

**For the Fiscal year Ended March 31, 2026 3rd Quarter
(April 1, 2025 to December 31, 2025)**

Financial Results

February 3, 2026
AISIN CORPORATION

Overview of FYE2026 3rd Quarter Financial Results

FYE2026 3Q Results

Revenue increased compared to the previous fiscal year, due to the increase in production volumes at customers and sales volumes of powertrain units, despite the effect of FX changes. Operating profit increased compared to the previous fiscal year, despite the tariff impact and the increase of investments for human capital and the future, there were the effects of the increased production volume and the efforts to improve the corporate structure.

FYE2026 Forecast

The forecast for FYE2026 remains unchanged from the previous announcement, as 3Q results were largely in line with the previous forecast. We expect revenue of 4,900.0 billion yen and operating profit of 205.0 billion yen by accelerating sales expansion of electrified products, strengthening of product competitiveness, and reinforcement of group management.

Return to Shareholders

As part of the capital policy to reduce the cost of capital, the company is in the process of conducting a stock repurchase. We will continue to consider stable and continuous shareholder returns in the medium to long term.

Consolidated Financial Results (FYE2026 3rd Quarter)

1

FYE2026 3rd Quarter Results Financial Summary

() Shows Rate to Revenue % 【 Billion JPY 】

	FY2025 3rd Quarter Results		FY2026 3rd Quarter Results		Change		Change Rate %
Revenue	3,602.1	-	3,769.1	-	+167.0		+4.6
Operating Profit	115.9	(3.2)	156.3	(4.1)	+40.4		+34.8
Profit before Income Taxes	92.3	(2.6)	177.5	(4.7)	+85.2		+92.1
Profit for the Period ^{*1}	49.7	(1.4)	107.3	(2.8)	+57.6		+115.7

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

Pre-conditions	FX Rate	USD	153	JPY	149	JPY	-4	JPY	-2.6
		CNY	21.2	JPY	20.8	JPY	-0.4	JPY	-1.9
	Toyota Production		737	10,000 unit	755	10,000 unit	+18	10,000 unit	+2.3
	Powertrain Unit Sales ^{*2}		760	10,000 unit	767	10,000 unit	+7	10,000 unit	+0.8
	(number of electrification unit ^{*3})		(172)		(190)		(+18)		(+10.6)

