



IR DAY 2026

Mid-term Management Plan

FY2028: SBU Strategy

PERSOL HOLDINGS CO., LTD.

July 6, 2026

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PERSOL HOLDINGS CO., LTD.

Held on Monday, July 6, 2026

Script of IR DAY 2026

IR DAY 2026

Mid-term Management Plan FY2028

Taro Mineo
Executive Officer CSO
July 6, 2026

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PERSOL HOLDINGS Executive Officer CSO Taro Mineo

Career profile

- 1994: Joined Intelligence, Ltd. (current PERSOL CAREER CO., LTD.)
Driving growth in businesses such as IT consulting, outsourcing, placement, and job recruitment media
- 2016: Appointed Representative Director and President at Intelligence, Ltd. (current PERSOL CAREER CO., LTD.)
While driving business expansion and leading the management of more than 10 companies, he also contributed to the healthy development of the market as a board member of an industry association
- 2022: Appointed Executive Officer CSO at PERSOL HOLDINGS CO., LTD.
Leading management strategy development, sustainability promotion, and branding enhancement



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[Executive Officer CSO, Mineo]

Hello, I am Taro Mineo, CSO. Thank you for your time today.

I have been involved in the creation and growth of multiple businesses within the Group. I am currently responsible for the group-wide management strategy and business portfolio.

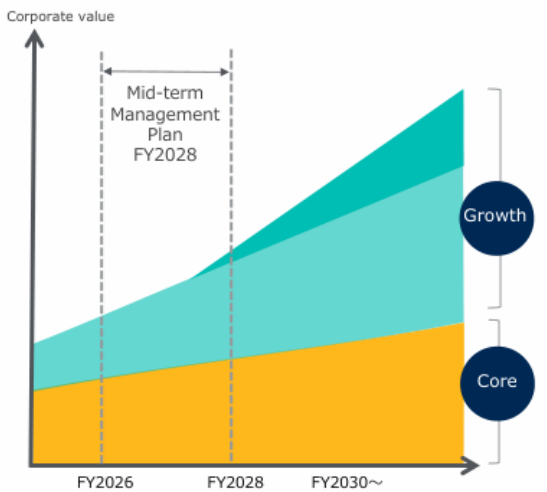
Today, I will explain our group-wide approach to growth and our future focus area: Frontline Worker domain.

Business Positioning to Enhance Corporate Value



Redefining business positioning toward 2030 and beyond,
based on market growth potential and competitive advantage in the AI era

Mid- to long-term corporate value trends (Conceptual Diagram)



Positioning and direction of each business in the Mid-term Management Plan FY2028

- R&D FU
Gojob** **New domains with strong growth potential**
Focusing on the Frontline Worker domain,
leveraging synergies with Gojob and domestic businesses
- Career
Technology** **Domains with sustained market growth and
leverage-enabled transformation upside**
Advancing AI model implementation and shifting toward
higher value-added domains to drive a high-growth, high-
profitability business
- Staffing
BPO
Asia Pacific** **Domains with moderate market growth**
Enhancing a strong profit base through productivity
improvements while maintaining stable revenue growth
* The optimization of the business portfolio is a priority for the
Asia Pacific SBU.

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First, here is the Group's overall approach.

We have redefined our business portfolio toward 2030 and beyond, based on market growth potential and competitive advantages in the AI era.

As you can see, Staffing, BPO and Asia Pacific SBUs are domains to enhance strong profit base while maintaining stable revenue growth.

Career and Technology SBUs are domains with sustained market growth and have high potential for upside through business model transformation. We will accelerate AI implementation and shift toward higher value-added domains to drive a high-growth, high-profitability business.

At the top of the slide on the right, we have R&D FU and Gojob, which are new domains with strong growth potential.

Leveraging synergies between Gojob and domestic businesses, we are going to focus our efforts on the Frontline Workers domain.

Broadly speaking, our core strategy is to hone our ability to generate profits from existing businesses and shift resources to areas that will grow in the AI era.

The Frontline Worker Market as PERSOL Group's Next Growth Portfolio

Targeted business domain

Frontline Worker domain

Frontline jobs where workers are in charge of onsite operations and contact with customers/users



Why this domain

1 Structural labor shortages

Persistent shortages due to low AI substitution and a declining workforce (approx. 1.50 million shortage projected by 2035*)

2 Increasing workforce mobility driven by AI

Supporting talent mobility from white-collar domains through infrastructure development

* Sum of the workforce shortage in relevant industries, drawn from the approx. 3.84 million shortfall for all industries projected in PERSOL RESEARCH AND CONSULTING'S "Future Projections of the Labor Market 2035"

Next, I'd like to talk about Frontline Worker domain.

Frontline work is where workers are in charge of onsite operation and have touchpoints with customers and users. This is a domain—such as manufacturing, logistics, construction, maintenance, food service, and nursing care—where people create value in the front lines.

There are two reasons why these markets are important.

One is because of structural labor shortages. In addition to decline in working population, substitution by AI is difficult. Even by 2035, huge labor shortage is expected.

The second is because we expect that there will be increasing workforce mobility from white-collar workers driven by AI. To accommodate this trend, we believe its importance as an infrastructure supporting career transitions and labor mobility will continue to grow.

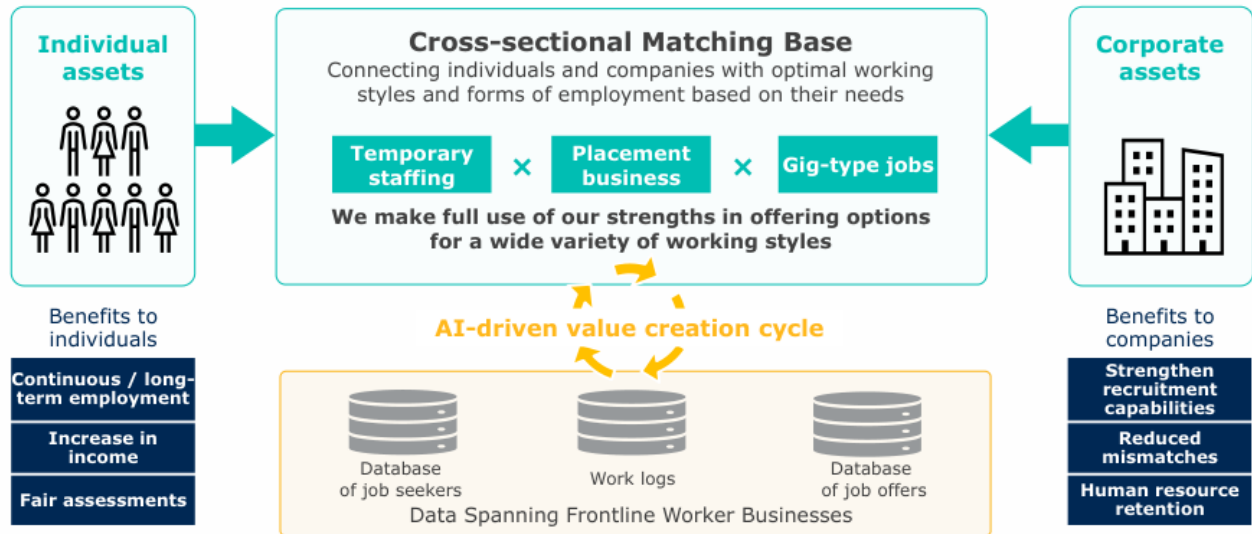
What would be needed at such a time is a system that enables individuals to transition to their next job opportunity. From a company's perspective, it is necessary to establish a system for securing the workforce that encompasses not only hiring but also workforce planning, retention, and development.

A Frontline Worker Platform Leveraging PERSOL's Strengths



We integrate our existing customer and talent bases, deep on-site insights and multiple HR service functions with AI and data to expand the value we deliver.

In addition to short-term talent acquisition, we provide value by supporting workforce planning for companies while creating career opportunities for individuals.



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Then, how can PERSOL create value in this domain?

Our strengths lie in offering options for a wide variety of work styles cross sectionally, such as temporary staffing, placement business and gig work.

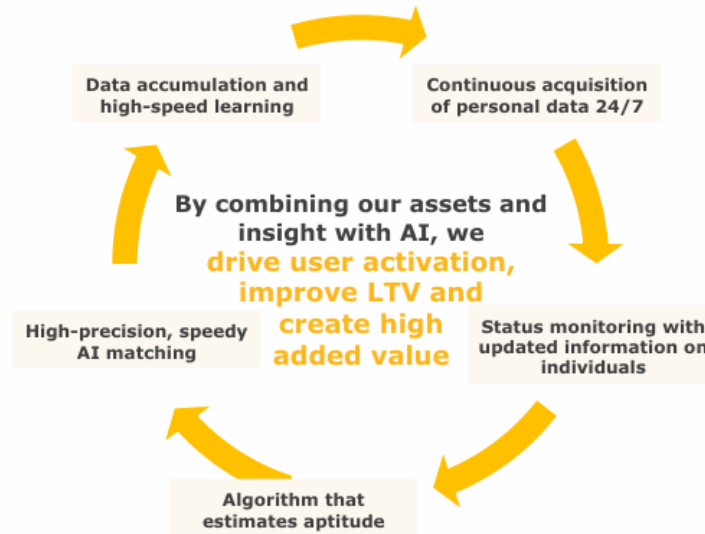
We are not going to offer them individually, but integrate them with AI and data to offer as a cross-sectional matching base. Through such efforts, benefits such as increase in income, or long-term employment can be offered to individuals and benefits such as strengthened recruiting capabilities, talent retention can be enjoyed by the companies.

The key point is that this goes beyond simply securing a single candidate and finalizing their hire; it allows us to address both the company's workforce planning and the creation of career opportunities for individuals.

We believe this is a domain that only we at PERSOL—as a company that operates multiple services and holds a wealth of data—can tackle.

AI-driven value creation cycle

AI continuously collects individual data and monitors real-time situations, enabling automated and continuous delivery of optimal career-aligned recommendations without human involvement.



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Last of all, I would like to share our thoughts on AI, which supports this platform.

The conventional human resource services have primarily relied on a model that matches candidates and job openings based on registered information and job postings at a given point in time. But going forward, we will evolve the model to the one where individual data are acquired continuously, and optimal recommendations will be made more frequently. We continuously collect individual data and update their status constantly. This has been realized because of the use of AI. Based on data, algorithm will estimate aptitude, enabling high precision, speedy AI matching. As data accumulates and learns, we can continue to improve our proposals to the users. Through this cycle, we believe we will be able to drive user activation, improve LTV, and create high added value. In the Frontline Worker market, PERSOL will create a platform to offer individuals opportunities to work, and at the same time, to solve workforce issues at companies.

This concludes my presentation. Thank you.

IR DAY 2026 Career SBU

Yu Senoo

Executive Officer Career SBU Lead

July 6, 2026

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[Executive Officer Career SBU Lead, Senoo]

I am Senoo from Career SBU. Thank you for your time today.

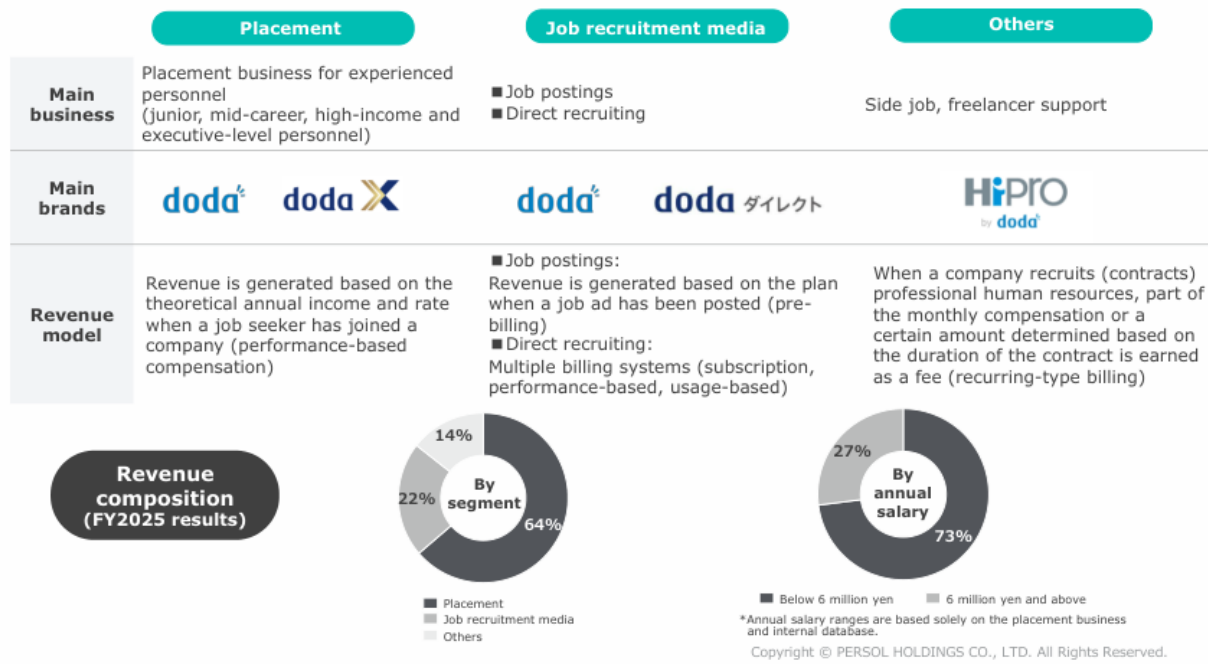
Today, I will explain the growth strategy of Career SBU, starting with “market assumptions”, “transformation to an AI-driven placement business model” and “strengthening of high-income segment”, in the order.

I would like to focus especially on how we can transition from a highly volatile business model to a structure that enables stable growth through the usage of AI and data.

Speaking for myself, having long been involved in the job placement and technology domains, I view the current market environment not as a temporary phenomenon, but as an opportunity for structural shift.

I will to explain the specifics today.

Basic Information About the Career SBU



First, let me state the premise.

Career SBU has three main businesses of “Placement”, “Job Recruitment Media” and “Side job and freelancer support”.

While Placement accounts for about 60% of revenue, we are characterized by a multi-layered structure in which we engage with customers through a combination of multiple services.

Out of the Placement business, high-income group whose annual income is 6 million yen or higher account for approximately one quarter. As such, we are shifting towards high value-added domain. I will explain later, but this structure itself is the foundation for the usage of AI and the growth of high-income segment growth.

Our Market View and Competitive Advantages



Our understanding of the market

- Over the next two to three years, the tendency of companies' **selective hiring will continue**
- **Human resources in the high-income group** who can be immediately useful **will continue to be in high demand**
- Over the mid- to long-term, in addition to the insufficient working population, **there will be an increase in job transition and career support demand**, reflecting rising job turnover rates and an increase in job transitions through private sector employment agencies
- **Mobility of human resources** between industries and between job types **will accelerate** due to the progress of AI utilization.

■ Our Analysis of the Impact of AI

Q: With matching and other tasks becoming automated due to AI advances, won't the value of placement business agents as intermediaries be diminished?

A: While the use of AI will help streamline recruitment processes, only human can provide decision-making support for both job seekers and hiring companies, and we believe the value in being an intermediary will shift accordingly. In addition to amassing a huge volume of matching data to date, we leverage proprietary data such as career aspirations and insight into corporate culture to achieve advanced matching powered by "Human × AI".

Q: With advancements in AI, won't there be a decline in demand for white-collar job offers, and lead to a particular decline in the placement market for the majority group, which is the core market for PERSOL?

A: While demand for white-collar hiring will continue to vary by occupation, industry, and company size, overall demand in the talent market is expected to expand over the medium to long term, supported by structural talent shortages. Against this backdrop, we will capture strong hiring demand, particularly in the high-income group.

Competitive advantages

- doda's high **visibility and ability to attract individuals**
- **A multi-layered service structure** combining the placement, job recruitment media, and side jobs/freelancers
- Insight data obtained through human involvement and **proprietary data** developed across services

Next is about market perception.

In the short term, we expect companies to continue selective hiring and demand for high-income group to continue strongly.

Over the mid- to long-term, in addition to the declining working population and rising job mobility, there will be an increase in job transition and career support demand.

While the use of AI will help streamline recruitment processes, decision-making support is expected to remain as an area that can only be materialized by humans.

