AISIN
We Touch the Future

For the Fiscal year Ended March 31, 2027 1st Quarter
(April 1, 2026 to June 30, 2026)

Financial Results

July 31, 2026

AISIN CORPORATION

Overview of FYE2027 1st Quarter Financial Results

FYE2027 1Q Results	Revenue increased compared to the same period of the previous fiscal year, despite decreases in customers' vehicle production volumes and sales volumes of powertrain (PT) units, due mainly to the positive impact of FX changes. Operating profit decreased compared to the same period of the previous fiscal year, although efforts to improve the corporate structure were further enhanced compared to the previous fiscal year, due to lower sales volumes of PT units and higher material costs resulting from the situation in the Middle East.
FYE2027 Forecast	In the first quarter, costs increased ahead of cost recovery due to higher material costs resulting from the situation in the Middle East. However, efforts to improve the corporate structure are progressing ahead of plan, and foreign exchange rates have remained weaker than assumed. As a result, business performance is progressing largely in line with the previous forecast, and the forecast remains unchanged from the previous announcement.
Return to Shareholders	As part of capital policies aimed at reducing the cost of capital, the company is currently implementing stock repurchases totaling up to 100 billion yen. We will continue to consider stable and continuous shareholder returns from a medium- to long-term perspective.

Consolidated Financial Results (FYE2027 1st Quarter)

1

FYE2027 1st Quarter Results Financial Summary

( ) Shows Rate to Revenue % 【 Billion JPY 】

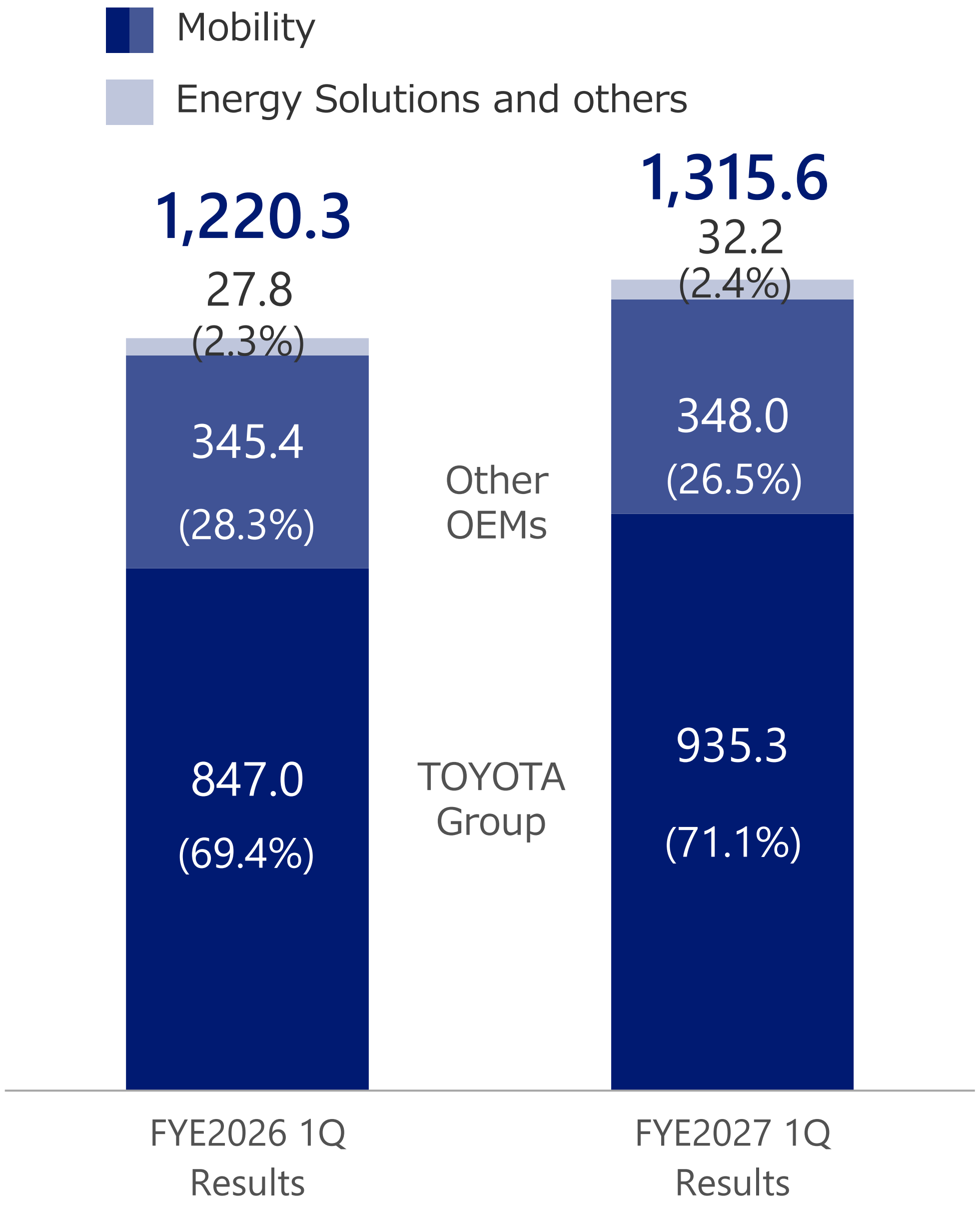
	FYE2026 1st Quarter Results		FYE2027 1st Quarter Results		Change	Change Rate %
Revenue	1,220.3	-	1,315.6	-	+95.3	+7.8
Operating Profit	47.8	(3.9)	36.5	(2.8)	-11.3	-23.6
Profit before Income Taxes	57.3	(4.7)	47.8	(3.6)	-9.5	-16.5
Profit for the Period*1	39.5	(3.2)	31.8	(2.4)	-7.7	-19.4