*2 : Total Sales of AT, CVT, HEV and eAxe

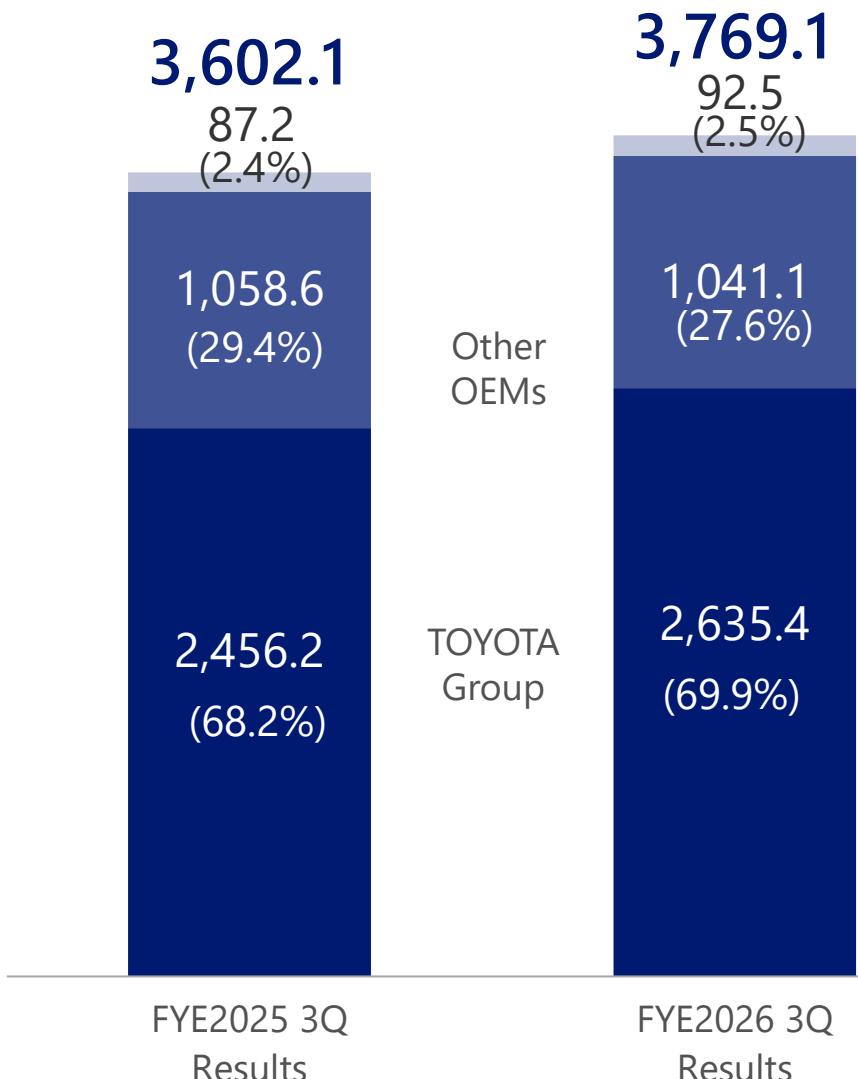
*3 : Total Sales of HEV, eAxe

FYE2026 3rd Quarter Revenue by Customer

Mobility

Energy Solutions and Others

【 Billion JPY 】



Revenue by Customer (Other OEMs)				
Customer	FYE2025 3Q Results	FYE2026 3Q Results	Change	Change Rate (%)
SUZUKI	138.9	158.7	+19.8	+14.3
Stellantis	166.1	140.9	-25.2	-15.2
VW&Audi	120.0	112.7	-7.3	-6.1
VOLVO	69.7	64.0	-5.7	-8.2
HONDA	62.1	58.3	-3.8	-6.1
MITSUBISHI	50.7	56.1	+5.4	+10.7
NISSAN	52.3	48.9	-3.4	-6.5
Geely	42.8	41.1	-1.7	-3.9
China FAW	36.1	35.1	-1.0	-2.7
ISUZU	29.6	32.7	+3.1	+10.5
Others	290.3	292.6	+2.3	+0.8
Total	1,058.6	1,041.1	-17.5	-1.7
(Reference) Chinese OEMs	167.7	156.9	-10.8	-6.4