In this context, we believe that our company is well-positioned to maintain and strengthen our competitive advantage even in the age of AI, thanks to doda's ability to attract individuals, its multi layered services, and its proprietary data.

Things to Be Achieved under Mid-term Management Plan FY2028



Implementing an AI model in the placement business to shift to a high-growth and high-profitability business structure

KGI (FY2028)	Revenue +7-10% YoY Adjusted EBITDA margin of 20% or more
How Strategies	<ul style="list-style-type: none">• Shift to a highly productive placement business model that accommodates diverse needs and is not solely dependent on the number of personnel, by increasing the sophistication of the matching process with "Human x Proprietary data x AI"• Strengthen business in areas with high growth rates, namely the placement for the high-income group and side jobs / freelancers (HiPro)
When Feasible timing	<ul style="list-style-type: none">• Transition to an AI-driven model: Phased implementation into the matching process by FY2028. The effects will gradually emerge during FY2028• Strengthening business for high-income group: Revenue growth of over 10% CAGR from FY2025 to FY2028
Why Achievable Probability	<ul style="list-style-type: none">• Possession of proprietary data including the insights acquired by consultants, and business characteristics that are highly compatible with AI implementation• A business structure that boosts job seekers engagement through multiple concurrent services, while simultaneously enhancing matching accuracy and operational productivity by leveraging accumulated data

Let me go into the main part from here.

We will implement an AI model in the Placement business to shift to a high-growth, high-profitability business structure.

There are two points to realize this.

First is to structure the matching process with "Human x Proprietary Data x AI".

The second is to strengthen businesses in areas with high growth, namely the placement for the high-income group and side jobs / freelancers (HiPro).

Through such efforts, we aim to realize revenue growth of 7-10% YoY, and adjusted EBITDA margin of 20% or more in FY2028.

We believe that this will mark a shift toward a model that simultaneously boosts both growth and profitability, rather than simply improving efficiency.

Strategy (1) Shifting to a "Human × Proprietary Data × AI" Model for Higher Productivity and Outcomes



Why The significance of efforts	<ul style="list-style-type: none">• The strong compatibility of the matching business and AI• Against the backdrop of advancements in AI, we will work to achieve business growth by creating new value driven by human involvement
How Measures	<ul style="list-style-type: none">• Utilize AI to integrate and enhance proprietary data including the insights acquired by consultants to strengthen matching accuracy and support for decision making• AI handles processes such as matching, scheduling and document creation, enabling human to focus on high value-added areas of decision-making and support
When Feasible timing	<ul style="list-style-type: none">• FY2026 - FY2027: Gradually expand the adoption of AI in processes, prioritizing improvements to conversion rate and productivity• FY2028: Complete the implementation of AI in overall processes, delivering personalized candidate and hiring experiences powered by "Human × AI"
Why Achievable Probability	<ul style="list-style-type: none">• Proven track record of AI adoption in recruitment processes, including creation of job postings• A business model where AI handles process-intensive tasks while human focus on high-value-added work such as decision-making and consulting, driving both productivity and outcomes simultaneously

Next is our approach on AI.

From FY2026 through FY2027, we plan to move forward with the introduction of AI into the hiring process, and we aim to complete the implementation of AI across the entire process by FY2028.

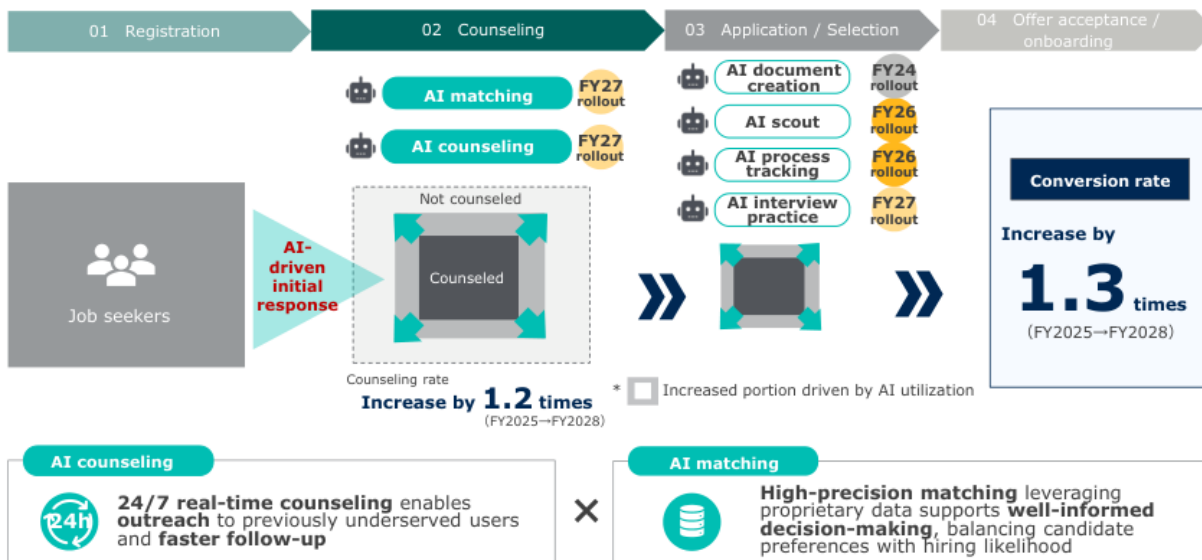
We already have a proven track record of AI adoption in creation of job postings. I believe what is important is the segregation of roles.

Having AI handle process intensive tasks while humans focus on decision-making support. With this design, we aim to improve both the productivity and outcomes simultaneously.

The Placement Business Model Realized with AI Utilization



- AI agents, including AI counseling, deliver broader, higher-quality career support
- Increasing the counseling rate enables outreach to previously untapped candidates, driving higher conversion rates



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The most important point is as follows.

We are not using AI just to reduce costs but believe it is an investment to grow revenue.

To be concrete, 24 x 7 counseling will be possible with AI counseling, enabling outreach to previously underserved users. We therefore aim to increase counseling rate by 1.2 times.

Furthermore, in matching using proprietary data, we aim to increase the conversion rate by 1.3 times.

In other words, we intend to create a structure that increases both the total number of counseling users and the conversion rate.

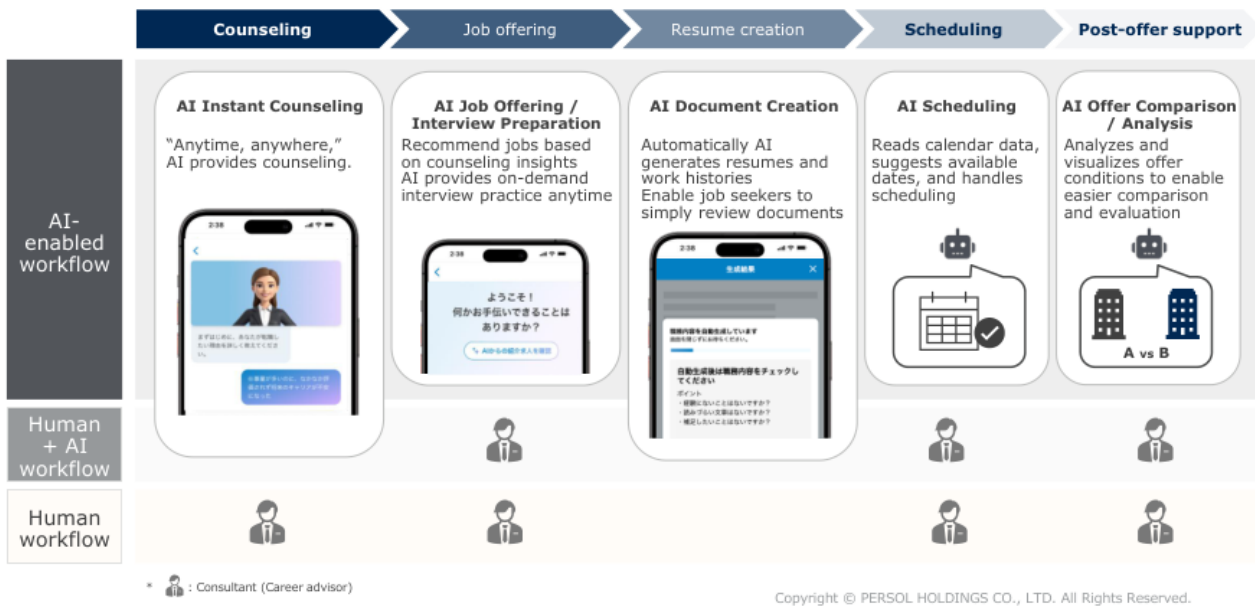
Furthermore, by leveraging data that provides insights into factors such as user preferences and corporate culture, we will provide decision-making support that leads to highly satisfactory outcomes.

As a result, we'd like to create a model that goes beyond mere efficiency improvements but one that enhances both the number of users we can support and the quality of that support.

AI-driven Transformation of the Hiring Process: Job Seekers



Scale up our candidate support capacity through AI, driving higher placement counts and conversion rates



This is just an illustrative example. Individual processes are shown here. From the perspective of job seekers, AI will handle tasks such as counseling, interview practice, scheduling, and document creation.

The key point is that AI will enable us to provide support to job seekers whom consultants have been unable to fully assist until now on a much broader basis.

Furthermore, we aim to achieve both efficiency and added value by having humans support the final decision-making process.

Strategy (2) Strengthening High-Income Segment



Why The significance of efforts	<ul style="list-style-type: none">• For the high-income group, we have achieved high revenue growth in the past three years, and relatively high market growth is expected to continue in the future
How Measures	<ul style="list-style-type: none">• Enhance touchpoints with both clients and job seekers through the concurrent provision of multi-layered services, driving both sales expansion and improved candidate acquisition• Strengthen organizational capabilities and optimize brand strategy<ul style="list-style-type: none">✓ Establish a 360-degree recruitment consultant organization focused on the high-income group✓ Enhance marketing communication targeted at the high-income group
When Feasible timing	<ul style="list-style-type: none">• Placement of high-income group: Over 10% CAGR revenue growth (FY2025–FY2028)• HiPro: Over 20% CAGR revenue growth (FY2025–FY2028)
Why Achievable Probability	<ul style="list-style-type: none">• Proven capabilities in integrating multiple customer touchpoints — placement, job recruitment media, and direct recruiting. A multi-layered service model that maximizes business opportunities by addressing diverse needs of both client companies and job seekers

Next, I'd like to talk about high-income segment.

We have achieved high revenue growth in the past three years in the high-income group.

Going forward, we intend to evolve this into a replicable growth model by combining the integration of multi-layered services, strengthening our consulting capabilities, and implementing brand strategies.

In other words, I believe we are now in a phase where we are not just riding the wave of a growing market but are actively working to develop a winning strategy.

High-income Segment Expansion and Revenue Growth Targets



Expansion of services for high-income segment

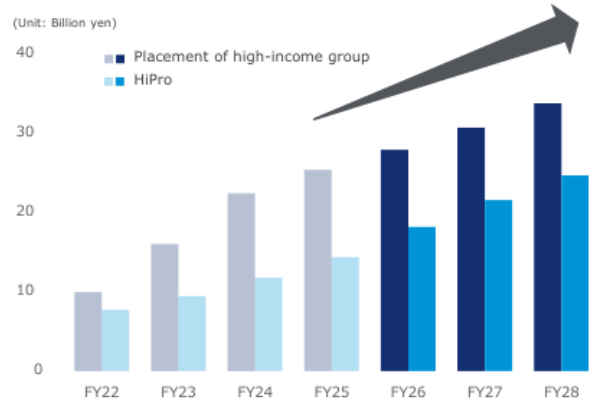
Demand for highly skilled talent is increasing in line with the growing complexity of management challenges

Placement of high-income group		HiPro
Strengthening organizational capabilities	Purpose	Solving specific business challenges
Permanent, full-time, long-term employment	Model	side-job/freelance project engagements
Mid- to long-term growth and cultural development	Benefit	Flexible, on-demand access to highly specialized talent

By leveraging growth in both areas, we will expand market share in the high-income segment

Revenue growth target

Placement of high-income group: CAGR over 10%
HiPro: CAGR over 20% (CAGR from FY2025 to FY2028)



*Placement of high-income group: Revenue from placement businesses for candidates with annual income of 6 million yen or more registered in the doda/doda X database

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High-income segment is not just job placement only but includes HiPro’s side jobs and freelancers’ support. We aim to grow our market share through the growth of both businesses.

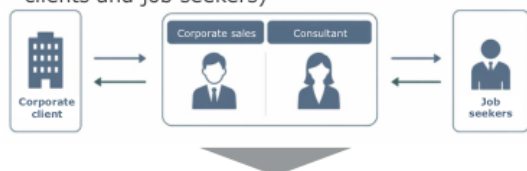
We aim to achieve continuous growth. Looking at the figures, in FY2028, which is during the current mid-term management plan, we aim to achieve CAGR of 10% or more in high-income segment, and CAGR of 20% or more in the side jobs and freelancers’ support, the HiPro segment.

Initiatives for Placement of High-income Segment

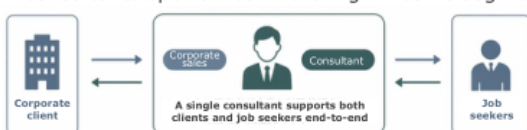
- In response to strong hiring demand in the high-income segment, established a 360-degree recruitment consultant organization capable of deep understanding of needs
- Optimize the brand strategy of doda/doda X and strengthen marketing communication targeting the high-income segment

■ Strengthen organizational capabilities in the high-income segment

- Previously: 180-degree model (separate handling of clients and job seekers)



- From FY2026: 180-degree model + 360-degree consultants specialized in the high-income segment



■ Strengthen marketing for the high-income segment

- Previously

	← Early career to mid-level	→ Mid- to senior-level
Above 8 million yen		doda X
6 - 8 million yen		doda X
4 - 6 million yen	doda	
Below 4 million yen		

- From FY2026: Optimize the doda/doda X brand strategy

	← Early career to mid-level	→ Mid- to senior-level
Above 8 million yen	doda X	doda X
6 - 8 million yen	doda X	doda X
4 - 6 million yen	doda	doda
Below 4 million yen		

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As a concrete way to grow the high-income segment in Placement business, we aim to bolster the 360-degree recruitment consultant organization and strengthen the strategies of the two brands, doda and doda X further.

Until now, doda has primarily focused on job seekers with annual incomes ranging from 4 to 6 million yen, but going forward, we plan to expand our services to those earning 6 to 8 million yen. Additionally, we intend to strengthen our services on doda X for those earning 8 million yen or more.

This isn't simply a matter of strengthening our sales efforts; it means redesigning our business model to better suit the high-income segment. Through this, we will enhance the sustainability of our growth.

To summarize, we will transform our revenue structure to evolve our Placement business model by using AI and drive growth in the high-income segment.

This is the major strategy of Career SBU.

Thank you for your attention.

IR DAY 2026 Technology SBU

Shinji Masaki

Executive Officer Technology SBU Lead

July 6, 2026

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[Executive Officer Technology SBU Lead, Masaki]

Hello, everyone. I am Masaki from Technology SBU.

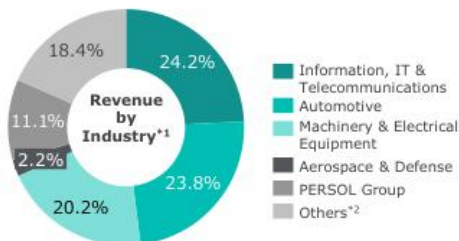
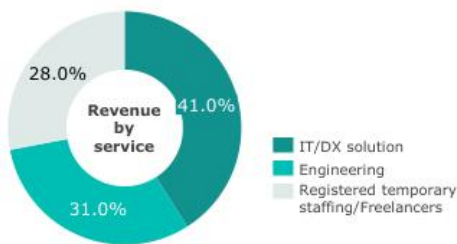
Thank you very much for taking your time out of your busy schedule.

Now, I'd like to start my presentation.