*1 : Profit for the Period Attributable to Owners of the Parent

Pre-conditions		FYE2026 1st Quarter Results		FYE2027 1st Quarter Results		Change		Change Rate %
FX Rate	USD	144	JPY	159	JPY	+15	JPY	+10.4
	CNY	20.0	JPY	23.4	JPY	+3.4	JPY	+17.0
Toyota Production		254	10,000 unit	241	10,000 unit	-13	10,000 unit	-5.3
Powertrain Unit Sales*2		263	10,000 unit	253	10,000 unit	-10	10,000 unit	-3.9
(number of elctrification unit*3)		(61)		(83)		(+22)		(+35.4)

*2 : Total Sales of AT, CVT, HEV and eAxle *3 : Total Sales of HEV, eAxle

FYE2027 1st Quarter Revenue by Customer



【 Billion JPY 】

Revenue by Customer (Other OEMs)

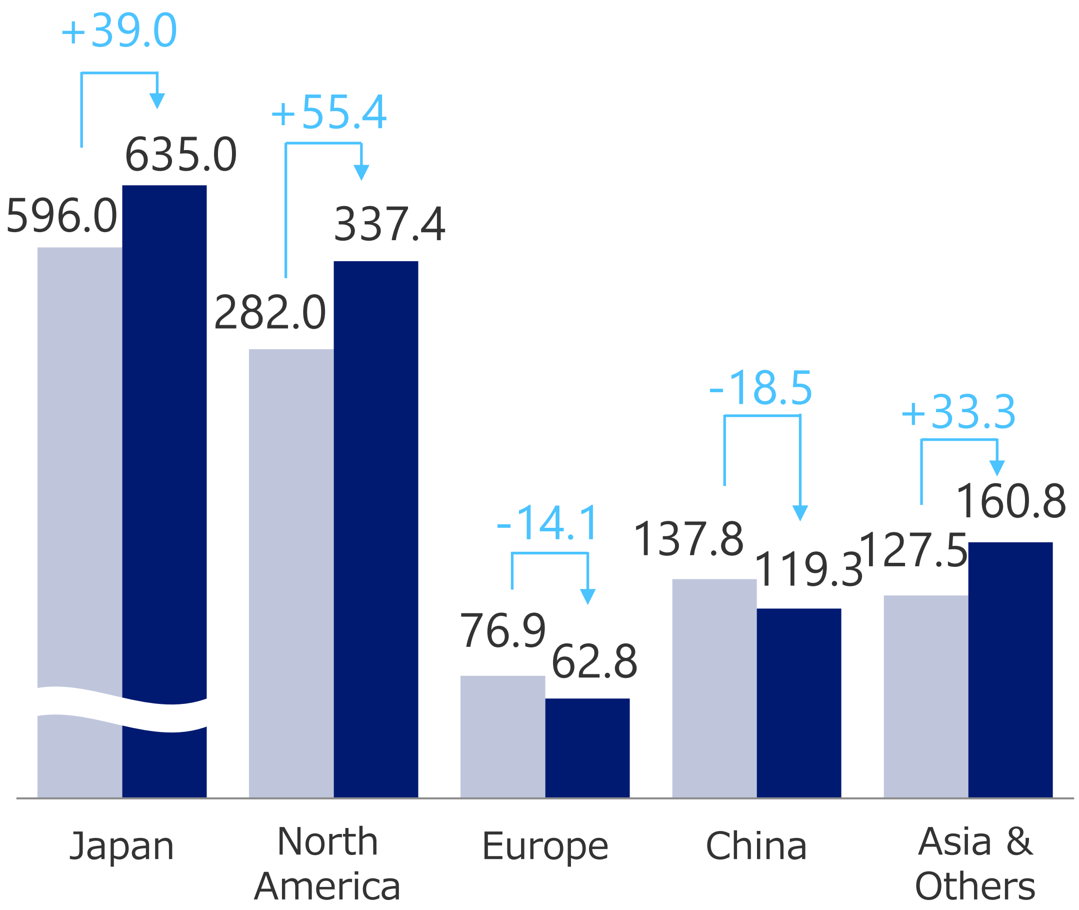
Customer	FYE2026 1Q Results	FYE2027 1Q Results	Change	Change Rate (%)
SUZUKI	47.1	58.8	+11.7	+24.9
Stellantis	54.4	49.2	-5.2	-9.7
VW&Audi	41.1	31.6	-9.5	-23.1
HONDA	18.3	20.9	+2.6	+14.3
NISSAN	15.4	18.4	+3.0	+19.4
VOLVO	24.0	18.1	-5.9	-24.8
MITSUBISHI	18.5	18.0	-0.5	-2.4
ISUZU	10.2	11.5	+1.3	+12.0
Mahindra & Mahindra	9.2	11.1	+1.9	+20.8
SUBARU	10.1	11.0	+0.9	+8.7
Others	97.1	99.4	+2.3	+2.5
Total	345.4	348.0	+2.6	+0.8
(Reference) Chinese OEMs	46.5	39.4	-7.1	-15.3

