

Consolidated Financial Results for the 3rd quarter of FY2025

(April 1st 2025 ~ December 31th 2025)

< February 12 2026 >

TORISHIMA PUMP MFG.CO.,LTD.

Securities Code : 6363
www.torishima.co.jp/en

【1】 Financial Results for the 3Q FY2025

【2】 Topics

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【1】 Financial Results for the 3Q FY2025

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- **Orders Received:** 76.6 billion yen (+1.3 billion yen YoY). Orders remained strong, showing steady growth in many sectors.
- **Net Sales:** 64.9 billion yen (+5.2 billion yen YoY). Maintained steady growth, despite partial impact from delays in public sector projects.
- **Gross Profit:** 15.8 billion yen (-0.3 billion yen YoY). Sales increased in overseas growth sectors, though margins decreased. Meanwhile, domestic projects (a stable profit source) saw some timing delays in revenue recognition, however this is expected to be recovered in Q4.
- **Operating Profit:** 1.7 billion yen (-1.1 billion yen YoY). Impacted by higher SG&A expenses, including increased personnel costs with growing global organisation.
- **Net Income:** 3.2 billion yen (+0.7 billion yen YoY) Increased due to 2.8 billion yen extraordinary gain recorded in December.

FY2025 3Q Financial Results Outline (1Q-3Q)

		Billions of yen	YOY (Billions of yen)
● Orders Received	...	76.6	+1.3
● Sales	...	64.9	+5.2
● Operating Income	...	1.7	-1.1
● Ordinary Income	...	1.7	-0.7
● Net Income	...	3.2	+0.7

FY2025 1-3Q Consolidated Financial Results



- **Orders received:** Increased by ¥1.3 billion compared to the same period last year, maintaining a steady trend.
- **Sales:** Although partially affected by the extension of public sector projects, all segments—public sector, private sector, overseas, and subsidiaries—performed well, resulting in overall revenue growing to ¥64.9 billion.
- **Profit:** Operating profit decreased by ¥1.1 billion year-on-year to ¥1.7 billion. However, net profit increased by ¥0.7 billion to ¥3.2 billion due to the recognition of extraordinary gains from the sale of securities.

	FY2024 1-3Q	FY2025 1-3Q	YOY		FY2025 Full-year	Vs. Plan
			Amount	%		
Orders Received	75.3	76.6	+1.3	+1.7%	90.0	85.1%
Sales	59.7	64.9	+5.2	+8.7%	89.0	72.9%
Gross Profit (Gross profit margin)	16.1 (27.0%)	15.8 (24.4%)	-0.3 (-2.6pt)	-1.9%	23.9 (26.9%)	—
SG&A expense	13.3	14.1	+0.8	+0.6%	—	—
Operating profit (Operating profit margin)	2.8 (4.7%)	1.7 (2.6%)	-1.1 (-2.1pt)	-39.3%	5.8 (6.5%)	29.3%
Non-operating Profit or loss	-0.4	-0.0	+0.4	—	—	—
Ordinary income	2.4	1.7	-0.7	-29.2%	5.1	33.3%
Extraordinary profit or loss	1.0	2.8	+1.8	+180.0%	—	—
Net income	2.5	3.2	+0.7	+28.0%	5.6	57.1%

Billions of yen

*Foreign exchange rate (1USD)

9/2024 ¥142.73
12/2024 ¥158.18

9/2025 ¥148.88
12/2025 ¥156.56

Assumed rate ¥150

FY2025 1-3Q Financial Results

(Non-consolidated / Subsidiaries)



■ Non-consolidated

Billions of yen

	FY2024 1-3Q	FY2025 1-3Q	YOY	
			Amount	%
Sales	44.1	48.5	+4.4	+10.0%
Gross Profit (Gross profit margin)	8.7 (19.7%)	7.2 (14.9%)	-1.5 (-4.8pt)	-17.2% —
SG&A expense	8.0	7.8	-0.2	-2.5%
Operating profit (Operating profit margin)	0.7 (1.6%)	-0.6 (-1.2%)	-1.3 (-2.8pt)	—

Net Sales: Achieved revenue growth of 4.4% to 48.5 billion yen. Growth in the private sector and the Europe, and U.S. markets drove the increase, despite partial delays in domestic public projects.

