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AEON Fantasy Co., LTD.

# 【Summary】Supplementary Material for First Quarter of the Fiscal Year Ended February 28, 2027

Stock code: 4343 | Tokyo Stock Exchange Prime Market


Supplementary Material for First Quarter
of the Fiscal Year Ended February 28, 2027

# Consolidated Financial Summary

# Business Highlights



- **Steady Growth in Consolidated Results: Net Sales and All Profit Lines Hit Record Highs YoY.**

  Net Sales Up 12.2% YoY; Operating Profit Up 9.3%. Quarterly Net Income Up ¥840M YoY on Forex Gains.

- **Domestic New Formats (Growth Sector) Significantly Outperformed Sales Plans.**

  "CRANE-YOKOCHO-KIWAMI" (All 4 Stores, Incl. Previous-Period New Openings) Outperformed Sales Plans.

- **Domestic Profit Down on Active Store Opening Costs, but EBITDA Up ¥86M.**

  Profits Down on Growth-Sector New Store Costs, but EBITDA Hits Record High YoY.

- **Overseas Operating Profit Grew as Continued Measures from the Previous Period Bore Fruit.**

  Operating Loss Narrowed by ¥144M on China Reforms; ASEAN Growth Boosts OP by ¥203M.

# Consolidated Financial Highlights



- Net Sales Up for 4th Consecutive Period & Operating Profit for 2nd; Ordinary & Quarterly Net Income Hit Record Highs. Operating Profit Generally on Track.

(¥M)

| Net Sales | 24,575 |
|---|---|
| YoY | 112.2% |
| vs. initial forecast | 25.1% |

| Operating profit | 1,336 |
|---|---|
| YoY | 109.3% |
| vs. initial forecast | 16.7% |

| Ordinary profit | 1,605 |
|---|---|
| YoY | 273.2% |
| vs. initial forecast | 25.5% |

| Profit attributable to owners of parent | 986 |
|---|---|
| YoY | 677.1% |
| vs. initial forecast | 32.9% |

| EBITDA | 4,266 |
|---|---|
| YoY | 111.9% |

| (¥M) | 2026/2 | 2027/2 | Change Amount | Change Rate |
|---|---|---|---|---|
| Net sales | 21,898 | 24,575 | +2,676 | 112.2% |
| Store-level profit | 2,985 | 3,173 | +187 | 106.3% |
| Operating profit | 1,222 | 1,336 | +113 | 109.3% |
| Ordinary profit | 587 (Foreign exchange losses::△539) | 1,605 (Foreign exchange gains:+547) | +1,017 | 273.2% |
| Profit attributable to owners of parent | 145 | 986 | +840 | 677.1% |
| Basic earnings per share/Yen | 7.37Yen | 49.87Yen | +42.50Yen | 676.8% |
| EBITDA | 3,812 | 4,266 | +454 | 111.9% |

# Segment Results

- Domestic Net Sales Hit Record Highs for 3rd Straight Period; Overseas OP Up ¥203M YoY.

| (¥M) | Net Sales | | Operating Profit | | |
|---|---|---|---|---|---|
| | 2027/2 | YoY Change Rate | 2027/2 | YoY Change Amount | Operating Profit Margin |
| JAPAN | 19,725 | +11.3% | 1,258 | -88 | 6.4% |
| Overseas Total | 4,927 | +16.1% | 78 | +203 | 1.6% |
| Consolidated total* | 24,575 | +12.2% | 1,336 | +113 | 5.4% |

*The consolidated totals are calculated including consolidation adjustments.

| | |
|---|---|
| Japan | While net sales hit record highs for the third consecutive period, profits decreased due to aggressive store openings in growth sectors. |
| Overseas | Net sales reached a record high due to the success of store openings in regional areas. Operating profit increased as measures for existing stores in ASEAN and structural reforms in China proved successful. |

# Balance Sheet



| (¥M) | End of FYE 2/26 | | End of 1Q FYE 2/27 | | |
|---|---|---|---|---|---|
| | Amount | Composition ratio | Amount | Composition ratio | Change vs. Prior FYE (Amount) |
| Current Assets | 17,599 | 27.4% | 19,353 | 28.7% | +1,757 |
| Non-Current Assets | 46,629 | 72.6% | 48,113 | 71.3% | +1,484 |
| Total Assets | 64,228 | 100.0% | 67,467 | 100.0% | +3,238 |
| Current Liabilities | 39,011 | 60.7% | 43,374 | 64.3% | +4,363 |
| Short-term Borrowings | 22,418 | 34.9% | 27,394 | 40.6% | +4,975 |
| Non-current Liabilities | 17,203 | 26.8% | 16,057 | 23.8% | -1,145 |
| L/T Borrowings | 12,159 | 18.9% | 11,305 | 16.8% | -854 |
| Total Liabilities | 56,214 | 87.5% | 59,432 | 88.1% | +3,217 |
| Total Equity | 8,014 | 12.5% | 8,034 | 11.9% | +20 |
| Total Liabilities and Equity | 64,228 | 100.0% | 67,467 | 100.0% | +3,238 |

# Number of Stores



| Total Consolidated Stores | 1,309 stores |
|---|---|

| Japan | Amusement | | | Playground | | | Others | FC | 1Q FY2/27 | | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | General | Specialty | | High-End | Low-End | Others | | | Openings | Closures | |
| | | Prize | Capsule Toy | CHIKYUU-NO-NIWA | NOBICCO JUMBO/PICNIC | | | | | | |
| Totals | 408 | 91 | 253 | 18 | 16 | 7 | 12 | 0 | 28 | 11 | 805 |
| | 752 | | | 41 | | | | | | | |

| Overseas | Amusement | | | Playground | | | Others | FC | 1Q FY2/27 | | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | General | Specialty | Outsourced | High-End | Mid-Range | Low-End | | | Openings | Closures | |
| China | 16 | 0 | 53 | 3 | 27 | 2 | 0 | 6 | 0 | 10 | 107 |
| Malaysia | 81 | 1 | 0 | 3 | 25 | 17 | 0 | 0 | 0 | 1 | 127 |
| Thailand | 17 | 0 | 0 | 1 | 23 | 13 | 0 | 0 | 1 | 0 | 54 |
| Philippines | 0 | 0 | 0 | 0 | 59 | 20 | 0 | 0 | 4 | 1 | 79 |
| Indonesia | 3 | 28 | 0 | 8 | 44 | 7 | 0 | 0 | 4 | 7 | 90 |
| Vietnam | 18 | 0 | 0 | 1 | 15 | 8 | 0 | 0 | 0 | 1 | 42 |
| Cambodia | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 0 | 0 | 4 |
| Myanmar | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 1 |
| Totals | 217 | | | 276 | | | 0 | 11 | 9 | 20 | 504 |


Supplementary Material for First Quarter
of the Fiscal Year Ended February 28, 2027

# Consolidated Financial Forecasts
## for The Fiscal Year Ending February 28, 2027

# Consolidated Forecasts



| (¥M) | FY2/26 Results | FY2/27 Forecast | Change Rate | Change Amount |
|---|---|---|---|---|
| Net Sales | 93,290 | 98,000 | +5.0 | +4,709 |
| Operating 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 |

* There are no changes to the figures announced on April 9.

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

# Consolidated Forecasts



| | (¥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 | - |
| Operating Profit | Amount | 8,000 | 7,500 | 500 | 0 |
| | YoY Change Rate | +1,885 | +480 | +1,402 | - |

* There are no changes to the figures announced on April 9.

# Disclaimer

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.