FYE2027 1st Quarter Segment Information

FYE2026 1st Quarter Results　FYE2027 1st Quarter Results

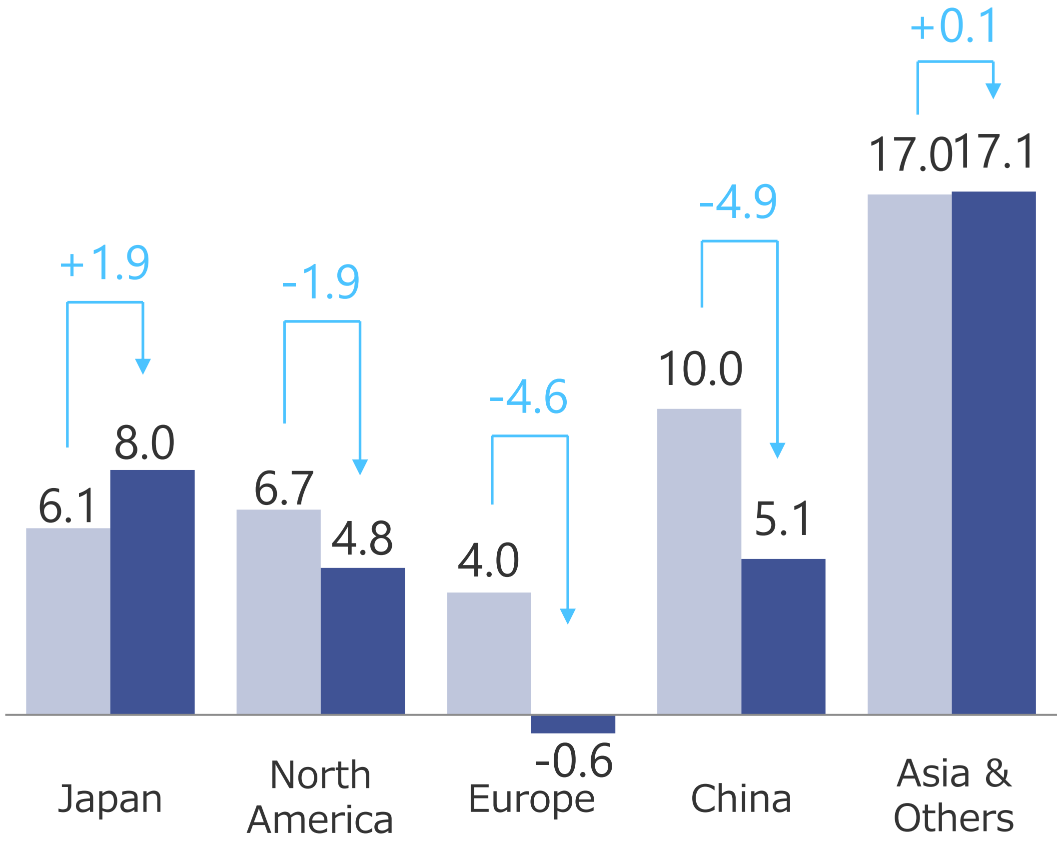
【 Billion JPY 】

Revenue （YoY+95.3）



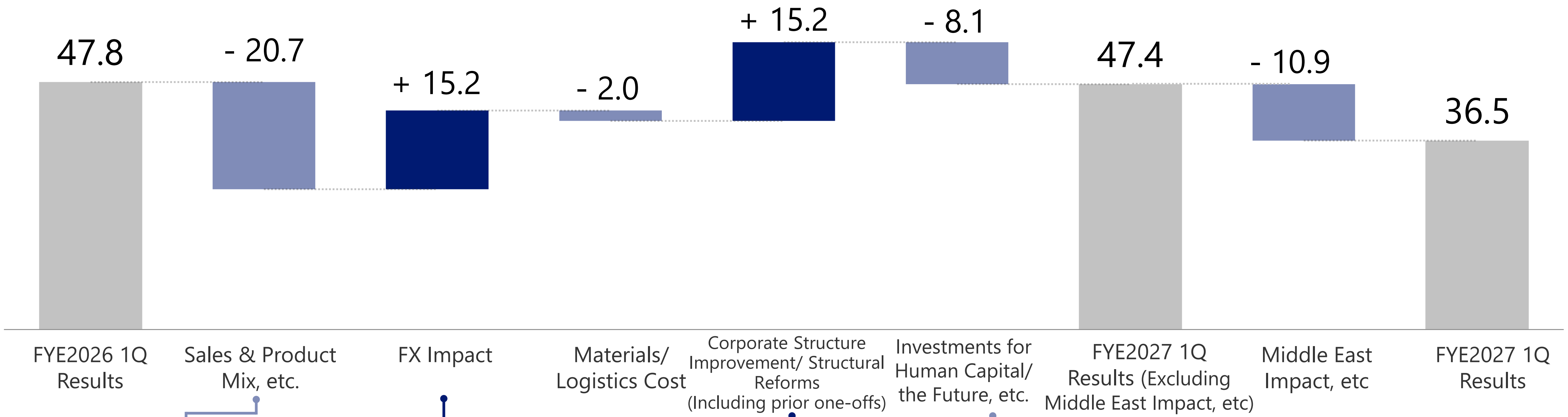
※Revenue to External Customers

Operating Profit （YoY-11.3）



FYE2027 1st Quarter Analysis of Operating Profit

【 Billion JPY 】



Sales &Product Mix etc. Breakdown

Sales Volume Fluctuations	- 6.1
Sales Price Variance & Product Mix	- 14.6

FX Impact Breakdown

USD	+ 6.9
CNY	+ 4.5
EUR	+ 0.3
THB	+ 3.5

Cost Structure Improvement/Structural Reforms

Implement further structural improvements and structural reforms to achieve a high-quality profit structure that strengthens “earning power”.

- Logistics Reform
- Improving Plant Productivity
- Enhance the Digital Foundation, etc.

Investments for Human Capital/the Future

- Expand investments in human capital.
- R&D investing in electrified and intelligent products.
- Investment in preparation for production of electrified products, etc.

(Ref) FYE2027 Forecast Financial Summary (Disclosed on April 28)

( ) Shows Rate to Revenue % 【 Billion JPY 】

