovations.

Four facilities were converted to the PALO brand in FY02/18, and in FY02/19 the focus of revitalization will be on upgrades to machines at Mollyfantasy facilities. In other formats, Aeon Fantasy has identified issues with the Nosica brand and is working to resolve them. In May, for example, the company decreased the number of medal games and increased the number of prize machines, which immediately led to a doubling of sales. While the Nosica brand is still an experiment and not yet at the expansion stage, these improvement efforts nonetheless bear watching.

Yokubari Pass, the company introduced in April 2017, a fixed-price pass that allows users to play as much as they like for a limited period of time remained popular. As of May 2018, the pass was valid at 136 facilities, and this increased to 200 facilities by July 2018 as planned.

#### **Topics: New business formats**

#### Molly.Online

Aeon Fantasy launched its online claw game Molly.Online in March 2018. The new game fared poorly in March, but it gained popularity and membership has since increased steadily with the aid of strengthened advertising via YouTube and the introduction of prizes (developed with collaboration from YouTubers) popular among patrons of physical facilities. The number of members has been increasing by 10,000 members per month, surpassing 60,000 members in August 2018. As sales have thus far seem to have been well above plan, the company believes its full-year target is eminently achievable. When Aeon Fantasy launched premium collaborative prizes available only to Molly.Online players, sales were sharply higher even on weekdays, as unlike games in physical facilities, Molly.Online can be played 24 hours a day. The company plans further expansion, including enlarged booths and increasing numbers of claw game machines. Increased number of members will fully contribute in FY02/20. We will keep a close watch on the development.

Although higher sales have driven up costs for personnel involved in prize delivery, such costs apparently are in line with plan and of no particular concern to the company. Aeon Fantasy plans to continue running regular advertisements on YouTube, and believes that even if earnings from the remotely-played claw game grow, personnel costs will increase only slightly, and





additional machines have already been secured. Aeon Fantasy estimates that rival online claw game Toreba has tens of times as many members, but expects advertising to deliver higher sales and profits for Molly. Online.

#### Oyugiwa

Opened in April 2018, Aeon Fantasy's pilot hot bath facility Oyugiwa, apparently is performing below expectations. However, the company says it is gradually reaching the type of customers originally envisioned. Whereas previously there was a high proportion of male customers, the percentage of female customers is now increasing, as planned. Aeon Fantasy is looking at further means of growing the bath facility's clientele, such as welcoming groups of female customers. Oyugiwa currently runs at a loss, and the company has no plans to open additional hot bath facilities in FY02/19, as it remains in the pilot stage; the company is still trying to work out, for example, the level of profitability appropriate for a newly opened facility of this type.



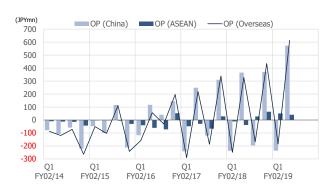
Source: Company data

#### Ton Ikkyoku

In July 2018, the company opened its second "healthy mahjong" facility (Ton Ikkyoku), which is its first facility in western Japan. This brand is also an experiment. Given the smaller floor space needed and relatively low startup costs (several million yen), if these facilities turn profitable the company looks to open more inside shopping centers, for example. Aeon Fantasy also plans to hold mahjong classes (for a monthly fee of JPY6,400 or JPY8,000), as a means of generating stable sales and attracting more customers.

#### Quarterly earnings: Overseas





#### **Number of facilities: Overseas**







## China: Sales up 21.2%, operating profit up by 2.6x. Renovation of 15 facilities boosts sales by 15.9% (+9.7pp versus 6.2% at facilities that did not undergo revitalization)

In China, sales were JPY5.1bn (+21.2% YoY) and the operating profit was JPY337mn (2.6x operating profit in 1H FY02/18). Double digit sales growth continued due to opening 10 new facilities, closing 12 unprofitable ones and renovating 15. In particular, Aeon Fantasy thinks it highly significant that the China business was profitable at the facility level, even though newly opened facilities were still finding their feet and Q1 is seasonally a period of lackluster demand. The company attributes this in large part to revitalization measures.

