



transcosmos inc.

H1 FY2026/3 Earnings Conference

October 31, 2025

Event Summary

[Company Name]	transcosmos inc.	
[Company ID]	9715-QCODE	
[Event Language]	JPN	
[Event Type]	Earnings Announcement	
[Event Name]	H1 FY2026/3 Earnings Conference	
[Fiscal Period]	FY2026 Q2	
[Date]	October 31, 2025	
[Number of Pages]	34	
[Time]	16:30 – 17:16 (Total: 46 minutes, Presentation: 35 minutes, Q&A: 11 minutes)	
[Number of Speakers]	2	
	Masaaki Muta	Representative Director, Co-President
	Takeshi Kamiya	Representative Director, Co-President
[Analyst Names]*	Katsumi Arai	Morgan Stanley MUFG Securities Co., Ltd.

*Analysts that SCRIPTS Asia was able to identify from the audio who spoke during Q&A or whose questions were read by moderator/company representatives.

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Presentation

Kamiya: I would like to begin with an overview of the financial results for the current fiscal year.

Executive Summary



Consolidated net sales	Consolidated operating profit	transcosmos inc. net profit
¥192,110mn	¥8,070mn	¥6,530mn
(YoY: +¥6,570mn/+3.5%)	(YoY: +¥940mn/+13.2%)	(YoY: +¥2,370mn/+57.1%)
<ul style="list-style-type: none">● Net sales grew 3.5% YoY, marking a record high for H1. Operating profit hit a record level for H1, with OP margin rising from 3.8% to 4.2% YoY (excluding FY2021/3-FY2023/3 impacted by COVID-related jobs).● BPO services net sales up 8.3% YoY; OP margin grew by 0.4 points.<ul style="list-style-type: none">- Growing outsourcing demand, driven by labor shortages in Japan, led to more new wins and larger project sizes.- Two jointly established companies with clients began operations. Further promoted trans-Xsynk, our AI-powered solution. Focused on expanding digital BPO services into supply chain, IT, and manufacturing.● CX services net sales up 2.8% YoY; OP margin grew by 0.5 points.<ul style="list-style-type: none">- Deployment of our integrated CX platform, trans-DX for Support, increased to 117 companies, supporting sales growth in digital contact center services.- Focused on accelerating the rollout of trans-DX for Support, enhancing service value and streamlining operations with AI, and driving sales in digital integration services.● Overseas net sales up 0.1% YoY; OP margin declined 0.3 points.<ul style="list-style-type: none">- Accelerated the expansion of CX/BPO services in Asia, leading to new orders in China and South Korea. Sales increased, offsetting the impact of foreign exchange rates.- Focused on promoting Global CX/BPO services via the Malaysia hub, developing AI-powered services mainly in South Korea, and increasing business with China-based global companies.● transcosmos inc. net profit achieved significant growth driven by higher operating profit, foreign exchange gains, and lower extraordinary losses.		

3

First is the overall executive summary.

Consolidated net sales for the period totaled JPY192.11 billion, an increase of 3.5% or JPY6.57 billion YoY. Consolidated operating profit was JPY8.07 billion, an increase of JPY940 million or 13.2% YoY. Net income for the parent company was JPY6.53 billion, an increase of JPY2.37 billion, or 57.1%, YoY.

Net sales were the highest ever recorded for an interim period. Excluding the fiscal years from FY2021 to FY2023, which were affected by the COVID-19 pandemic, operating profit was at its highest level, and the operating margin improved from 3.8% last year to 4.2%.

By service, BPO services continued to show a high growth rate, with an 8.3% increase in sales. The operating profit margin also improved by 0.4 percentage points.

We have been able to capture the continuing need for outsourcing services against the backdrop of the labor shortage, and we are also focusing on joint ventures with clients, which is a model we have been focusing on recently. Two new joint ventures began operations in the second quarter. In addition, we are expanding sales of an AI solution called trans-Xsynk, which is used to convert non-standard documents into data. We are also focusing on developing new services in the supply chain, IT, and production areas.

Moving on to the CX Service. Although the growth rate of this segment is lower than that of BPO, we were able to increase sales by a solid 2.8%, and in particular, we were able to improve profitability with a 0.5-point increase in the operating margin.

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We continue to promote the integrated platform, trans-DX for Support, and the number of companies that have adopted this solution has expanded to 117, which has contributed significantly to the recovery in sales of contact center services.

We will further expand orders, add value to services through the use of AI, and improve operational efficiency. We will also continue to focus on digital integration. The web development business is now at a slight standstill, but we are focusing on recovering sales.

Overseas sales were almost flat, up 0.1% YoY, and the operating profit margin declined 0.3 percentage points, resulting in a decrease in profit.

We deliver both CX and BPO services overseas. We have been focusing on CX, but in addition to this, BPO is now accelerating its expansion in Asia, and orders are increasing in China and South Korea. Although there was a negative impact from the exchange rate, we were able to absorb this negative impact and achieve a small increase in total sales.

In future, we will promote global CX and BPO services using Malaysia as our hub. South Korea is ahead of other countries in AI services, so we will focus on expanding our services there. We will also continue to focus on global companies from China. We have been expanding transactions with those companies considerably, and we are focusing on further advancing these transactions.

The last item, parent company interim net income, shows a significant increase due to an increase in operating profit, a foreign exchange gain, and a decrease in extraordinary loss, which was recorded in the previous fiscal year.

Consolidated Statement of Income Summary



In ¥100mn (rounded to the nearest ¥100mn)		H1 FY2025/3		H1 FY2026/3		Change		FY2026/3 (outlook)	
		Amount	Mix	Amount	Mix	Amount	%Change	Amount	Progress
Net sales		1,855.5	100.0%	1,921.1	100.0%	+65.7	+3.5%	4,000.0	48.0%
	Parent Company	1,206.5	65.0%	1,265.1	65.9%	+58.7	+4.9%		
	Domestic Affiliates	210.4	11.3%	218.5	11.4%	+8.1	+3.8%		
	Overseas Affiliates	505.7	27.3%	506.2	26.3%	+0.5	+0.1%		
	Elimination of intersegment transaction	-67.1	-3.6%	-68.7	-3.6%	-1.6	-2.4%		
Gross profit		353.5	19.0%	372.0	19.4%	+18.6	+5.2%		
SG&A expenses		282.1	15.2%	291.3	15.2%	+9.2	+3.2%		
Operating profit		71.3	3.8%	80.7	4.2%	+9.4	+13.2%	155.0	52.1%
	Parent Company	33.5	2.8%	42.3	3.3%	+8.7	+25.9%		
	Domestic Affiliates	14.9	7.1%	16.8	7.7%	+1.9	+12.8%		
	Overseas Affiliates	23.4	4.6%	21.9	4.3%	-1.6	-6.8%		
	Elimination of intersegment transaction	-0.6	-	-0.2	-	+0.4	+69.3%		
Non-operating income (loss)		0.6	0.0%	12.3	0.6%	+11.7	-		
Ordinary profit		72.0	3.9%	93.1	4.8%	+21.1	+29.3%	170.0	54.7%
Extraordinary income (loss)		-8.3	-0.4%	-1.1	-0.1%	+7.2	+86.4%		
Profit attributable to owners of parent		41.5	2.2%	65.3	3.4%	+23.7	+57.1%	115.0	56.8%

*For each segment profit row, figures in the Mix columns are profit margins.

5

A summary of the consolidated statement of income is shown on page five .

As I mentioned earlier, all segments, parent company , domestic affiliates, and overseas affiliates, increased sales.

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As for operating profit, the parent company and the domestic business increased their profits. On the other hand, overseas affiliates saw a decline in profitability, resulting in a decrease in profit. The total operating profit margin was 4.2% for this fiscal year, up from 3.8% last year.

In terms of progress toward the earnings forecast that we have disclosed for this fiscal year, net sales have reached 48%, operating profit 52%, and both ordinary income and net income attributable to the parent company stand at approximately 55% and just under 57%, respectively.

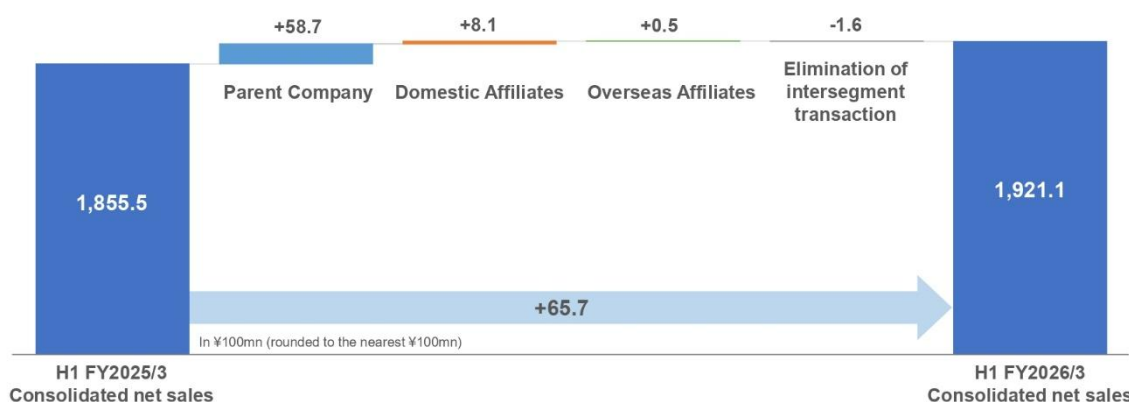
Due to the timing and seasonality of our business, sales are slightly concentrated in the second half of the year, so we recognize that the current sales trend is firmly on-track.

Consolidated Net Sales Analysis



- Consolidated net sales up ¥6,570mn (+3.5%)

Parent Company	Up, reflecting sales growth in both CX and BPO services.
Domestic Affiliates	Up, as BPO-related joint ventures expanded their business scope and new entities were newly consolidated.
Overseas Affiliates	Up, reflecting sales growth in subsidiaries in China, despite the impact of foreign exchange rates.