	FYE2026 Results		FYE2027 Forecast		Change	Change Rate %
Revenue	5,117.7	-	5,250.0	-	+132.3	+2.6
Operating Profit	228.7	(4.5)	235.0	(4.5)	+6.3	+2.7
Profit before Income Taxes	247.9	(4.8)	245.0	(4.7)	-2.9	-1.2
Profit for the Period*1	171.6	(3.4)	150.0	(2.9)	-21.6	-12.6

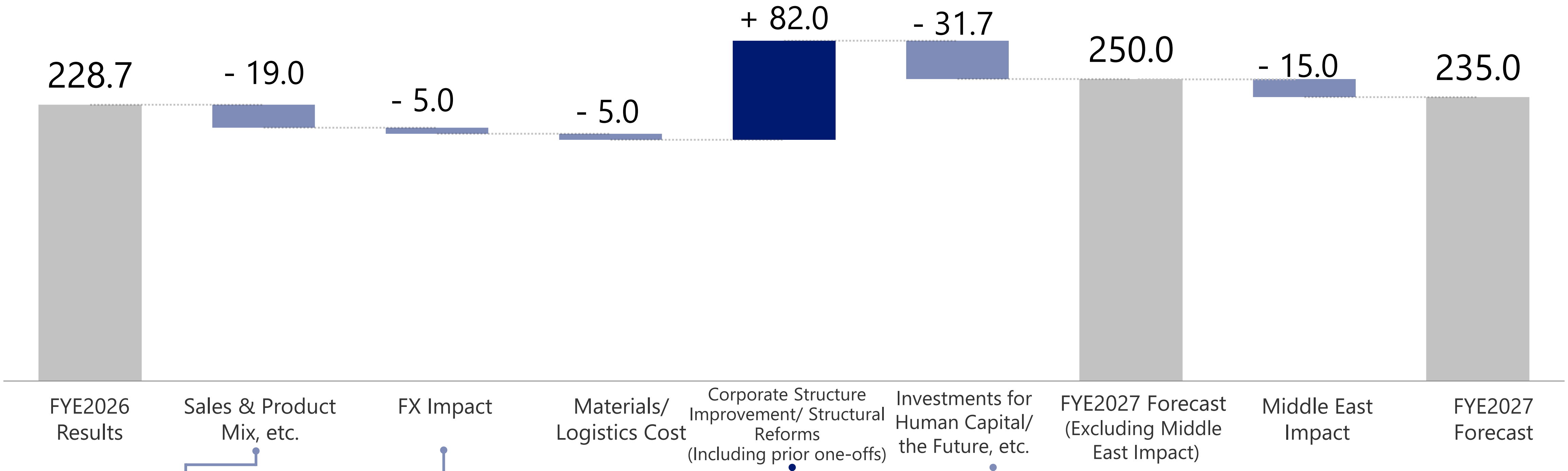
*1 : Profit for the Period Attributable to Owners of the Parent

Pre-conditions			FYE2026 Results		FYE2027 Forecast		Change		Change Rate %
	FX Rate	USD	151	JPY	150	JPY	-1	JPY	-0.7
		CNY	21.2	JPY	21.5	JPY	+0.3	JPY	+1.4
	Powertrain Unit Sales*2		1,019	10,000 unit	1,070	10,000 unit	+51	10,000 unit	+5.0
	(number of electrification unit*3)		(269)		(375)		(+106)		(+39.3)

*2 : Total Sales of AT, CVT, HEV and eAxle *3 : Total Sales of HEV, eAxle

(Ref) FYE2027 Analysis of Operating Profit (Disclosed on April 28)

【 Billion JPY 】



Sales &Product Mix etc. Breakdown

Sales Volume Fluctuations	+ 31.8
Sales Price Variance & Product Mix	- 50.8

FX Impact Breakdown

USD	- 1.7
CNY	+ 2.0
EUR	+ 0.0
THB	- 5.3

Cost Structure Improvement/Structural Reforms

Promoting structural reforms in “SPEED&AGILE” way for “Full Model Change” that “Change Inside Gain Strength”.

