

(TRANSLATION FOR REFERENCE ONLY)

This is a translation of the original Japanese text of the “Consolidated Financial Results for the Second Quarter of Fiscal Year Ending March 31, 2023.” Should there be any discrepancy between any part of this translation and the original Japanese text, the latter shall prevail.

Consolidated Financial Results

for the Second Quarter of Fiscal Year Ending March 31, 2023 <Japanese GAAP>

November 8, 2022

Company Name: GLORY LTD. Stock exchange listing: Tokyo
 Code number: 6457 URL: <https://corporate.glory-global.com/>
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Scheduled filing date of Quarterly Securities Report: November 10, 2022
 Scheduled date of dividend payments: December 5, 2022
 Preparation of quarterly earnings supplementary explanatory material: Yes
 Holding of quarterly earnings presentation: Yes (for analysts and institutional investors)

(Amounts less than one million yen are rounded downward.)

1. Consolidated Financial Results for the Second Quarter of Fiscal Year Ending March 31, 2023 (from April 1, 2022 to September 30, 2022)

(1) Consolidated Operating Results (cumulative)

(The percentages show the changes from the corresponding period of the previous year.)

	Net sales		Operating income		Ordinary income		Net income attributable to owners of parent	
	(Millions of yen)	(%)	(Millions of yen)	(%)	(Millions of yen)	(%)	(Millions of yen)	(%)
Six months ended September 30, 2022	112,142	8.7	(4,711)	—	(5,359)	—	(6,195)	—
Six months ended September 30, 2021	103,154	16.4	5,735	258.2	5,725	304.5	2,443	—

(Note) Comprehensive income

Six months ended September 30, 2022: ¥10,062 million [162.2%]
 Six months ended September 30, 2021: ¥3,837 million [— %]

	Net income per share	Fully diluted net income per share
	(Yen)	(Yen)
Six months ended September 30, 2022	(105.99)	—
Six months ended September 30, 2021	40.42	—

(Reference) EBITDA (Operating income + Depreciation + Amortization of goodwill)

Six months ended September 30, 2022: ¥4,477 million [(67.5)%]
 Six months ended September 30, 2021: ¥13,785 million [54.7%]

Net income before amortization of goodwill (Net income attributable to owners of parent + Amortization of goodwill)

Six months ended September 30, 2022: ¥(2,878) million [— %]
 Six months ended September 30, 2021: ¥4,868 million [131.7%]

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(2) Consolidated Financial Position

	Total assets	Equity	Ownership equity ratio	Equity per share
	(Millions of yen)	(Millions of yen)	(%)	(Yen)
As of September 30, 2022	375,925	207,641	54.6	3,602.71
As of March 31, 2022	362,827	208,604	56.6	3,395.27

(Reference) Ownership equity

As of September 30, 2022: ¥205,311 million As of March 31, 2022: ¥205,314 million

(Note) During the second quarter of the fiscal year ending March 31, 2023, the Company finalized the provisional accounting treatment for business combinations, and the figures as of March 31, 2022 reflect the details of the finalization of the provisional accounting treatment.

2. Dividends

(Record date)	Dividends per share				
	First quarter-end	Second quarter-end	Third quarter-end	Year-end	Annual
	(Yen)	(Yen)	(Yen)	(Yen)	(Yen)
Year ended March 31, 2022	—	34.00	—	34.00	68.00
Year ending March 31, 2023	—	34.00			
Year ending March 31, 2023 (forecast)			—	34.00	68.00

(Note) Revisions to the latest dividend forecast: None

3. Consolidated Financial Forecast for the Year Ending March 31, 2023 (from April 1, 2022 to March 31, 2023)

(The percentages show the changes from the corresponding period of the previous year.)