Gross Profit Margin: 14.9% (-4.8pt YoY). While overseas sales continued to grow, short term higher outsourcing costs impacted the margin (improvement expected from FY2026). Domestic margins were affected by the timing of revenue recognition for percentage-of-completion projects.

SG&A Expenses: 7.8 billion yen (-0.2bn yen YoY). Higher personnel costs from wage increases were offset by lower transportation costs and sales commissions.

Operating Profit: Operating loss of 0.6 billion yen (-1.3bn yen YoY) due to the temporary margin compression.

■ Subsidiaries

Billions of yen

	FY2024 1-3Q	FY2025 1-3Q	YOY	
			Amount	%
	22.0	26.6	+4.6	+20.9%
	7.9 (35.9%)	9.0 (34.0%)	+1.1 (-1.9pt)	+13.9% —
	5.7	6.6	+0.9	+15.8%
	2.2 (10.0%)	2.4 (9.2%)	+0.2 (-0.8pt)	+9.1%

Net Sales: Rose by JPY 4.6 billion, driven by strong service performance.

SG&A Expenses: Increased due to the inclusion of a newly consolidated subsidiary and higher personnel costs.

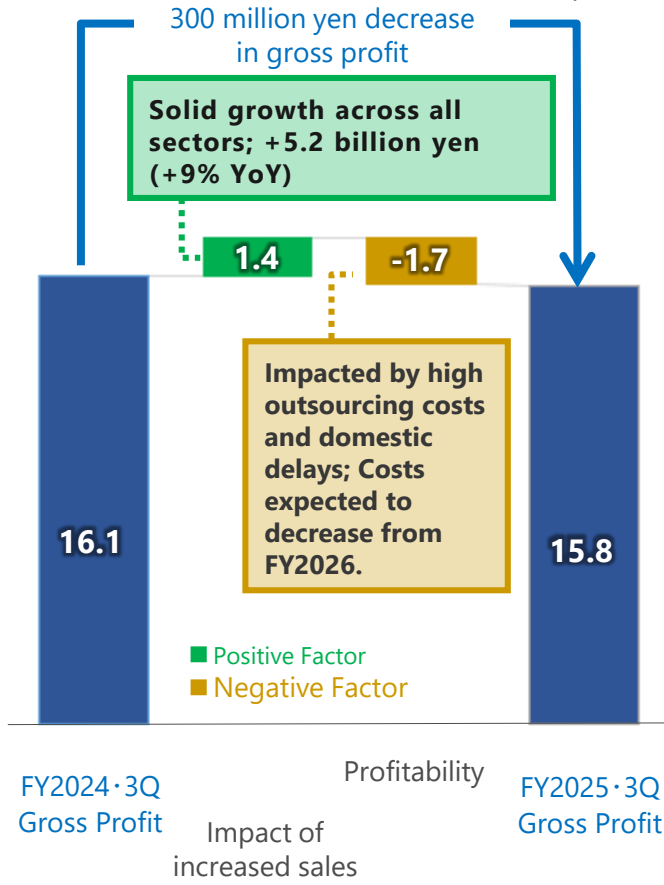
Operating Profit: Rose 9.1% to 2.4 billion yen (+0.2 billion yen YoY) as a result of the strong top-line growth.

*Subsidiary financial results are before consolidation adjustments. Therefore, non-consolidated + subsidiary does not = consolidated results.