Over the full year, Aeon Fantasy initially planned to open sixty new facilities. However, the company was behind schedule as it opened just 10 new facilities in 1H (two facilities in Q1, eight in Q2). There appear to have been two reasons for this as of Q1: a) as in the previous year, planned openings of new facilities are heavily tilted toward 2H; and b) even though the company has identified candidate sites, it needs to carry out due diligence. At this stage Aeon Fantasy has left its full-year target intact and is still aiming to open sixty new facilities, but the actual number could be closer to fifty. There is also potential, however, for new facilities to open in a burst, if development of new formats (including the Molly WAKA Kids Restaurant outlined below) allows the company to open multiple facilities within the same shopping center. We plan to confirm progress at interviews with the company. Also, as mentioned above the company closed six unprofitable facilities in Q1 when rent contracts came up for renewal (over the full year the plan is to shut 10 facilities);in 1H the company closed 12 stores, exceeding plans, which seems to have contributed to an increase in profit.

Aeon Fantasy has renovated 15 (five in Q1 and 10 in Q2) facilities (mostly Kidzooona) that have been in business four to five years. The company expanded MollyFantasy prize spaces and increase prize lineup, and renewed amusement machines at Kidzooona. Sales of the five renovated facilities increased 15.9% YoY in 1H (+9.7pp versus 6.2% at facilities that did not undergo revitalization). Although it is not clear how many facilities will undergo renovations in FY02/19, the number of candidates for renovation (29 facilities opened in FY02/14) has increased.

#### Topics: Opened second circus-themed Molly WAKA Kids Restaurant in Beijing, China

On July 14, 2018, the company opened its first Molly WAKA Kids Restaurant, a new business format with a circus theme in Hangzhou, China. This format was concocted by Aeon Fantasy's new president Nobuyuki Fujiwara, who also has experience in the restaurant and service industry, when he was head of the company's China business. The company will continue to propose new play facilities that combine food service and entertainment as a new business format that responds to a wider range of consumers amid the ongoing expansion of the children's market in China. Molly WAKA is a new style of entertainment restaurant that provides menus that are popular among kids and families and family-friendly entertainment such as performances by magicians and clowns. Aeon Fantasy's China business consists primarily of the Mollyfantasy, Kidzooona, and FÄNPEKKA formats, and the company potentially could open multiple formats within the same shopping center in future, with scope also to export formats back to Japan. The second store was opened in Beijing on August 24, 2018.







Source: Company data

## ASEAN: Sales up 33.9%, operating profit increased in the Philippines, Indonesia, and Vietnam, and operating losses in Thailand narrowed.

Sales were JPY2.7bn (+33.9% YoY) and operating profit was JPY92mn in the ASEAN business, getting back to the black (operating loss of JPY49mn in 1H FY02/18). Operating profit grew in the Philippines, Indonesia, and Vietnam, and the operating loss in Thailand narrowed. 14 new facilities opened (one in Cambodia, four in Malaysia, six in the Philippines, one in Vietnam, and two



in Indonesia). In Indonesia the company renovated to make better use of space, opening a new model of Kidzooona facility with an expanded entertainment range.

In Malaysia, operating profit came in at JPY76mn (-JPY17mn YoY), due to the large impact on the time-charge amusement machines from an epidemic among children centered around the busy season in July to August.

The Thai business posted an operating loss of JPY72mn (narrowed by JPY58mn YoY) in 1H. Profit at the facility level improved, causing operating losses to narrow, and although the company still thinks an FY02/19 profit remains out of reach, quarterly profits and a full-year profit in FY02/20 now look attainable. The company pushed ahead with renovation of facilities in Thailand, such as updating Kidzooona play equipment, installing new equipment, and adding a relaxation zone, resulting in a 121.0% YoY sales increase in Q1 FY02/18 versus a 96.8% increase the previous year before the changes. We would like to confirm the situation for Q2. Closure of unprofitable stores appears likely to continue.

In the Philippines, operating profit was JPY36mn (+JPY31mn YoY) in Q1. This was a better result than planned, thanks in large part to strong starts by new facilities opened a year earlier. Among first generation facilities opened, some appear to be operating in the red, but in general newer facilities have been highly successful, contributing significantly to earnings. As of June 2018, Aeon Fantasy Vietnam president Atsushi Iyoda has been appointed president of Aeon Fantasy Group Philippines. The Vietnam unit is performing extremely well, already running at a profit, and over the full year the company expects to turn a profit in the Philippines also.