	Net sales		Operating income		Ordinary income		Net income attributable to owners of parent		Net income per share
Full year	(Millions of yen)	(%)	(Millions of yen)	(%)	(Millions of yen)	(%)	(Millions of yen)	(%)	(Yen)
	250,000	10.3	(7,000)	—	(7,500)	—	(8,500)	—	(145.40)

(Note) Revisions to the latest consolidated financial forecast: Yes

For details on the revision to the consolidated financial forecast, please refer to the news release titled “Notices regarding Differences between Financial Forecast and Actual Results for First Half of FY2022, and Revision to Consolidated Financial Forecast for FY2022” announced on the same day as this report (November 8, 2022).

(Reference) EBITDA

Year ending March 31, 2023: ¥11,400 million
Net income before amortization of goodwill
Year ending March 31, 2023: ¥(2,000) million

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Notes:

(1) Changes in significant subsidiaries during the period (changes in specified subsidiaries involving a change in the scope of consolidation):
None

(2) Application of accounting methods specific to preparation of the quarterly consolidated financial statements: Yes

(3) Changes in accounting policies and estimates, and restatements

(a) Changes in accounting policies associated with revisions of accounting standards, etc.: Yes

(b) Changes in accounting policies other than (a): Yes

(c) Changes in accounting estimates: Yes

(d) Restatements: None

(Note) For more information, please refer to “2. Quarterly Consolidated Financial Statements and Significant Notes Thereto, (3) Notes to Quarterly Consolidated Financial Statements, Changes in Accounting Policies and Changes in Accounting Policy That Are Difficult to Make a Distinction from Changes in Accounting Estimates” on page 11 of the Attachment.

(4) Total number of shares issued (common shares)

(a) Total number of shares issued at the end of the period (including treasury shares)

As of September 30, 2022: 63,638,210 shares

As of March 31, 2022: 63,638,210 shares

(b) Number of treasury shares at the end of the period

As of September 30, 2022: 6,291,973 shares

As of March 31, 2022: 2,866,078 shares

(c) Average number of shares (cumulative from the beginning of the period)

Six months ended September 30, 2022: 58,458,234 shares

Six months ended September 30, 2021: 60,464,411 shares

(Note) In addition to the number of treasury shares at the end of the period, there also existed Company shares owned by the “Board Incentive Plan (BIP) Trust Account” and “Employee Stock Ownership Plan (ESOP) Trust Account.” (As of September 30, 2022: 358,285 shares, As of March 31, 2022: 301,284 shares)

(Note) Quarterly financial results reports are exempt from quarterly review conducted by certified public accountants or an audit corporation.

(Note) Explanation regarding the appropriate use of financial forecasts and other special items

(Caution concerning forward-looking statements)

The forward-looking statements such as operational forecasts contained in this report are based on the information currently available to the Company and certain assumptions which the Company regards as legitimate, and are not promises regarding the achievement of forecasts. Actual performance may differ greatly from these forecasts due to various present and future factors. For the assumptions and other related matters concerning the financial forecasts, please refer to “1. Qualitative Information on the Financial Statements,

(2) Consolidated Financial Forecasts and Other Forward-looking Statements” on page 6 of the Attachment.

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Attachment

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1. Qualitative Information on the Financial Statements

(1) Operating Results

In the six months ended September 30, 2022, the gradual easing of COVID-19 restrictions led to the progressive normalization of economic activity, and to a gradual recovery in the global economy. On the other hand, the outlook remained uncertain due to supply chain disruptions resulting from the semiconductor shortage and soaring material prices, the prolongation of the conflict between Russia and Ukraine, and the advance of inflation worldwide.

In Japan, there has been a growing sense of uncertainty regarding business conditions, with the sharp depreciation of the yen following increases in interest rates in the U.S. and Europe.

Under such circumstances, demand for our products and services remained steady as the need for contact-free and self-service solutions continued and labor shortages persisted in both financial institutions and retail industry overseas. However, sales of our main products were postponed due to the impact on production caused by difficulty in parts procurement. On the other hand, sales remained steady for the Acrelec Group S.A.S. and its subsidiaries, which are engaged in self-service kiosks related business, and for Revolution Retail Systems, LLC, which we acquired in December 2021.

