FY2026/Q3 Financial Results

VELTRA Corporation | TSE Growth Market: 7048

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FY2026 Q3 Summary (CEO Message)

Q3 standalone results delivered higher revenue and significantly higher profit YoY. Operating profit exceeded plan, substantially narrowing the H1 shortfall against plan.

To Our Shareholders and Investors



Q3 (July–September) standalone revenue was JPY 1,478 million (YoY +10.5%), and operating profit was JPY 335 million, JPY 67 million above plan. Cumulative revenue was JPY 3,560 million (97.7% of plan) and operating profit was JPY 146 million, narrowing the shortfall against plan from ▲JPY 95 million at H1 to ▲JPY 28 million.

In the OTA business, revenue declined 0.9% YoY, yet operating profit rose to JPY 657 million (YoY +1.3%), and the Q3 cumulative operating margin remained high at 23.7% (prior year: 23.2%). Contributing factors were the recovery in domestic travel demand and lower personnel costs from organizational restructuring and the use of AI. We are also shifting to customer acquisition channels less dependent on search engines, such as our app and B2B.

In the Mobility Tech business (LINKTIVITY), cumulative revenue reached 107.0% of plan, up 23.0% YoY, and the operating loss narrowed from JPY 184 million to JPY 170 million. We have also begun turning upfront investment into recurring revenue, for example by operating direct-sales websites for clients.

There is no change to our full-year earnings forecast. We will continue to place “investment discipline” at the core of our management as we work toward achieving our full-year plan.

Wataru Futaki, President & CEO

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FY2026 Q3 Results Summary

Consolidated

In Q3, capturing travel demand and improving productivity brought progress back broadly in line with plan
Higher revenue and profit YoY

Revenue (Cumulative)

vs. plan 97.7%

3.56 billion yen

Q3 standalone: JPY 1,478M (vs. plan ▲24M)

Operating Profit (Cumulative)

vs. plan 83.5%

146 million yen

Q3 standalone: JPY 335M (vs. plan +67M)

By Segment

OTA captured peak-season demand; Mobility Tech continued to grow ahead of plan

OTA Revenue (Cumulative)

vs. plan 95.8%

2.77 billion yen

Mobility Tech Revenue (Cumulative)

vs. plan 107.0%

790 million yen

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FY2026 Quarterly Plan Progress

Q3 cumulative company-wide revenue reached 97.7% of plan. Q3 standalone operating profit landed at JPY 335 million, exceeding plan (JPY 268 million) by JPY 67 million and substantially narrowing the H1 shortfall against plan.

Revenue Achievement Highlights (Q1–Q3 Cumulative)