Looking ahead to Q2 (for reference, as of Q1)

Strategy-related costs such as those for developing new businesses were mainly accountable for the YoY drop in profit in Q1, but such costs appear transitory in nature—consisting mostly of costs for bringing forward revitalization measures and initial costs for Oyugiwa and Molly.Online—and should decrease in Q2. The company aims to renovate eight or nine existing facilities in Q2, and still plans to renovate 35 facilities over the full year. While it will continue advertising Molly.Online on YouTube, Aeon Fantasy expects advertising expenditure to decline. In FY02/18, sales growth was driven for the most part by strong performances at the prizes and medals divisions, which together made up about 70% of sales. In Q2, the company expects summer machine upgrades at the medals division, and machine increases at the prizes division to contribute to sales.

#### Strategic direction

	At present	Medium- to long-term
Customers	Children and their families, other	Focus on children and their families
Business	Provider of games	Provider of entertainment space where children and parents
Growth area	Asia (19%)	Global (50%)

Source: Shared Research based on company data

In the results briefing materials for 1H, the company stated its strategic direction going forward (shown in the table above). An outline is as follows regarding a) evolution of existing businesses, b) creation and expansion of new businesses, and c) store opening strategy.

#### **Evolution of existing businesses**

The company aims to 1) introduce unique games, products and interior decoration, utilizing digital technology, and 2) procure amusement machines and others at lower prices than other companies by taking advantage of overwhelming facility numbers. This will include the world's first VR game machines for children, digital interior decoration, introduction of signage, original game machines, an eyesight training game (under development), and the indoor playground New Kidzooona.

#### Creation and expansion of new businesses

Based on the core concept of "play," the company plans to combine business areas with high affinity and high growth potential and add "out of the ordinary," "experience," and "expertise" by providing the company's unique value. The company is already operating Oyugiwa, Molly. Online, and Molly WAKA, and it plans to develop edutainment facilities and facilities in collaboration with major brands (currently under planning) in the future. The company also plans to horizontally deploy successful new businesses around the globe.

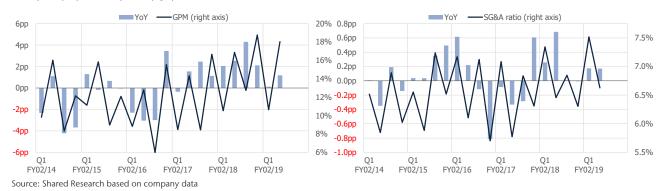


#### Store opening strategy

In Japan: open stores in undeveloped channels (department stores, home centers, large electronics retail stores, and others). In China: combine newly created facilities and expand. In ASEAN: open indoor playgrounds at the same business channels with other store brands. The company had originally planned to open 50 facilities in 50 shopping centers, but going forward it plans to open 100 facilities in 20 shopping centers (five facilities per shopping center).