Analysis of Changes in Gross and Operating Profit

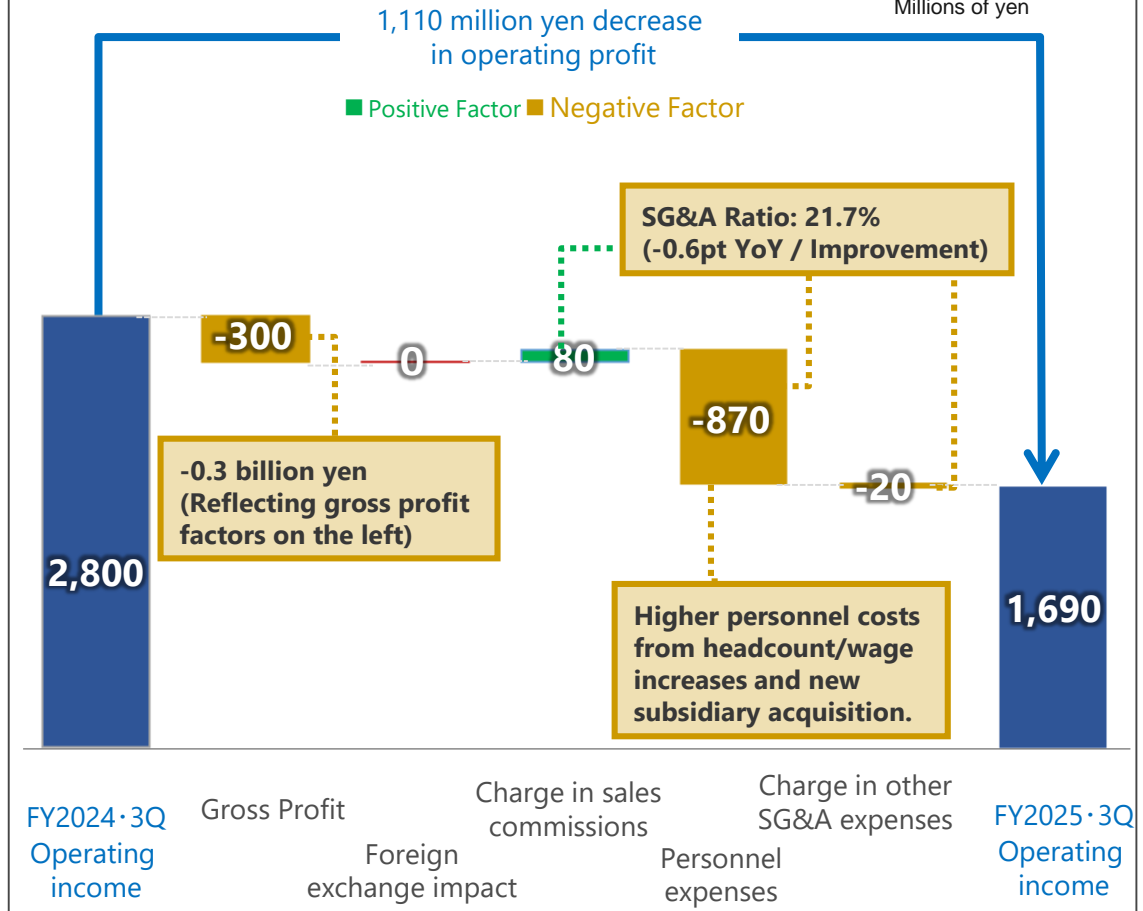
Gross Profit

Billions of yen



Operating income

Millions of yen



Full-Year Forecast for FY2025

Although the breakdown between the parent company and its subsidiaries has been revised, there is no change to the full-year consolidated earnings forecast.