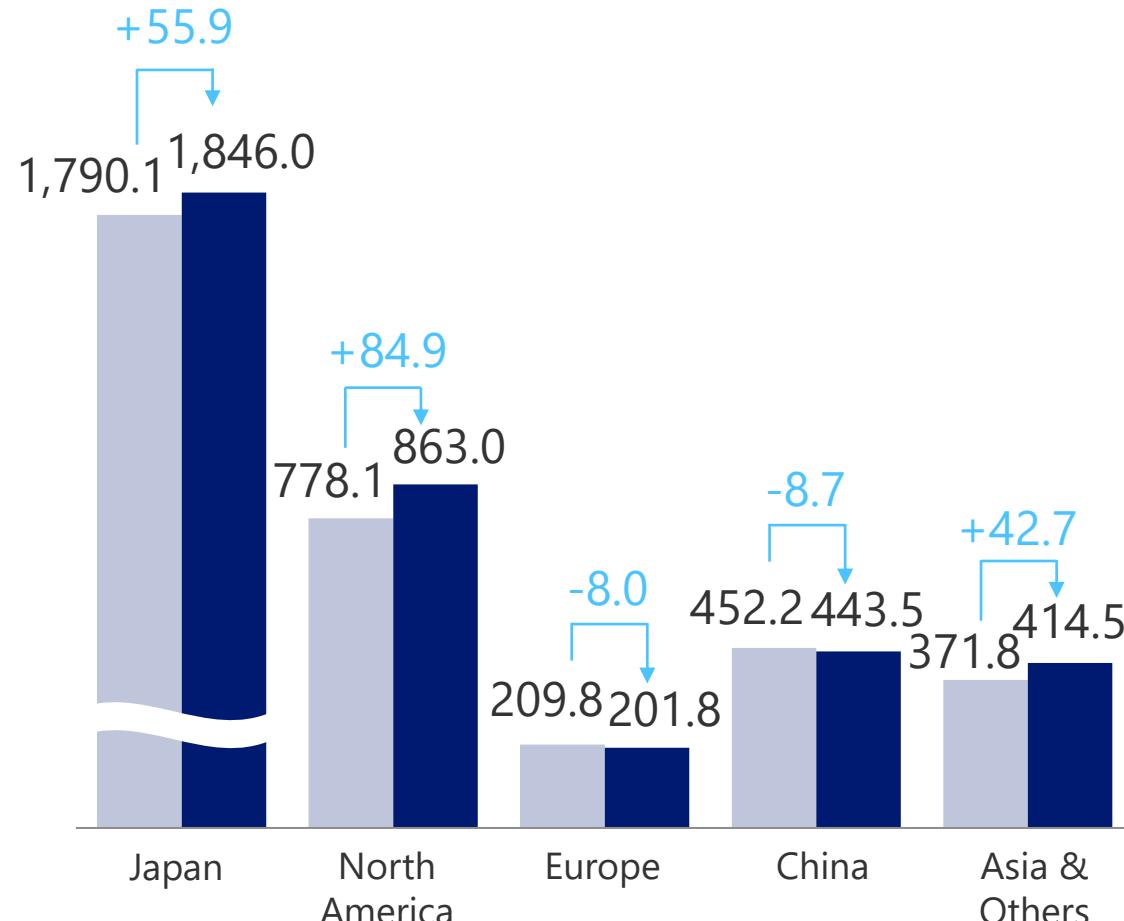
FYE2026 3rd Quarter Segment Information

FYE2025 3rd Quarter Results

FYE2026 3rd Quarter Results

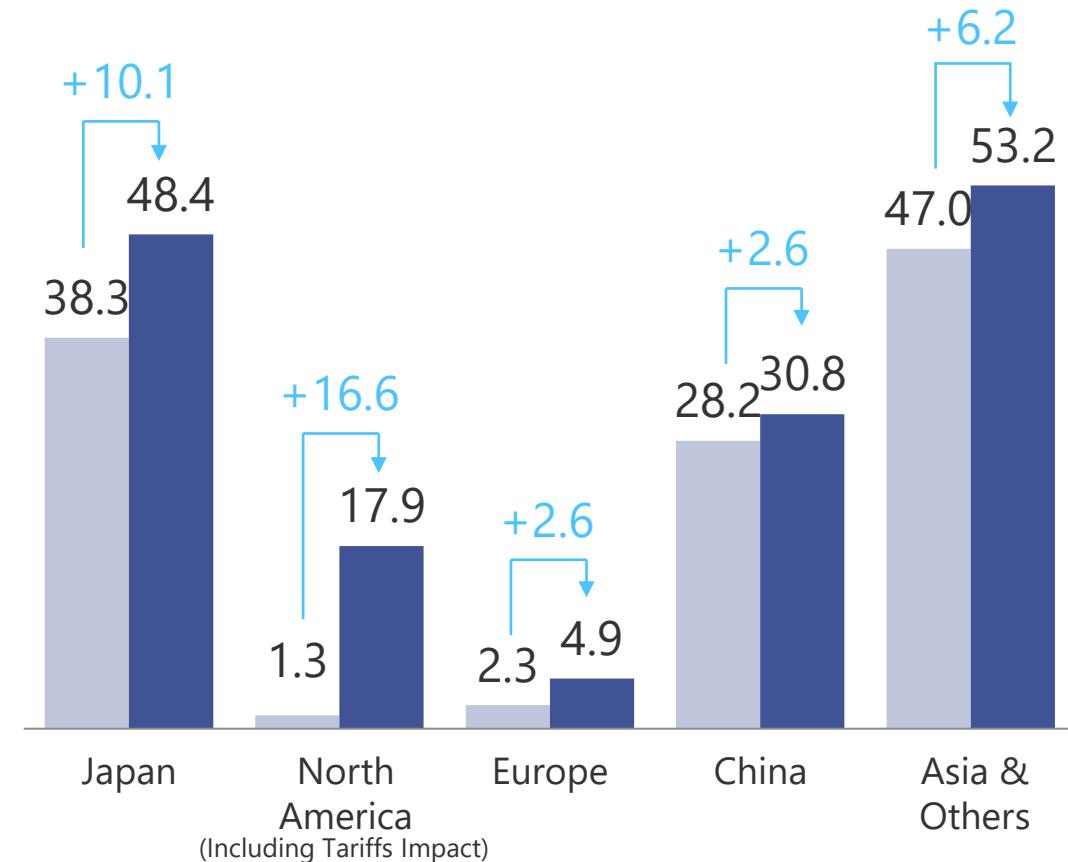
【 Billion JPY 】

Revenue (YoY+167.0)