#### Reference

#### Gross profit (left), SG&A expenses (right)



#### **Business performance: Japan (parent)**

Performance in Japan	FY02/1	7			FY02/1	8			FY02/19		FY02/17	FY02/18	FY02/19	FY02/15	FY02/16	FY02/17	FY02/18	FY02/19	FY02/20	FY02/21
(JPYmn)	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	1H	1H	1H	Cons.	Cons.	Cons.	Cons.	Est.	MTP	MTP
Parent sales	12,883	14,634	12,551	14,505	13,759	15,949	13,886	15,224	14,403	15,739	27,518	29,708	30,142	41,180	49,872	54,575	58,820	60,600	61,500	62,100
Time-based	4.4%	4.6%	4.5%	4.1%	4.2%	4.4%	4.3%	4.2%	4.3%	4.5%										
Physical activities	9.4%	8.7%	8.6%	8.0%	8.3%	7.4%	7.2%	6.8%	7.2%	7.3%										
Cards	15.9%	15.9%		16.4%			15.6%													
Medals	24.9%		24.4%		24.9%															
Prizes	39.8%		39.6%		42.3%															
Stickers	4.3%	3.4%	3.1%	2.7%	3.4%	2.5%	2.2%	2.2%		2.4%										
Capsules	1.1%	1.0%	1.0%	1.3%	1.2%	0.9%	0.9%	0.9%	0.9%	0.8%										
YoY	27.4%	6.0%	4.6%	4.0%	6.8%		10.6%	5.0%	4.7%	-1.3%	15.0%	8.0%	1.5%		21.1%	9.4%	7.8%		1.5%	1.0%
Existing stores YoY (qtr)	0.2%	6.8%	6.6%	6.9%	7.1%		10.0%	4.8%	5.5%	-2.1%				-8.0%	-1.5%	5.2%	7.8%	3.0%		
Time-based	5.6%	3.8%	2.4%	-6.2%	-4.9%	-1.2%	1.2%	1.0%	5.2%	-1.9%										
Physical activities	-17.7%	-9.7%	-6.3%	-6.6%	-4.8%	-6.4%	-7.4%	-9.6%	-7.5%	-0.8%										
Cards	-17.6%	-5.2%	8.9%	7.6%	2.8%	-6.9%	-5.5%	-7.0%	1.8%	-14.5%										
Medals	-2.4%	4.2%	0.2%	5.2%	6.9%	7.5%	9.9%		-1.2%	-0.7%										
Prizes	16.3%	12.5%								0.6%										
Stickers	-11.9%	-5.9%			-13.3%				-10.0%											
Capsules	9.5%	-7.0%			20.8%	8.4%			-10.5%											
Existing stores YoY (cml. qtr)	0.2%	3.6%	4.5%	5.2%	7.1%	8.4%	8.9%			1.4%					-1.5%			-	-	-
Cost of sales					12,136						24,251				44,474			-	-	-
YoY	26.9%	4.5%		2.9%	4.4%	6.0%	4.4%	2.2%		-1.6%	100.6%	5.3%			23.3%		4.3%	-	-	-
Gross profit	1,262	2,004	1,150	2,336	1,622		1,979				3,266	4,178	4,198	5,112		6,754		-	-	-
YoY	32.0%	16.4%	92.3%		28.5%				1.2%	0.0%	27.8%			-5.3%		25.1%		-	-	-
GPM	9.8%	13.7%	9.2%		11.8%						11.9%				10.8%			-	-	-
SG&A expenses	763	739	725	838	856	853	811	801	907	867	1,502	1,709	1,774	2,201	2,715	3,067	3,324	-	-	-
YoY	27.4%	4.2%	-0.7%	24.1%		15.4%		-4.4%	6.0%	1.6%	73.2%	-			23.3%		8.4%	-	-	-
SG&A ratio	5.9%	5.0%	5.8%	5.8%	6.2%	5.3%	5.8%	5.3%	6.3%	5.5%	5.5%	5.8%	5.9%	5.3%	5.4%	5.6%	5.7%			
Operating profit	498	1,264	425	1,498	766	1,702	1,167	1,991	735	1,689	1,763	2,468	2,424	2,911	2,684	3,687	5,628	5,900	6,150	6,400
YoY	39.9%	24.8%		3.6%			174.6%		-4.0%	-0.8%	4.4%			-5.4%		37.4%		4.8%	4.2%	4.1%
OPM	3.9%	8.6%	3.4%			10.7%		13.1%		10.7%	6.4%	8.3%	8.0%	7.1%	5.4%	6.8%	9.6%			10.3%
No. of facilities	497	495	488	481	477	470	470	459	461	458	495	470	458	334	496	481	459	460	465	470
Openings	7	2	2	1	3	2	3		3	2	9	5	5	12	187	12	8	10	10	10
Closures (est.)	-6	-4	-9	-8	-7	-9	-3	-11	-1	-5	147	142	134	-4	-25	-27	-30	-9	-5	-5
Sales per facility	25.95	29.50	25.54	29.94	28.72	33.68	29.54	32.78	31.31	34.25	54.93	61.57	64.96		120.17			131.88	132.97	132.83
Cost per facility	23.41	25.46	23.19	25.11	25.34	28.29	25.33	26.76	27.74	28.69	48.41	52.91	55.91	109.30		97.89		-	-	-
GP per facility	2.54	4.04	2.34	4.82	3.39	5.40	4.21	6.01	3.57	5.56	6.52	8.66	9.05	15.49	13.01	13.83	19.05	-	-	-
SG&A per facility	1.54	1.49	1.48	1.73	1.79	1.80	1.73	1.72	1.97	1.89	3.00	3.54	3.82	6.67	6.54	6.28	7.07	-	-	-