6

This is an analysis of changes in consolidated net sales.

As I mentioned earlier, we have newly consolidated some of our domestic affiliated companies, including the BPO joint venture. In addition, one of our BPO joint ventures, which is already consolidated, has expanded the scope of its outsourcing activities, and this has had an impact on the increase in sales.

Overseas subsidiaries and affiliates were negatively impacted by foreign exchange rates, but the result was positive mainly due to an increase in sales at a Chinese subsidiary.

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Reference: Effects of currency fluctuations on Overseas Affiliate sales



- H1: Net sales up ¥2,190mn on a local currency basis, reflecting sales growth in subsidiaries in South Korea and China. Currency fluctuations had a negative impact of ¥2,140mn on reported sales.
- Q2: Net sales up ¥1,260mn on a local currency basis, reflecting sales growth in subsidiaries in South Korea and China. Currency fluctuations had a negative impact of ¥1,810mn on reported sales.



*The bar charts above show the impact of currency fluctuations on overseas subsidiaries that significantly affect the Company's consolidated financial results when translated into the reporting currency. FX impact has minimal effect on consolidated operating profit.

*Overseas affiliates' profits and losses are translated into the reporting currency using the average exchange rate for January to June 2025. A decline in the average exchange rate of the South Korean won against the Japanese yen, compared to the same period last year, significantly impacted reported sales.

7

On the next page, we provide a brief explanation of the impact of foreign exchange rates on sales in the Overseas Affiliates segment.

The left-hand chart shows changes in the interim basis, which shows that sales in a local currency basis increased by JPY2.19 billion, or about 4%, due to the increase in sales of our South Korean and Chinese subsidiaries.

The impact of exchange rate fluctuations was negative JPY2.14 billion, so as a result, sales were almost unchanged, with a slight increase of JPY500 million.

Looking at the trend for the three months of Q2 alone, as shown on the right, sales increased by JPY1.26 billion due to the increase in sales of the South Korean and Chinese subsidiaries. However, the impact of foreign exchange rates was even more significant, resulting in a slight decrease in sales when looking at Q2 alone.

As I have indicated in the notes at the bottom of this page, the foreign exchange impact on overseas affiliates is calculated using the average exchange rate from January to June 2025 in the profit and loss section. In the interim period under review, the average exchange rate of the Korean Won was lower than in the previous period, which had a significant negative impact on our overseas sales in South Korea, which in turn account for a fairly high percentage of our total overseas sales.

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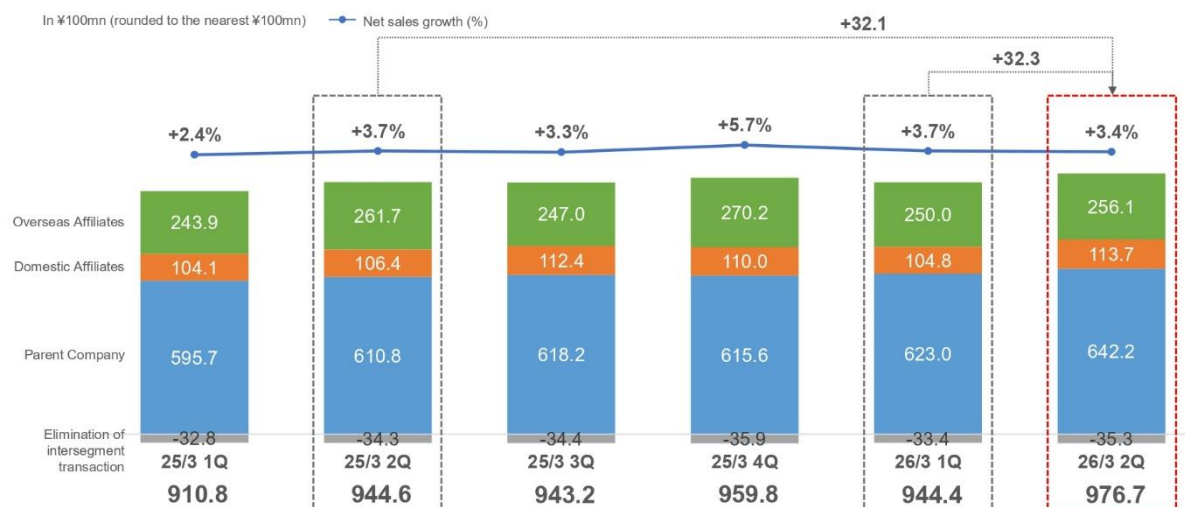
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Consolidated Net Sales Analysis (Quarterly Trend)



- YoY: Up ¥3,210mn, reflecting sales growth in the Parent Company and Domestic Affiliates, achieving growth for six consecutive quarters from Q1 FY2025/3.
- QoQ: Up ¥3,230mn, reflecting sales growth in all segments.



8

This slide shows quarterly trends.

Parent company sales, shown at the bottom of each bar, have increased sales for six consecutive quarters.

Consolidated Operating Profit Analysis



- Operating profit up ¥940mn (+13.2%)

Parent Company	Up, reflecting increased profitability in both CX and BPO services.
Domestic Affiliates	Up, reflecting profit growth in a listed subsidiary.
Overseas Affiliates	Profits up in subsidiaries in China and South Korea. Profitability increased in subsidiaries in Europe and the U.S. due to progress in business restructuring. Despite these increases, overall operating profit declined due to lower profit in subsidiaries in Southeast Asia.



9

Next is the change in operating profit.

The parent company segment also reported an increase of JPY870 million, reflecting improved profitability in both CX and BPO. Domestic subsidiaries and affiliates also reported an increase in profits due to an increase in profits from listed subsidiaries and other factors.

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6

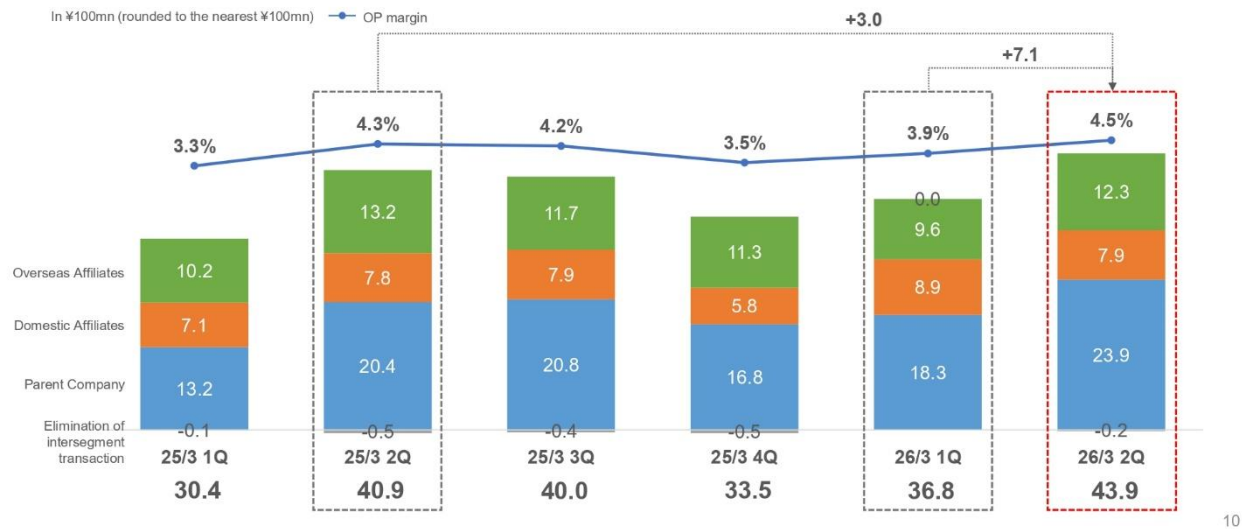
As for overseas subsidiaries and affiliates, profits increased in China and South Korea, and business restructuring in Europe and the US made progress, decreasing deficits and improving profitability.

However, our Southeast Asian subsidiaries, which had contributed considerably to profits, have now seen their profits decline, which has had a negative effect on the total.

Consolidated Operating Profit Analysis (Quarterly Trend)



- YoY: Up ¥300mn, reflecting profit growth in the Parent Company and Domestic Affiliates. OP margin grew by 0.2 points.
- QoQ: Up ¥710mn, reflecting profit growth in the Parent Company and Overseas Affiliates. OP margin grew by 0.6 points.



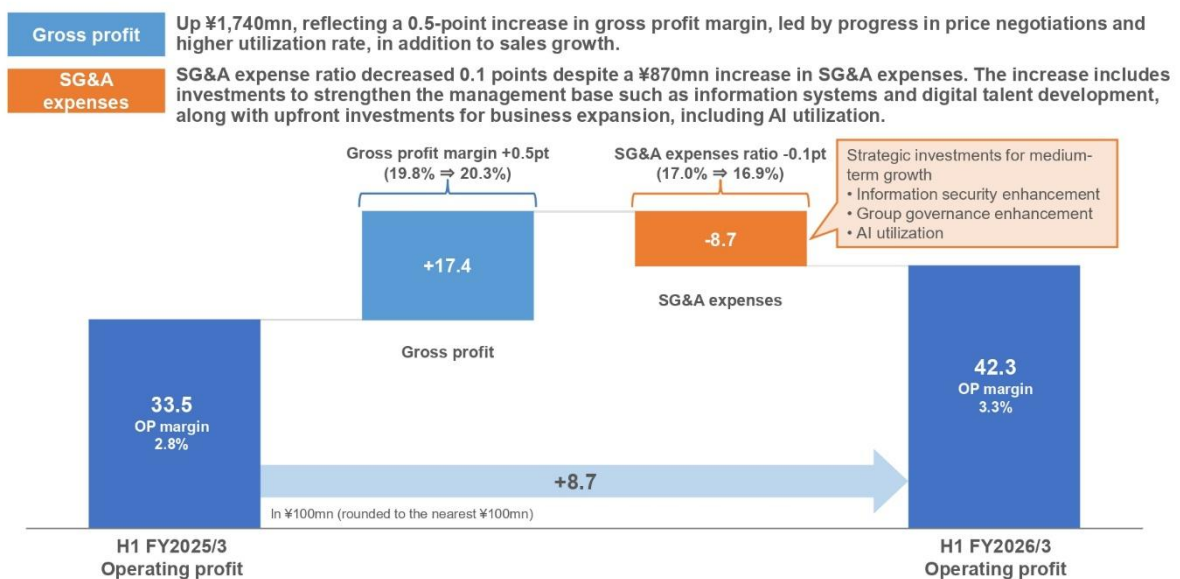
10

The same is true of the quarterly trends.