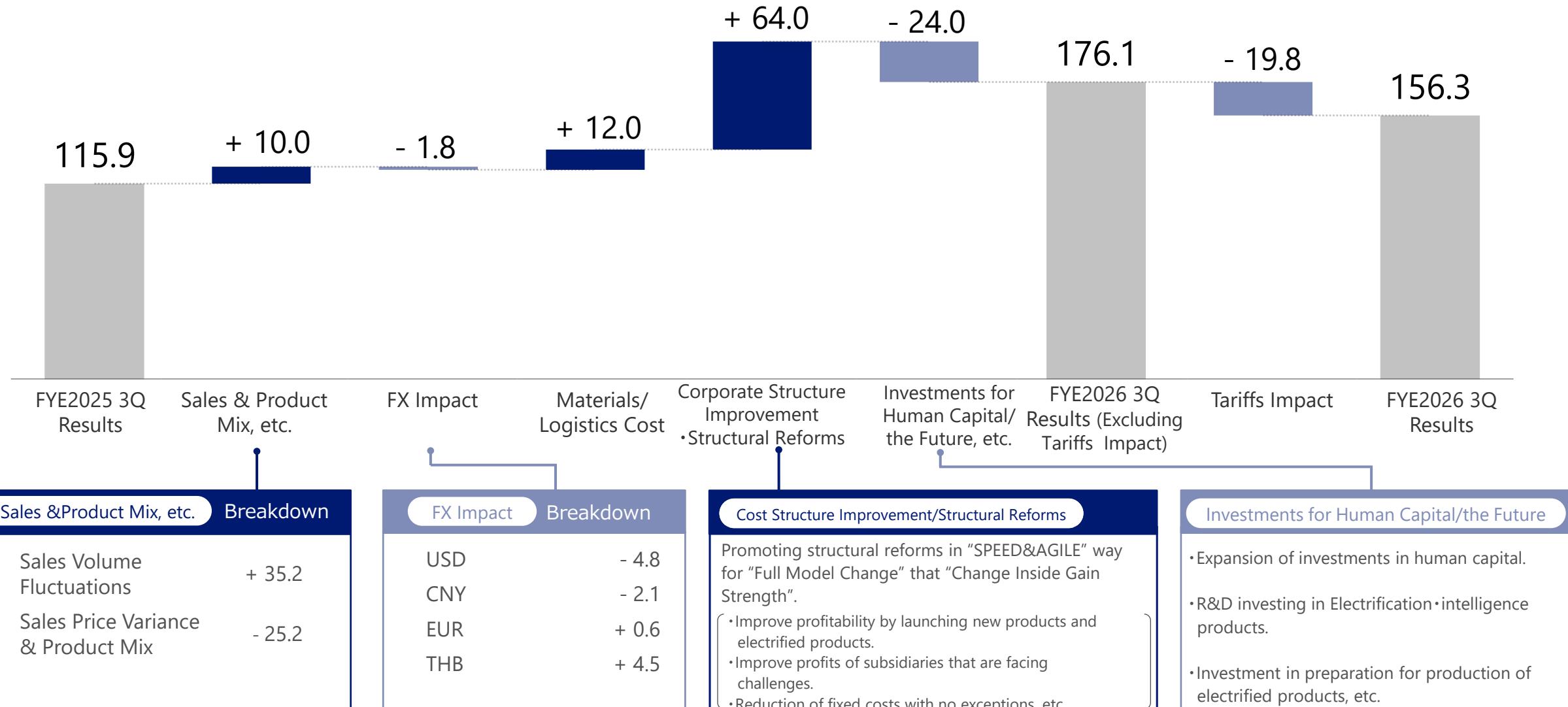
※Revenue to External Customers

Operating Profit (YoY+40.4)



FYE2026 3rd Quarter Analysis of Operating Profit

【 Billion JPY 】



(Ref) FYE2026 Forecast Financial Summary (Disclosed on April 25)

() Shows Rate to Revenue % 【 Billion JPY 】

	FYE 2025 Results		FYE 2026 Forecast		Change		Change Rate %
Revenue	4,896.1	-	4,900.0	-		+3.9	+0.1
Operating Profit	202.9	(4.1)	205.0	(4.2)		+2.1	+1.0
Profit before Income Taxes	173.4	(3.5)	215.0	(4.4)		+41.6	+24.0
Profit for the Period ^{*1}	107.5	(2.2)	125.0	(2.6)		+17.5	+16.2