In the domestic market, sales of our main products were postponed due to the impact on production caused by difficulty in parts procurement in both the financial market and the retail and transportation market. Sales also decreased due to a slowdown in the system modifications required in relation to the issuance of the new 500-yen coin. Demand for our products and services, however, remained steady. In the retail and transportation market in particular, there was strong demand for self-service coin and bank note recyclers, resulting from labor shortages and the need for contact-free and self-service solutions, and sales remained at high levels and on a par with the corresponding period of the previous year.

As a result, net sales in this six-month period totaled ¥112,142 million (up 8.7% year on year). Of this, net sales of merchandise and finished goods were ¥63,332 million (down 1.1% year on year) and net sales from maintenance services were ¥48,809 million (up 24.8% year on year). An operating loss of ¥4,711 million was recorded (vs. operating income of ¥5,735 million for the corresponding period of the previous year), along with an ordinary loss of ¥5,359 million (vs. ordinary income of ¥5,725 million for the corresponding period of the previous year), and net loss attributable to owners of the parent of ¥6,195 million (vs. net income attributable to owners of parent of ¥2,443 million for the corresponding period of the previous year). Despite our efforts, which included design modifications to allow the use of substitutes for difficult-to-obtain parts, as well as supply chain changes and price revision initiatives, we were unable to absorb the loss caused by postponements of sales and higher material prices.

Results of operations in each business segment are as follows.

Financial market

Sales of this segment's main products, namely open teller systems and coin and banknote recyclers for tellers, were sluggish because of the postponement of sales due to the impact of production problems. In addition, sales from maintenance services decreased due to a slowdown in the system modifications associated with the issuance of the new 500-yen coin.

As a result, net sales in this segment were ¥15,362 million (down 13.9% year on year). Operating loss was ¥1,215 million (vs. operating income of ¥3,196 million in the corresponding period of the previous year) due mainly to decreased sales and the impact of higher material prices.

Retail and transportation market

Sales of this segment's main product, namely coin and banknote recyclers for cashiers, were maintained at high levels and on a par with the corresponding period of the previous year, despite the impact of production problems. However, sales of sales proceeds deposit machines for cash-in-transit companies and self-service medical payment kiosks were slow due to production problems caused by parts shortage. In addition, sales from maintenance services decreased due to a slowdown in the system modifications associated with the issuance of the new 500-yen coin.

As a result, net sales in this segment were ¥20,764 million (down 11.9% year on year). Operating loss was ¥584 million (vs. operating income of ¥2,010 million in the corresponding period of the previous year) due mainly to decreased sales and the impact of higher material prices.

Amusement market

Sales of this segment's main products such as card systems and pachinko prize dispensing machines for pachinko parlors were sluggish. As a result, net sales in this segment were ¥5,228 million (down 9.1% year on year). Operating income was ¥108 million (vs. operating loss of ¥106 million in the corresponding period of the previous year) mainly owing to an improvement in the product mix.

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Overseas market

In the Americas, despite some sales postponements caused by the production impact, sales of this segment's main products, namely RBG-series coin and banknote recyclers for financial institutions, and CI-series sales proceeds deposit machines for the retail industry, were favorable. In Europe, sales of the main products, namely RBG-series coin and banknote recyclers for financial institutions and CI-series sales proceeds deposit machines for the retail industry, were steady. In Asia, sales of UW-series banknote sorters were steady. Furthermore, net sales of Acrelec Group S.A.S. and its subsidiaries totaled ¥9,843 million (up 16.2% year on year), while net sales of Revolution Retail Systems, LLC in the U.S., which was added to the scope of consolidation in the third quarter of the fiscal year ended March 31, 2022, were ¥8,576 million.

As a result, net sales in this segment were ¥69,511 million (up 26.7% year on year). Operating loss was ¥2,431 million (vs. operating income of ¥1,354 million in the corresponding period the previous year), due to the sales postponement caused by production impact as well as higher material prices and logistics costs.

In the "Other" business segment, net sales were ¥1,274 million (up 11.9% year on year) and operating loss was ¥589 million (vs. operating loss of ¥720 million in the corresponding period of the previous year).