■Non-consolidated

	FY2024 1Q~3Q Result	FY2025			vs. 2Q Forecast
		1Q~3Q Result	Forecast (as of 2Q)	Forecast (as of 3Q)	
Sales	44.1	48.5	65.0	68.5	+3.5
Gross Profit (Gross profit margin)	8.7 (19.7%)	7.2 (14.9%)	13.0 (20.0%)	12.4 (18.1%)	-0.6 (-1.9pt)
SG&A expense	8.0	7.8	10.4	10.3	+0.1
Operating income (Operating profit margin)	0.7 (1.6%)	-0.6 (-1.2%)	2.6 (4.1%)	2.1 (3.1%)	-0.5 (-1.0pt)

■Subsidiaries

	FY2024 1Q~3Q Result	FY2025			vs. 2Q Forecast
		1 Q~3Q Result	Forecast (as of 2Q)	Forecast (as of 3Q)	
	22.0	26.6	33.9	35.2	+1.3
	7.9 (35.9%)	9.0 (34.0%)	11.6 (34.3%)	13.0 (36.9%)	+1.4 (+2.6pt)
	5.7	6.6	8.3	9.3	+1.0
	2.2 (10.0%)	2.4 (9.2%)	3.3 (9.9%)	3.7 (10.5%)	+0.4 (+0.6pt)

■Consolidated

	Billion of yen
No change to Consolidated Forecast at Q2	
	89.0
	23.9 (26.9%)
	18.1
	5.8 (6.5%)

Note: Subsidiary results are pre-consolidation figures. As such, the sum of parent and subsidiaries may not match the consolidated results.

【1】 Financial Results for the 3Q FY2025

【2】 Topics

【3】 Appendix

Share Acquisition of Shin Nippon Machinery Co., Ltd.



Torishima has agreed to acquire 100% of Shin Nippon Machinery from Sumitomo Heavy Industries on Feb 10, 2026.

■ Overview of Shin Nippon Machinery Co., Ltd.

Name	Shin Nippon Machinery Co., Ltd.
Location	2-1-1 Osaki, Shinagawa-ku, Tokyo
Business	Manufacture and sale of steam turbines and process pumps
Capital	2,408 million yen
Established	November 1, 1973
Consolidated Net Sales	19,167 million yen (Dec 2025)

■ Rationale for Stock Acquisition

Shin Nippon Machinery Co., Ltd. ("SNM") SNM is a globally recognised Japanese manufacturer, engaged in the design, manufacture, sale, and after-sales service of engineered steam turbines and pumps, primarily in the petrochemical sector. We believe that the integration of SNM's exceptional API product lines and technical capabilities with the our global sales and service network, as well as our operational expertise across a wide range of business areas, is the best fit for both organisations. The technical and product portfolios of both businesses are highly complementary and will enhance our joint ability to effectively support our customers.

The two organisations will continue to strive for increased corporate value by enhancing our position as a "global top player" that continues to be chosen by customers around the world.

■ Execution Date of Share Transfer: July 1, 2026 (Scheduled)



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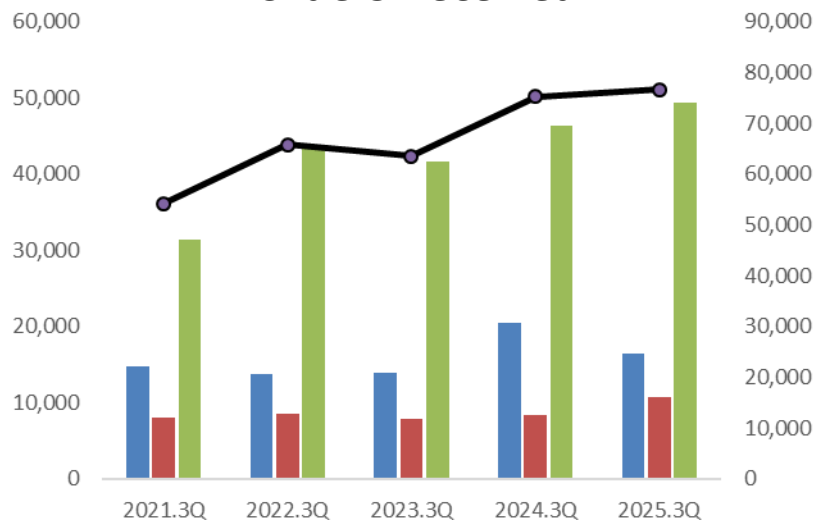
1-3Q Orders received, Sales and Orders backlog by sector