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

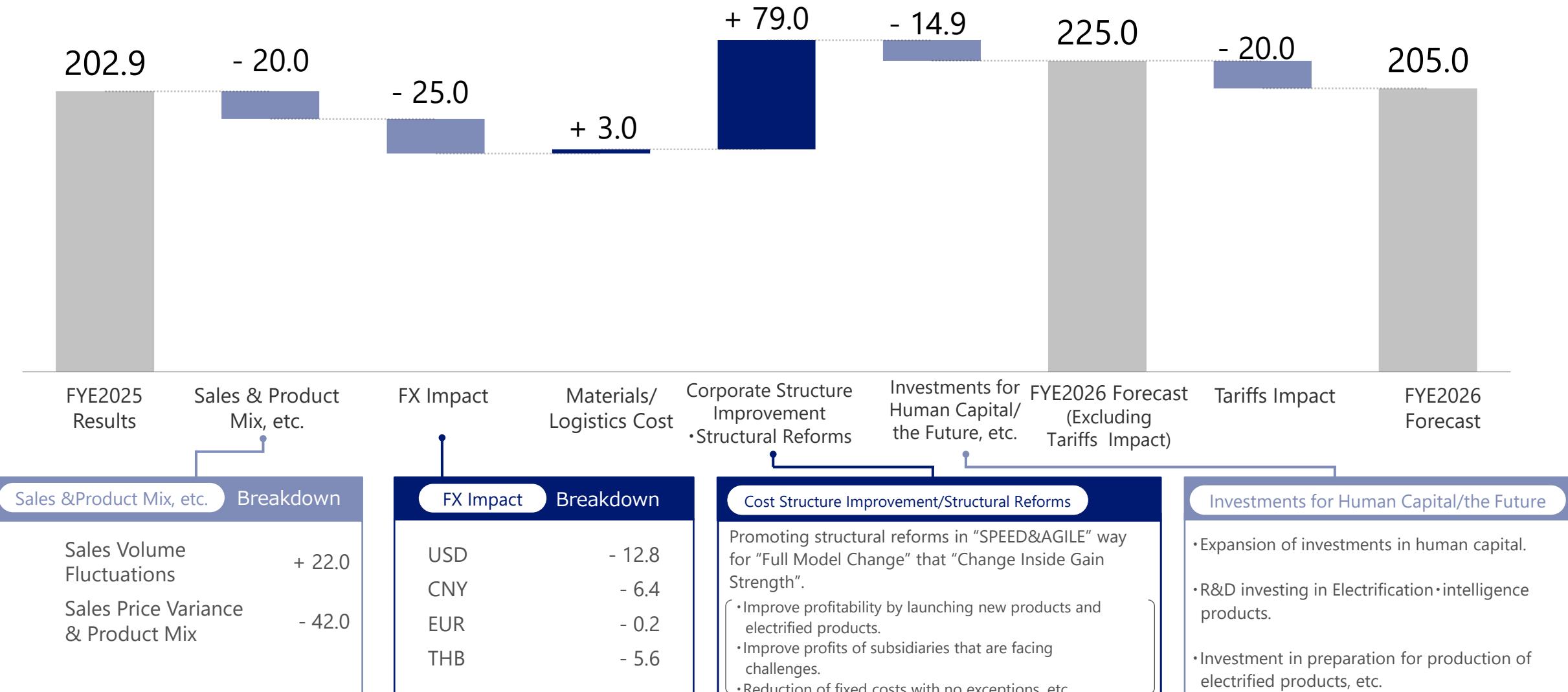
Pre-conditions	FX Rate	USD	153	JPY	145	JPY	-8	JPY	-5.2
		CNY	21.1	JPY	20.0	JPY	-1.1	JPY	-5.2
Powertrain Unit Sales ^{*2} (number of electrification unit ^{*3})		1,014	10,000 unit		1,050	10,000 unit	+36	10,000 unit	+3.5
		(231)			(332)		(+101)		(+43.5)

*2 : Total Sales of AT, CVT, HEV and eAxe

*3 : Total Sales of HEV, eAxe

(Ref) FYE2026 Analysis of Operating Profit (Disclosed on April 25)

【 Billion JPY 】



Business Progress

2

Progress of the FYE2026 Mid-term Plan (Generate Capital by Balance Sheet Reformation)

Business Assets

Business Asset Reduction

Compress over **100BJPY**

120.1BJPY*1 in funds generated

Transfer “entrust” business and
depreciate existing business assets

Entrust Partners

- Seat Business
- Shower Toilet Business
- Dissolution of capital relationship with EXEDY
- Equity transfer of Aisin Anqing Automotive Parts Co. Ltd.
- Other Projects (Ongoing)

Accelerate Reduction of Inefficient assets

- Structural change on surplus assets
- Merger of Production companies (Ongoing)

