Disclosed on October 13, 2026

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AEON Fantasy Co., LTD.

【Summary】Supplementary Material for the Interim Period of the Fiscal Year Ending February 28, 2027

Stock code: 4343 ｜Tokyo Stock Exchange Prime Market

Supplementary Material for the Interim Period
of the Fiscal Year Ending February 28, 2027

Consolidated Financial Summary

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1H Highlights

- **Consolidated: Net sales and all profit lines reached record highs.**

  Net sales up 12.3% YoY; operating profit up 14.5% YoY. Operating profit reached 52.0% of the full-year target, reflecting steady progress.

- **Domestic Business: Net sales and operating profit reached record highs, driven by growth in existing formats and contributions from new formats.**

  Operating profit increased despite higher costs associated with the aggressive rollout of new store formats.

- **The new format "Crane Yokocho KIWAMI" performed strongly, with all 6 stores exceeding sales and store-level profit targets.**

  Generating strong cash flow, with investment payback expected to accelerate.

- **Overseas Business: Net sales and operating profit increased, driven by existing store recovery in ASEAN and structural reforms in China.**

  Particularly driven by contributions from Indonesia and Thailand, with operating profit up JPY 432 million YoY.

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Consolidated Financial Results

- 1H sales reached a record high for the fourth consecutive period, operating profit for the third, and ordinary profit and net profit for the second.

(¥M)

Net Sales

52,374

YoY	112.3%
vs. Initial forecast	53.4%

Operating profit

4,156

YoY	114.5%
vs. Initial forecast	52.0%

Ordinary profit

4,301

YoY	125.9%
vs. Initial forecast	68.3%

Profit attributable to owners of parent

2,155

YoY	122.2%
vs. Initial forecast	71.8%

EBITDA

10,109

YoY	113.6%

(¥M)	Interim 2026/2	Interim 2027/2	Change Amount	Change Rate
Net sales	46, 625	52,374	+5,750	112.3%
Gross profit (Store-level profit)	7,106	7,865	+759	110.7%
Operating profit	3,630	4,156	+526	114.5%
Ordinary profit	3,418 (Foreign exchange gains:+4)	4,301 (Foreign exchange gains:+707)	+883	125.9%
Profit attributable to owners of parent	1,763	2,155	+391	122.2%
Basic earnings per share/Yen	89.18yen	108.96yen	+19.78yen	122.2%
EBITDA	8,902	10,109	+1,207	113.6%

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Segment Results

- **Domestic profit grew on existing store growth and new store success, while Overseas profit increased on recovering existing store trends.**

(¥M)	Net Sales		Operating Profit		
	1H 2027/2	YoY Change Rate	1H 2027/2	YoY Change Amount	OP Margin
JAPAN	42,612	+12.9%	3,997	+94	9.4%
Overseas Total	9,911	+10.1%	160	+432	1.6%
Consolidated total*	52,374	+12.3%	4,156	+526	7.9%

*The consolidated totals are calculated including consolidation adjustments.

Japan	Net sales and operating profit hit record highs for the 3rd consecutive period, with profit up after absorbing upfront costs for aggressive store expansion.
Overseas	Net sales hit a record high on successful ASEAN regional expansion. Operating profit grew on recovering existing stores and smaller operating losses in China.

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Balance Sheet

(¥M)	End of FYE 2/26		End of 1H FYE 2/27		
	Amount	Composition ratio	Amount	Composition ratio	Change vs. Prior FYE (Amount)
Current Assets	17,599	27.4%	18,282	27.0%	+683
Non-Current Assets	46,629	72.6%	49,430	73.0%	+2,801
Total Assets	64,228	100.0%	67,713	100.0%	+3,484
Current Liabilities	39,011	60.7%	41,084	60.7%	+2,073
Short-term Borrowings	22,418	34.9%	23,259	34.3%	+840
Non-current Liabilities	17,203	26.8%	17,599	26.0%	+396
L/T Borrowings	12,159	18.9%	12,617	18.6%	+458
Total Liabilities	56,214	87.5%	58,684	86.7%	+2,469
Total Equity	8,014	12.5%	9,028	13.3%	+1,014
Total Liabilities and Equity	64,228	100.0%	67,713	100.0%	+3,484

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Consolidated Statement of Cash Flows

- **Operating cash flow exceeded cash used in investing activities, and interest-bearing debt decreased.**

(¥M)	Interim 2026/2	Interim 2027/2	Change vs. Prior Interim Period (Amount)
Cash flows from operating activities	3,429	**9,384**	5,955
Profit before income taxes	3,106	3,639	533
Depreciation	5,271	5,952	681
Decrease (increase) in deposits paid from sales	- 4,856	1,174	6,030*
Income taxes paid	- 1,036	−1,807	−770
Cash flows from investing activities	- 7,919	**−7,138**	781
Purchase of property, plant and equipment	- 7,429	−6,713	715
Cash flows from financing activities	6,492	−643	−7,136
Net increase (decrease) in short-term borrowings	5,307	512	−4,794
Net increase (decrease) in long-term borrowings	2,752	975	−1,777
Dividends paid	0	−296	−296
Effect of exchange rate change on cash and cash equivalents	12	−32	−44
Net increase (decrease) in cash and cash equivalents	2,014	1,569	−444
Cash and cash equivalents at beginning of period	6,141	7,792	1,651
Cash and cash equivalents at end of period	8,155	9,362	**1,206**

*The increase reflects sales proceeds settled the following month due to bank holidays at the prior interim period-end and fiscal year-end.

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Number of Stores (As of August 31, 2026)

Total Consolidated Stores	1,294 stores

Japan	Amusement			Playground			Others	FC	Interim FY2/27		Total
	General	Specialty		High-End	Low-End	Others			New	Close	
		Prize	Capsule Toy	CHIKYUU-NO-NIWA	NOBICCO JUMBO/PICNIC						
Totals	407	93	249	19	19	7	12	0	43	25	**806**
	749			45							

Overseas	Amusement			Playground			Others	FC	Interim FY2/27		Total
	General	Specialty	Outsourced	High-End	Mid-Range	Low-End			New	Close	
China	15	0	41	2	25	1	0	6	0	27	90
Malaysia	82	1	0	3	23	19	0	0	1	1	128
Thailand	15	0	0	1	17	20	0	0	2	2	53
Philippines	0	0	0	0	59	21	0	0	5	1	80
Indonesia	3	24	0	8	32	20	0	0	6	12	87
Vietnam	18	0	0	2	15	10	0	0	3	1	45
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	199			278			0	11	17	44	**488**

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Supplementary Material for the Interim Period
of the Fiscal Year Ending February 28, 2027

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

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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

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

No changes from figures released previously(April 9)

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Forecasts by Segment

	(¥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 Amount	+1,885	+480	+1,402	-

No changes from figures released previously(April 9)

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Disclaimer

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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.

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