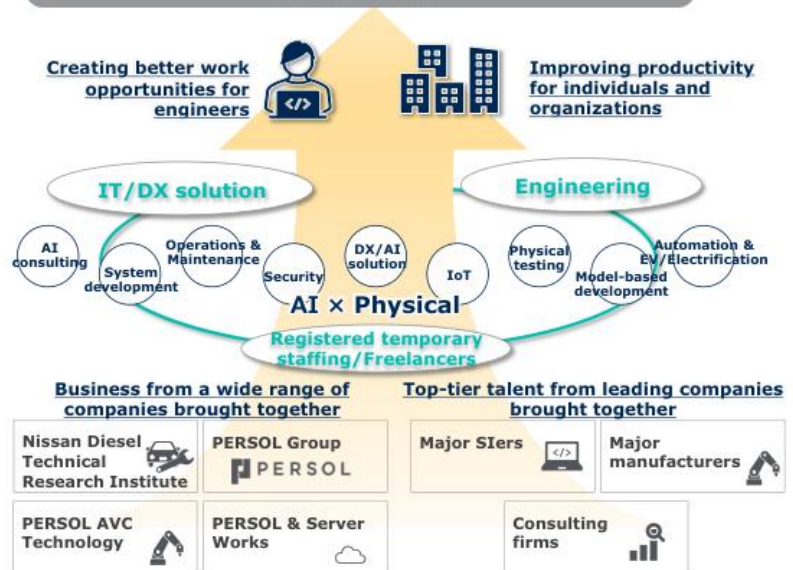
Basic Information About Technology SBU



Diverse Service Models and Business Domains



Value Delivered



*1 : Aggregated based on revenue by customer of PERSOL Cross Technology Co., Ltd. and PERSOL AVC Technology Co., Ltd.
 *2 : Includes healthcare/medical, construction/real estate, energy, and public sector, among others

Let me start by introducing our SBU. We have diverse service models and industries as shown on the left.

At the bottom left of the right side, we have businesses from a wide range of companies brought together like, Nissan Diesel Technical Research Institute, a company with diesel engineering specialists, and PERSOL AVC Technology, formerly engineers of Panasonic consumer appliances. Furthermore, members from various SBUs within the PERSOL Group who develop systems came together, and when members from the temporary staffing business joined, our Technology SBU was established.

And the business is run by management from various backgrounds, such as from major manufacturers, consulting firms, major SIers, others, as described on the right bottom of the slide. And currently, we are divided into three subsegments of IT/DX Solutions, Engineering, and Registered temporary staffing and freelancers.

We have two key missions. Create better working opportunities for engineers. And the other mission is to improve productivity for individuals and organization, which we have been upholding since 2020. We are operating our business with these two missions.

Case Studies

Engineering



Autonomous driving bus demonstration in the Oki Islands

End-to-end initiatives covering on-site verification, 3D mapping, operation management, and driver training
Identification of issues and development of solutions based on driving data

AI-related Initiatives



Development of our original electric tractor (AI Designed)



Development of AI tools to improve sales operations efficiency and enhance sales skills



Implementation of robotics utilizing Physical AI



For manufacturer: Transforming veteran know-how in manufacturing processes into explicit knowledge using AI



Development and operation of PERSOL's internal GPT and AI agent development environment "CHASSU"

Let me share some case studies.

This photo on the left shows one of our engineering projects—an autonomous driving bus operating in the Oki Islands. There are many autonomous driving buses everywhere in the world, but this one is the first in the world in autonomous driving between islands, and getting on and off the vessels by bus. We are conducting on site verification in Japan and it is successful.

On the right, are photos related to AI initiatives.

At the left top, is a tractor we bought from a certain manufacturer. We removed the engine and made it into an EV. Furthermore, we made the front styling based on a design by generative AI. We were able to realize this in a little over a year. We brought this to a trade show the other day and received many inquiries. We are currently receiving many requests for “retrofit”, such as converting the existing engine or diesel engine cars, trucks and others to autonomous or electrified vehicles.

Please take a look at the photo in the middle left. This is physical AI, which is in trend now. We are in the business of helping robots eliminate error rates through the use of AI and cameras.

The photo at the bottom shows our in-house GPT platform and proprietary AI agent development environment. When ChatGPT was first introduced, our team rapidly rolled out the platform, making it available to employees across the Group almost immediately.

Make it happen



Financial Indicators	Technology SBU Adjusted EBITDA margin	<u>10%</u> [FY2028]	<u>12%</u> [FY2030]
	Revenue CAGR	<u>10%</u> [FY2023 → FY2028]	
Non-financial Indicators	Pay increase rates (employees)	<u>Inflation rate + 1.0%</u>	

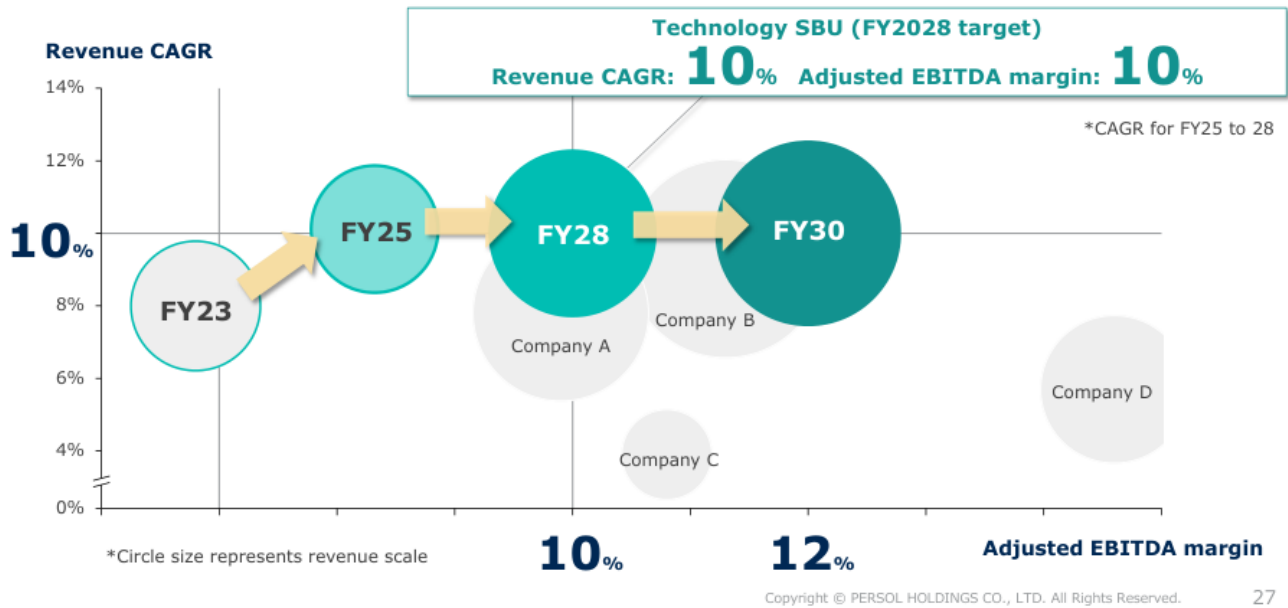
Now, to make it happen, what do we aim to achieve?

As shown in the middle of the slide, we aim to maintain a revenue CAGR of 10% while achieving a 10% adjusted EBITDA margin in FY2028 and 12% in FY2030. Internally, we refer to this as “10 by 10” and “10 by 12.” These are the metrics we use internally.

For non-financial indicators, as the economy has shifted from deflation to inflation, we have made an internal commitment to increase employee pay by the inflation rate plus 1%.

FY2028 Goals (Financial Targets)

We aim to achieve our target adjusted EBITDA margin while maintaining sales growth



I'd like to once again inform you of our SBU's history and the future.

Under our previous mid-term management plan, from FY2023 to FY2025, we achieved 10% growth in revenue by steadily advancing our growth initiatives in line with the plan.

From FY2026 through FY2028, and further to FY2030, we will aim to achieving adjusted EBITDA margin of 10% and then increase it to 12% by FY2030 as described on the right.

Our Market View

With the added value structure of the market shifting from "volume" to "higher sophistication and scarcity value," Technology SBU also needs to transform its portfolio in response.

<p>Supply-demand tightness</p>	<p>Sustained growth in demand for engineers in Japan</p> <ul style="list-style-type: none"> • Against a backdrop of growing needs for AX, DX and productivity improvements, the demand for engineers will continue to grow. • In 2030, the shortage of IT talent is projected to reach up to approximately 790,000 (Source: the Ministry of Economy, Trade and Industry)
<p>Qualitative change</p>	<p>Increasingly severe shortages of high-level talent</p> <ul style="list-style-type: none"> • Demand is surging for high-level AI-empowered engineers who are proficient in the thorough utilization of AI as a tool • As technological changes develop rapidly, adaptability - the ability to flexibly adapt without being limited to specific skills - is a necessary quality
<p>Increased scarcity</p>	<p>Increasing scarcity of the value created by combining "AI × Physical"</p> <ul style="list-style-type: none"> • Due to autonomous driving and the widespread adoption of physical AI, the ability to digitize tacit knowledge and coordination from the field will command the highest scarcity value • Due to differences in technical expertise, this is an area with extremely high barriers to entry for IT vendors and hardware manufacturers

How are we going to achieve that? But before that, let me talk about our market view.

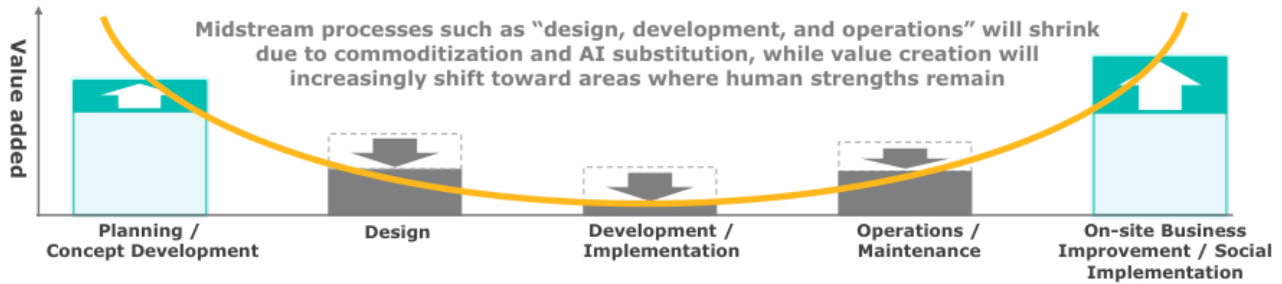
Let me start with supply-demand imbalance. Against a backdrop of growing demand for AX, DX and productivity improvements, we are seeing a growing number of inquiries due to the labor shortage.

The second point is a qualitative change. We have come to the conclusion that simply providing engineers is no longer enough, so we have been emphasizing the need to "arm ourselves with AI" within our SBU. From the stage of being able to use AI, we aim to be able to make full use of it. And ultimately, we aim to become experts.

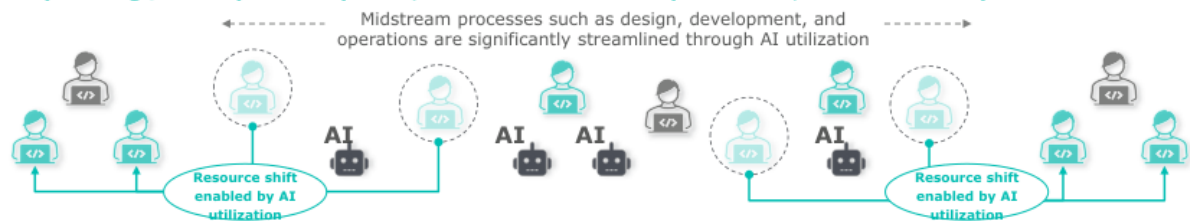
Finally, in terms of increasing scarcity, we highlight "AI × Physical." This is different from Physical AI. It means utilizing AI to be close to customers, working alongside them, to enter into the front line. For example, customers have responded positively to the way we work alongside them—wearing their uniforms, operating within their factories, and collaborating closely with them. We believe this approach further strengthens our unique value.

Shift in Business Model Driven by Expected AI Impact

Based on the view that value will increase in upstream and downstream processes due to AI impact, we execute business activities aligned with this shift in value



- Improve productivity through AI utilization, accelerating the reallocation of resources toward "planning / concept development," "on-site business improvement," and "social implementation"



Let me explain the impact of AI based on our perception of the market. You may know much more than I do, but given that this is said to have an impact on the scale of the Industrial Revolution, we have been quite surprised ever since the Claude Code was introduced. Where is value shifting? We believe value will shift towards both end of the smile curve.

In such an environment, what is our strength? As I mentioned earlier, Technology SBU is made of 12 companies combined together. It is precisely this power of transformation, cherishing each person's past and history while evolving toward the future. This is exactly what the members gathered here today, have achieved. What is written here are examples of engineers who used to handle design and development now transitioning to roles where they leverage AI to establish basic designs and set policy, while engineers who used to handle maintenance and support are now moving into on site, helping on site staff advance their implementation skills, etc. Engineers work alongside on-site workers, and our workforce continues to evolve in a flexible manner learning from them. I believe this ability to adapt and transform is crucial in the age of AI.

Competitive Advantages

Integration of "AI × Physical" enabled by a diverse pool of engineers and strong on-site execution capabilities backed by deep customer understanding

On-site execution capabilities based on deep customer understanding

Engineers with manufacturing and SI backgrounds combine deep customer understanding with strong on-site execution



A diverse pool of highly specialized engineers

Attracting talent

High rankings in new graduate employer surveys (PERSOL CROSS TECHNOLOGY)

No.1 in the "Human Resources & Education" industry*1, ranked No.10 overall
No.1 in the "IT & Engineering" category**2

Developing talent

80 employees, including those with no prior experience, obtained AWS certifications (PERSOL & Serverworks)



Retaining talent

Turnover rate: 8.7% (FY2025)

*1 "Minshu New Graduate Popular Employer Ranking (Class of 2027)"

**2 "Minshu IT Industry New Graduate Popular Employer Ranking (Class of 2027)"

Integration of "AI × Physical"

Transforming Japan's industries from "labor-intensive" to "knowledge- and value-driven"

Supporting @SkyDrive's challenge to lead the future of urban air mobility



Last-mile delivery demonstrations using autonomous delivery robots



Demonstration projects for labor-saving and automation of snowplows



AI 歳Lab®



AI みぞみるくん® "AI Mizomiru-kun"®



Now, regarding our competitive advantage, I might sound like I'm bragging, but let me explain. Please take a look at the top left of the slide. In January, we were selected as "No. 1 in Customer Satisfaction" in the Oricon Customer Satisfaction Survey.

Please take a look at the bottom left next to "attracting talents." We are now able to hire as many engineers with science background as we want. As featured in Nikkei Newspaper in May, we were chosen as No. 1 in "IT and Engineering" category and "Human Resources and Education" industry. We were also ranked No. 10 overall in "Minna no Shukatsu." Furthermore, we are developing talents. We established a company together with Server Works to do temporary staffing of AWS. 80 of our engineers, and more than 90% of our staff, have already earned the "SA Professional" certification, which is the highest-level qualification available, and we are currently leveraging this expertise to provide close support to our clients. As for retention of talents, our turnover rate has been below 10% in the past three years. We'd like to contribute more to our customers by improving their productivity leveraging our strengths to attract talents, develop talents and retain talents.

On the right side of competitive advantages, we have a photo of Sky Drive's air mobility. Maybe you have seen this at the Expo held in Osaka. Our engineer has been working under President Fukuzawa for the past 5 years for the wings.

On the right, we have autonomous delivery robots. It is delivery lunch boxes. We manufactured, implemented these robots in Kouka City in Shiga Prefecture and the POC was successful recently. Left bottom is a request from Hokkaido Airport. We take pride that we are the only one designing snowplows in Japan nowadays.

We recently received a request to implement autonomous driving capabilities in response to an aging population. We conducted our own experiments and we successfully achieved retrofit autonomous driving, which was even featured in the news.

On the right, let us introduce two products on PAVCT.

This is called AI Kura Lab. To make Japanese Sake, master brewers are seasonal workers and is a challenging job. Therefore, there is a decrease in number of master brewers. To address this issue, we developed a way that enables anyone to perform the process. We attached camera and sensors to the tank so that it can be viewed on smart phone. And when malt is bubbling, you know you should stir. On the right, we have "Mizomiru-kun." We received Good Design Award. I would love to explain more about it, so if anyone is interested, please make an appointment.