(2) Consolidated Financial Forecasts and Other Forward-looking Statements

For the fiscal year ending March 31, 2023, while net sales are expected to increase as a result of the depreciation of the yen, we expect to record operating and ordinary losses, as well as a net loss attributable to owners of the parent. This is because we anticipate that production delays will continue for the remainder of the year for some of our main products due to difficulty in parts procurement such as semiconductors and soaring parts prices, although we had expected that the situation would gradually ease in the second half of the year. We will minimize the production delays by shifting to designs using alternative parts for difficult-to-obtain parts and optimizing the supply chain, while further promoting efforts toward price revisions. We predict that the trend for contact-free and self-service solutions will continue and therefore expect continued steady demand for self-service products and services used by financial institutions and the retail industry, both in Japan and overseas.

The exchange rate assumptions for the revised financial forecasts are US\$1=¥140 (¥125 before revision) and 1 euro=¥140 (¥135 before revision).

For more information, please refer to the news release titled "Notices regarding Differences between Forecast and Actual Results for First Half of FY2022, and Revision to Consolidated Financial Forecast for FY2022" announced on November 8, 2022.

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2. Quarterly Consolidated Financial Statements and Significant Notes Thereto

(1) Quarterly Consolidated Balance Sheet

(Millions of yen)

	As of March 31, 2022	As of September 30, 2022
Assets		
Current assets		
Cash and deposits	52,376	38,836
Notes and accounts receivable - trade, and contract assets	52,420	45,114
Electronically recorded monetary claims - operating	749	831
Securities	50	-
Merchandise and finished goods	36,657	47,755
Work in process	15,658	18,247
Raw materials and supplies	17,599	28,260
Other	13,688	11,661
Allowance for doubtful accounts	(1,240)	(1,359)
Total current assets	187,960	189,345
Non-current assets		
Property, plant and equipment	40,485	41,356
Intangible assets		
Customer relationships	26,790	29,581
Goodwill	58,399	64,158
Other	11,717	12,032
Total intangible assets	96,907	105,772
Investments and other assets		
Investment securities	14,871	15,389
Other	24,709	26,166
Allowance for doubtful accounts	(2,106)	(2,105)
Total investments and other assets	37,474	39,450
Total non-current assets	174,867	186,579
Total assets	362,827	375,925
Liabilities		
Current liabilities		
Notes and accounts payable - trade	14,656	14,351
Electronically recorded obligations - operating	6,975	8,509
Short-term borrowings	16,743	34,901
Current portion of long-term borrowings	2,585	1,519
Income taxes payable	1,075	661
Provision for bonuses	7,373	5,035
Provision for bonuses for directors (and other officers)	102	19
Provision for stock grant	209	34
Other	50,175	45,354
Total current liabilities	99,898	110,388
Non-current liabilities		
Bonds payable	20,000	20,000
Long-term borrowings	11,187	13,899
Provision for stock grant	247	195
Retirement benefit liability	2,327	1,943
Other	20,562	21,857
Total non-current liabilities	54,325	57,895
Total liabilities	154,223	168,283

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(Millions of yen)

	As of March 31, 2022	As of September 30, 2022
Equity		
Shareholders' equity		
Share capital	12,892	12,892
Capital surplus	12,286	12,286
Retained earnings	166,563	158,301
Treasury shares	(9,191)	(16,496)
Total shareholders' equity	182,550	166,983
Accumulated other comprehensive income		
Valuation difference on available-for-sale securities	666	867
Foreign currency translation adjustment	18,050	33,187
Remeasurements of defined benefit plans	4,047	4,272
Total accumulated other comprehensive income	22,764	38,327
Non-controlling interests	3,289	2,330
Total equity	208,604	207,641
Total liabilities and equity	362,827	375,925

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(2) Quarterly Consolidated Statements of Income and Comprehensive Income

Quarterly Consolidated Statement of Income

(Millions of yen)