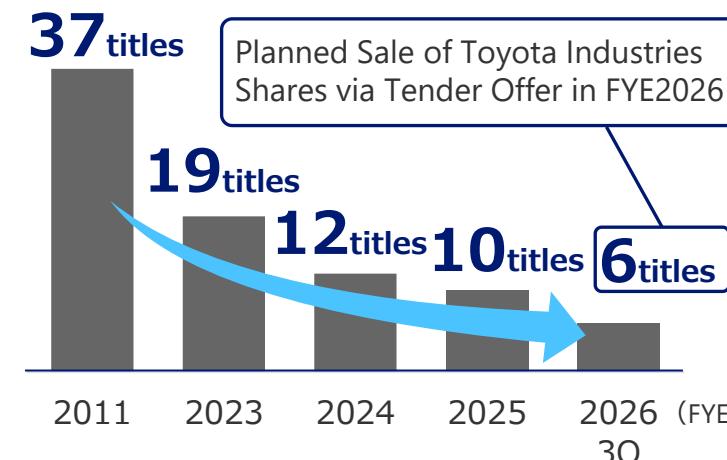
Cross-Shareholdings

Execution of Sale of Cross-Shareholdings

Sell over **100BJPY**

118.0BJPY*1 in funds generated

Aim for zero



*1 Cumulative total from FYE2024 to FYE2026 3Q

*2 Assuming FYE2022 exchange rate *3 () Assuming actual exchange rate

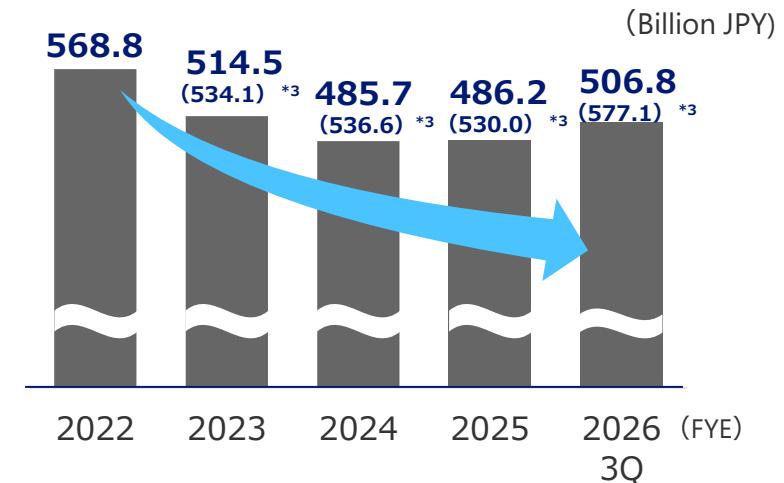
Global Inventories

Global Inventory Reduction

Compress over **100BJPY**

**62.0BJPY in funds generated
compared to FYE2022 *2**

Compress to Pre-COVID19 Level
By FYE2026



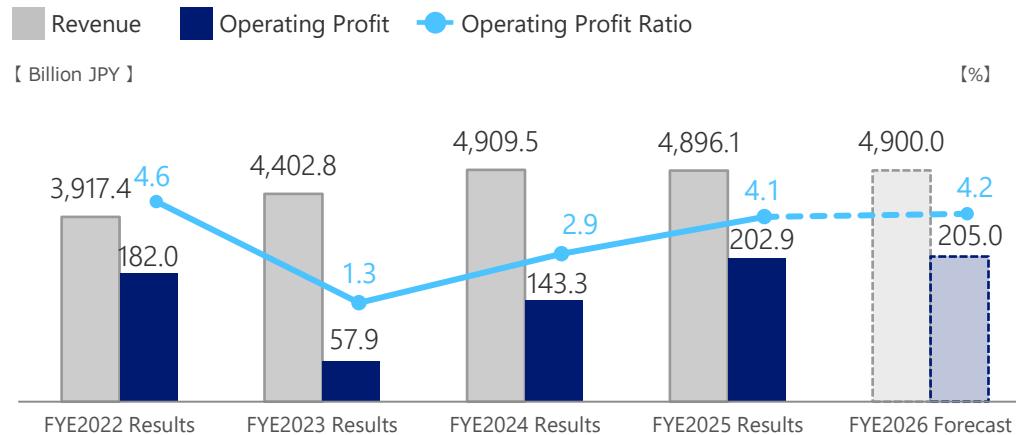
Promote Reform 400BJPY, which is 10% of Total Assets, by FYE2026

Reference Information

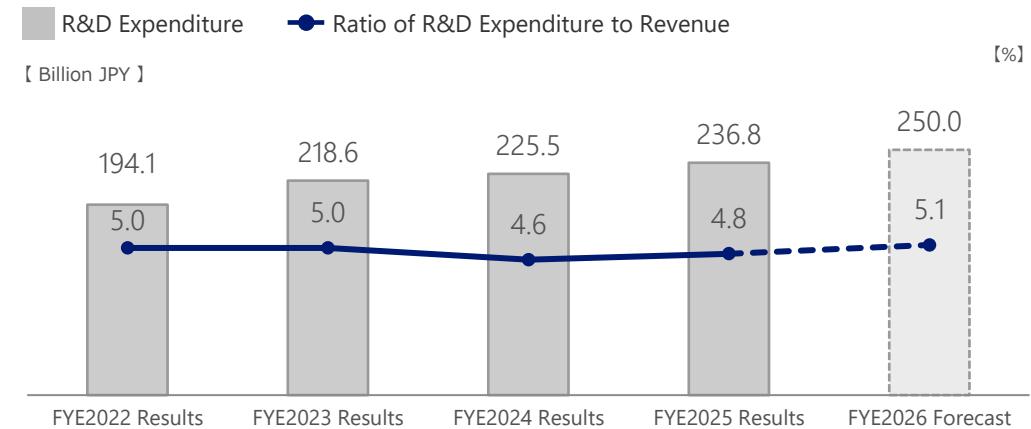
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Highlights of Financial Performance