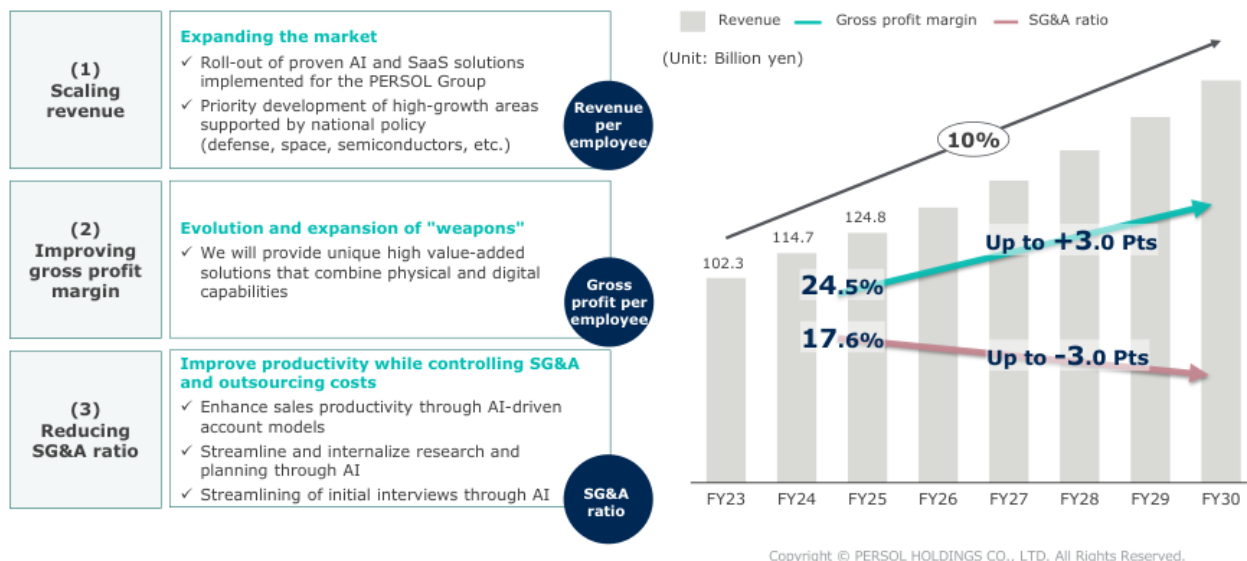


Moving on to our growth strategies toward 2030.

I'd like to highlight two points regarding our further shift toward a solution-drive business, which I had been talking about from the previous mid-term management plan. This is about transforming our capabilities, transforming our talents and also to transform the market. We have become engineers who can fully harness the power of AI, and as "AI-equipped" engineers, we're now capable of taking on roles such as PMO or consultants. With the market expanding, we hope to secure opportunities in sectors like defense and aerospace as well.

The Path to Achieving Our Targets (Financial Figures)

Through (1) scaling revenue, (2) improving gross profit margin and (3) reducing SG&A ratio, we will achieve a revenue CAGR of 10% and an adjusted EBITDA margin of 10% by FY2028



As for how we will achieve our goals, I mentioned "10 by 10" and "10 by 12" earlier. This slide explains how we'll make that happen.

First, we will expand our sales volume, and we intend to maintain a growth rate of 10% or more. Second, we plan to increase our gross profit margin by about three percentage points going forward. Third, we plan to further reduce our SG&A ratio by three percentage points. This will enable us to achieve our "10 by 10" goal, and as we move toward "10 by 12," we will pursue M&A and strategic partnership opportunities by FY2030 to drive further growth. This is our strategic direction.

Make it happen



Financial Indicators	Technology SBU Adjusted EBITDA margin	<u>10%</u> [FY2028]	<u>12%</u> [FY2030]
	Revenue CAGR	<u>10%</u> [FY2023 → FY2028]	
Non-financial Indicators	Pay increase rates (employees)	<u>Inflation rate + 1.0%</u>	

This is the last page. Let me reiterate: "Make it happen." Our goals are "10 by 10" by FY2028 and "10 by 12" by FY2030.

This concludes my presentation of Technology SBU. Thank you for your attention.

IR DAY 2026 BPO SBU

Kazuyuki Ichimura
Executive Officer BPO SBU Lead
July 6, 2026

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[Executive Officer BPO SBU Lead, Ichimura]

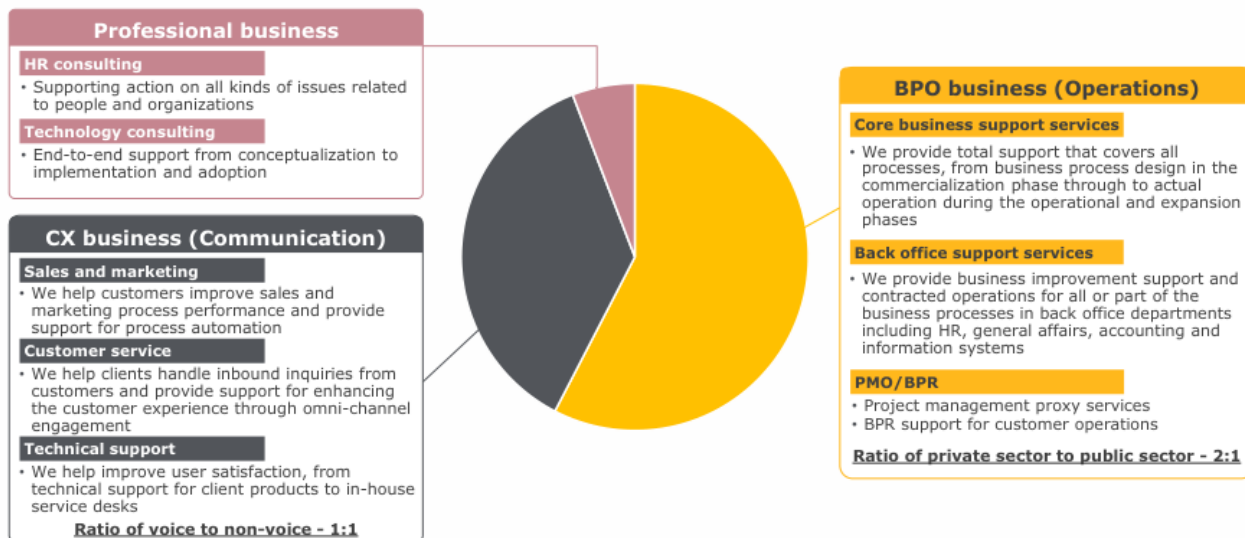
I am Ichimura from BPO SBU. Thank you for your time today.

Today, I would like to take you through our SBU's strategy and key initiatives.

Basic Information About BPO SBU



Sales Composition by Business



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This is the basic information about BPO SBU including sales composition and others.

About 60% of the total consists of BPO businesses, where we handle operational functions for our clients. In this field, while we support our clients' core business operations, there are also many domains where we handle corporate and indirect department functions. In addition, domains such as PMO and BPR have been growing significantly in recent years, and these domains are currently experiencing a boom as new initiatives.

We also have CX business, which is mainly communication domain. We are offering sales and marketing, customer support, technical support and others.

The last one is Professional business, where we provide consulting service. At a high level, we are offering HR consulting and Technology consulting.

Our Market View and Competitive Advantages



Our understanding of the market

- Against a backdrop of labor shortages, the demand for BPO has continued to rise as a means to supplement resources
- At the same time, advances in technology have accelerated business transformation, and the role of BPO continues to expand, evolving from simple business outsourcing to a medium- to long-term partner supporting a company's business transformation and enhanced competitiveness

Our Analysis of the Impact of AI

Q: Will advances in AI diminish demand in the BPO market?

A: Demand for routine and simple tasks will partially decline as they are replaced with AI. However, as a result of expanding business design and operating needs premised on AI adoption and operation, instead of shrinking, demand is expected to continue to expand in step with structural transformation.

Q: How will advances in AI shift the competitive landscape of the BPO market?

A: It will become more difficult to differentiate on the basis of labor-intensive models, and price competition will intensify. However, demand will be concentrated in companies with business design and digital technology utilization capabilities. High value-added business capabilities will be the source of competitive advantages.

Competitive advantages

- Ability to achieve highly accurate automation through a deep understanding of customer processes
- A workforce of approx. 5,000 specialized human resources* able to handle high value-added operations such as business design, development and enhancement
- Ability to drive continuous business transformation and create value through long-term involvement in customer business processes

* Specialized human resources: human resources who can be tasked with business activities that require specialized knowledge, such as business design, development and enhancement

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On this slide, we have summarized our market view and competitive advantages.

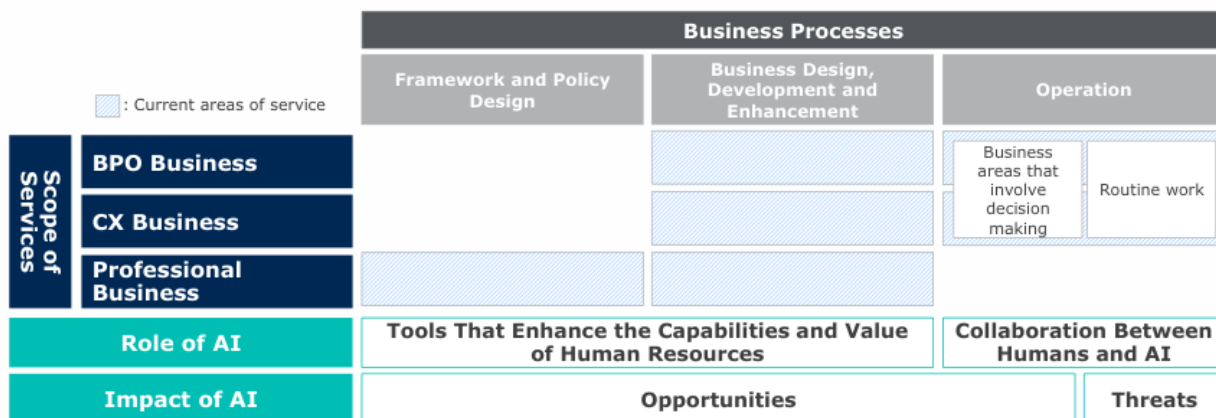
Against a backdrop of persistent labor shortages, demand for BPO has continued to grow substantially. We believe demand will continue to grow as companies seek not simply to add more personnel, but to sustainably operate and improve their business processes through continuous review and redesign.

In addition, the impact of AI is an issue that we must seriously address. We expect demand for routine and simple tasks to partially decline as they are replaced with AI. However, we believe demand will continue to expand in areas such as business design, improvement and reform. This is where we'd like to capture the market.

The Positioning of AI in Business Processes and its Impact on PERSOL's Business



Capabilities in human-driven domains remain our strongest asset, and the shift to AI serves as a tailwind



We have a workforce of approx. 5,000 specialized human resources engaged in operations enhanced by AI
The evolution of AI represents an opportunity for business growth and the creation of high added value

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I have included a diagram showing how we approach AI within our business processes.

Vertically, we have the scope of services, including BPO business, CX business and Professional business that I had talked about earlier.

Horizontally, it shows the various processes involved in our clients' business operations. The starting point would be framework and policy design. Once they are solidified, business design, development and enhancement stage will follow. As the operation starts, the processes start to run, and we are able to leverage the capabilities of each business at every phase.

In that context, regarding the role and impact of AI, I believe that routine operational tasks will undergo significant changes as AI increasingly takes over the work currently performed by human. On the other hand, in other processes, leveraging AI will lead to improvements in productivity, quality and others. Therefore, we view the shift toward AI as an opportunity rather than a threat, and we intend to take on the challenge proactively and boldly.

Things to Be Achieved under Mid-term Management Plan FY2028



Human × AI: Transitioning from a labor-intensive model to enhance profitability

KGI (FY2028)	Adjusted EBITDA margin: 8%
How Strategies	<ul style="list-style-type: none">Promote business automation and significantly enhance the productivity of business processes by implementing AI-integrated operationsDrive an AI-first redesign of business processes, shifting the value of human role from "execution" to "design and enhancement"
When Feasible timing	<ul style="list-style-type: none">FY2026 - FY2027 (Foundation Building and Investment Phase): In-house PoC for AI utilization, service implementation, acquisition of AI skillsFY2028 (Outcome Realization Phase): Achieve revenue CAGR of around 7% and adjusted EBITDA margin of 8%
Why Achievable Probability	<ul style="list-style-type: none">The PERSOL Group's recruitment, training and management capabilities × business knowledge and customer insight as a BPO providerAI adoption improves productivity per employee, enabling additional project acquisition through freed-up resources

This is a summary of things to be achieved under the mid-term management plan.

The biggest point is to achieve an adjusted EBITDA margin of 8% in FY2028. Our goal is to further enhance our current earnings power and achieve both improved profitability and increased productivity.

As for the initiatives we're taking to achieve this, which I'll touch on briefly later, the key points will be how to integrate AI into our current operations, or how to create operations that are driven by AI. Of course, developing the talent who support that effort is something we cannot avoid, in fact, it's an area we should actively focus on.

Strategy (1) Implementing AI-driven Operations to Enhance Productivity



Why The significance of efforts	<ul style="list-style-type: none">• Leveraging deep business and customer insight along with business design and enhancement capabilities as strengths, we have established the foundations needed to drive AI utilization
How Measures	<ul style="list-style-type: none">• Demonstrate the effectiveness, safety and reproducibility of AI utilization in internal operations before rolling out solutions to customers• Launch business process automation services and incorporate automation into existing services
When Feasible timing	<ul style="list-style-type: none">• FY2026 - FY2027: Perform PoC and verify effects internally, create AI use cases, and phase in service adoption• FY2028: Full-scale launch of AI-driven services
Why Achievable Probability	<ul style="list-style-type: none">• Proven track record of helping customers with AI adoption and driving many AI utilization projects following practical implementation internally• Drive efficient AI utilization by accumulating use cases, codifying them into knowledge, and replicating the solutions elsewhere

First, implementation of AI driven operations.

We thoroughly understand our customers' operations and manage them accordingly. Furthermore, the fact that new operations are constantly being created even at this very moment, and that we have a wealth of use cases, is one of our strengths. We will therefore move quickly to further integrate AI into these operations.

Rollout of Services Based on Our In-house AI Track Record



Our internal operations serve as a proving ground, simultaneously driving both operational improvements and new service development



Demonstrate the track record of AI utilization in internal operations before rolling out solutions to customers.

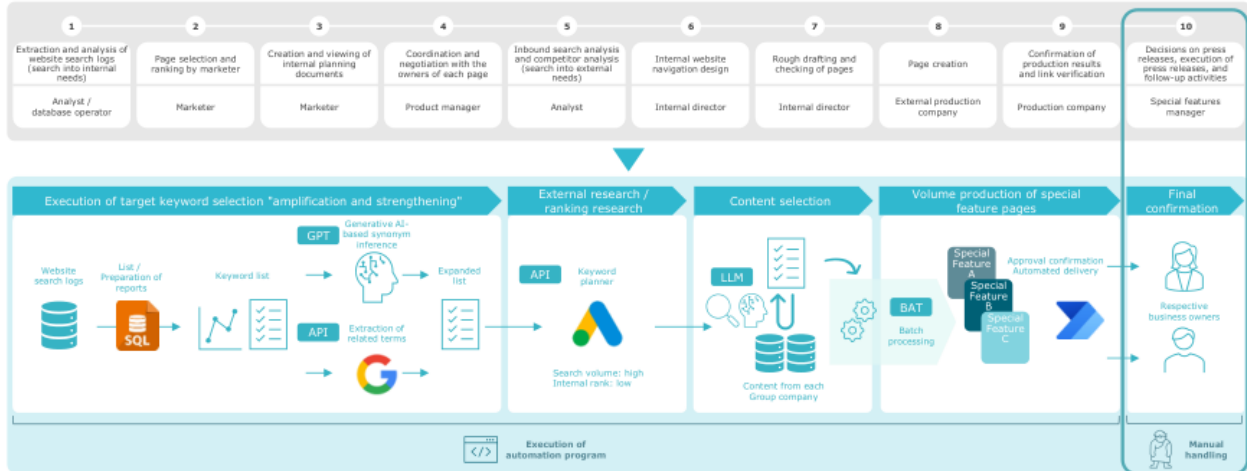
Our company also has corporate and indirect support functions, and we have been working since last fiscal year to figure out how to redesign these processes to incorporate AI. Since this initiative is directly linked to our support for the corporate functions of the clients we serve, we intend to move forward aggressively with launching this service while thoroughly addressing success stories, lessons learned, and risk management.

