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AEON Fantasy Co., LTD.

【Summary】 Supplementary Material for Financial Results for the Fiscal Year Ended February 28, 2026

Stock code: 4343 | Tokyo Stock Exchange Prime Market





Supplementary Material for Financial Results
for the Fiscal Year Ended February 28, 2026

Consolidated Financial Summary

- Net sales and Operating profit and Ordinary profit **reached record highs** for the full year.
- EBITDA was ¥17,201 million, an increase of ¥2,100 million from the same period in the previous year.

(¥M)

Net Sales

93,290

YoY 106.9%

vs. initial forecast 101.2%

Operating profit

6,114

YoY 140.7%

vs. initial forecast 83.8%

Ordinary profit

7,358

YoY 213.9%

vs. initial forecast **129.1%**

Profit attributable to
owners of parent

2,790

YoY +4,607M

vs. initial forecast **111.6%**

EBITDA

17,201

YoY

113.9%

(¥M)	2025/2	2026/2	Change Amount	Change Rate
Net sales	87,240	93,290	+6,049	106.9%
Store-level profit	11,668	13,172	+1,503	112.9%
Operating profit	4,344	6,114	+1,770	140.7%
Ordinary profit	3,440 (Foreign exchange losses:457)	7,358 (Foreign exchange gains:1,821)	+3,918	213.9%
Profit attributable to owners of parent	△1,816	2,790	+4,607	-
Basic earnings per share/Yen	△91.87Yen	+141.09Yen	+232.96Yen	-
EBITDA	15,101	17,201	+2,100	113.9%

- Japan : Achieved record-high net sales and operating profit.
- ASEAN: Higher net sales but lower operating profit.
- China : Operating profit improved by 1,683 million yen YoY.

	Net Sales		Operating Profit		
	(¥M) 2026/2	YoY Change Rate	2026/2	YoY Change Amount	Operating Profit Margin
JAPAN	75,516	+8.7%	7,019	808	9.3%
ASEAN	15,222	+15.5%	465	△724	3.1%
CHINA	2,850	△41.0%	△ 1,368	1,683	-
Consolidated total*	93,290	+6.9%	6,114	1,770	6.6%

*The consolidated totals are calculated including consolidation adjustments.



JAPAN

Both net sales and operating profit achieved record highs for the third consecutive term.



ASEAN

Net sales reached a record high for the fourth consecutive year, supported by new store openings progressing in line with plan. Operating profit declined due to lower profitability at existing stores and other factors.



CHINA

Structural reforms are progressing steadily. Operating profit improved by 1,683 million yen year-on-year. (Note: Includes ¥1.3 billion for stores and ¥0.3 billion for SG&A expenses.)

	End of FYE 2/25		End of FYE 2/26			
	(¥M)	Amount	Composition ratio	Amount	Composition ratio	Change vs. Prior FYE (Amount)
Current Assets		12,185	22.7%	17,599	27.4%	+5,413 [※]
Non-Current Assets		41,488	77.3%	46,629	72.6%	+5,141
Total Assets		53,673	100.0%	64,228	100.0%	+10,555
Current Liabilities		30,758	57.3%	39,011	60.7%	+8,253 [※]
Short-term Borrowings		15,394	28.7%	22,418	34.9%	+7,024
Non-current Liabilities		16,072	29.9%	17,203	26.8%	+1,130
L/T Borrowings		10,540	19.6%	12,159	18.9%	+1,618
Total Liabilities		46,831	87.3%	56,214	87.5%	+9,383
Total Equity		6,842	12.7%	8,014	12.5%	+1,171
Total Liabilities and Equity		53,673	100.0%	64,228	100.0%	+10,555

※ The impact of financial institution holidays at the interim period (¥2776 million).

Consolidated Statement of Cash Flows

Consolidated
Financial Summary

(¥M)	2025/2	2026/2	Change vs. Prior FYE (Amount)
Cash flows from operating activities	12,353	11,598 [※]	△ 754
Profit before income taxes	334	5,106	+4,771
Depreciation	10,756	11,087	+330
Decrease (increase) in trade receivables	△ 153	△ 2,768	△ 2,615
Income taxes paid	△ 1,502	△ 1,799	△ 296
Cash flows from investing activities	△ 10,858	△ 14,856	△ 3,998
Purchase of property, plant and equipment	△ 9,825	△ 13,908	△ 4,083
Cash flows from financing activities	△ 2,841	4,725	+7,566
Net increase (decrease) in short-term borrowings	△ 12,152	5,176	+17,329
Net increase (decrease) in long-term borrowings	12,834	2,886	△ 9,947
Dividends paid	△ 197	0	+197
Effect of exchange rate change on cash and cash equivalents	△ 3	184	+188
Net increase (decrease) in cash and cash equivalents	△ 1,350	1,651	+3,002
Cash and cash equivalents at beginning of period	7,491	6,141	△ 1,350
Cash and cash equivalents at end of period	6,141	7,792	+1,651

※After adjusting for the year-end banking-related impact (¥2.76 billion), the Company effectively generated ¥14.35 billion in cash.

Number of Stores

(店舗)	Amusements			Playgrounds			Others	FC	TOTAL	FYE 2/26	
	Large	Standard	Small	Large	Standard	Small				Opened	Closed
JAPAN	4	409	328	30	2	4	11	0	788	95	60
ASEAN	0	63	93	11	162	64	0	5	398	100	34
Malaysia	0	52	31	3	25	17	0	0	128	16	20
Thailand	0	1	16	1	23	12	0	0	53	14	0
Philippines	0	0	0	0	57	19	0	0	76	13	3
Indonesia	0	3	35	6	42	7	0	0	93	45	2
Vietnam	0	7	11	1	15	9	0	0	43	12	9
Cambodia	0	0	0	0	0	0	0	4	4	0	0
Myanmar	0	0	0	0	0	0	0	1	1	0	0
CHINA	0	17	59	5	28	2	0	6	117	62*	88
Total	4	489	480	46	192	70					
Business Total	973			308			11	11	1,303	257	182

* The main store openings in China were small-format "Molly Vitality Space" stores under business consignment agreements.



Supplementary Material for Financial Results
for the Fiscal Year Ended February 28, 2026

Consolidated Financial Forecasts

for The Fiscal Year Ending February 28, 2027

(¥M)	FY2/26 Results	FY2/27 Forecast	Change Rate	Change Amount
Net Sales	93,290	98,000	+5.0	+4,709
Operation Profit	6,114	8,000	+30.8	+1,885
Ordinary Profit	7,358	6,300	△ 14.4 [※]	△ 1,058 [※]
Profit attributable to owners of parent	2,790	3,000	+7.5	+209
Basic earnings per share /Yen	141.09Yen	151.67Yen	-	+10.58Yen
Dividends Per Share /Yen	15.00Yen	20.00Yen	-	+5.00Yen

※ FY2/2026 results included ¥1,821 million in foreign exchange gains, while FY2/2027 forecasts assume a stronger yen.

		(¥M)	Total	JAPAN	Overseas	Consolidation Adjustment
Net Sales	Amount		98,000	81,000	17,300	△ 300
	YoY Change Rate		+5.0	+7.3	△ 4.3	-
Operation Profit	Amount		8,000	7,500	500	0
	YoY Change Rate		+1,885	+480	+1,402	-



Disclaimer:

The forward-looking statements such as business forecasts contained in this material are based on information currently available to the Company and on certain assumptions that the Company deems reasonable. The Company does not guarantee the achievement of these forecasts.

Actual results may differ materially from these forecasts due to various factors.