Parent Company Operating Profit Analysis



- Operating profit up ¥870mn (+25.9%)



11

The next slide shows an analysis of non-consolidated operating profit.

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First, the JPY1.74 billion increase in gross profit was primarily led by sales growth in both CX and BPO services. In addition, we have continued persistent efforts in raising operating rates and conducting price negotiations, as we are still facing factors such as increasing labor costs. Thanks to progress in these areas, our overall gross profit margin improved by 0.5 percentage points, resulting in an increase in profit of JPY1.74 billion.

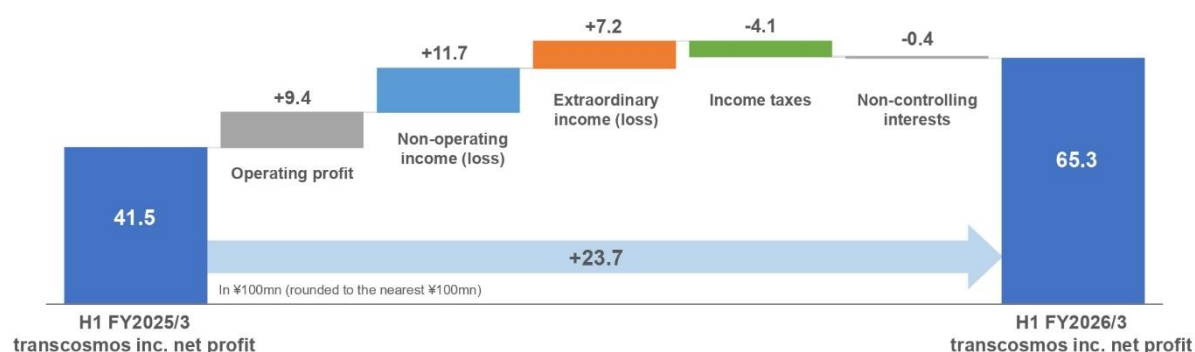
Regarding SG&A expenses, we have been making investments to strengthen information security, given the recent rise in cybersecurity issues. In addition, we are investing strategically to reinforce group governance and promote the use of AI as part of our initiatives for medium-term business growth. As a result of these efforts, SG&A expenses increased by JPY870 million YoY. However, the SG&A-to-sales ratio remained well controlled, showing an improvement of 0.1 percentage points YoY.

transcosmos inc. H1 Net Profit Analysis



- transcosmos inc. net profit up ¥2,370mn (+57.1%)

Non-operating income (loss)	Up ¥1,170mn, mainly due to the posting of foreign exchange gains* (posted foreign exchange losses in the same period last year).
Extraordinary income (loss)	Up ¥720mn, mainly due to a decrease in loss on valuation of securities.
Income taxes	Up ¥410mn, due to an increase in profit before income taxes.



*Most of the foreign currency-dominated bonds held by the Company are translated into the reporting currency using the exchange rate at the end of this quarter, which was the end of September 2025. As the Japanese yen declined primarily against the US dollar during the first half of FY2026/3 compared to the same period last year, foreign exchange gains were posted.

12

This is the change in net income of the parent company for the interim period.

Operating profit is as I mentioned earlier. In terms of non-operating profit and loss, we were able to record foreign exchange gains.

As noted in the accompanying remarks, our holdings of foreign-currency-denominated bonds were translated at the exchange rate as of the end of the current interim period, that is, the end of September. During this interim period, the yen depreciated against the US dollar compared to the previous fiscal year. Since a significant portion of our foreign-currency-denominated bonds are in US dollars, this yen depreciation had a notable impact, resulting in the recognition of foreign exchange gains on these holdings.

Extraordinary gains/losses increased by JPY720 million, due in part to a decrease in loss on valuation of investment securities. Tax expenses increased by JPY410 million, which had a negative impact. As a result, our net profit increased JPY2.37 billion YoY.

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Consolidated Balance Sheet Summary



- Assets: Notes and accounts receivable - trade and contract assets, cash and deposits, as well as prepaid expenses included under current assets, increased.
- Liabilities: Accounts payable - trade and provisions for bonuses increased.
- Net assets: Retained earnings increased. Foreign currency translation adjustment decreased.

In ¥100mn (rounded to the nearest ¥100mn)	End of Mar. 2025	End of Sep. 2025	Change	
Current assets	1,546.6	1,573.2	+26.6	• Cash and deposits +4.1 • Notes and accounts receivable - trade +4.7
Non-current assets	533.3	530.3	-3.0	• Property, plant and equipment -7.5 • Investment securities +4.5 • Shares of subsidiaries and associates -9.7
Total assets	2,079.8	2,103.5	+23.6	
Current liabilities	620.1	664.9	+44.8	• Accounts payable - trade +21.1 • Provision for bonuses +6.1
Non-current liabilities	169.0	147.8	-21.2	• Long-term borrowings -20.3
Total liabilities	789.2	812.7	+23.5	
Net assets	1,290.7	1,290.7	+0.1	• Retained earnings +25.5 • Foreign currency translation adjustment -30.1
Total liabilities & net assets	2,079.8	2,103.5	+23.6	
Cash and deposits	735.0	739.1	+4.1	
Interest-bearing liabilities	165.3	144.1	-21.2	
Net cash*	569.7	595.0	+25.3	
Net cash* to monthly sales ratio	1.8	1.9	+0.1	

*Net cash = Cash and deposits – interest-bearing liabilities

13

This is the balance sheet.

As for assets, notes receivable, accounts receivable and contract assets, cash and deposits, and prepaid expenses increased in current assets.

As for liabilities, accounts payable and provision for bonuses increased, while long-term liabilities decreased by more than JPY2 billion due to the repayment of long-term debt.

Consolidated Cash Flow Statement



- Operating cash flow: Profit before income taxes increased, trade payables increased year-over-year, and accrued liabilities increased.
- Investing cash flow: Proceeds from the refund of guarantee deposits decreased. Payments for acquisition of businesses were incurred in H1.
- Financing cash flow: Dividends paid increased.

In ¥100mn (rounded to the nearest ¥100mn)	H1 FY2025/3	H1 FY2026/3	Change
Cash flows from operating activities	30.8	113.1	+82.3
Cash flows from investing activities	-18.8	-32.6	-13.8
Cash flows from financing activities	-55.7	-66.3	-10.6
Balance of cash and cash equivalents	613.5	736.7	+123.3
Free cash flow *	12.0	80.5	+68.5

*Free cash flow = Cash flows from operating activities + Cash flows from investing activities.

14

Next is cash flow.

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Operating cash flow shows an increase in income before income taxes and minority interests, an increase in notes and accounts payable-trade, and an increase in accrued expenses compared to the previous year's interim period.

Investment cash flow: Although income from the recovery of security deposits has decreased, we recorded expenditures related to a business acquisition during the current fiscal period. As a result, there was an increase of approximately JPY1.38 billion.

Financial affairs: The amount of dividends paid increased by JPY1.06 billion.

CAPEX, Amortization/Depreciation, Employees, Service Bases



Capital expenditures/Depreciation expenses

In ¥100mn (rounded to the nearest ¥100mn)	H1 FY2025/3	H1 FY2026/3	Change
Capital expenditures	19.2	20.5	+6.6%
Depreciation expenses	28.4	27.6	-2.8%

- CAPEX
Capital expenditures increased in overseas subsidiaries.
- Depreciation
Depreciation expenses decreased in both domestic and overseas subsidiaries.

Number of employees

	End of Mar. 2025	End of Sep. 2025	Change
Consolidated basis	41,682	43,059	1,377
(Temporary employees)	28,971	28,357	-614
Parent Company	17,910	18,315	405
(Temporary employees)	21,002	20,958	-44

- Consolidated basis
Employees increased, primarily in the Parent Company. Temporary employees decreased in Southeast Asia due to the downsizing of some projects.
- Parent Company
Employees increased due to new graduate hires.

Service bases

	End of Mar. 2025	End of Sep. 2025	Change
Service bases	184	184	-
(Japan)	72	71	-1
(Overseas)	112	113	+1

- Japan
Some centers were integrated.
- Overseas
A new center was opened in Indonesia.

*Service bases included the Company's own bases, head offices, branches, sales offices and bases of subsidiaries, associates, and partners.

15

Capital expenditures.

With regard to capital expenditures, there was an increase in capital expenditures by overseas subsidiaries.

The number of employees also increased on a consolidated basis, but the increase was in the parent company. The number of temporary employees decreased due to the downsizing of some projects in Southeast Asia.

The above was the overall financial situation. Muta will now explain the situation by service and region.

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Reference: Service portfolio



CX Services (~70% of consolidated net sales)		BPO services (~30% of consolidated net sales)	
Front-office services: Integrated services covering all digital customer touchpoints across the customer journey from marketing to customer care		Back-office services: Common back-end functions outsourcing (e.g. accounting, HR, IT) as well as industry-specific engineering BPO	
Japan	Digital contact center Customer support	Japan	Common back-end functions digital outsourcing Accounting, HR, procurement & purchasing, order management, sales admin and IT system operations & maintenance
	Digital integration Website & app development, improvement and operations services, social platform operations including LINE apps		Industry-specific digital engineering BPO Services to support systems and operations for the manufacturing and construction industries
	Digital advertisement Internet ads services		
	E-commerce one-stop E-commerce site development & operations, and fulfillment services		
Overseas (mainly contact center and e-commerce) South Korea, China, Southeast Asia, and Europe and the U.S.		Overseas South Korea, China, Southeast Asia, and Europe and the U.S.	