Examples of Business Process Automation Services



Using AI and technology, we provide overall process automation for operations that have traditionally been handled by people.

Conceptual Image of Marketing Process Automation



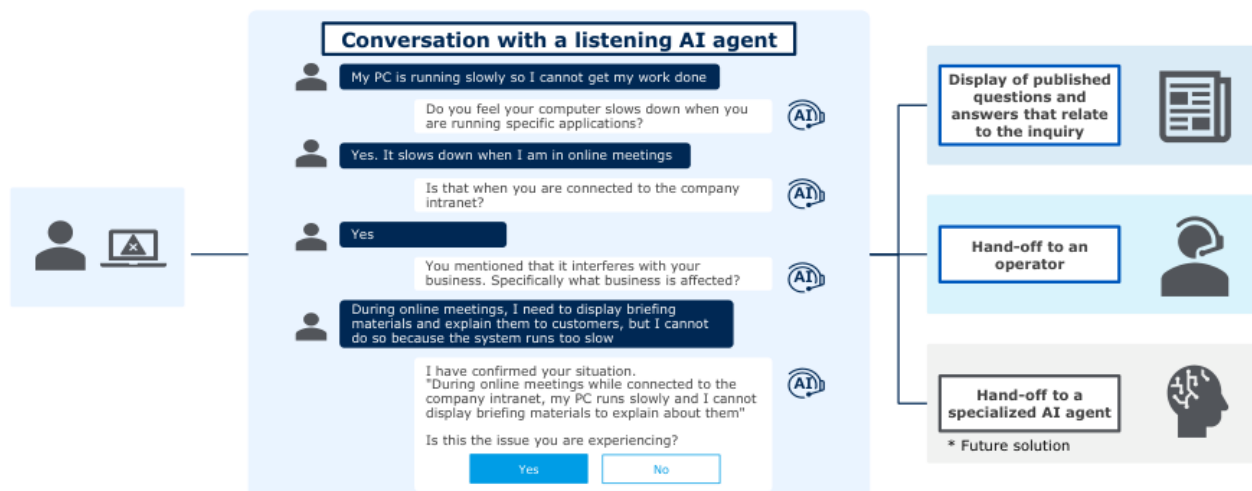
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Next is about automation of operational processes. As an example, we are sharing how a marketing process can be automated. Embedding AI including automation tools, will enable significant labor savings, or leading to final conclusions without human involvement. We have already announced such a service to the public under the name "Zero Operations," and we have been receiving many inquiries about it.

Examples of Business Process Automation Services



The process for determining the content of inquiries is automated **through a "listening AI agent."**



PERSOL Business Process Design Website: [Listening AI Agent Service](#) (only available in Japanese)

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There is another use case. It is "Listening AI Agent." This solution is used in various settings, such as contact centers and support desks. While there are already a wide variety of voice AI-powered response systems available on the market, we are conducting research and compiling case studies on how to use these systems to identify the root cause of an issue by posing the right questions from our end based on how the inquiry is handled. We have already implemented many for our customers, and we are currently working on them, including some refinements. While this is just one example of how AI is being utilized, we intend to continue developing more of such applications in the future.

Strategy (2) Shifting the Value of Human Role from "Execution" to "Design and Enhancement"



<p>Why The significance of efforts</p>	<ul style="list-style-type: none"> • With many routine tasks being replaced with AI, the value of BPO is shifting to high value-added domains such as business design and enhancement • By shifting human resources currently spending time on labor-intensive work to high value-added operations, we can enhance the value of our human resources
<p>How Measures</p>	<ul style="list-style-type: none"> • Leveraging our strengths in human resource development, process design and organizational management, we will drive the development of specialized human resources* • We will accelerate the transition to a human expertise × AI model through AI-based process design training for specialized human resources*
<p>When Feasible timing</p>	<ul style="list-style-type: none"> • FY2026 – FY2027: Phased implementation of specialized human resource* development and AI utilization training • FY2028: Development of additional 1,000 specialized human resources* and completion of AI utilization training
<p>Why Achievable Probability</p>	<ul style="list-style-type: none"> • We will provide specialized human resources* with AI skills to enable the development of qualities directly linked to actual work • We will codify the results of AI utilization as knowledge for ongoing skill enhancement

* Specialized human resources: human resources who can be tasked with business activities that require specialized knowledge, such as business design, development and enhancement

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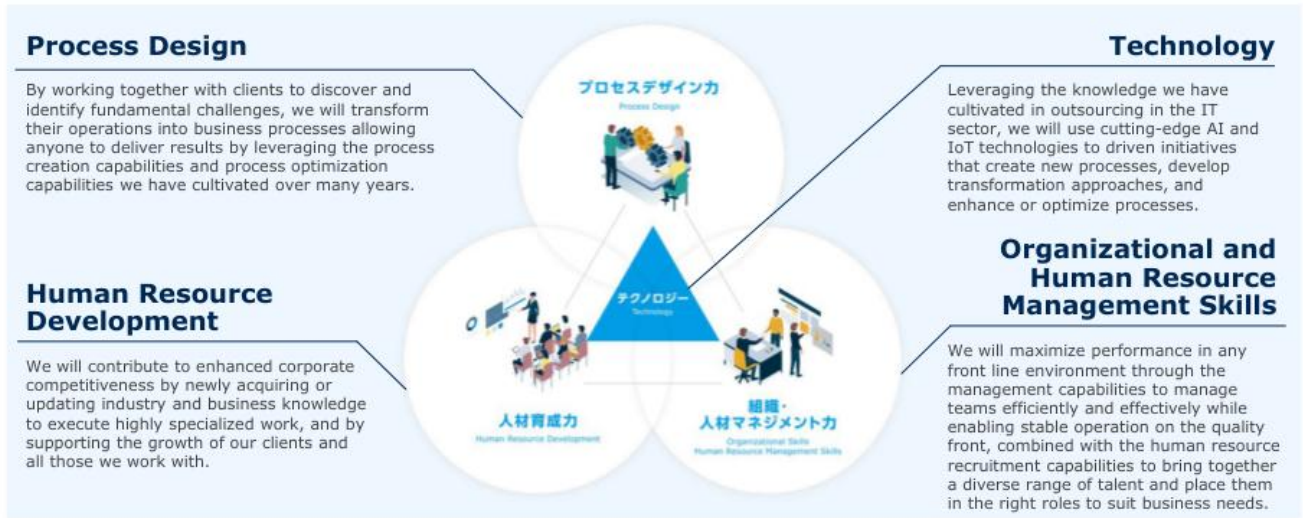
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Next, I believe we will need to transform and update the talent that will take on this role. First, while we take a level-headed view that many routine tasks are likely to be replaced by AI, we believe that the value of our BPO services will shift from simply streamlining these operations to areas such as design, improvement, and further advancement.

Characteristics and Strengths



We will maximize the value of human resources by creating a cycle of three capabilities - process design, human resource development, as well as organizational and human resources management skills - and combining them with technology








This slide shows our characteristics and strengths.

I'd like to particularly emphasize our process design capabilities. We already have many processes that we own. The key for the BPO development in the future is to update them into AI version. We already have a few thousand employees who have the capability of process design. We intend to take action fully during the current mid-term management plan to further expand this area in the future through education.

Enhancing the Added Value of Human Resources through the Acquisition of AI Utilization Skills



We will systematically enhance AI utilization skills with a fully-integrated program spanning conceptualization to organizational adoption

Concept phase	Base phase	Individual adoption phase		Organizational adoption phase
<p>Conceptual alignment</p>  <ul style="list-style-type: none"> ● Definition of post-training target outcomes ● Prior-confirmation of trainee skills ● Setting of difficulty levels ● Revisions to content 	<p>Lecture and hands-on training</p>  <ul style="list-style-type: none"> ● Lecture and hands-on training ● * Implemented in real time ● Questionnaires ● Initial counseling 	<p>Accompanied 1-on-1 support</p>  <ul style="list-style-type: none"> ● Partnered boot camp training ● * Standard training: conducted as eight weekly 1-on-1 sessions of one hour each ● Preparation of evaluation sheets 	<p>Evaluation and measurement</p> 	<p>Community and guideline development</p>  <ul style="list-style-type: none"> ● Running of results sharing sessions ● Sharing of tips ● Development of guidelines ● Development of a community for sharing best practices

We are now proactively promoting acquisition of AI utilization skills to our employees and staff. What sets us apart is that, while there are countless opportunities to learn through classroom lessons, we focus on immediately applying that knowledge in practice. We believe we can effectively enhance the speed at which we update our employees' skills and improve the quality as well. We have a track record of having a few thousand headcounts attending such curriculum, updating their skills. We intend to accelerate this process to raise their capabilities to increase the value of business.

I apologize for the rather lengthy explanation, but that concludes my presentation on the BPO SBU. Thank you for your attention.

IR DAY 2026 Staffing SBU

Kazunari Kimura
Executive Officer Staffing SBU Lead
July 6, 2026

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[Executive Officer Staffing SBU Lead, Kimura]

Hello, I am Kimura from Staffing SBU.

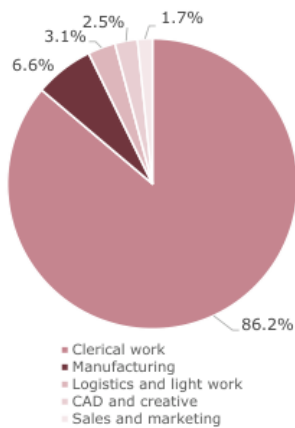
I will explain about the strategy of Staffing SBU.

First, let me introduce Staffing SBU.

Basic Information About Staffing SBU

Breakdown of Revenue by Job Type

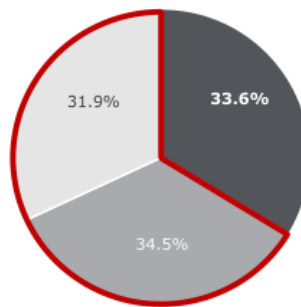
Clerical staffing is the primary revenue driver, led by our core operating company PERSOL TEMPSTAFF.



*1 Only core company PERSOL TEMPSTAFF
*2 FY2025 results of Staffing SBU

Breakdown of Revenue by Company Size*1

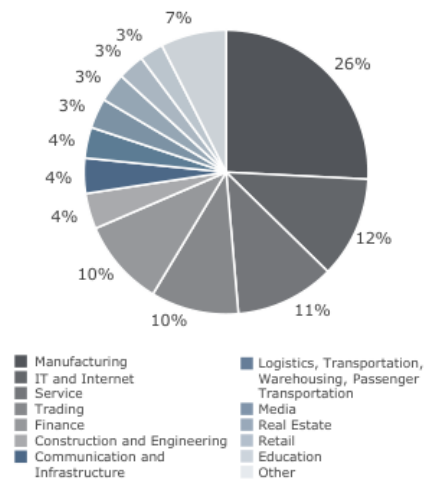
The Staffing SBU does business with companies of all sizes, from SMEs and mid-tier enterprises to large enterprises, with SMEs and mid-tier enterprises accounting for 66.4% of business.



- Large enterprises: 2,000 or more employees
- Mid-tier enterprises: 301 to 2,000 employees
- Small and medium enterprises: less than 300 employees

Breakdown of Revenue by Industry*1

The Staffing SBU has built a client portfolio spanning a wide range of industries and has a solid operating base that is less susceptible to economic fluctuations.



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On the left, we have breakdown of revenue by job type.

Clerical work accounts for 86% of revenue, making it our largest job type.

The pie chart in the middle shows the breakdown of revenue by company size. Majority exceeding 65% are SMEs and mid-tier enterprises.

The pie chart on the right shows the breakdown of revenue by industry. As you can see, we have secured a sales channel spanning a wide range of industries.

Our Market View and Competitive Advantages



Our understanding of the market

- In the temporary staffing market for clerical work, **there is growing demand for staff who are able to use high-level digital skills to generate results.**
- The market has shifted to an environment where **the ability to enhance value through continuous engagement-driven staff development and the design of job roles** determines competitiveness.
- In fields where it is **difficult to attract enough workers**, including those responsible for social infrastructure such as construction and other physical work, **labor shortages have become increasingly serious.**

■ Our Analysis of the Impact of AI

Q: Will the field of temporary staffing for clerical work in particular shrink due to the advancement of AI?

A: We recognize that there is a risk of market contraction, and we have formulated a hypothesis that the temporary staffing market for clerical work may shrink from its current size by 2035. However, we believe that by enhancing added value through continuous engagement-driven staff development and the design of job roles, we can expand our market share even within that shrinking market and achieve sustained growth.

Q: Are AI opportunities in the Staffing SBU only related to efficiency improvements?

A: In terms of the opportunities for us, in addition to efficiency improvements, we see potential in developing more sophisticated matching that leverages our accumulated customers, staff and data as extensive business resources. Furthermore, in terms of market opportunities, we project expanded demand for staff who are able to use high-level digital skills to generate results, such as utilizing RPA, BI and AI to drive internal DX initiatives at clients.

Competitive advantages

- TEMPSTAFF's strong **brand power** (high customer satisfaction and brand recall among both individual and corporate customers)
- **A wealth of business resources** (accumulated customers, staff, data, and nationwide network) backed by a track record spanning over 50 years
- **Provision of value through ongoing involvement**, including extensive follow-ups of currently placed staff, and the provision of feedback to companies

Let me share our view of the market. The first point is that, with advances in technology, there is growing demand for clerical staff with strong digital skills.

Second, the ability to enhance added value through staff development and job design, based on continuous engagement with workers, is a key determinant of competitiveness.

Third, in fields where it is difficult to attract enough workers, including those responsible for social infrastructure such as construction and other physical work, labor shortages have become increasingly serious.

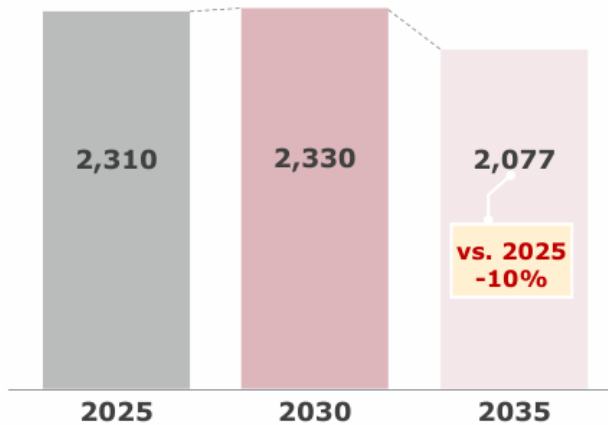
In response to these changes in the market environment, we will further sharpen our competitive edge by leveraging TEMPSTAFF's strong brand power, the wealth of business resources, and our ongoing value proposition to both individual and corporate customers.

Environment Surrounding the Staffing SBU



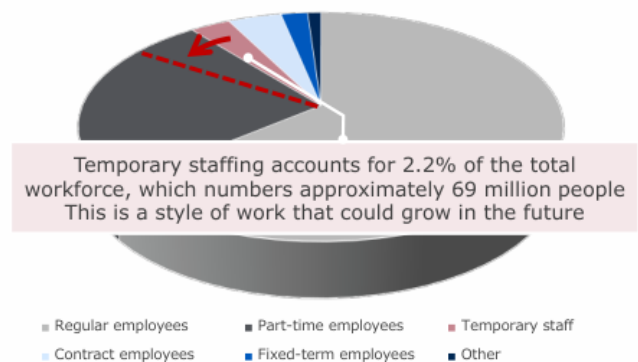
We need to change as a leading company in the market we serve

Outlook for the Clerical Temporary Staffing Market (Unit: Billion Yen)



* PERSOL estimates

Breakdown by Type of Employment



*Prepared based on official statistics (Ministry of Internal Affairs and Communications, Ministry of Health, Labour and Welfare)

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It is said that advances in technology are changing the way we work and leading to changes in job types.

The clerical work, which is our core area of business, is expected to be significantly affected. The temporary staffing market for clerical work is currently worth 2.3 trillion yen. While it is projected to grow slightly till 2030, contraction by 10% is expected by 2035 due to technological advancements.

On the other hand, the total number of workers in Japan is approximately 69 million. Of these, approximately 2.2% are temporary workers. When we look at the Japanese labor market as a whole, we believe there is still much more that we at the Staffing SBU can do to support job seekers, staff, and companies.