Millions of yen

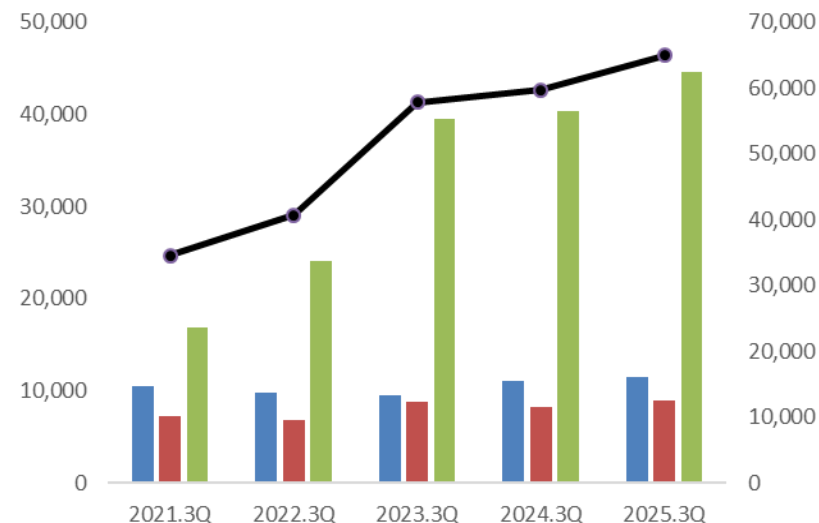
		FY2024 1-3Q			FY2025 1-3Q		
		Orders Received	Sales	Order Backlog	Orders Received	Sales	Order Backlog
Public sector		20,524	11,107	35,930	16,489	11,456	34,535
	YOY rate	47.0%	16.5%	41.4%	▲19.7%	3.1%	▲3.9%
Private sector		8,371	8,213	9,908	10,768	8,924	12,255
	YOY rate	5.2%	▲7.3%	3.2%	28.6%	8.7%	23.7%
Overseas		46,356	40,368	64,863	49,321	44,515	69,162
	YOY rate	11.5%	2.4%	10.0 %	6.4%	10.3%	6.6 %
Total		75,253	59,689	110,701	76,580	64,895	115,953
	YOY rate	18.5%	3.2%	17.8%	1.8%	8.7%	4.7%