Muta: Thank you.

As a reference, although our business is structured into the segments of CX, BPO, and Global, we believe it may be easier to understand if we group them into two categories — CX and BPO. Therefore, in the following discussion, we will explain our operations in this manner, positioning the Global segment under the respective service categories.

The sales composition is now 70%CX and 30%BPO.

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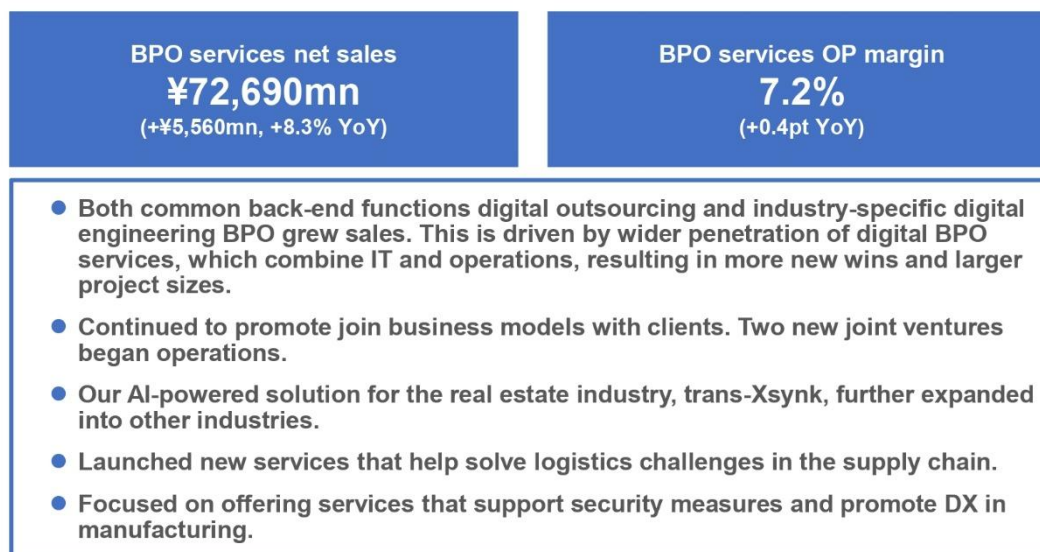
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18

Page 18 shows the BPO summary.

As for sales of services, as shown in this slide, both sales and profits increased in H1 of this year, and the profit margin improved.

In the initial scopes of BPO, our outsourcing services that include functions performed by clients' employees, the line between core and non-core areas has been changing rapidly, especially in Japan, where the tasks performed by employees were traditionally considered sacred territory.

For example, various companies have redefined their HR, accounting, and legal functions as either core or areas of specialization, so that we now have a considerable business in these functions.

While the upstream and decision-making processes are handled by each company, the operations and specific decisions are increasingly handled by us.

We have been operating in this field for 60 years, so there are not many competitors. Moreover, when we enter this area, clients retain the business relationship with us over a longer term unlike in CX or call center businesses where clients tend to replace vendors from year to year.

Therefore, in BPO, once we receive a project, we can build a solid base, accumulate know-how and knowledge, and expand our business with clients. As you know, for example, our competitors in the call center business talk about BPO, but the fact that they are not that big is because we have a great deal of expertise and knowledge in this field, and it is an area where mistakes cannot be made. Therefore, BPO is growing on the basis of such things.

We are trying to develop a model to increase productivity while also incorporating AI and other such features.

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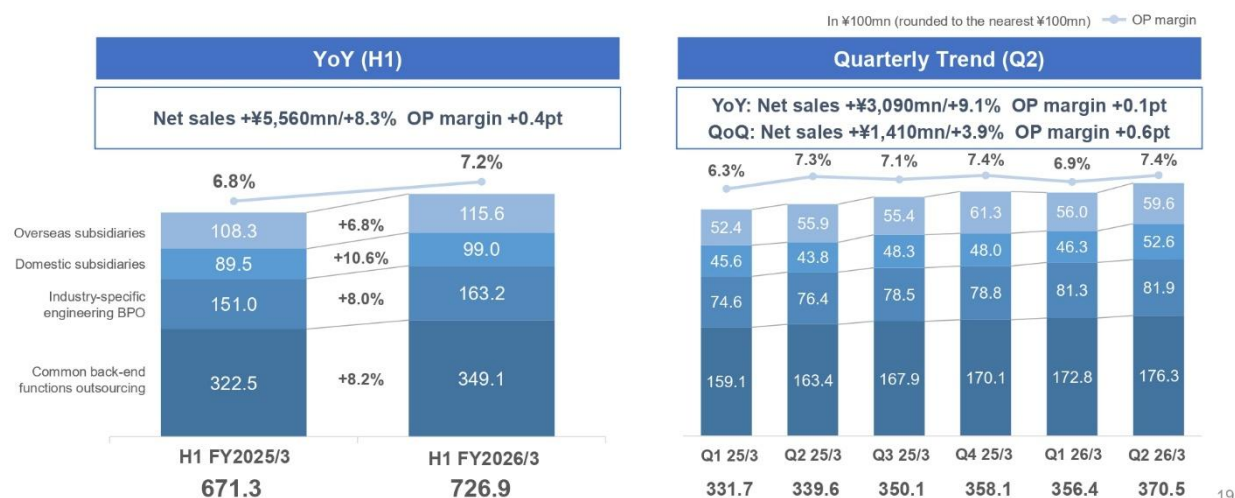
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BPO Services: Financial results

*Net sales for each service are calculated based on gross sales used for management accounting and are not adjusted for intersegment transactions.



- BPO services net sales up 8.3% YoY, OP margin grew by 0.4 points.
- Both common back-end functions digital outsourcing and industry-specific digital engineering BPO grew sales. This is driven by wider penetration of digital BPO services, which combine IT and operations, resulting in more new wins and larger project sizes.



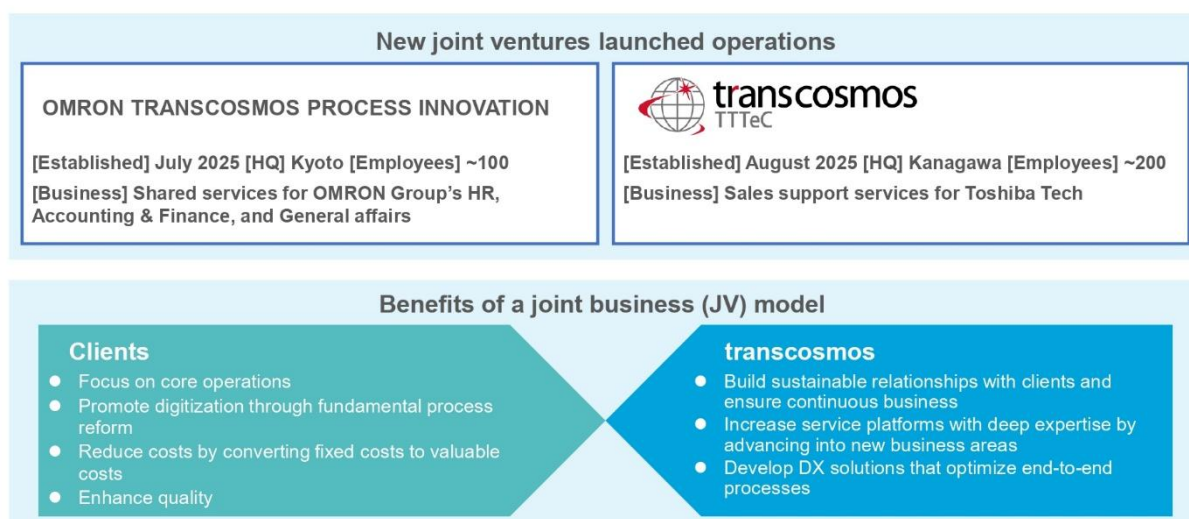
19

So, as you can see on page 19, our performance is growing steadily.

BPO Services: Promoted joint business (JV) model with clients



- As part of our joint business model with clients, two new joint ventures began operations.
- We aim to continue building sustainable relationships with clients, increase service platforms with deep expertise by advancing into new business areas, and develop DX solutions that optimize end-to-end processes.



20

As part of this effort, as you will see on page 20, we are creating back-office companies with Omron and Toshiba Tec. OMRON TRANSCOSMOS PROCESS INNOVATION is a company that handles human resources, accounting and general affairs functions for the Omron Group.

As you know, Toshiba Tec is the largest POS company in Japan, and we will provide sales support around POS with this company.

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Companies like Omron and Toshiba Tec, of course, have employees who have been engaged in these functions. In principle, these employees transfer to the new company, and we also assign our own staff. In terms of capital involvement, there are various arrangements. For example, we initially took a 49% stake, but as the business gets on track, we might increase our share gradually and become the majority owner.

For companies like Omron and Toshiba Tec, the benefit is that they can maintain employment for their employees even though those employees are transferred to the new company. At the same time, for the parent company, the area that had previously been accounted for as personnel expenses is converted into outsourced business costs, allowing those expenses to become variable rather than fixed. This shift provides the advantage of greater cost flexibility.

We can expand into new industries while gaining deeper knowledge. So it is a win-win model. Moreover, as I mentioned earlier, this work is back-office in nature, which makes it difficult for competitors to replace us. In fact, the business is built on a foundation that leaves virtually no room for others to take over, and that is exactly the approach we are implementing.