We need to address this as a leading company in the market.

Strategic Framework of the Staffing SBU

Driving business growth by addressing social issues and creating changes in the way of working

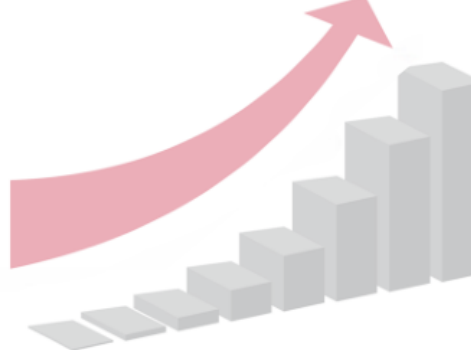
Expand Market Share

Expand market share by providing choices for a wide range of employment opportunities



Improve Profitability

Improve profitability by maximizing the value provided through a combination of human and digital technologies



We aim to identify social issues, drive changes in the way people work, and grow our business. We will leverage our strengths and drive business transformation through the use of technology. Specifically, we will focus on two areas: expanding our market share and improving profitability. We will explain this in more detail starting on the next page.

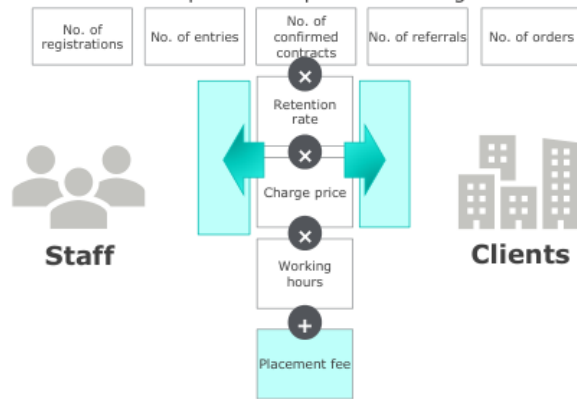
Strategic Framework of the Staffing SBU: Expand Market Share



Driving share growth by offering a wide range of employment choices

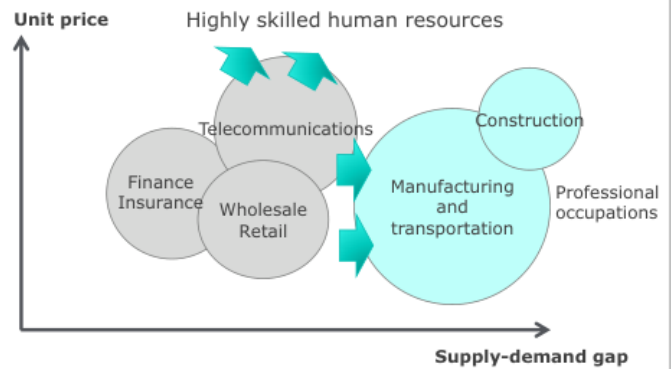
Evolution of Business

- Maximization of LTV through optimal matching by human combined with digital technology
- Higher unit prices through customer data-driven human resource development and problem solving



Expansion of Growth Areas

- Strengthening the development of staff with high-level digital skills
- Stepped up efforts in areas in which human resource demand is expected, such as construction and light work



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For many years, we have focused our business primarily on women engaged in clerical work. Looking ahead to a future where administrative work will increasingly be replaced by AI, we must effectively leverage the strengths we currently possess and embrace new challenges and transform to explore a wide range of possibilities.

The diagram on the left illustrates the points of contact between staff and clients. By optimally matching human and digital elements, we aim to maximize lifetime value and drive the evolution of our business.

And, as shown in the diagram on the right, we will expand the services we offer both vertically and horizontally to create new growth opportunities.

The first area is highly skilled human resources.

We aim to increase hourly wages by providing digital skills training for workers and placing them in a wide range of industries that require specialized knowledge and the effective use of technology. We will also expand our services to the construction and light work sectors, where there is a significant supply-demand gap and strong demand for workers is anticipated.

Last December, Aoyama Art, a company specializing in introducing designers, joined our group. In collaboration with PERSOL TEMPSTAFF's CAD operator and design support businesses, we have also begun dispatching teams that include personnel for upstream processes.

By offering a wide variety of employment opportunities, we aim to expand our market share.

Strategic Framework of the Staffing SBU: Improve Profitability Maximizing value provided through "Human x Digital" to drive profitability

Value of Human Involvement

- Contextual insight (deep, fundamental perspective built on customer understanding)
- Individual optimization (personalized proposals)
- Building relationships (the trust to support customer progress)

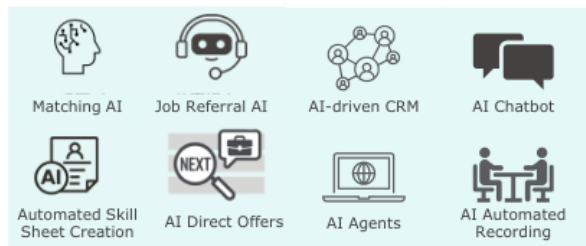


Enhanced Capabilities and Automation through Digitalization

- Comprehensiveness (extensive customer touchpoints)
- Speed (fast processing and decision making)
- Stability (minimal human variation)

Process Transformation through Group-wide Operational Improvement and AI Adoption

Turning tacit knowledge into explicit knowledge



Standardization and Streamlining

Our core company, PERSOL TEMPSTAFF, has been dedicated to supporting our staff for over 50 years. Our annual staff survey highlights our strengths, such as our ability to look beyond superficial issues and truly understand the context; the trusting relationships that help staff move forward when they face uncertainty or difficulties; and our capacity to deeply understand others and communicate effectively with them.

Our actions—standing by our staff and continuing to do so—have built trust over time, transforming isolated moments into a continuous relationship. This is precisely the value that comes from human involvement. To further enhance this strength, we will continue to advance the digitization of our internal operations.

We are working to transform our business company-wide and improve our processes through the use of AI, with the goal of maximizing the value we deliver through human and digital technologies and improving profitability.

Things to Be Achieved under Mid-term Management Plan FY2028



We will achieve expanded market share and improved profitability with a business model transformation that combines human and digital technologies.

KGI (FY2028)	Adjusted EBITDA margin: over 6%
How Strategies	<ul style="list-style-type: none"> • Through optimum matching that combines the strengths of people with digital technologies, we will increase LTV by matching staff to higher-paying positions and job types in their next assignment. • We will boost profitability through human resource development based on information gained from customer contact points (staff evaluations, sales information), and the provision of solutions to client issues • We will expand market share by developing markets in new fields such as construction and other fields involving physical work
When Feasible timing	<ul style="list-style-type: none"> • FY2027: Generate results from improved productivity through the implementation of digital technologies and AI, achieving an adjusted EBITDA margin of 6% • FY2028: Achieve an adjusted EBITDA margin of over 6%
Why Achievable Probability	<ul style="list-style-type: none"> • Through TEMPSTAFF's strong brand power, we can continue to consistently secure registrations and orders from both individual and corporate customers • By utilizing our accumulated information on customers and staff to train AI, we will establish the foundations for a highly effective matching model • By combining our existing temporary staffing business and construction design-related business*, it is highly likely that we can expand market share in new areas

* In December 2025, we acquired Aoyama Geijutsu Co., Ltd., which operates a matching platform for the architectural design industry, making it a subsidiary.

In FY2028, we aim to achieve an adjusted EBITDA margin of just over 6%. I will explain our specific strategies in the following slides.

Strategy (1) Optimum matching combining human strengths with digital technologies



Why The significance of efforts	<ul style="list-style-type: none"> • To enable the sustained growth of staff and companies by walking alongside individuals on their career journey and cultivating the talent businesses need
How Measures	<ul style="list-style-type: none"> • Rather than simply matching job seekers to job openings as a one-time transaction, we partner with them throughout their career journey to enhance their long-term market value, leveraging digital technologies for optimal recommendations and personalized support.
When Feasible timing	<ul style="list-style-type: none"> • FY2027: Create the foundations of digital matching that integrates digital technologies and AI with the matching process • FY2028 and beyond: Implement growth matching algorithms that utilize staff data
Why Achievable Probability	<ul style="list-style-type: none"> • A wealth of business resources (accumulated customers, staff, and data) backed by a track record spanning over 50 years • Provision of value through ongoing involvement, including extensive follow-ups of currently placed staff, and the provision of feedback to companies

Let me explain the first strategy.

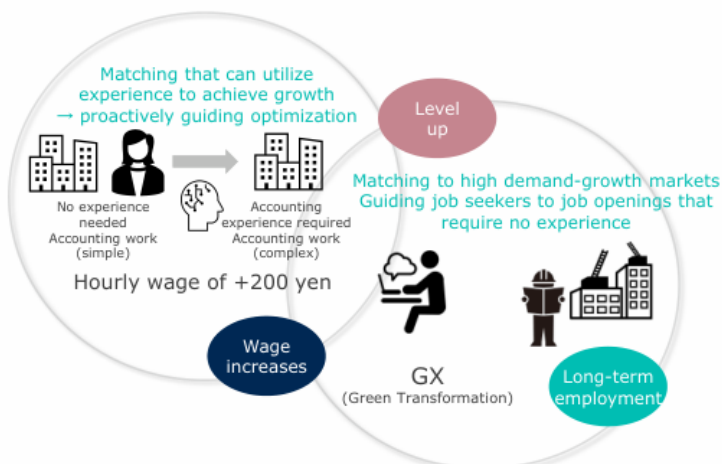
Strategy (1) Optimum matching combining human strengths with digital technologies



Rather than simply matching job seekers to job openings at a certain point in time, we utilize digital technologies to achieve matching that enhances the market value of job seekers over the long term.

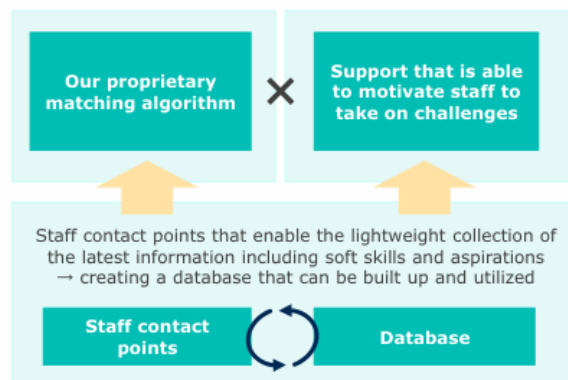
Growth-oriented matching that enhances customer LTV

A job guide utilizing past experiences that lead to future growth



Career optimization combining human with digital technologies

Original matching that leverages staff contact points and data



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While staffing services are generally viewed as simply matching job openings with job seekers, we place a high priority on continuity.

By supporting each staff member's work style and career path while developing the talent needed for our clients' businesses, we aim to foster the ongoing growth of both our staff and the companies they work for.

Through optimal matching that combines individual strengths with digital technology, we aim to create opportunities where staff can apply their work experience to their next job and continue to grow.

For example, if a candidate wants to develop their skills in an accounting role, we'll have them gain work experience through an accounting position that accepts candidates with no prior experience. Then, for their next assignment, we'll introduce them to an accounting position that requires experience. This approach enables our staff to grow and earn higher wages, while also helping us provide clients with the talent they need. To achieve this, we need to accumulate data from our interactions with staff—such as the practical experience they have gained at their assignments and their current career aspirations—and incorporate them into our matching algorithm.

The power of AI and digital technology is indispensable in this regard. And I believe it's important not to stop at simply matching data, but to have human involvement to provide strong motivation and deliver that final mile.

Strategy (2) Solving Problems Based on Customer Contact Point Data



Why The significance of efforts	<ul style="list-style-type: none">• To build new service models and organizational/training structures to realize solutions to customer issues, and create value beyond the traditional staffing supply model.
How Measures	<ul style="list-style-type: none">• Solve the human resources issues faced by customers in their frontline operations in a practical and phased manner, dealing with both the work itself and the training of human resources
When Feasible timing	<ul style="list-style-type: none">• FY2027: Build the foundations of fundamental sales practices by implementing digital technologies and AI in sales activities• FY2028 and beyond: Implement problem solving-focused sales activities based on customer contact point data
Why Achievable Probability	<ul style="list-style-type: none">• A wealth of business resources (accumulated customers, staff, and data) backed by a track record spanning over 50 years• Provision of value through ongoing involvement, including extensive follow-ups of currently placed staff, and the provision of feedback to companies

Next is the second strategy.

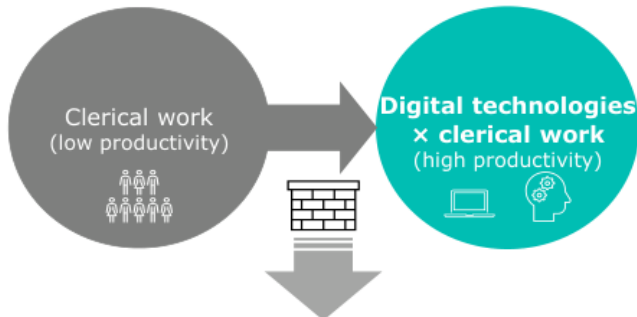
Strategy (2) Solving Problems Based on Customer Contact Point Data



Solve the human resources issues faced by customers in their frontline operations in a practical and phased manner, dealing with both the work itself and the training of human resources.

Client issues in the AI era

It is necessary to overcome the "digital implementation barriers" to boost productivity

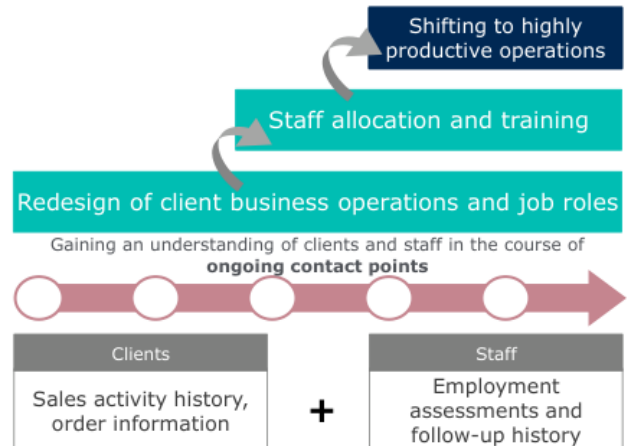


The "digital implementation barriers" hindering structural change

1. Membership-based job design alone is insufficient to drive DX
2. Shortage of human resources capable of delivering results using AI relative to demand

Problem solving that leverages the unique strengths of PERSOL TEMPSTAFF

Phased problem solving utilizing ongoing contact points with customers



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While our services have primarily focused on temporary staffing, we believe our true goal is to solve our clients' problems.

When solving problems based on customer touchpoint data, we identify our clients' deeper challenges by leveraging the ongoing customer touchpoint data—such as sales activities, order details, and information on staff currently on assignment—that is unique to our staffing services. We then deliver new value by offering innovative services designed to address those challenges.

For example, improving productivity is a human resources challenge that every client faces.

To achieve productivity improvements, there is one major hurdle to overcome: the challenge of digital implementation. We believe we can help our clients improve their productivity by going beyond simply providing labor, as has been the case in the past. Instead, we propose solutions based on all the information accumulated through ongoing interactions—from reevaluating the design of our clients' business operations and job roles to staff deployment and training. Furthermore, our work does not end with the proposal; we provide ongoing support to ensure operations run smoothly afterward. It is through these efforts that we believe we can help our clients achieve greater productivity.