- Improve profitability by launching new products and electrified products.
- Improve profits of subsidiaries that are facing challenges.
- Reduction of fixed costs with no exceptions, etc.

Investments for Human Capital/the Future

- Expand investments in human capital.
- R&D investing in electrified and intelligent products.
- Investment in preparation for production of electrified products, etc.

Progress and Key Topics of the FYE2029 Mid-Term Business Plan

2

Expand Sales of Electrification Products for BEV

Daihatsu's First Mass-Produced Mini Commercial BEV Van Adopts eAxle

The eAxle jointly developed by BluE Nexus Corporation, AISIN Corporation, and DENSO Corporation has been installed in Daihatsu's first mass-produced BEV mini commercial vehicles, the e-Hijet Cargo and e-Atrai.

e-Hijet Cargo 4-Seater (2WD)

e-Atrai RS (2WD)

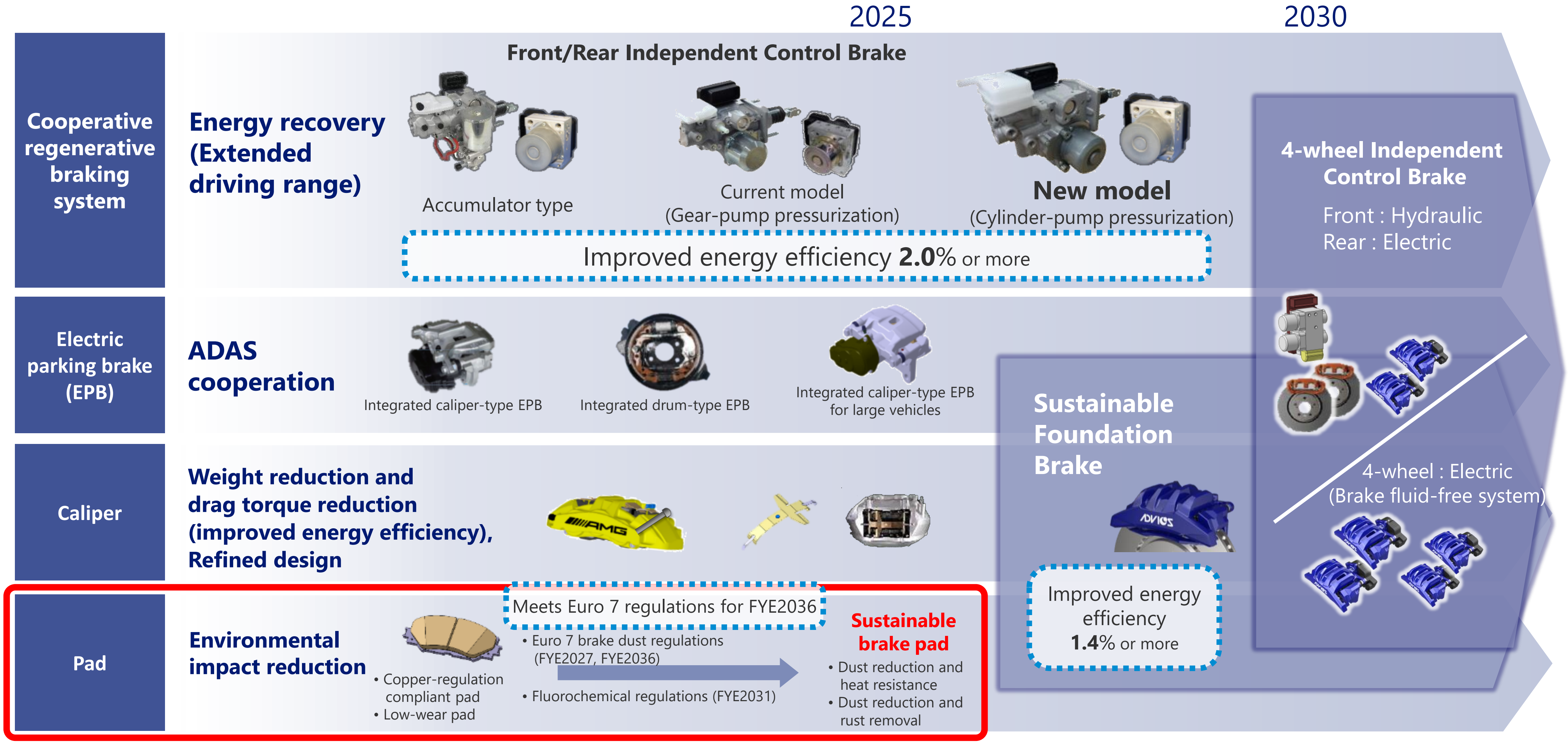
Equipped product (eAxle Cutaway Model)

- Deliver powerful hill-climbing performance even when carrying cargo, while achieving high energy efficiency that contributes to extended driving range
- Contribute to both practicality and environmental performance in the BEV models based on the Hijet Cargo and Atrai, vehicles that have long supported businesses across Japan

Further expand our presence in the BEV market through increased eAxle adoption

Development and Expansion of New Brake Products（1/2）

Brake Roadmap



Development and Expansion of New Brake Products（2/2）

Developed New Brake Pads Combining Environmental Friendliness and Braking Power

ADVICS CO., LTD. developed the Sustena (New Environmental Regulation Compliant) Pad, a brake pad combining environmental friendliness[*1] and braking power, which has been adopted for the MAZDA "CX-5" released in Japan in May 2026.