1-3Q Orders received, Sales and Orders backlog by sector TORISHIMA

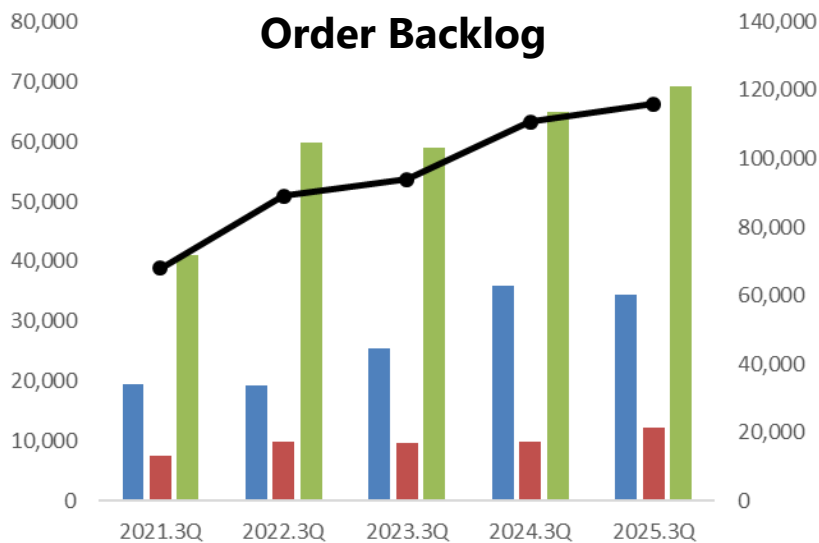
Orders Received



Sales



Order Backlog



Left

Public Private Overseas

Right

Total

Millions of yen

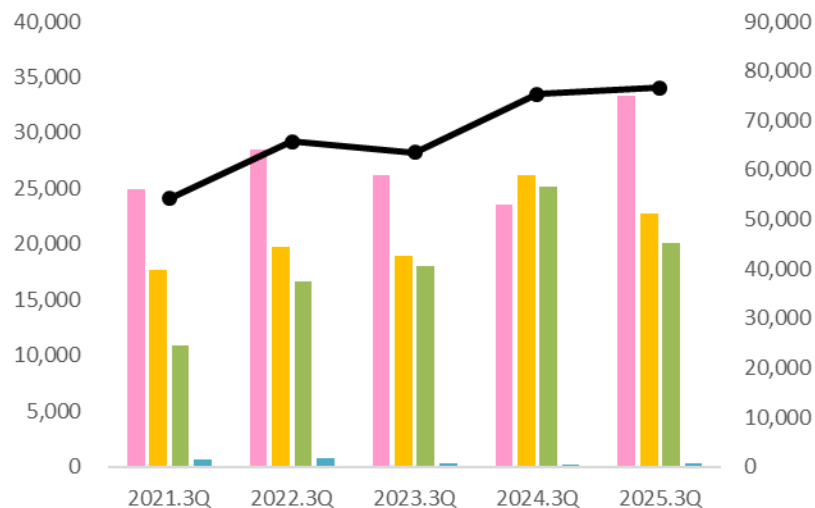
1-3Q Orders received, Sales and Orders backlog by segment

Millions of yen

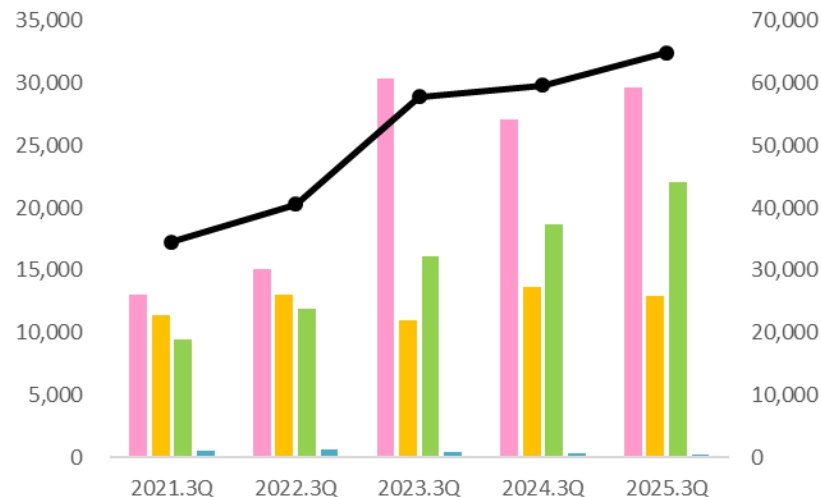
		FY2024 1-3Q			FY2025 1-3Q		
		Orders Received	Sales	Order Backlog	Orders Received	Sales	Order Backlog
High-tech Pump		23,612	27,042	44,153	33,353	29,637	47,506
	YoY rate	▲9.9%	▲10.8%	4.1%	41.3%	9.6%	7.6%
Project		26,254	13,622	46,637	22,767	12,967	49,805
	YoY rate	38.7%	24.3 %	21.7%	▲13.3%	▲4.8 %	6.8%
Service Solutions		25,182	18,688	19,786	20,155	22,037	18,521
	YoY rate	39.4%	16.1%	49.9%	▲20.0%	17.9%	▲6.4%
Other		206	338	126	305	255	122
	YoY rate	▲29.5%	▲22.5%	687.5%	48.0%	▲24.6%	▲3.2%
Total		75,253	59,690	110,702	76,580	64,896	115,954
	YoY rate	18.5%	3.2%	17.8%	1.8%	8.7%	4.7%