Strategy (3) Developing Markets in Construction and Other Fields Involving Physical Work Where Demand Is Growing



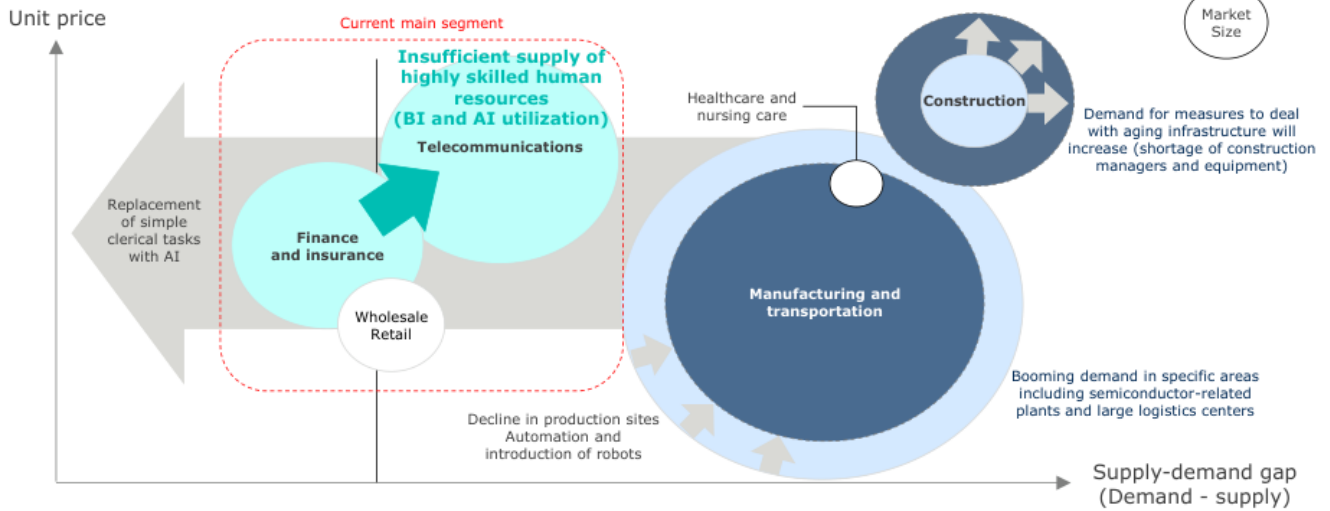
<p>Why The significance of efforts</p>	<ul style="list-style-type: none"> To resolve a supply-demand gap in the labor market by developing and expanding a labor market that will face human resource supply issues even as AI and digitalization advance
<p>How Measures</p>	<ul style="list-style-type: none"> With an expansion in construction investment, including measures to deal with aging infrastructure, address the increasingly serious shortage of construction workers by providing end-to-end services catering to customer needs across all construction processes, from design to execution Enhance the provision of services in the production process and light work areas which employ more than 600,000 temporary staff
<p>When Feasible timing</p>	<ul style="list-style-type: none"> FY2026: Develop detailed resource allocation policies and business plans FY2027 and beyond: Implementation of plans
<p>Why Achievable Probability</p>	<ul style="list-style-type: none"> TEMPSTAFF's strong brand power (high customer satisfaction and brand recall among both individual and corporate customers) A wealth of business resources (accumulated customers, staff, and data) backed by a track record spanning over 50 years

Next is the third strategy.

Strategy (3) Developing Markets in Construction and Other Fields Involving Physical Work Where Demand Is Growing



- In the clerical and administrative staffing market, our core market, we will expand our market share by cultivating human resources with high-level digital skills, for which demand is expected to grow
- In addition, we will proceed with efforts to develop the construction and light work areas where demand is expected to grow, and there is room for increased market share



We place great importance on providing our staff with ongoing employment opportunities and supporting our clients' continued business operations.

As we have mentioned in our previous strategies, we anticipate that demand for clerical staff with higher digital skills than currently available will grow in the administrative sector, which is our current core business. Therefore, we aim to develop and deploy personnel with digital skills.

Furthermore, we believe that even as AI and digitalization continue to advance, there will still be industries and job types that require human workers. By developing and expanding labor markets where the supply of workers is a challenge, we aim to bridge the hourly wage gap in the labor market.

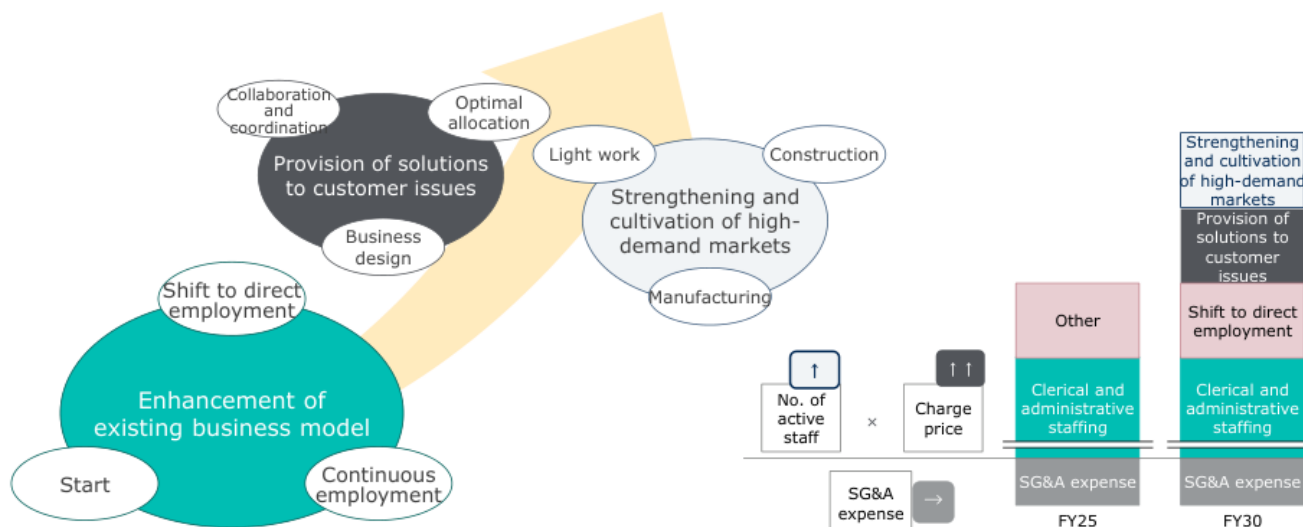
For example, in the construction industry, while construction investment is expanding—driven in part by the need to address aging infrastructure—the shortage of workers is becoming increasingly severe. We believe that by combining our long-established capacity to supply talent with the design platform of Aoyama Art, which joined our group last year, we will be able to provide services that cover the full spectrum of architectural design processes, from design to construction sites.

Furthermore, sectors such as manufacturing and transportation employ a large number of temporary workers. While we anticipate a decline in these numbers due to advances in automation and robotics, we believe that labor shortages will persist. In addition to the broad coverage provided by PERSOL TEMPSTAFF, we believe that strengthening our existing businesses—such as PERSOL FACTORY PARTNERS, which focuses on manufacturing positions, and PERSOL FIELD STAFF, which focuses on light industrial work—will enable us to contribute to the creation of even more employment opportunities.

Grand Design for FY2030

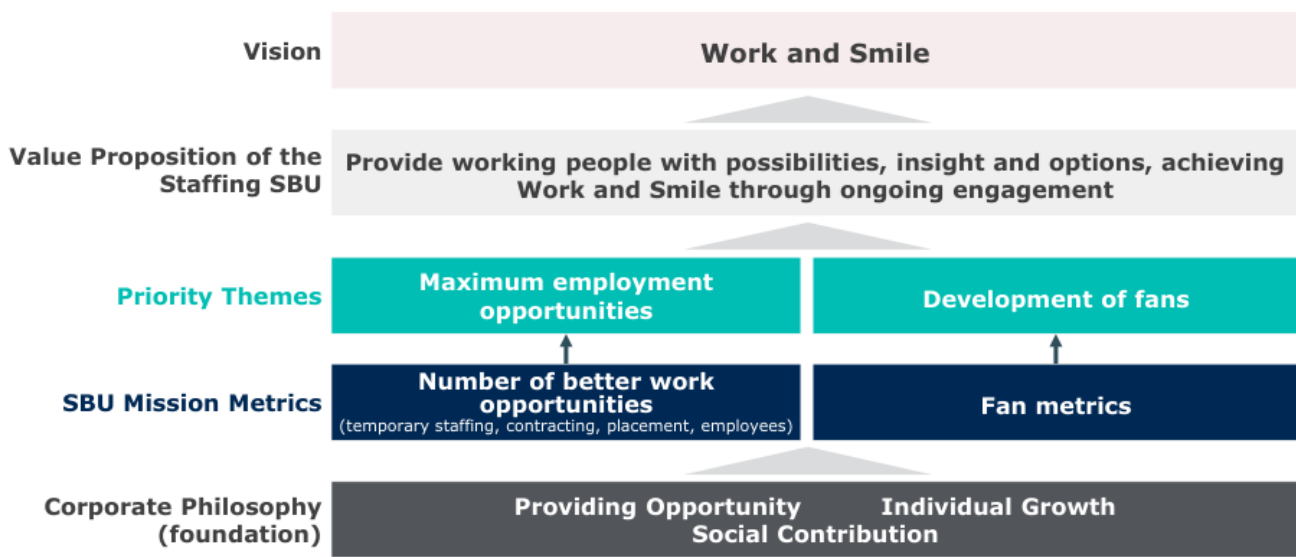


While ensuring profit in existing markets, we will expand growth by solving customer issues and cultivating new areas of operation.



The diagram on the left illustrates strategies (1) through (3), which we have discussed so far. We will enhance our existing business model and take a more active role in solving customer challenges. We will also continue to expand into the construction, manufacturing, and light industrial sectors, where strong demand is anticipated. Through these initiatives, we will not only increase the number of active staff and raise our average billing rate but also reduce SG&A expenses through the digital transformation of our company.

Vision for the Staffing SBU



At the Staffing SBU, our value proposition is: "Provide working people with possibilities, insight and options, achieving Work and Smile through ongoing engagement".

Our key focus is to create the greatest possible employment opportunities—going beyond simply providing temporary staffing services. We aim to become a company that job seekers, staff, and corporate clients all consider their go-to choice whenever they need assistance—in other words, to turn them into our loyal supporters.

The Staffing SBU is positioned as a core business within the PERSOL Group. We will continue to maintain steady growth while strengthening our earnings base through productivity improvements. This concludes my explanation of the Staffing SBU's strategy. Thank you.

IR DAY 2026

A New Technology Strategy for AI-First Business Transformation

Yuta Tsuge

Executive Officer CIO/CAIO

July 6, 2026

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PERSOL HOLDINGS **Executive Officer CIO/CAIO** **Yuta Tsuge**

Career profile

- 2006: Joined Intelligence, Ltd. (current PERSOL CAREER CO., LTD.), where he was in charge of corporate sales
- 2011: In charge of drawing up and implementing business strategies at Business Planning/Sales Planning (*Also responsible for the IT and Technology departments)
- 2017: In charge of drawing up and driving medium- to long-term strategies at Corporate Planning
- 2019: In charge of Technology Division and New Business Development Division as an Executive Officer
- 2022: Appointed Executive Officer CIO/CDO at PERSOL HOLDINGS CO., LTD.
Leading Group-wide technology utilization



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[Executive Officer CIO/CAIO, Tsuge]

Hello. Thank you for joining us at IR DAY 2026.

I am Tsuge, Executive Officer CIO/CAIO. It is a pleasure to meet you.

Key Messages in Today's Presentation



- 1 Overview of Our New Technology Strategy**
- 2 AI Investment Priorities Across the Group**
- 3 Execution Framework Supporting Our AI Strategy**

Although we have limited time today, I'd like to share my thoughts on these three points.

Key Messages in Today's Presentation



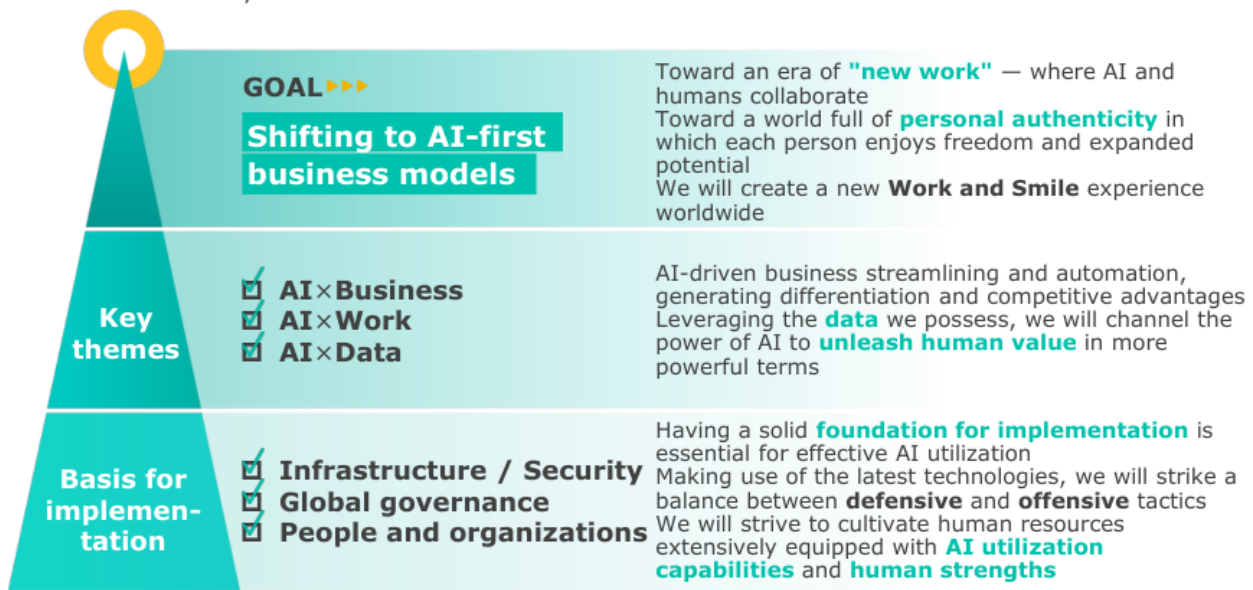
- 1 Overview of Our New Technology Strategy**
- 2 AI Investment Priorities Across the Group
- 3 Execution Framework Supporting Our AI Strategy

The first is an overview of the new technology strategy.

Overview of Our New Technology Strategy



Aiming to realize an AI-first business transformation, we have formulated a new technology strategy centered on three key themes



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While the Group has announced its new mid-term management plan, we are also formulating a strategy for this mid-term management plan as part of our new technology strategy. I have summarized everything on this single slide, and I hope to use it to explain the big picture.

First, as part of our new technology strategy, we have set the goal of "shifting to AI-first business model." Toward an era of "new work" where AI and humans collaborate, our company is committed to promoting the use of AI. At the same time, we aim to create a world where each person can enjoy freedom and expanded potential—a world full of personal authenticity. With this in mind, we are striving to shift to "AI-first" business model that can make this a reality, and we have set this as our goal.

Now, regarding the key themes for achieving this, we have identified three points.

The first is "AI × Business"—please note that "Business" here refers to "operations." While there are various operations within each SBU and across the Group, our top priority is to use AI to thoroughly shift them into AI-first business models suited to the AI era.

Second, since we must simultaneously adapt the work styles of PERSOL Group employees to the AI era, we have established the concept of "AI × Work," where "Work" refers to the update of PERSOL Group employees' work styles for the AI era.

Finally, regarding "AI × Data," I believe that "Data" plays a significant role in determining AI's competitive advantage and competitiveness. Since the PERSOL Group as a whole possesses a vast amount of data, we intend to make full use of it to leverage the power of AI. With these three key themes—Business, Work, and Data—as our focus, we aim to shift to AI-first business model.

As for the basis for implementation that underpins these principles, I have summarized the three points outlined here.

I have often wondered whether the theme of this "basis for implementation"—which has existed through the IT era, the DX era, and the upcoming AI era—has been present since the IT era itself.

However, I believe that the nature of this foundation in the IT era, the DX era, and the upcoming AI era is fundamentally different, and I would like to update this foundation to suit the AI era. Infrastructure/security, global collaboration, governance, and people and organizations—I believe AI is relevant to all of these key areas, so I intend to rebuild the foundation for implementation to suit the AI era.

Due to time constraints, I can only cover this much of the big picture today, but we have formulated detailed plans for each of these six areas—which combine key themes and foundation for implementation—so I hope to share those with you when we have the opportunity.