Reference: BPO services-related joint ventures



Company name	FJ transcosmos Human Resource Professionals	TT Process Management	TT Human Asset Service	TETRAmp Tohoku Electric Power Trans Cosmos Management Partner	OMRON TRANS COSMOS PROCESS INNOVATION	TT Tech Creation
Founded/equity participation	February 2016	November 2019	November 2019	April 2023	July 2025	August 2025
Ownership ratio	51% Fujitsu 49%	84.9% Toshiba 15.1%	80.5% Toshiba Digital Solutions 19.5%	49% Tohoku Electric Power 51%	49% OMRON 51%	85.1% Toshiba Tech 14.9%
Headquarters	Kanagawa	Kanagawa	Kanagawa	Miyagi	Kyoto	Kanagawa
Employees	~750	~150	~200	~200	~100	~200
Services	<ul style="list-style-type: none"> • HR • Accounting • General affairs 	<ul style="list-style-type: none"> • HR 	<ul style="list-style-type: none"> • General BPO • Healthcare support • Document solutions 	<ul style="list-style-type: none"> • HR • Accounting • General affairs • Procurement 	<ul style="list-style-type: none"> • HR • Accounting • General affairs 	<ul style="list-style-type: none"> • Sales support
Consolidation accounting	Included as a consolidated subsidiary	Included as a consolidated subsidiary	Included as a consolidated subsidiary	Included as non-operating income (loss)	Included as non-operating income (loss)	Included as a consolidated subsidiary

21

As you can see on the next page, we actually have six companies. Going back, since FY2016, we invested in Fujitsu's FT HR Professionals, a domestic company within the Fujitsu Group that handles HR, accounting, and general affairs functions. We provided capital, and now we hold a 51% majority stake.

After that, we established two companies with Toshiba. In April of the year before last, we set up a company with Tohoku Electric Power covering HR, accounting, general affairs, and procurement. Most recently, we partnered with Omron and Toshiba Tec.

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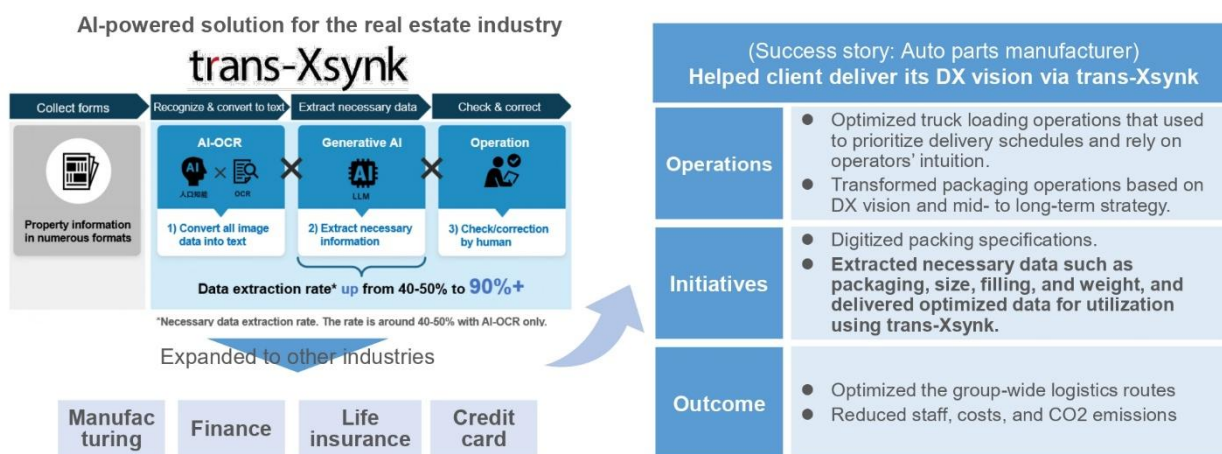
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BPO services: Expanded the scope of AI-powered solutions originally designed for the real estate industry



- Promoted our AI-powered solution, originally designed for the real estate industry to convert data from various irregular forms into text data, to other industries.
- Helped an auto parts manufacturer optimize their Group's logistics routes and costs by organizing packaging data via trans-Xsynd, enabling the client to utilize the data across the Group based on their DX vision.



22

On page 22, the topic shifts a bit. As Kamaya mentioned earlier, this relates to a solution that uses AI.

It was originally created for the real estate industry. In the real estate industry, property information prepared in each area is handwritten, and unless it is digitized, it is not useful. Since these paper-based documents and forms come from various offices and sites, field staff in each area could not digitize these forms when they were busy.

We can convert nearly 100% of analog data into digital, even when each sales office is busy. Each piece of information, including addresses and floor plans, must be put in a fixed format, and our solution enters the information according to a fixed format using AI.

We created this solution with Tokyo Tatemono for the real estate industry, but it can be expanded across other industries since there are similar needs. So we are promoting this model.

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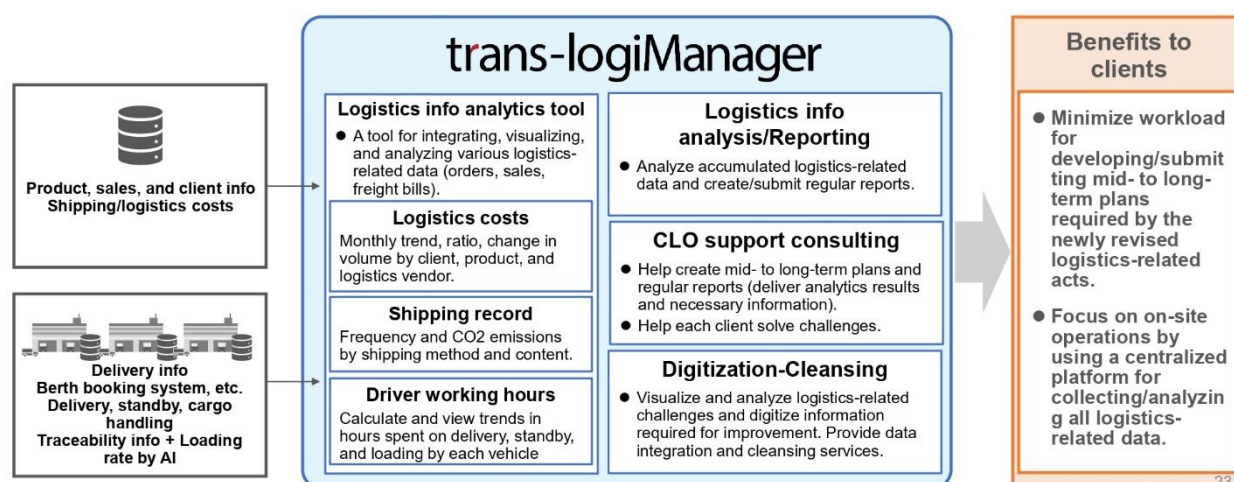
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BPO services: Common back-end functions outsourcing: Released new services to help clients overcome logistics challenges



- SCM back-office services cover procurement, production, order processing, supply/demand/shipment arrangement, billing/collection, and customer services. We aim to capture new demand by helping clients comply with two revised logistics laws: the Motor Truck Transportation Business Act and the Act on Advancement of Integration and Streamlining of Distribution Business.
- Launched trans-logiManager, new logistics DX solutions that help clients comply with the two revised laws requiring specified business operators to develop and submit their mid- to long-term plans for streamlining logistics operations.



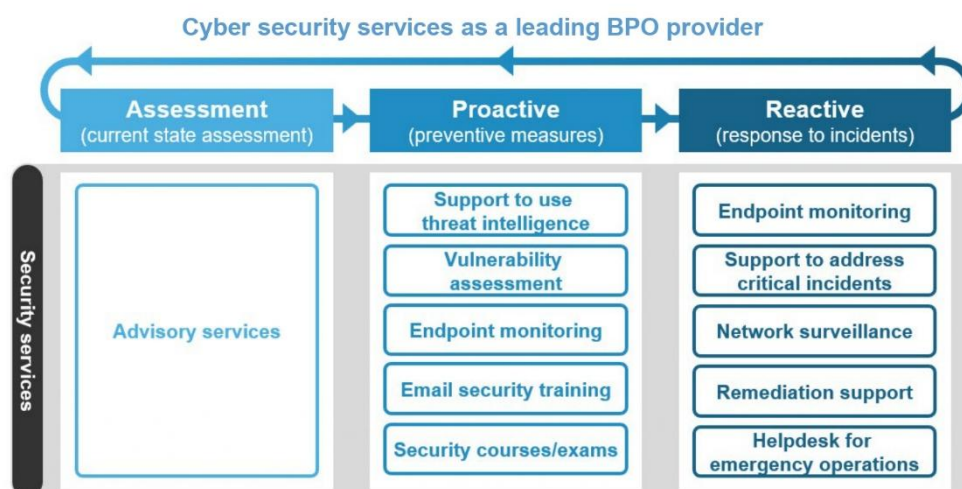
Page 23 shows our new logistics services. We have logistics centers in Kumamoto and Sapporo and have around 40 clients, mostly in the food industry. We handle order placement and processing tasks for them. So, we have expertise in order management and processing, mainly for B2B area.

So now, we have the know-how to handle orders via telephone, e-mail, and fax, as well as inventory management and deemed inventory management, and we have expanded our services to solve logistics issues. Recently, there are various problems related to truck drivers, so we have expanded the scope and begun providing additional support.

BPO services: Common back-end functions outsourcing: Promoted cyber security services



- Building on experience and expertise in IT operations, including industry-leading IT help desk services, promoted security services to satisfy rising client demand for implementing cyber security measures.
- Enhanced assessment, proactive and reactive security services to address evolving threats amid increasingly advanced and complex cyber-attack threats that companies face along with progress in DX and generative AI.