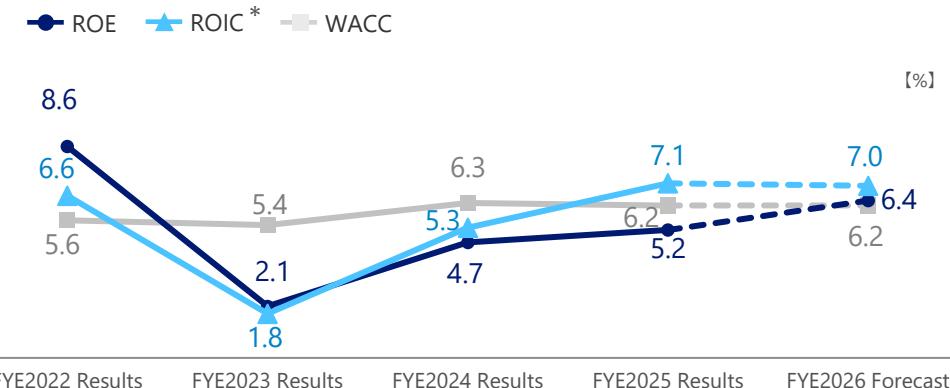
Revenue / Operating Profit / Operating Profit Ratio



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

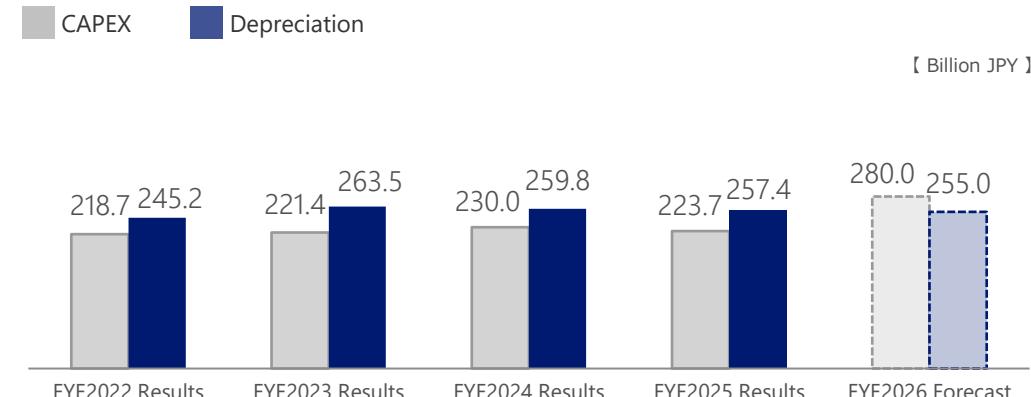


Return on Equity / Return on Invested Capital / Weighted Average Cost of Capital



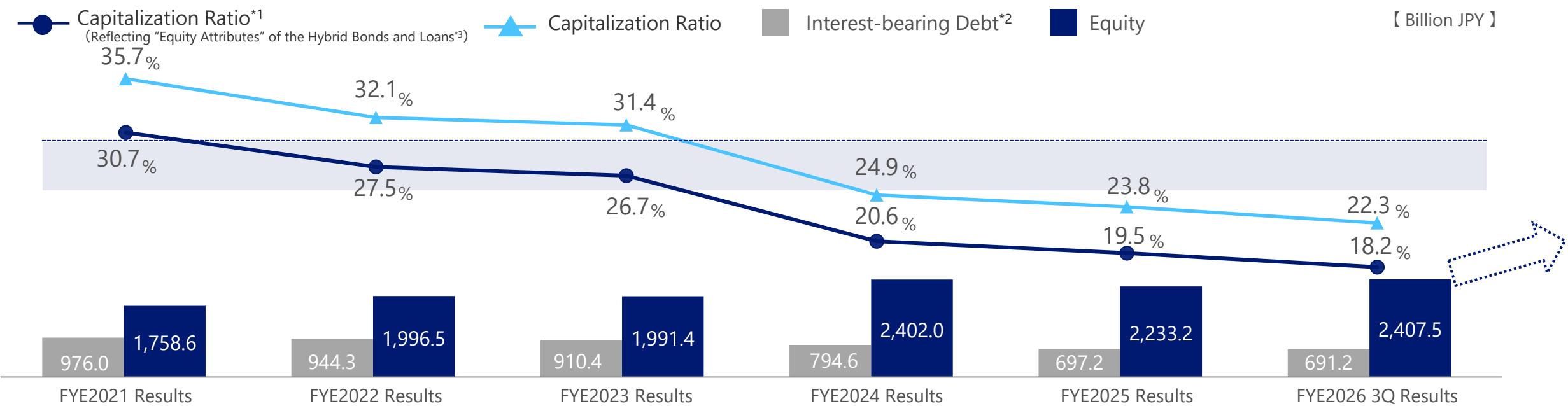
*Operating Profit after Income Tax / (Inventories + Tangible Fixed Assets + Intangible Assets)