#### **Business performance: Overseas**

Overseas	performance	FY02/1	7			FY02/1	8			FY02/19		FY02/17	FY02/18	FY02/19	FY02/15	FY02/16	FY02/17	FY02/18	FY02/19	FY02/20	FY02/21
(JPYmn)		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	1H	1H	1H	Cons.	Cons.	Cons.	Cons.	Est.	MTP	MTP
China	Sales	1,432	1,960	1,524	2,259	1,593	2,591	1,917	2,939	1,923	3,147	3,392	4,184	5,070	3,531	6,423	7,175	9,040	-	-	-
	YoY	23.1%	23.4%	-6.3%	10.5%	11.2%	32.2%	25.8%	30.1%	20.7%	21.5%	7.8%	-	-	225.7%	81.9%	11.7%	26.0%	-	-	-
	Facility costs	1,487	1,543	1,505	1,763	1,627	1,964	1,895	2,261	1,913	2,278	3,030	3,591	4,191	3,274	5,513	6,298	7,747	-	-	-
	YoY	31.0%		7.0%	5.8%	9.4%	27.3%	25.9%		17.6%		33.0%	-	-	189.7%	68.4%			-	-	-
	Facility profit	-55	417	19	496	-34	627	22	678	10	869	362	593	879	257	910	877		-	-	-
	YoY		47.3%		30.9%		50.4%				38.6%	-58.3%	-	-		254.1%			-	-	-
	Profit margin	-	21.3%	1.2%	22.0%	-	24.2%	1.1%	23.1%	0.5%	27.6%	10.7%	14.2%	17.3%	7.3%	14.2%	12.2%	14.3%	-	-	-
	SG&A expenses	185	169	139	185	202	262	218	307	245	297	354	464	542	501	725	678	989	-	-	-
	YoY	26.7%	2.4%	-22.3%	-21.3%	9.2%	55.0%	56.8%	65.9%	21.3%	13.4%	19.2%	-	-	42.7%	44.7%	-6.5%	45.9%	-	-	-
	SG&A ratio	12.9%	8.6%	9.1%	8.2%	12.7%	10.1%	11.4%	10.4%	12.7%	9.4%	10.4%	11.1%	10.7%	14.2%	11.3%	9.4%	10.9%	-	-	-
	Operating profit	-241	248	-119	310	-236	364	-194	370	-235	572	7	128	337	-243	185	198	304	-	-	-
	YoY	-	112.0%	-	115.3%	-	46.8%	-	19.4%	-	57.1%	-98.8%	-	-	-	-	7.0%	53.5%	-	-	-
	OPM	-	12.7%	-	13.7%	-	14.0%	-	12.6%	-	18.2%	0.2%	3.1%	6.6%	-	2.9%	2.8%	3.4%	-	-	-
	No. facilities	142	149	158	165	169	176	183	200	196	198	149	176	198	80	131	165	200	250	320	400
	Openings	13	7	11	8	6	10	10	18	2	8	20	16	10	37	53	39	44	60	80	100
	Closures (est.)	-2	-	-2	-1	-2	-3	-3	-1	-6	-6	-69	160	188	-	-2	-5	-9	-10	-10	-20
	Sales per facility	10.49	13.47	9.93	13.99	9.54	15.02	10.68	15.35	9.71	15.97	28.15	25.75	27.11	57.41	60.88	48.48	49.53	-	-	-
	Cost per facility	10.89	10.60	9.80	10.92	9.74	11.39	10.56	11.81	9.66	11.56	25.15	22.10	22.41	53.24	52.26	42.55	42.45	-	-	-
	Profit per facility	-0.40	2.87	0.12	3.07	-0.20	3.63	0.12	3.54	0.05	4.41	3.00	3.65	4.70	4.18	8.63	5.93	7.08	-	-	-
	SG&A per facility	1.36	1.16	0.91	1.15	1.21	1.52	1.21	1.60	1.24	1.51	2.94	2.86	2.90	8.15	6.87	4.58	5.42	-	-	-