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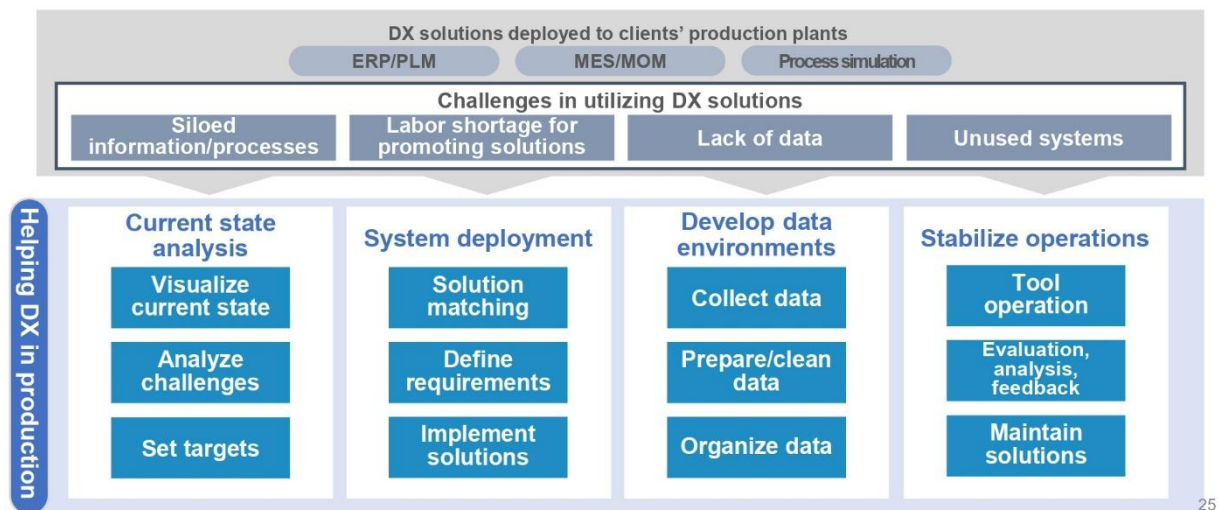
Page 24 shows our security services. This area is an extension of our help desk business, which is probably the largest in Japan.

We are strengthening our services based on our track record to meet the needs of clients.

BPO services: Industry-specific engineering BPO: Promoted services that help achieve DX in production



- Promoted services that help manufacturing companies achieve DX in on-site production processes.
- Helped clients transform productivity through digital BPO services addressing factory-floor challenges such as labor shortages, unused systems, lack of data, and siloed data and processes. Services include DX solution implementation and operation, data environment development, and current state analysis - all at one stop.



The same is true for page 25. Many of our clients are in the manufacturing industry, and in many cases, data does not flow among production sites; each site uses different systems.

We help clients build a seamless data flow, visualize data, and increase productivity.

We are providing these services using Mitsubishi Electric's e-F@ctory Alliance. Using that as a foundation, we are adding our industry expertise to increase the value of the service. These are the recent topics of the BPO.

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CX services net sales

¥143,320mn

(YoY +¥3,850mn/+2.8%)

CX services OP margin

2.9%

(YoY +0.5pt)

- Deployment of trans-DX for Support, our integrated CX platform that fully supports diversifying customer touchpoints, rose to 117 companies, including replacements. This led to service growth in digital contact center services driven by sales activities aimed at increasing orders.
- Focused on enhancing hybrid chat and VoC analytics features with AI to accelerate the rollout of trans-DX for Support.
- Promoted AI utilization, primarily in digital contact center operations and digital integration services.
- Digital integration services focused on swift recovery in sales through AI utilization and VoC via trans-DX for Support.

26

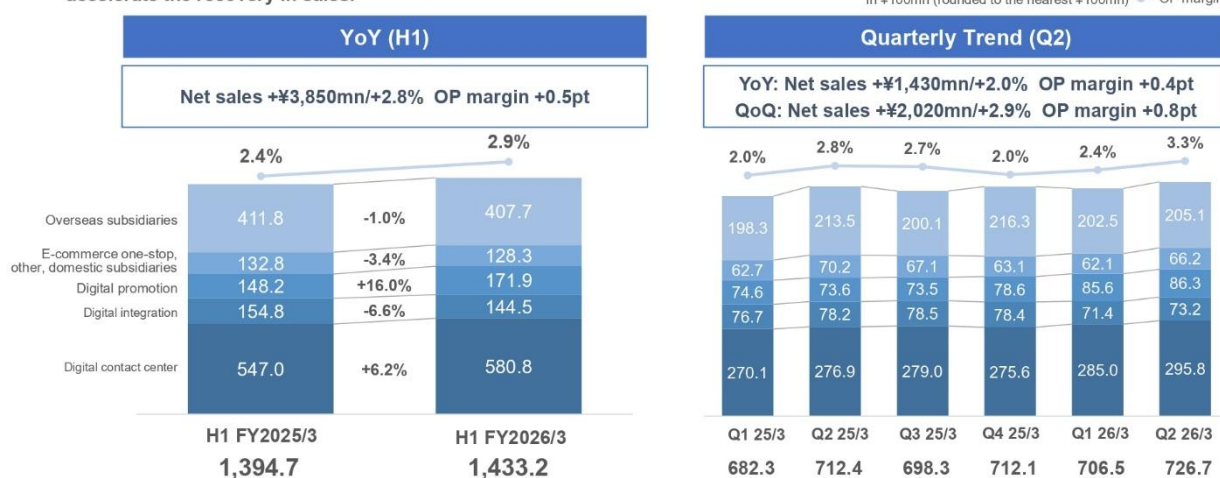
In CX services, we were able to continue to increase sales and profits and improve profits.

CX Services: Financial results

*Net sales for each service are calculated based on gross sales used for management accounting and are not adjusted for intersegment transactions.



- CX services net sales up 2.8% YoY, OP margin grew by 0.5 point.
- Deployment of our unique, competitive integrated trans-DX for Support platform reached 117 companies, led by growth in replacements from competitors and in-house platforms. Digital contact center returned to sales growth, backed by sales activities that contributed to total deal wins.
- Although sales declined in digital integration services, focused on AI adoption and VoC utilization via trans-DX for Support to accelerate the recovery in sales.



27

Page 27 shows sales trends.

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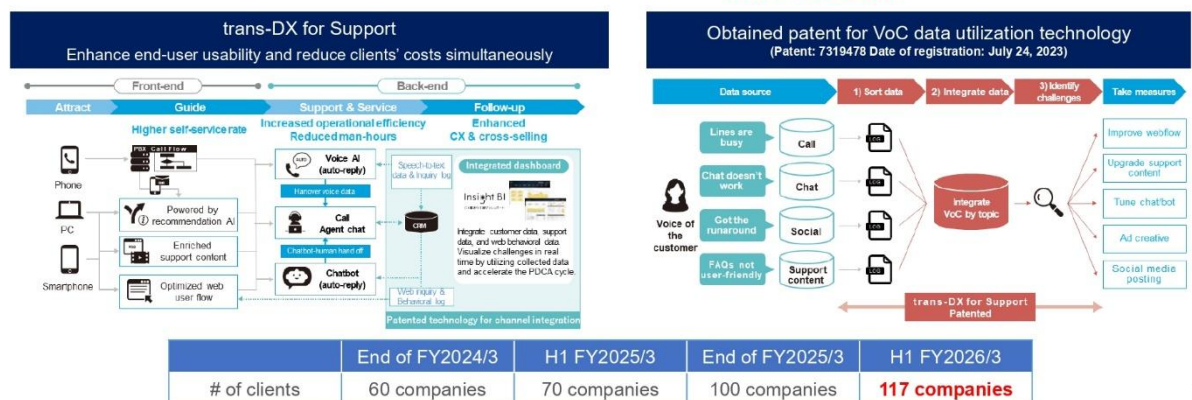
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CX Services: trans-DX for Support, an integrated CX platform covering all digital front

- Expanded deployment of trans-DX for Support, an integrated CX platform that comprehensively covers diversified customer touchpoints, to 117 companies.
- Customers' self-service rate on website/app doubled by utilizing VoC from social platforms in addition to feedback directly conveyed to clients.
- Optimized CX at customer touchpoints by seamlessly integrating hybrid chat channels, which have about 3x higher productivity than call services, with contact centers.

[Patented] Internally developed trans-DX for Support, a digital platform that solves CX challenges at customer touchpoints
 ~Boost usability and reduce clients' costs **without trade-offs**~



28

Page 28 shows an area where we have been continuously focusing our efforts.

Even when we talk about CX, we are still primarily regarded as a call center business. However, we are a leading company in Asia in digital integration and web production. We connect our web production and contact center services through VoC (Voice of the Customer), and naturally, user feedback also comes into the call centers.

Recently, users post their voices on social media, so we also link to posts on social platforms using a tool called Sprinkler. We have obtained a patent for our technology and process for connecting VoCs and optimizing four channels, including chats.

The goal of optimization is to enable users to self-solve their problems via smartphones. Most users have smartphones, and they don't necessarily recognize it as a phone interaction. When they have a problem, they check smartphone sites, check their inquiry details and, if they can't find an answer, they search the page again or dig deeper, often ending up without a solution. So, our initial goal is to help users resolve their problems more effectively directly on a smartphone site.

The reason users can't always find solutions on the site is that they use different phrases when making an inquiry. For example, some people enter "the air conditioner in my house is broken," some write "air conditioner failure," "air conditioner water leak," and some write "strange noise or odor." If the Q&A content doesn't include those keywords in it, users cannot find the page. And so, eventually, consumers perceive that the page does not exist.

Consumers don't change their words, even if they think their search is bad. Thus, they conclude that there is no page. So that's why they call us, plain and simple.

We understand this. Because call center services are our largest business, we are aware of the variations in language. We know all the words that come in from users, so we can identify the language users use. We then use this insight to optimize web search (SEO) and guide users to the right content.

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Another point is that only about half of users actually check the FAQ. Many find FAQs cumbersome because there are so many entries. Users often prefer to go to support pages or links that consolidate multiple pieces of information, which is actually more convenient for them. However, many companies still operate under the mindset that just providing a FAQ is enough. We understand the latest user behavior and flows, so we guide companies to ensure users can navigate from search to the correct page efficiently. We manage the user journey using search engines and SEO tools to make sure pages are actually viewed.