1-3Q Orders received, Sales and Order Backlog by segment TORISHIMA

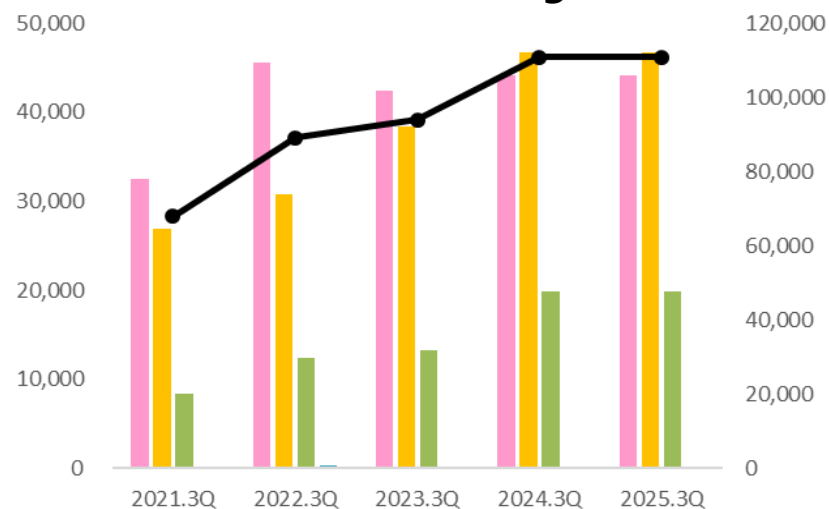
Orders Received



Sales



Order Backlog



Left
■ High-tech pump ■ Project
■ Service Solutions ■ Other

Right
● Total
 Millions of yen

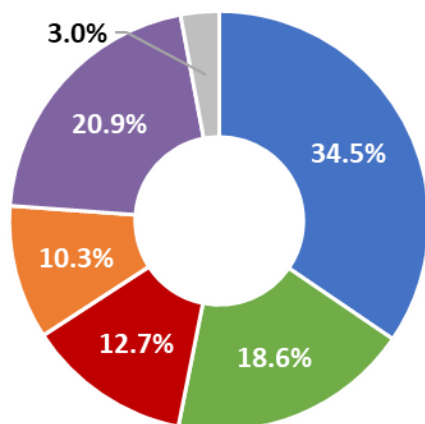
1-3Q Orders Received breakdown by region

Millions of yen

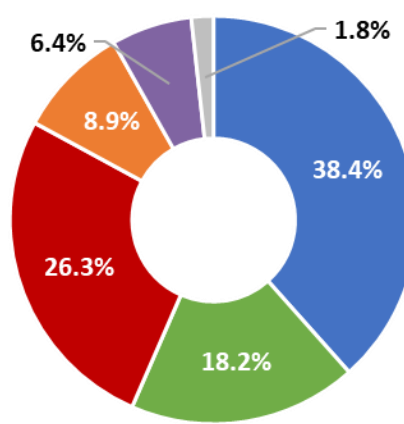
	Japan	Overseas	Breakdown					Total
			Asia	Middle East	Middle East	Europe and Americas	Others	
3Q FY2023	21,921 (34.5%)	41,578 (65.5%)	11,819 (18.6%)	8,055 (12.7%)	6,562 (10.3%)	13,261 (20.9%)	1,882 (3.0%)	63,499
3Q FY2024	28,897 (38.4%)	46,356 (61.6%)	13,667 (18.2%)	19,822 (26.3%)	6,707 (8.9%)	4,835 (6.4%)	1,325 (1.8%)	75,253
3Q FY2025	27,258 (35.6%)	49,322 (64.4%)	11,149 (14.6%)	23,522 (30.7%)	11,007 (14.4%)	1,948 (2.5%)	1,697 (2.2%)	76,580