Revenue (Company-wide)
vs. Plan 97.7%

OTA Business

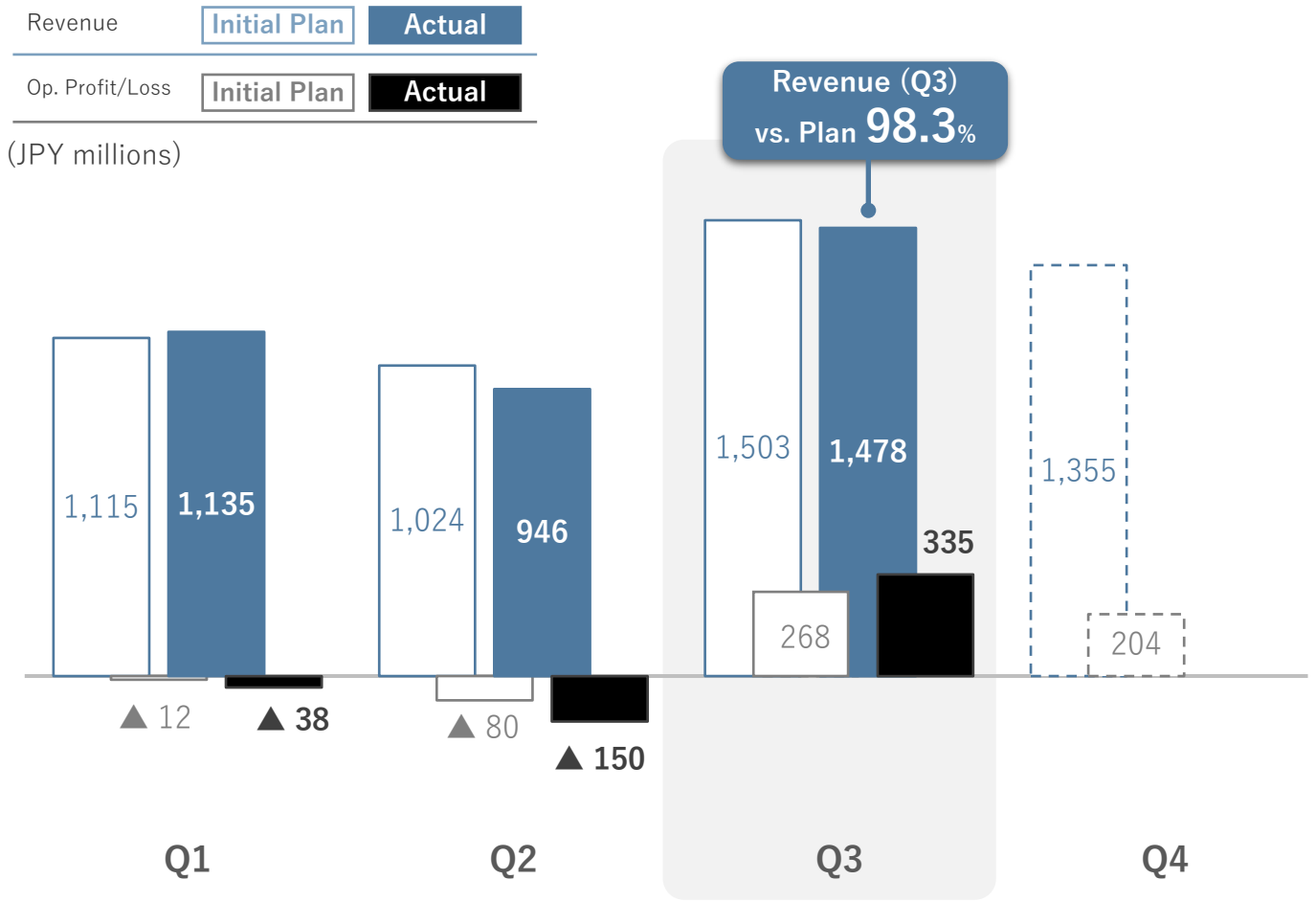
95.8%

Continuing to generate cash steadily despite ongoing external factors such as the Middle East situation

Mobility Tech

107.0%

Securing growth that outpaces plan even as inbound visitor numbers decline YoY



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PL Summary

Q3 cumulative revenue rose 3.6% YoY and operating profit rose 58.2%, delivering higher revenue and profit. The operating profit shortfall against plan narrowed to ▲JPY 28 million.

JPY millions	FY2025 Q3	FY2026 Q3	Chg.	YoY %	FY2026 Q3 Plan	vs. Plan	Achv.
Revenue	**3,438**	**3,560**	**+122**	**+3.6%**	**3,644**	**▲83**	**97.7%**
Operating Expenses	3,346	3,414	+68	+2.1%	3,469	▲54	-
Operating Profit	**92**	**146**	**+53**	**+58.2%**	**175**	**▲28**	**83.5%**
Ordinary Profit	87	122	+35	+40.7%	164	▲41	74.6%
Profit attributable to owners of parent	86	92	+6	+7.6%	67	+25	137.9%
Basic Earnings per Share (JPY)	2.35	2.53	+0.18	+7.7%	-	-	-

Extraordinary Items Recorded

Extraordinary Gain

- Gain on sale of TableCross Inc. shares: 72 million JPY

Extraordinary Losses

- Malaysia subsidiary closure (severance, legal fees, etc.): 56 million JPY
- LINKTIVITY fund outflow incident: 50 million JPY