*1 Complies with the brake dust emission limits of Euro 7, the European Union's new environmental regulations for automobiles

MAZDA CX-5

Equipped product (Sustena Pad)

- Achieve high braking power while meeting environmental regulations[*2] by using non-asbestos material, which does not contain asbestos or copper, as a base, and increasing the proportion of heat-resistant organic and inorganic materials and ceramics

  *2 Particulate matter (PM10) generated from brakes during driving is subject to regulation
- AI-powered simulations of compounding patterns were utilized in development, and after numerous tests and evaluations, the product was commercialized

Leveraging Euro 7 compliant technologies to turn tighter environmental regulations into growth opportunities

Initiatives for New Business Creation

Communication Support App Series "YYSystem"

Overview and Features of the YYSystem

- Provide real-time, highly accurate speech-to-text transcription and visualization of spoken conversations, while maintaining stable recognition performance even in noisy environments
- In addition to conversation content, the system can convey surrounding reactions and the nuances of communication (Support 31 Languages)

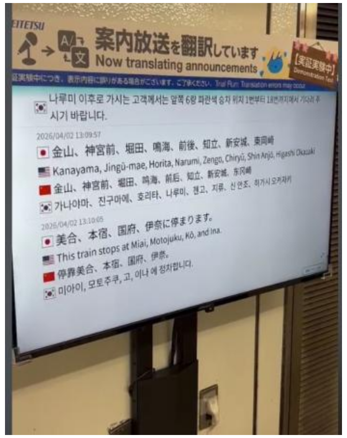
Implementation Track Record

- Cumulative Downloads : Over 3 million
- Corporate Customers : Adopted by more than 250 companies, including railway operators and hotel chains

Case Proprietary 'My Engine' Technology Implemented in the Railway Sector

- Utilize proprietary speech recognition technology developed in collaboration with Microsoft
- Improve recognition accuracy by using AI to learn individual users' speech patterns and characteristics
- Expand from personal use to commercial applications in the railway sector

▲ My Engine supported a meeting between YYSystem user and Microsoft CEO Satya Nadella (March 2025)



▶ Utilized for platform announcements at Nagoya Station by Nagoya Railroad (April 2026)

<u>**Recognition accuracy improved significantly (from 80% to 97%*)**</u>

*Based on approximately six months of voice learning data

Topics YYSystem Officially Adopted by the National Diet

- Expanding adoption in the public sector, including use by the National Diet

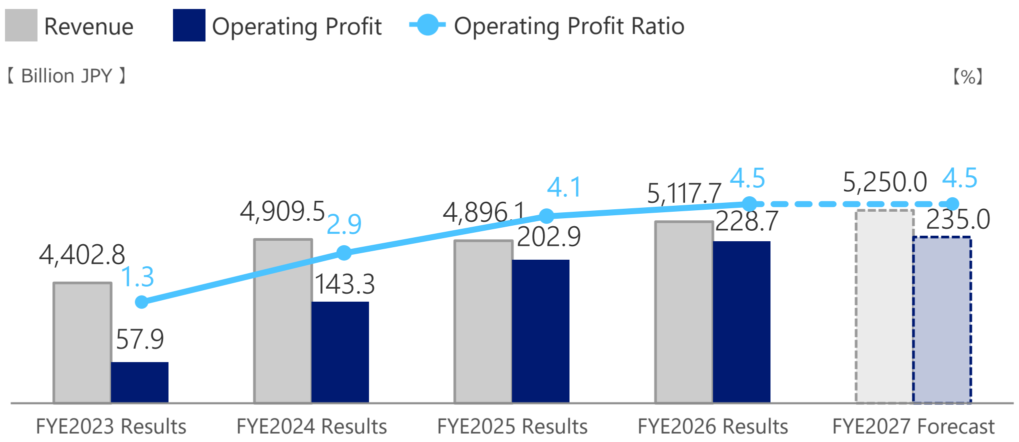
Contributing to the advancement of mobility by solving challenges that hinder movement