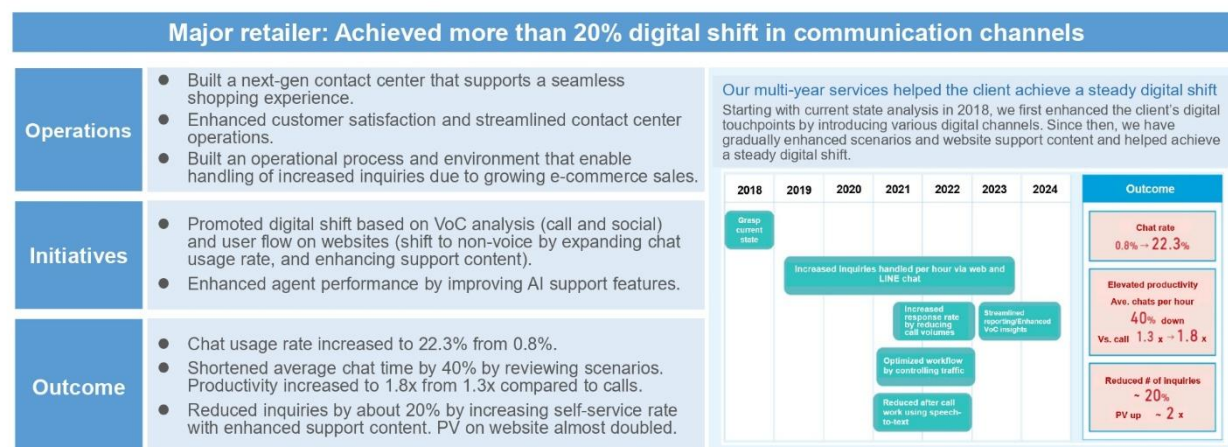
Just to have a website requires a fixed cost. If consumers can self-solve, the number of incoming calls to call centers will decrease. Our model enhances web-based solutions by closely evaluating VoCs acquired via calls and on social media. From clients' perspectives, costs will go down because call center operating costs are the highest. Typically, the maximum achievable call acceptance rate is around 80% to 90%, depending on each client. Trying to achieve 100% requires significant overcapacity. This leaves 10% to 20% of dissatisfied customers who could not get through. Our model helps address this problem by solving user inquiries on the web. Currently, this model is deployed by 117 companies.

With this model, we are helping users and consumers as well as reducing costs for clients. Since other companies don't support all these touchpoints, including the web, call centers, and chat, and we also have obtained a patent for this model, we are growing this service as our unique advantage.

CX Services: trans-DX for Support case study



- Helped a leading retail company shift their communication channels to digital via trans-DX for Support.
- As e-commerce and online customer service became increasingly important, built operational processes and an environment that can handle growing customer inquiries along with increasing e-commerce sales. Helped the client reduce the number of inquiries by enhancing usability and developing a website that enables customers to self-solve their problems online.



29

We already have many clients, such as the case study on page 29. I'm sure we can provide many more examples continuously, but the results include cost savings of up to 20% and an increase in usability by 10%.

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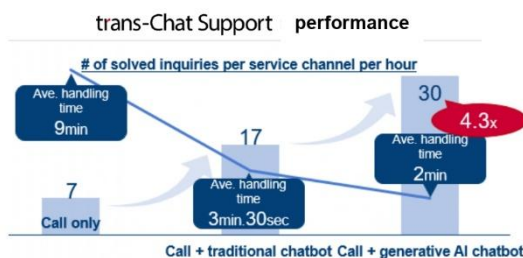
CX Services: Enhanced trans-DX for Support with the power of AI



- Further evolved trans-DX for Support features with the power of AI.

trans-Chat Support Increase productivity with hybrid chat x generative AI

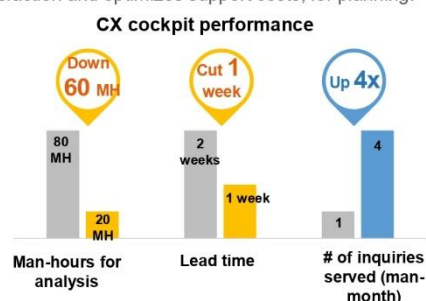
- Deployed hybrid chat services equipped with a generative chatbot to COOP Gift online service by Japanese Consumers' Co-operative Union. Productivity increased 4.3x compared to call-only services.
- Continuously evolving trans-Chat Support by utilizing different services for different purposes, including OpenAI and other LLMs and Japan's domestic SLM like tsuzumi.



[Data collection period]
Pre-deployment: Thu. Sep 21 – Sun. Dec. 31 2023 Post-deployment: Fri. Oct 25 – Wed. Nov. 20, 2024

CX cockpit Cut analytics workload with VoC analysis x generative AI

- Used AI for VoC data diagnostics, including call logs. Based on the identified trend of inquiries, assessed potential for self-services. Helped clients optimize support costs and elevate customer satisfaction.
- AI realized swift analysis and standardized service quality. Also helped shift employees from simple tasks to high-value operations.
- Utilized trans-DX Support, a platform that enhances customer satisfaction and optimizes support costs, for planning.



30

I mentioned VoC that comes into call centers. We are also using a bot service with trans-Chat Support system that uses generative AI. We are tuning chatbots by looking at the logs. We are strengthening the linkage between bots and chat operators through hybrid chat.

This is also based on the logs that come into call centers, and we are strengthening the chat center by looking at the logs that come into the chat center. We are also using LLMs as well as tsutsumi, a domestic model by NTT. We also run the PDCA cycle for analysis.

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CX Services: AI utilization in contact centers

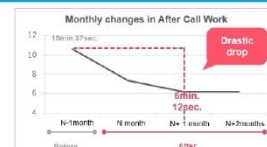
- Evolved transpeech, our unique speech-to-text solution, into AI-powered agent assistant solutions by adding AI-powered features to extract VoC, generate FAQs, alert harassment by customers (customer harassment), and prevent false guidance.
- transpeech has become an integrated, automated platform that helps end-to-end agent operations such as extracting VoC and generating FAQs that used to be performed manually or using different tools. As a result, the renewed transpeech dramatically enhanced operational productivity and efficiency.



□ Additional features powered by AI technology.

Operational productivity in speech-to-text, auto summarization, and VoC extraction processes

Before vs. After
Up
170%



Efficiency in FAQ generation processes

Before vs. After
Up
130%/month

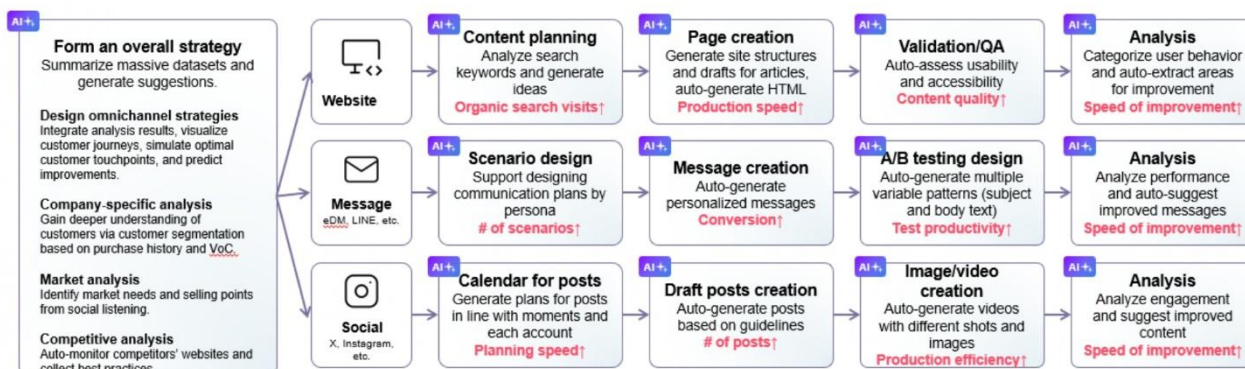


31

Page 31 is a tool that converts voice into text, and we are working to enhance this tool, which is actually used by more than 150 companies, to tune it up and make it standard equipment by FY2028. By converting voice to text, you can do things I just mentioned and more.

CX Services: AI utilization in digital integration services

- Delivered trans-AI Hack, a solution that helps increase marketing initiatives and CVR by using AI in digital marketing processes, including the creation of key visuals, banners and videos and programming.



32

Page 32 shows the use of AI in a digital area. We position ourselves as a company that optimizes customer touch points, so while we make full use of AI, there is a possibility that we may be reducing the number of our products. We are aiming to be the most AI-enabled CX vendor.

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As a result, there may be fewer people, but we would like to grow by connecting companies and consumers by providing feedback, while considering the monetization of our services.

CX Services: Digital integration services priorities



- Aiming to grow both new orders and replacements from other vendors by enhancing operational efficiency and quality with the power of AI, and steadily enhancing CX by utilizing VoC via trans-DX for Support.

Success story: Replaced website operations service from other vendors at a financial company

Challenge: Insufficient value created in upstream processes. Internal resources were occupied with routine tasks such as QC.

Streamlined operations and higher quality with AI



- ◆ Increased operational speed and enhanced quality with expertise in creative work and the power of AI.
- ◆ Streamlined microapp development, accelerated creative work, and semi-automated operations by integrating expertise in creative work with AI.

Client's perspective

Streamlined routine tasks by the power of AI enables the client to **focus more on tasks that create value in upstream processes.**

Enhanced CX using VoC via trans-DX for Support



- ◆ Extracted core needs from VoC and incorporated them into initiatives.
- ◆ Partnered with our contact center team to enhance websites from customer and UI/UX perspectives.

Client's and end-user perspectives

A website that helps achieve goals such as growing sales for the client and one that helps end-users self-solve problems and encourages continuous use.