Quarterly		FY02/1				FY02/1				FY02/1		FY02/17	FY02/18		FY02/15	FY02/16	FY02/17	FY02/18			FY02/21
(JPYmn) Malaysia	Salas	Q1 396	Q2 393	Q3 434	Q4 505	Q1 472	Q2 519	Q3 582	Q4 673	Q1 593	Q2 594	1H 789	1H 991	1H 1,187	Cons. 1,475	Cons. 1,569	Cons. 1,728	Cons. 2,246	Est.	MTP	MTP
Maiaysia	YoY	9.4%	3.7%		12.7%	19.2%	32.1%		33.3%	25.6%		108.2%	25.6%		25.5%	6.4%	10.1%		-		
	Facility costs	336	320	357	375	376	410	444	511	480	490	656	786	970	1,200	1,257	1,388	1,741	-	-	-
	YoY	6.3%	-1.2%	5.9%	33.9%	11.9%		24.4%		27.7%		102.5%	19.8%		20.6%	4.8%	10.4%	25.4%	-	-	-
	Facility profit	60	73	77	130	96	109	138	162	113	104	133	205		275	312	340	505	-	-	-
	YoY Profit margin	30.4% 15.2%	32.7% 18.6%		-22.6% 25.7%	60.0% 20.3%	49.3% 21.0%		24.6% 24.1%		-4.6% 17.5%	141.8% 16.9%	54.1% 20.7%			13.5% 19.9%	9.0% 19.7%	48.5% 22.5%	-	-	-
	SG&A expenses	45	42	48	42	57	54	23.7%	73	70	71	87	111	141	128	165	177	248			
	YoY	40.6%			-39.1%	26.7%	28.6%		73.8%			180.6%	27.6%			28.9%	7.3%	40.1%	-	-	-
	SG&A ratio	11.4%	10.7%	11.1%	8.3%	12.1%	10.4%	11.0%	10.8%	11.8%	12.0%	11.0%	11.2%	11.9%	8.7%	10.5%	10.2%	11.0%	-	-	-
	Operating profit	14	31	29	88	38	55	74	89	43	33	45	93	76	147	147	162	256	-	-	_
	YoY OPM	7.7% 3.5%	24.0% 7.9%	190.0% 6.7%	-11.1% 17.4%	171.4% 8.1%	77.4% 10.6%		1.1% 13.2%	13.2% 7.3%	-40.0% 5.6%	80.0% 5.7%	9.4%	-18.3% 6.4%	133.3% 10.0%	9.4%	10.2% 9.4%	58.0% 11.4%	-	-	-
	No. of facilities	76	7.9%	78	77	75	78	80	85	7.3%	88	76	78		55	72	77	85	90	100	110
	Openings	4	-	3	1	2	3		5	1	3	4	5		12	18	8	13	10	12	14
	Closures (est.)	-	-	-1	-2	-4	-	-1	-	-1	-	-16	73	84	-4	-1	-3	-5	-5	-2	-4
	Sales per facility	5.35	5.17	5.64	6.52	6.21	6.78		8.16	6.98	6.87	11.52	12.87	14.30	28.92	24.71	23.19	27.73	-	-	-
	Cost per facility	4.54	4.21	4.64	4.84	4.95	5.36		6.19	5.65	5.66	9.58	10.21		23.53	19.80	18.63	21.49	-	-	-
	Profit per facility SG&A per facility	0.81	0.96 0.55	1.00 0.62	1.68 0.54	1.26 0.75	1.42 0.71	1.75 0.81	1.96 0.88	1.33 0.82	1.20 0.82	1.94 1.27	2.66 1.44	2.61 1.70	5.39 2.51	4.91 2.60	4.56 2.38	6.23 3.06			
Thailand	Sales	182	141	141	204	200	184	182	196	192	180	323	384	372	470	634	668	762	-		
rraiaria	YoY	3.4%	-7.8%	-4.7%	29.9%	9.9%	30.5%		-3.9%	-4.0%	-2.2%	111.1%	18.9%		138.6%	34.9%	5.4%	14.1%	-	-	_
	Facility costs	189	173	195	254	229	234	220	204	201	183	362	463	384	442	676	811	887	-	-	-