■ Japan ■ Asia ■ Middle East ■ Europe and Americas ■ Africa ■ Other

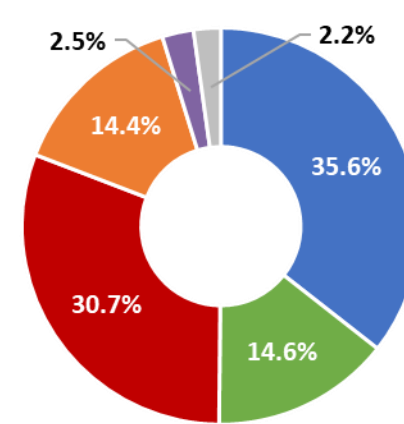
FY2023 3Q



FY2024 3Q



FY2025 3Q



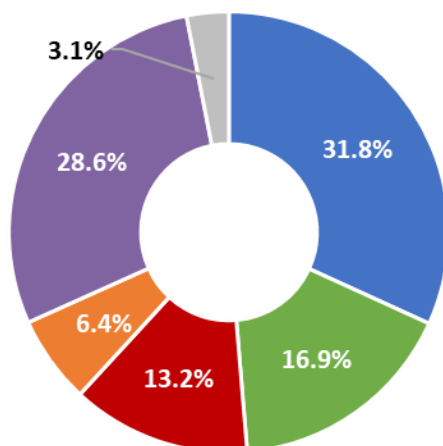
1-3Q Sales breakdown by region

Millions of yen

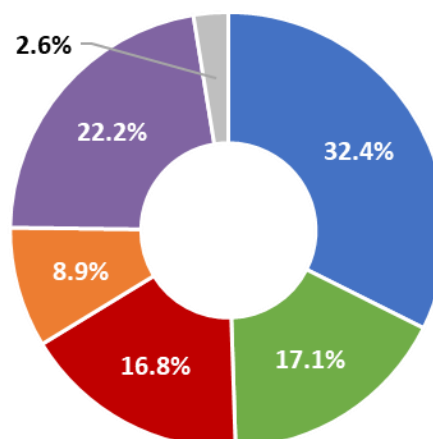
	Japan	Overseas	Breakdown					Total
			Asia	Middle East	Middle East	Europe and Americas	Others	
3Q FY2023	18,386 (31.8%)	39,435 (68.2%)	9,757 (16.9%)	7,624 (13.2%)	3,723 (6.4%)	16,538 (28.6%)	1,792 (3.1%)	57,822
3Q FY2024	19,321 (32.4%)	40,368 (67.6%)	10,194 (17.1%)	10,059 (16.8%)	5,324 (8.9%)	13,257 (22.2%)	1,534 (2.6%)	59,689
3Q FY2025	20,381 (31.4%)	44,515 (68.6%)	7,943 (12.2%)	20,734 (32.0%)	6,447 (9.9%)	7,240 (11.2%)	2,152 (3.3%)	64,896

■ Japan ■ Asia ■ Middle East ■ Europe and Americas ■ Africa ■ Other

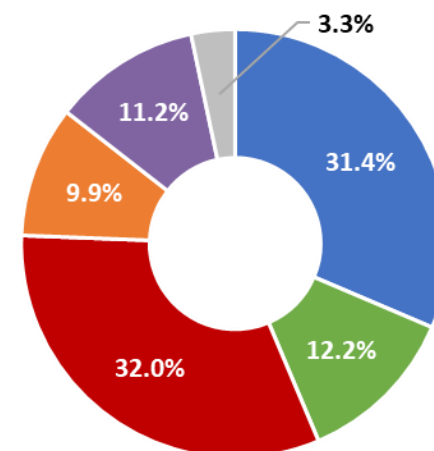
FY2023 3Q



FY2024 3Q



FY2025 3Q



Forecasts regarding future performance in these materials are based on judgment made in accordance with information available at the time this presentation was prepared. Therefore, please notice that there is a risk or uncertainty that the actual results may be different from these predicted results, depending on various factors.

【Inquiries】

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