Reference Information

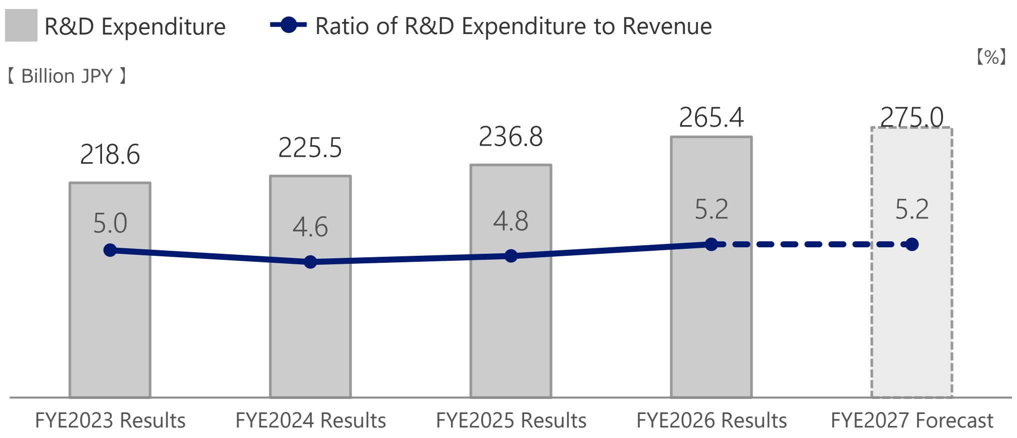
3

Highlights of Financial Performance

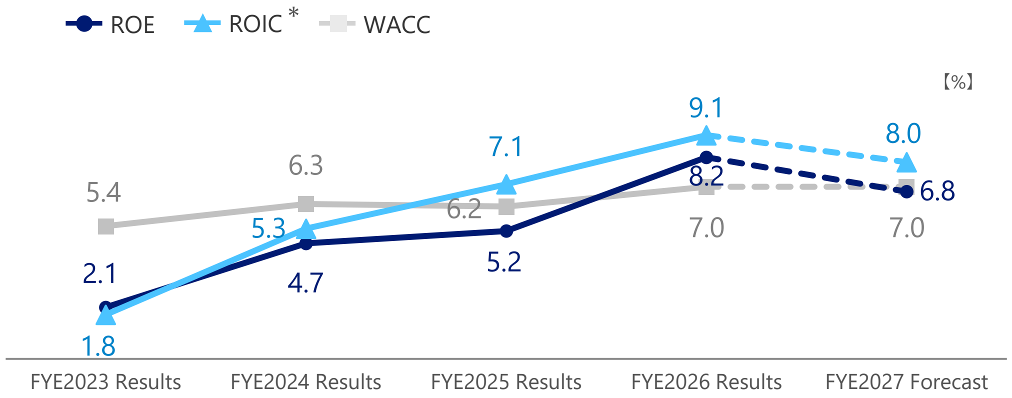
Revenue／Operating Profit／Operating Profit Ratio



R&D Expenditure ／Ratio of R&D Expenditure to Revenue

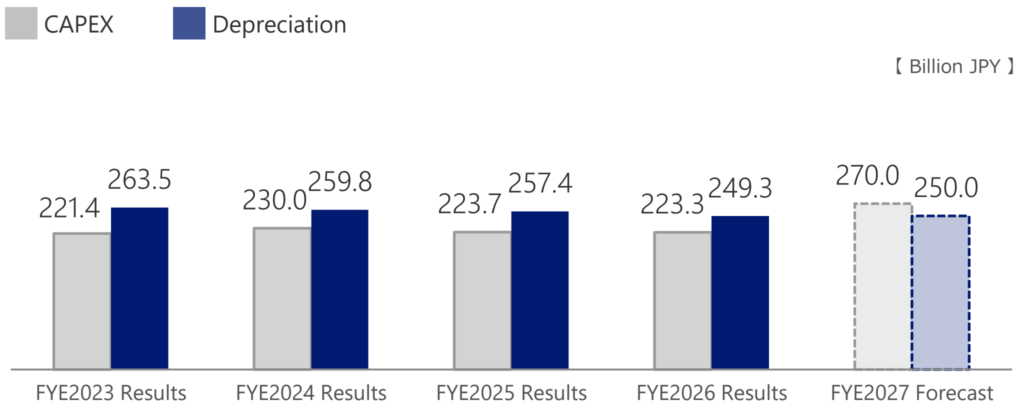


Return on Equity／Return on Invested Capital／ Weighted Average Cost of Capital



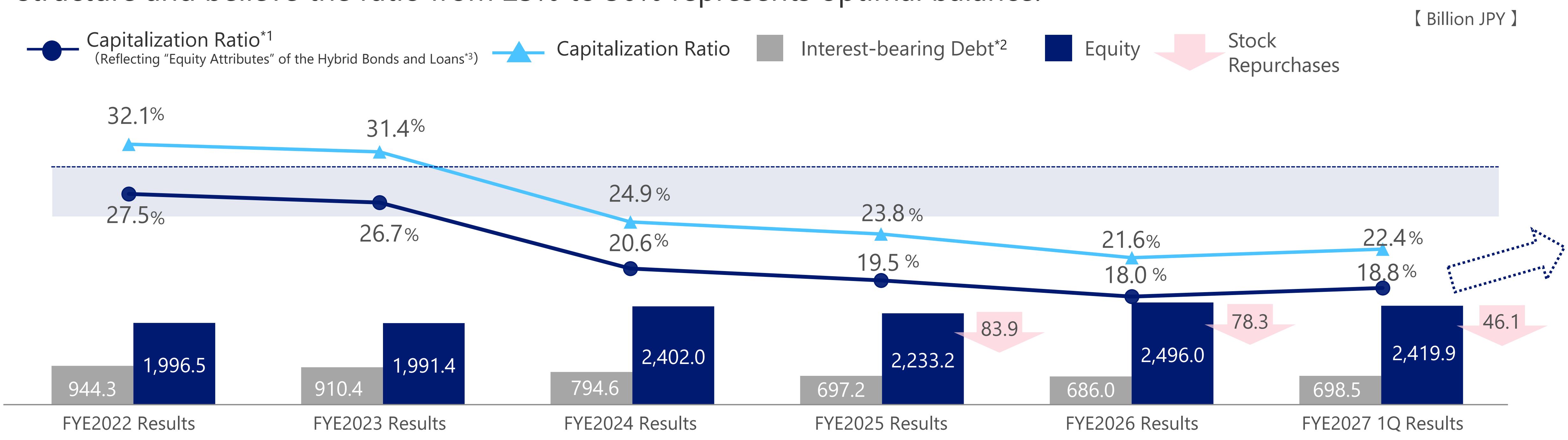
*Operating Profit after Income Tax / (Inventories + Tangible Fixed Assets + Intangible Assets)