	Cost ratio		122.7%		124.5%		127.2%			104.7%		112.1%					121.4%		-	-	-
	YoY	26.8%	-0.6% -32		41.9%	21.2%	35.3%		-19.7%	-12.2% -9	-21.8% -3	108.0%	27.9% -79		122.1%	52.9%	20.0%	9.4%	-	-	-
	Facility profit Profit margin	-7	-32	-54	-50	-29	-50	-38	-8	-9	-5	-39	-/9	-12	6.0%	-42	-143	-125			
	SG&A expenses	30	17	22	27	28	22	24	28	32	28	47	50	60	94	90	96	102	-	-	-
	YoY		-22.7%	29.4%	-3.6%	-6.7%	29.4%		3.7%			113.6%	6.4%		10.6%	-4.3%	6.7%	6.3%	-	-	-
	SG&A ratio				13.2%	14.0%	12.0%		14.3%		15.6%	14.6%	13.0%			14.2%	14.4%	13.4%	-	-	-
	Operating profit YoY	-37	-49	-77	-77	-57	-73	-61	-36	-42	-30	-86	-130	-72	-66	-132	-240	-227	-	-	-
	OPM	[								]		-	_		_						- 1
	No. of facilities	56	55	52	48	45	45	41	39	37	25	55	45	25	37	52	48	39	28	35	50
	Openings	4	-	-	2	-	-	-	-	-	-	4	-	-	16	18	6	-	3	10	16
	Closures (est.)		-1	-3	-6	-3		-4	-2	-2	-12	6	-10	-20		-3	-10	-9	-14	-3	-1
	Sales per facility	3.37	2.54	2.64	4.08 5.08	4.30	4.09	4.23 5.12	4.90 5.10	5.05	5.81 5.90	6.46	7.68 9.26		16.21 15.24	14.25	13.36 16.22	17.52 20.39	-	-	-
	Cost per facility Profit per facility	3.50 -0.13	3.12 -0.58	3.64 -1.01	-1.00	4.92 -0.62	5.20 -1.11	-0.88	-0.20	5.29 -0.24	-0.10	7.24 -0.78	-1.58	10.97 -0.34	0.97	15.19 -0.94	-2.86	-2.87			
	SG&A per facility	0.56	0.31	0.41	0.54	0.60	0.49	0.56	0.70	0.84	0.90	0.94	1.00	1.71	3.24	2.02	1.92	2.34	-	_	_
Philippines		141	164	176	204	228	236	285	330	330	317	305	464	647	21	310	685	1,079	-	-	-
	YoY		173.3%	100.0%	64.5%	61.7%	43.9%		61.8%			408.3%	52.1%				121.0%	57.5%	-	-	-
	Facility costs Cost ratio	122	145 173.6%	149 84.0%	174 70.6%	192 57.4%	209 44.1%	239 60.4%	277 59.2%	267 39.1%	292 39.7%	267 403.8%	401 50.2%	559 39.4%	26	272 946.2%	590	917 55.4%	-	-	-
	YoY	19	173.0%	27	30	37.4%	27	46	53.270	63	25	38	63	88	-5	38	95	162			
	Facility profit		171.4%		36.4%		42.1%	70.4%	76.7%		-7.4%	442.9%		39.7%	-		150.0%		-	-	-
	Profit margin		11.6%		14.7%		11.4%	16.1%	16.1%		7.9%		13.6%			12.3%		15.0%	-	-	-
	SG&A expenses	26	21	34	12	31	36	11	62	26	27	47	67	53	50	87	93	140	-	-	-
	YoY SG&A ratio	23.8% 18.4%	-4.5% 12.8%		-42.9% 5.9%	19.2% 13.6%	71.4% 15.3%		416.7% 18.8%	-16.1% 7.9%	-25.0% 8.5%	113.6% 15.4%	42.6% 14.4%			74.0% 28.1%	6.9% 13.6%	50.5% 13.0%			
	Operating profit	-6	-3	-6	17	5	-9	35	-9	36	-2	-9	-4	34	-56	-49	2	22	-	-	-
	YoY	-	-	-	1,600.0%	-	-	-	-	620.0%	-	-	-	-	-	-	-	1,000.0%	-	-	-