	Six months ended September 30, 2021 (From April 1, 2021 to September 30, 2021)	Six months ended September 30, 2022 (From April 1, 2022 to September 30, 2022)
Net sales	103,154	112,142
Cost of sales	60,553	73,078
Gross profit	42,600	39,063
Selling, general and administrative expenses	36,865	43,775
Operating income (loss)	5,735	(4,711)
Non-operating income		
Interest income	101	73
Dividend income	83	113
Foreign exchange gains	6	–
Share of profit of entities accounted for using equity method	15	–
Other	227	268
Total non-operating income	435	455
Non-operating expenses		
Interest expenses	342	480
Share of loss of entities accounted for using equity method	–	434
Foreign exchange losses	–	23
Other	102	165
Total non-operating expenses	445	1,102
Ordinary income (loss)	5,725	(5,359)
Extraordinary income		
Gain on sale of non-current assets	9	3
Gain on sale of investment securities	1	–
Total extraordinary income	10	3
Extraordinary losses		
Loss on sale of non-current assets	0	13
Loss on retirement of non-current assets	13	5
Loss on valuation of investment securities	23	30
Provision of allowance for doubtful accounts	365	–
Other	–	0
Total extraordinary losses	403	50
Income (loss) before income taxes	5,332	(5,405)
Income taxes	2,533	492
Net income (loss)	2,799	(5,898)
Net income attributable to non-controlling interests	355	297
Net income (loss) attributable to owners of parent	2,443	(6,195)

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Quarterly Consolidated Statement of Comprehensive Income

(Millions of yen)

	Six months ended September 30, 2021 (From April 1, 2021 to September 30, 2021)	Six months ended September 30, 2022 (From April 1, 2022 to September 30, 2022)
Net income (loss)	2,799	(5,898)
Other comprehensive income		
Valuation difference on available-for-sale securities	(65)	204
Foreign currency translation adjustment	1,370	15,503
Remeasurements of defined benefit plans, net of tax	(264)	225
Share of other comprehensive income of entities accounted for using equity method	(2)	28
Total other comprehensive income	1,038	15,961
Comprehensive income	3,837	10,062
Comprehensive income attributable to		
Owners of parent	3,395	9,512
Non-controlling interests	441	550

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(3) Notes to Quarterly Consolidated Financial Statements

Notes Regarding Assumption of a Going Concern

Not applicable.

Notes for Significant Change in the Amount of Shareholders' Equity

(Acquisition of treasury shares)

The Company resolved at a meeting of the Board of Directors held on May 12, 2022 to acquire its treasury shares and, during the six months ended September 30, 2022, it acquired its treasury shares as follows.

- (1) Type of shares acquired Common shares of the Company
- (2) Total number of shares acquired 3,425,800 shares
- (3) Total amount of shares acquired ¥7,249,009,000
- (4) Period of share acquisition From May 13, 2022 to September 30, 2022
- (5) Method of share acquisition Open-market purchase on the Tokyo Stock Exchange (Includes purchase through the off-auction own share repurchase trading system (ToSTNeT-3).)

Application of Accounting Methods Specific to Preparation of the Quarterly Consolidated Financial Statements

Tax expense is calculated by rationally estimating the effective tax rate after application of tax-effect accounting to income before income taxes for the fiscal year including this second quarter, and then multiplying the income before income taxes for the period by the estimated effective tax rate.

Changes in Accounting Policies

(Application of Accounting Standard for Fair Value Measurement, etc.)

The Company has applied the "Implementation Guidance on Accounting Standard for Fair Value Measurement" (ASBJ Guidance No. 31, June 17, 2021) from the beginning of the first quarter ended June 30, 2022. Furthermore, in accordance with the transitional treatment prescribed in paragraph 27-2 of the Implementation Guidance on Accounting Standard for Fair Value Measurement, the Company will prospectively apply the new accounting policy prescribed by the Implementation Guidance on Accounting Standard for Fair Value Measurement. There is no impact on the quarterly consolidated financial statements as a result of this change.