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 response to the recent increase in financial safety, we are implementing the stock repurchases.
We will continue considering flexible stock repurchases, taking into consideration the optimal capital level.**

*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 share repurchases, to further enhance corporate value and capital efficiency.

The annual dividend per share and total return ratio for FYE2026 are expected to be the highest.

(*Stock repurchases are shown based on the resolved date and the resolved amount)

◆ Dividends

The annual dividend for FYE2025 is 60 yen (interim dividend of 30 yen /year end dividend of 30 yen)

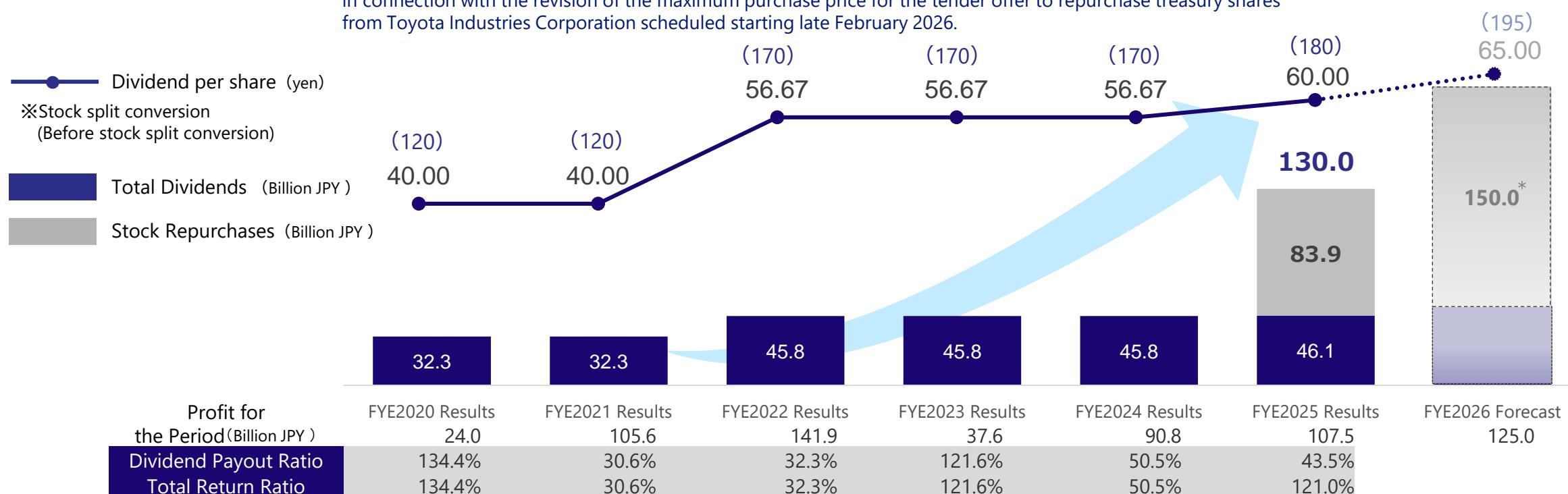
The annual dividend forecast for FYE2026 is 65 yen, increase of 5 yen from the previous fiscal year.
(interim dividend of 30 yen /year end dividend of 35 yen)

◆ Stock Repurchases

We repurchased of stock 83.9 billion yen in FYE2025.

We will repurchase stock *150.0 billion yen in FYE 2026.

*As announced in the press release on January 14, 2026, the amount has been revised from 120.0 billion yen to 150.0 billion yen in connection with the revision of the maximum purchase price for the tender offer to repurchase treasury shares from Toyota Industries Corporation scheduled starting late February 2026.





[Note on future predictions]

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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