	OPM	-	-	-	8.3%	2.2%	-	12.070	-	10.9%	-	-	-	3.370	-		0.3%	2.0%	-	-	-
	No. of facilities	20	22	26 4	26	29	31 2	37 6	39 2	42	45 3	22 8	31 5	45 6	2	14 12	26 12	39 13	52 13	66 14	81 15
	Openings Closures (est.)	-	-	-			-	-	-		-	6	4	8	-	12	12	- 13	- 13	14	- 15
	Sales per facility	8.29	7.81	7.33	7.85	8.29	7.87	8.38	8.68	8.15	7.29	20.33	17.51			38.75	34.25	33.20	-	-	_
	Cost per facility	7.18	6.90	6.21	6.69	6.98	6.97	7.03	7.29	6.59	6.71	17.80	15.13	14.71		34.00	29.50	28.22	-	-	-
	Profit per facility	1.12	0.90	1.13	1.15	1.31	0.90	1.35	1.39	1.56	0.57	2.53	2.38	2.32		4.75	4.75	4.98	-	-	-
To do o o oto	SG&A per facility	1.53	1.00	1.42	0.46	1.13	1.20	0.32	1.63	0.64	0.62	3.13	2.53	1.39		10.88	4.65	4.31	-	-	-
Indonesia	YoY	45	53	57	87	87 93.3%	101 90.6%	130 128.1%	185 112.6%	160 83.9%	190 88.1%	98	188 91.8%	350 86.2%	-	115	242 110.4%	503 107.9%	-	-	-
	Facility costs	36	38	45	54	55.576	68	108	115	112	113	74	123	225	-	95	173	346	-	-	-
	Cost ratio	-	-	-	-	52.8%	78.9%	140.0%	113.0%	103.6%	66.2%	-	66.2%	82.9%	-	-	82.1%	100.0%	-	-	-
	YoY	9	15	12	33	32	33	22	70	48	77	24	65	125	-	20	69	157	-	-	_
	Facility profit	20.0%	20 20/-	21 10/-	27.00/-			83.3%					170.8%		-		245.0%		-	-	-
	Profit margin SG&A expenses	16	28.3% 14	21.1%	37.9% 24	20	32.7% 22		37.8%	30.0%	40.5%	24.5%	34.6% 42			58	28.5% 68	107			
	YoY	-	-	-	-			64.3%						57.1%	-		17.2%		-	-	-
	SG&A ratio			24.6%								30.6%	22.3%	18.9%	-	50.4%	28.1%	21.3%	-	-	-
	Operating profit	-7	2	-2	8	11	12		28	18		-5	23			1	1	49	-	-	-
	YoY OPM		3.8%		9 2%	12.6%	500.0% 11.9%			63.6% 11.3%		-		156.5% 16.9%		0.9%	0.4%	4,800.0%			-
	No. of facilities	5	5.0 /0	8	8	9	9		15.170	15	17	6	9			5.570	8	15	27	42	57
	Openings	-	1	2	-	1	-	5	1	-	2	1	1				3	7	12	15	15
	Closures (est.)	-	-	-	-	-	-	-	-	-	-	2	2				5	-	-	-	-
	Sales per facility	9.00	9.64		10.88			11.30			11.88	21.78		26.92				43.74	-	-	-
	Cost per facility Profit per facility	7.20 1.80	6.91 2.73	6.43 1.71	6.75 4.13	6.47 3.76	7.56 3.67		7.93 4.83	7.47 3.20	7.06 4.81	16.44 5.33	16.40 8.67	17.31 9.62				30.09 13.65			
	One per ruelley	1.00	2./3	1./1	1.13	3.70	3.0/	1.71	1.03	3.20	1.01	3.33	0.07	2.02			11.23	10.00			

Source: Shared Research based on company data

This note is the most recent addition to the **full report**.



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