Changes in Accounting Policy That Are Difficult to Make a Distinction from Changes in Accounting Estimates

(Change in the depreciation method for property, plant and equipment)

The Company and its consolidated subsidiaries in Japan had primarily adopted the declining balance method for the depreciation method on property, plant and equipment (excluding leased assets) in the past (However, the straight-line method has been used for buildings (excluding attached structures) acquired since April 1, 1998 and for attached structures and structures acquired since April 1, 2016), but changed this to the straight-line method from the beginning of the first quarter ended June 30, 2022.

This change is attributed to the reconsideration given to the method of depreciation on property, plant and equipment from the perspective of appropriately stating the profit and loss for the term and unified accounting policies for the Group. The stable operations of property, plant and equipment owned by the Company and its consolidated subsidiaries in Japan were considered to be reasons for this change. This also reflects that fact that the overseas ratio of the Group's production facilities has increased due to the accelerated development of the global business with the increase in market needs and as a result of revisions to the production system, including transfer of control for production items to overseas. As a result, since there is also thought to be fixed depreciation of property, plant and equipment owned by the Company and its consolidated subsidiaries in Japan, we decided to adopt the straight-line method as the depreciation method for property, plant and equipment as it is rational from the perspective of stating the profit and loss for the term and it more appropriately reflects the Group's management conditions.

Consequently, compared to the figures calculated by the previous method, the operating loss, ordinary loss and loss before income taxes each decreased by ¥296 million in the six months ended September 30, 2022.

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Segment Information

(a) Six months ended September 30, 2021 (from April 1, 2021 to September 30, 2021)

Information on net sales, profit (loss) by reportable segment

(Millions of yen)

	Reportable segments					Other (Note: 1)	Total	Reconcilia- tion	Amounts reported on the quarterly consolidated statement of income (Note: 2)
	Financial market	Retail and transportation market	Amusement market	Overseas market	Total				
Net sales									
(1) Sales to customers	17,852	23,558	5,754	54,850	102,016	1,138	103,154	—	103,154
(2) Intersegment sales or transfers	—	—	—	—	—	—	—	—	—
Total	17,852	23,558	5,754	54,850	102,016	1,138	103,154	—	103,154
Segment profit (loss)	3,196	2,010	(106)	1,354	6,455	(720)	5,735	—	5,735

Notes: 1. “Other” segment is merchandise and finished goods that is not included in the above reportable segments.
2. Segment profit (loss) corresponds to operating income of quarterly consolidated statement of income.

(b) Six months ended September 30, 2022 (from April 1, 2022 to September 30, 2022)

1. Information on net sales, profit (loss) by reportable segment

(Millions of yen)

	Reportable segments					Other (Note: 1)	Total	Reconcilia- tion	Amounts reported on the quarterly consolidated statement of income (Note: 2)
	Financial market	Retail and transportation market	Amusement market	Overseas market	Total				
Net sales									
(1) Sales to customers	15,362	20,764	5,228	69,511	110,868	1,274	112,142	—	112,142
(2) Intersegment sales or transfers	—	—	—	—	—	—	—	—	—
Total	15,362	20,764	5,228	69,511	110,868	1,274	112,142	—	112,142
Segment profit (loss)	(1,215)	(584)	108	(2,431)	(4,122)	(589)	(4,711)	—	(4,711)

Notes: 1. “Other” segment is merchandise and finished goods that is not included in the above reportable segments.
2. Segment profit (loss) corresponds to operating loss of quarterly consolidated statement of income.

2. Changes in reportable segments

(Change in the depreciation method for property, plant and equipment)

As stated in the “Changes in Accounting Policy That Are Difficult to Make a Distinction from Changes in Accounting Estimates,” the Company and its consolidated subsidiaries in Japan changed the depreciation method for property, plant and equipment (excluding leased assets) from the beginning of the first quarter ended June 30, 2022. As a result of this change, segment profit (loss) for the six months ended September 30, 2022 changed from the figures calculated by the previous method to increase in income of ¥22 million for “Amusement market” and to decrease in losses of ¥99 million for “Financial market,” ¥96 million for “Retail and transportation market,” ¥69 million for “Overseas market” and ¥8 million for “Other.”