Key Messages in Today's Presentation



- 1 Overview of Our New Technology Strategy
- 2 AI Investment Priorities Across the Group**
- 3 Execution Framework Supporting Our AI Strategy

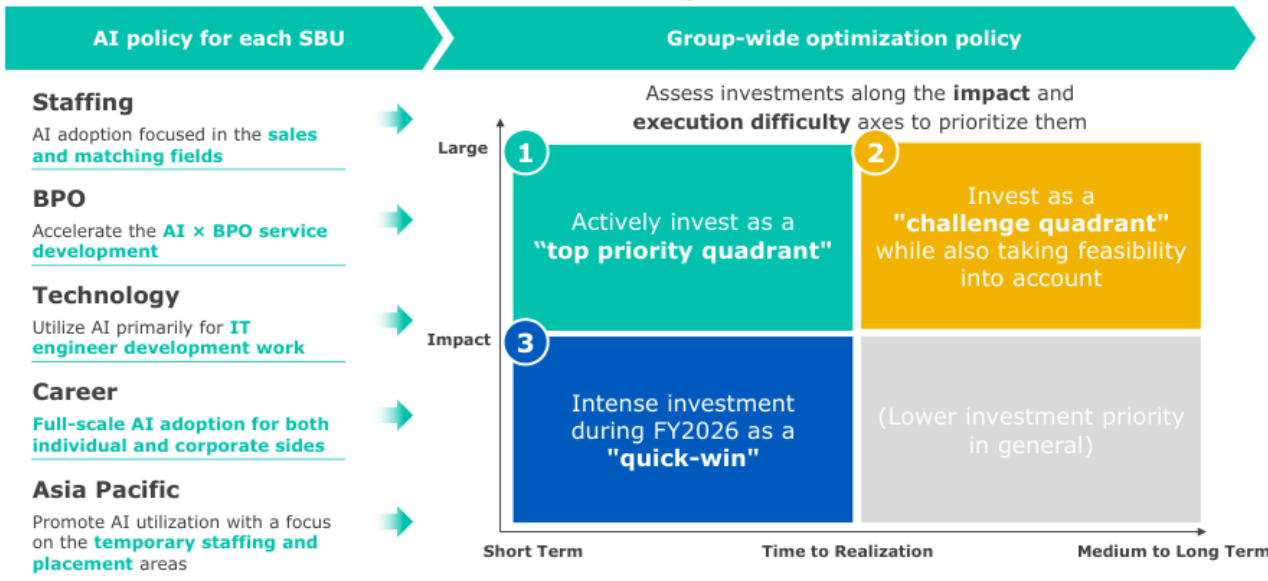
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Second, I'd like to talk about the group's overall priorities for AI investment.

Group-wide AI Investment Policy



Our policy is to combine assessments along the two axes of "impact" and "time to realization" with SBU characteristics to make AI investments from areas with a high likelihood of investment returns

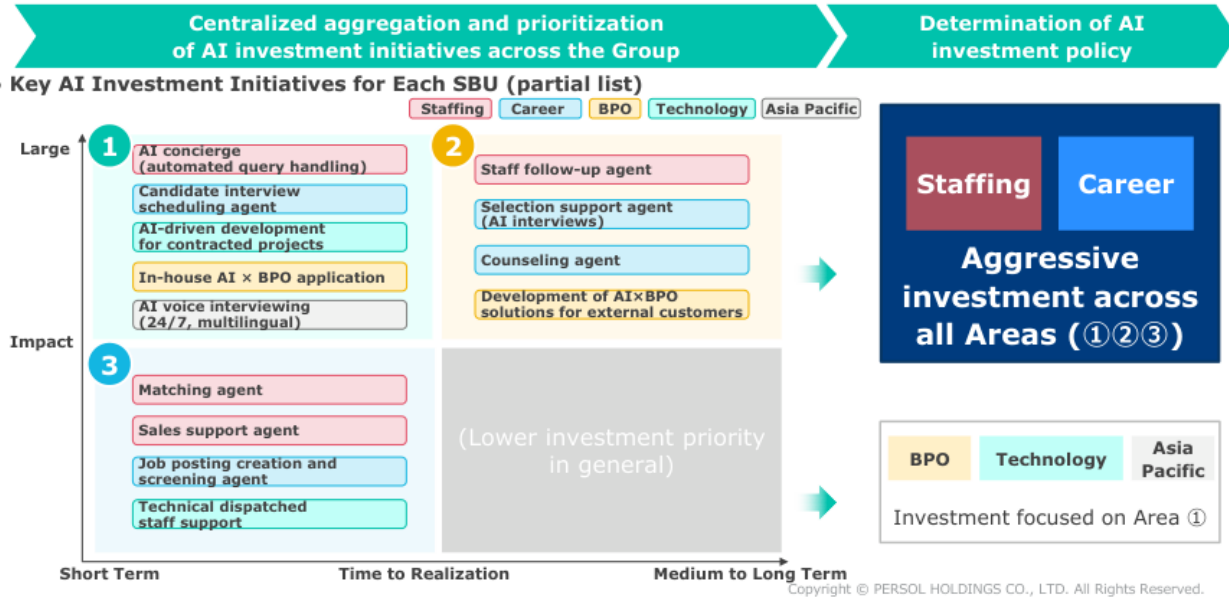


I believe each SBU shared its strategy earlier, and among those, the SBUs will certainly be stepping up their AI investments. While each SBU will make its own investments, it is also important to determine how to allocate resources across the entire Group—prioritizing some areas over others—in order to maximize results for the Group as a whole. Therefore, as we formulate our mid-term management plan, we are also considering the group-wide priorities.

Here on the left, you will find a brief summary of each SBU’s AI policy. We have plotted these on a graph with “Impact” on the vertical axis and “Timeline” on the horizontal axis. First, in area (1), we have designated initiatives with a short timeline and high impact as our top priority quadrant. Next, in area (2), we have categorized initiatives with a slightly longer timeline but high impact as our challenge quadrant. Third, we have designated initiatives with a near-term implementation timeline that can deliver quick wins as quadrant (3). We have mapped each initiative in this manner.

Key AI Initiatives in Each SBU

For the Staffing and Career SBUs, we will actively invest across all areas, while in the BPO, Technology and Asia Pacific SBUs, we will focus on top-priority areas to secure reliable returns.

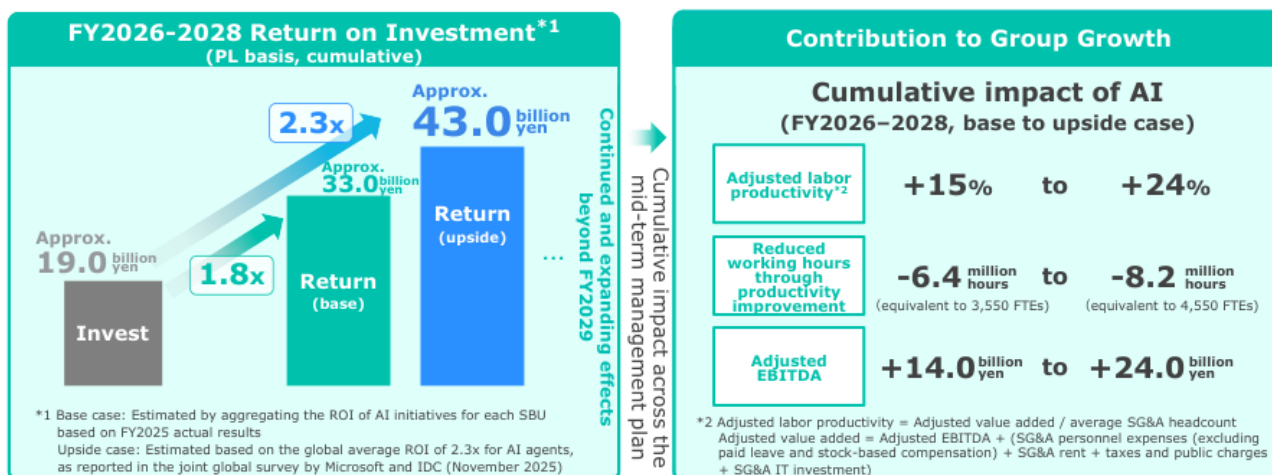


Here are the results. What is shown here represents only a very small fraction of the total. Additionally, the colors indicate each SBU, and each SBU is planning various initiatives within its respective quadrants. Based on this mapping, our priority strategy is to first focus our investments on quadrants (1), (2) and (3) within Staffing SBU and Career SBU—which are our concentrated investment and aggressive investment areas. Furthermore, for BPO, Technology, and Asia Pacific SBUs, we have decided to focus our investments primarily on quadrant (1). Through this approach, we have designed the overall strategy so that not only each SBU but the entire Group can carefully consider how to maximize the impact of our limited AI investment budget.

AI-related Investments and Returns

Under the current mid-term management plan, we expect total investments of approx. 19.0 billion yen, generating returns of approx. 33.0 billion yen (base case) and approx. 43.0 billion yen (upside case). AI investments will be reviewed annually based on technological, market, and strategic changes.

● AI Investments and Returns (FY2026–2028)



As for the results, during the period covered by the current mid-term management plan—based on cumulative figures from the income statement—we estimate that for an AI investment of approximately 19 billion yen, the effect will be about 1.8 times the investment under the base case scenario, and about 2.3 times the investment in a best-case scenario with an upside.

Please note that these figures are based on a limited period within this mid-term management plan. Naturally, for initiatives launched in the latter half—such as those introduced in the second or third year—the point at which full results become apparent may come later than the current mid-term management plan. On the other hand, the initiatives we were able to implement during the current mid-term management plan period will accumulate effects year after year, continuing to yield results even beyond the plan’s timeframe. Therefore, I would like you to view these figures strictly as a benchmark for investment and results specific to the current mid-term management plan period.

I think it might be a little hard to visualize based on this alone, so to give you a clearer picture using some numbers—which you’ll see on the right—while these are cumulative figures, we have calculated an improvement in adjusted labor productivity of approximately 15% to 24%, a reduced working hours and an impact on adjusted EBITDA as stated. Since these figures are already factored into the targets announced in our current mid-term management plan, we intend to leverage AI to ensure we achieve the goals set for the plan period, thereby further strengthening the likelihood of meeting the targets we have declared in the plan.

Key Messages in Today's Presentation



- 1 Overview of Our New Technology Strategy
- 2 AI Investment Priorities Across the Group
- 3 Execution Framework Supporting Our AI Strategy**

Finally, to elaborate a bit on whether the various initiatives I have discussed in the first and second points can actually be implemented, I'd like to briefly touch on the execution structure that supports our AI strategy.

Initiatives for Implementation of an AI-First Strategy: Strengthening Human Resource and Organizational Capabilities



Enhance the execution of the AI strategy through a workforce of 2,000 technology professionals and the establishment of a Group AI Division

Technology-oriented human resources

Technology-oriented human resources within the Group **over 2,000**

Accelerating AI transformation through the capabilities of technology talent essential for the AI era

- 1 Deploying technology talent with deep business understanding within each business
- 2 Building the foundation for AI advancement through AI and data talent
- 3 Establishing a unified, end-to-end in-house development structure across the Group

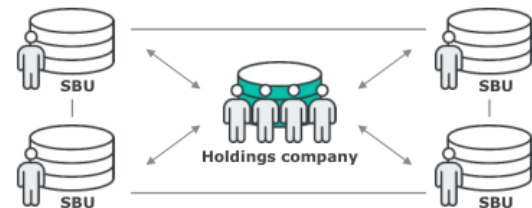
Building a Group-wide AI execution structure

(April 1, 2026)

New establishment of a Group AI Division

Driving, supporting, and scaling AI initiatives across all SBUs

- Centralize AI and data engineers within Holdings to enable Group-wide optimization
- Successful use cases from each SBU will be shared and leveraged across the Group (e.g., Extending doda's AI matching to staffing business, etc.)



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First, the first point is “Strengthening Human Resource and Organizational Capabilities,” which is on the left. Thanks to our efforts to recruit and develop technology talent during the previous mid-term management plan period, we currently have over 2,000 technology-oriented human resources on our team. Please note that this figure of 2,000 excludes engineers who are performing engineering work at client sites; it specifically refers to technology talents working directly for the PERSOL Group. Our 2,000 employees include AI and data talents, as well as many technology talents who have developed a deep understanding of HR and therefore understand the business. And since we established various in-house development structures during the previous mid-term management plan period, we are now well-positioned to successfully develop our products in-house. We intend to leverage the capabilities of these 2,000 employees to significantly accelerate our initiatives in the coming AI era.

Second, in April 2026, we established a new division under my leadership at the holding company called the Group AI Division. We have centralized AI and data talents in this division, and we have launched it with many employees involved in AI now assigned to this division. To prevent duplicate AI investments across each SBU and to generate synergies that would further accelerate these initiatives across the entire Group, we established a central organization to handle major projects. By centralizing the Group’s AI talent in this way, we aim to ensure that our AI and data initiatives are carried out thoroughly, efficiently, and effectively. We will continue to collaborate closely with each SBU, we aim to lead the Group-wide efforts in sharing know-how across SBUs and establishing common environments and infrastructure.

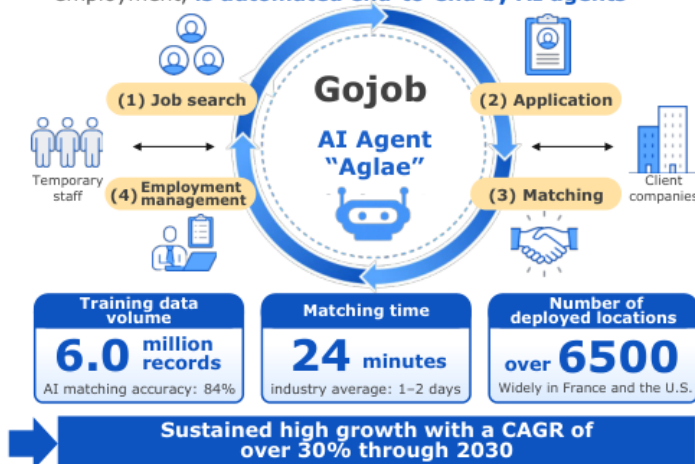
Initiatives for Implementation of an AI-First Strategy: Acquisition of Global Advanced AI Technologies



Leveraging Gojob's industry-leading AI technologies to deliver superior quality and drive step-change growth

• Overview of the Gojob Platform

- A temporary staffing SaaS platform operating in France and the United States
- The entire frontline worker process, from job search to employment, is automated end-to-end by AI agents



• Integration into PERSOL's Business (Plan)

Combined with PERSOL's strengths, accelerating the Group's step-change growth

Evolution of Existing Businesses

1 Deployment of AI agents in domestic temporary staffing businesses

Maintaining PERSOL's strengths while significantly accelerating the entire matching process

Acceleration of Growth in New Domains

2 Expansion into the domestic frontline worker market

Integrate Gojob's frontline worker technologies and expertise into services such as Sharefull to rapidly capture share in new markets

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Finally, there's one more point I'd like to make. Regarding the acquisition of global advanced AI technology, let me touch on Gojob.

Gojob is a temporary staffing SaaS platform that operates in Europe and the United States. Historically, the temporary staffing industry—including in Japan—has been built by a wide range of people. Gojob is a company that operates a platform designed to replace human labor with AI and technology as much as possible, thereby further enhancing the value of the temporary staffing business.

From my perspective, I can see that this initiative—including the AI agents and the platform's features—has evolved significantly, and I feel it's more advanced than its Japanese counterparts. Therefore, I intend to ensure that we fully incorporate these capabilities and expertise into our group.

First, we would like to explore ways to create synergies with our domestic temporary staffing business. As you know, our domestic temporary staffing business is a very large business, so even a small integration of these products can have a significant impact. Looking ahead to the coming AI era, we intend to fully leverage Gojob's expertise and products to continuously update our domestic temporary staffing business model so that it is well-suited for this new era.

The second point is our expansion into the new frontline worker domain, which we also announced in the current mid-term management plan. We have confirmed that Gojob's features are highly compatible with this initiative as well, so we intend to leverage Gojob's capabilities to ensure steady growth and accelerate our expansion into these new services. Therefore, by acquiring these global advanced AI technologies, we aim to firmly accelerate the adoption of AI across the entire Group moving forward.



“Work and Smile”

“A new way of working”
where AI and human collaborate

Expanding individual freedom
and potential, toward a world
where individuality thrives

As we enter an era of “a new way of working” where AI and humans collaborate, our Group is firmly committed to promoting the use of AI. At the same time, we aim to create a world which expands individual freedom and potential, toward a world where individuality thrives, we intend to build AI-driven businesses that are fully aligned with this vision.

Although today’s session was brief, I provided an overview of our AI technology strategy and added a few points regarding the Group’s overall technology strategy.

Thank you for your attention. I ask for your continuous support.