CAPEX / Depreciation



Capital Policy

Our core capital policy is to maximize corporate value by maintaining the balance between "financial safety" and "capital efficiency". We regard capitalization ratio*1 as an important financial index to assess our capital structure and believe the ratio from 25% to 30% represents optimal balance.



In pursuit of achieving the optimal capital structure, we are executing the stock repurchases up to 100 billion yen in FYE2027, with 46.1 billion yen completed in the 1st quarter.
We will continue to enhance capital efficiency and raise our capitalization ratio to a desirable level over the medium to long term.

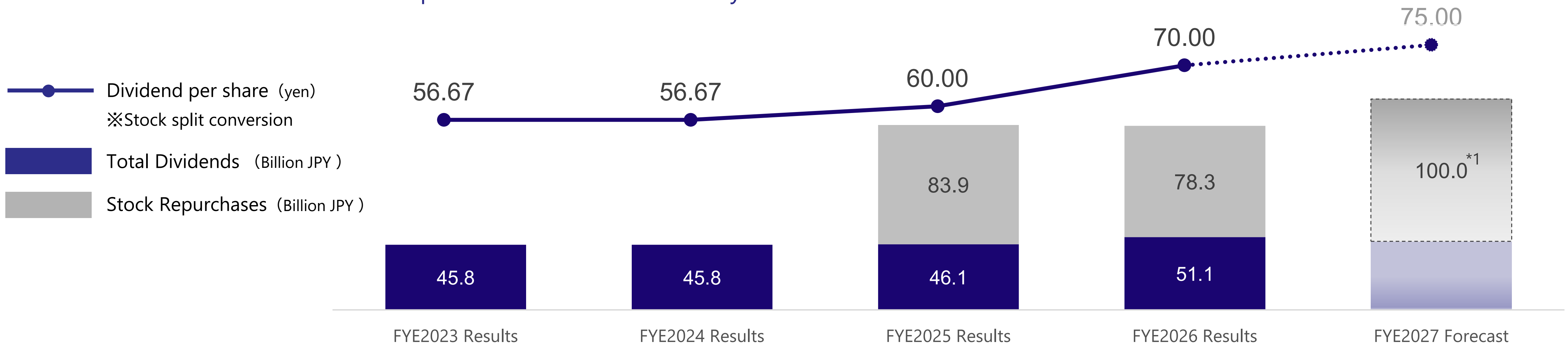
*1 : Capitalization Ratio (Cap Ratio) = Interest-bearing Debt/(Interest-bearing Debt + Equity)
*2 : Interest-bearing Debt =Bonds and Loans Payable + Lease Liabilities
*3 : 50% of the Balance of Hybrid Procurement is Considered as Capital on the Rating

Return to Shareholders

Based on stable and continuous shareholder dividends over the medium to long term, we will continue to strengthen shareholder returns, including flexible stock repurchases, to further enhance corporate value and capital efficiency.

For FYE 2027, we plan to increase dividends, following the increase in FYE2026, and to implement stock repurchases of 100 billion yen*1.

- **Dividends** The annual dividend for FYE2026 is 70 yen, increase of 10 yen.
  (interim dividend of 30 yen / year end dividend of 40 yen)
  The annual dividend forecast for FYE2027 is 75 yen, increase of 5 yen from the previous fiscal year.
  (interim dividend of 35 yen / year end dividend of 40 yen)
- **Stock Repurchases** We repurchased of stock 78.3 billion yen in FYE2026.
  We will repurchase stock 100.0 billion yen*1 in FYE2027.



	FYE2023 Results	FYE2024 Results	FYE2025 Results	FYE2026 Results
DOE*2	3.2%	3.1%	3.0%	3.2%
Total Return Ratio	121.6%	50.5%	121.0%	75.4%

*1 Amount resolved

*2 For the calculation of DOE, "equity attributable to owners of the parent" is based on adjusted figures that exclude "other components of equity," which are subject to significant fluctuations due to foreign exchange movements and market conditions.

AISIN
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【Note on Forward-Looking Statements】

Excluding matters related to past and current facts, the business results forecasts and forward-looking estimates, strategies and targets disclosed by the Company are estimates regarding the future. These estimates are formulated from plans, expectations and judgments made based on information that the Company can obtain at the present time, and certain assumptions deemed reasonable. Accordingly, actual results may vary from the disclosed business results forecasts, etc., due to variable factors with uncertainties, including the economic situation.
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