33

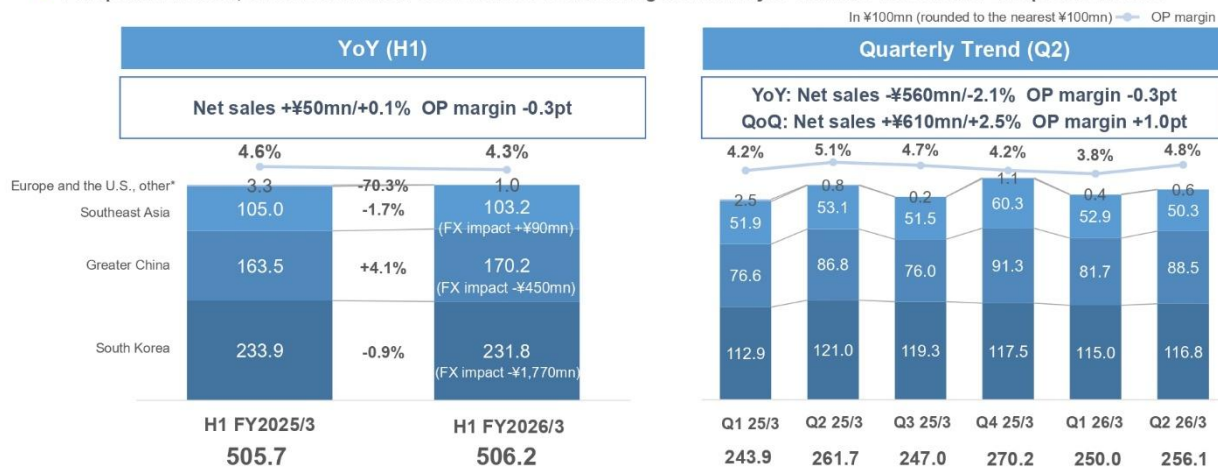
The following page 33 is a similar example of digital, AI, and the platform I mentioned earlier.

*For overseas net sales by country or region based on clients' location, refer to p40.

Overseas: Financial results by geographic markets (Overseas Affiliates segment)



- South Korea: Down 0.9% YoY. Although sales decreased on a reported basis, they rose 6.7% on a local currency basis, driven by growth in digital contact centers.
- Greater China: Up 4.1% YoY. Up 6.9% on a local currency basis, led by growth in digital contact center sales.
- Southeast Asia: Down 1.7% YoY. On a local currency basis, sales declined 2.6% due to weaker performance in large-scale global projects.
- Europe and the U.S., other: Down 70.3% YoY. Business restructuring is underway to eliminate the deficit in Europe and the U.S.



*Figures for "Europe and the U.S., other" are adjusted for intersegment transactions.

34

On page 34, we have categorized results into CX and BPO, but in terms of overseas, there are many areas that overlap with Kamiya's presentation. I have listed South Korea, Greater China, and Southeast Asia, in order of size.

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There are various trends, including the exchange rate. We entered these markets first with CX. Now we are providing BPO on a trial basis in countries and regions where we started earlier.

Overseas: Provided global CX/BPO services through our hub in Malaysia



- Promoted delivery of CX/BPO services to global markets through Malaysia, a hub for our global services.



Why make Malaysia our hub for our global services?



35

Page 35 shows the reasons for using Malaysia as our hub. Southeast Asia is a relatively new area and the size of each country is very small, so we are trying to deliver BPO for Southeast Asia using Malaysia as a hub.

Overseas: Global CX/BPO services through our hub in Malaysia – case studies



	BPO	BPO	CX
	Centralized accounting tasks/Standardized processes (Client: a major global entertainment)	Centralized HR back-office operations	Centralized multilingual operations (Client: a global manufacturer)
Challenge	<ul style="list-style-type: none"> Standardize accounting tasks currently performed separately in South Korea, Taiwan, Hong Kong, and Singapore. 	<ul style="list-style-type: none"> Standardize different HR programs and systems across five ASEAN countries and regions and optimize cost. 	<ul style="list-style-type: none"> Optimize customer support operations costs across 16 APAC countries and regions.
Initiative	<ul style="list-style-type: none"> Centralized accounting operations to Malaysia. Standardized business processes via BPR (visualized and standardized processes, set common rules, designed and deployed a framework to use AI/RPA). 	<ul style="list-style-type: none"> Centralized policies and systems considering local regulations in each country/region. Integrated operations. 	<ul style="list-style-type: none"> Centralized language support services for 16 countries and regions to Malaysia. Effectively obtained work visas in Malaysia using our MD status. Assigned local staff for operations.
Outcome	<ul style="list-style-type: none"> Established sustainable competitiveness with mid- to long-term cost advantages. 	<ul style="list-style-type: none"> Centralized all processes except for local regulations and standardized 70-80% of HR programs and systems. Reduced duplicate costs and helped clients elevate employee satisfaction. 	<ul style="list-style-type: none"> 30% reduction in management costs. Lean management and communication. Centralized operational processes and KPIs.

36

Page 36 is a case study, including accounting and HR functions. Each country naturally has its own policies and laws, and there are many differences, so we sometimes do things on a country-by-country basis.

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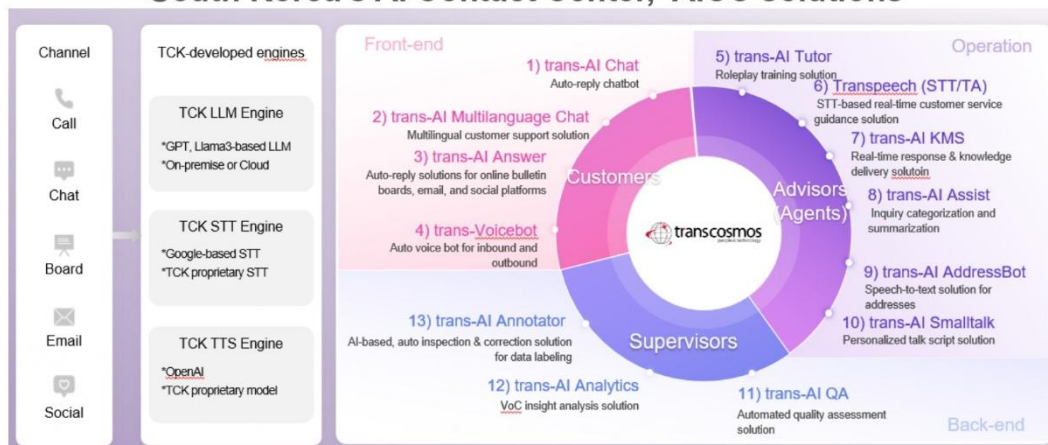
It's more efficient for us to manage everything from our Malaysia base. For clients with a large presence in, say, Thailand, we operate directly there. However, for clients who have smaller, scattered operations across Southeast Asia, it's difficult for them to manage separate back-office teams at each location. In those cases, we handle it effectively from Malaysia. Thus, we have two approaches. This model is based on a two-brand, two-system approach, with some things done locally and some things done at the Malaysian base.

Overseas: South Korea led the development/delivery of generative AI solutions



- Promoted generative AI utilization in China, South Korea, and Southeast Asia. South Korea has been focusing on the development and operations of AI-powered contact centers (AICC) since 2023. Today, it has developed **13 AICC solutions** in-house.
- Held events inviting several hundred visitors in 2024. Today, the solutions empower **over 70** companies across industries, including finance, distribution, manufacturing, public sector, and IT. Also focused on developing industry-specific solutions.

South Korea's AI Contact Center, AICC solutions



37

As for page 37, South Korea is our largest center and the most digitally advanced country in our group. We are working with South Korea on AI-powered chatbot services as I explained earlier.

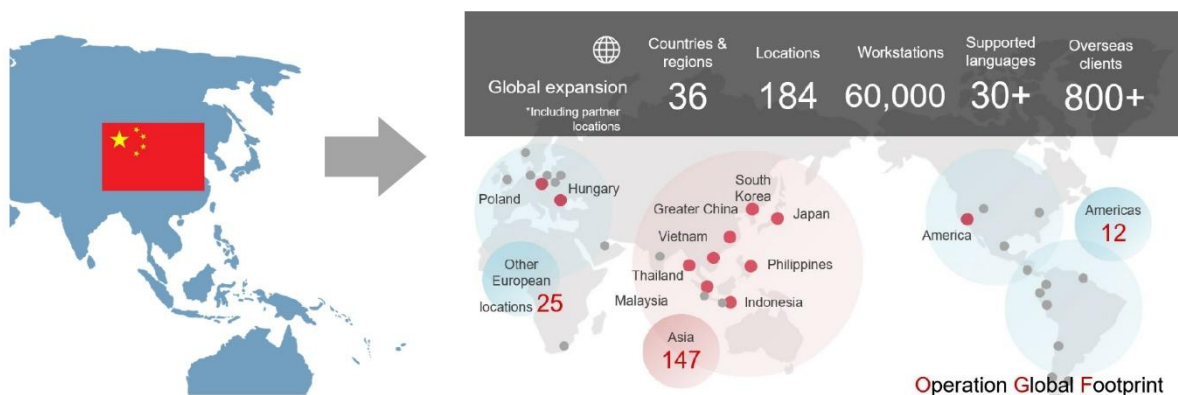
Overseas: Enhanced services for Chinese global companies in Asia and Europe



- As Chinese companies accelerate global expansion, we are focusing on winning Chinese global companies' demand for services in Asian and European markets, leveraging our global locations.

Number of Chinese global clients (2024 China's top 100 brands expanding internationally*): **19**

=> Aiming to expand the client base and grow business volume in their destination markets.



*Top 100 Chinese companies were co-announced by the Federation of Shenzhen Industries, China Academy of Information and Communication Technology, and 龍數國際 (the first international brand consulting firm in China) at the 13th World Industrial Development Forum. Global companies with 30% or more overseas sales to net sales, or net sales of 3 billion yuan or more, are nominated.

38

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On page 38, you see the recent trend of global companies. When we talk about global companies, we tend to have a strong image of companies from Europe and the US, but nowadays there are quite a few global companies from China.

We have a large number of offices in China, and we have always had ties with Chinese companies. Consequently, we are receiving requests from global companies originating from China, and we are also making considerable progress in expanding our business overseas, including in the ASEAN region. Today, we have business with about 19 such global companies from China.

That is all.

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Document Notes

1. *This document has been translated by SCRIPTS Asia.*

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