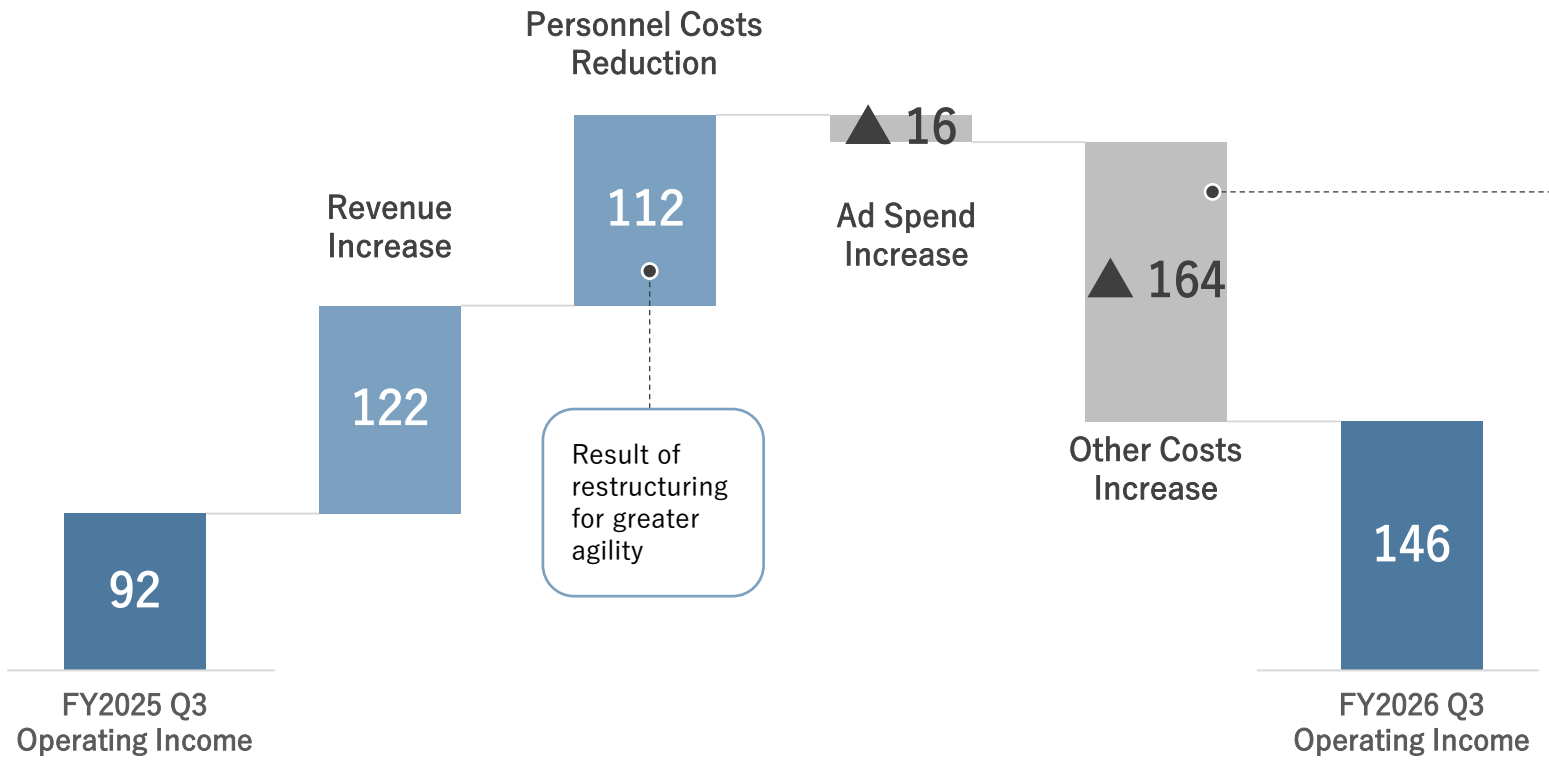
Distribution gains from the Malaysia subsidiary's residual assets will be recorded as liquidation progresses (approx. 80 million JPY in total)

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Operating Profit Variance Analysis

Revenue growth and lower personnel costs from restructuring our business organization absorbed increases in payment processing fees, server costs and other expenses.

Operating Profit Variance Analysis (JPY millions)



Key Drivers of Cost Increase

Mobility Tech Business

- Higher payment fees from transaction growth
  - ✓ Acting to lower fee rates
- Temporary rise in server costs from transaction growth
  - ✓ Acting to control server costs
- Cost of sales from system development and marketing support contracts
  - ✓ Booked as cost of sales; offset by the related revenue increase
- Higher amortization from expanded software investment
- Higher burden from size-based business tax

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FY2026 Q3 Segment Results (Cumulative)

OTA maintained its earnings base with operating profit of JPY 657 million (YoY +1.3%, operating margin 23.7%).

Mobility Tech continued to grow revenue (YoY +23.0%), and its operating loss narrowed from JPY 184 million to JPY 170 million.

OTA Business

Profit Driver

VELTRA

Revenue **2.77** B JPY

Operating Margin 23.7%

Revenue reached 95.8% of plan, continuing to generate cash steadily

Mobility Tech

Growth Driver

LINKTIVITY

Revenue **790** M JPY

YoY +23.0%

107.0% of plan despite a YoY drop in Jul–Sep inbound visitors (▲5%)

FY2026 Q3 (Cumulative) (JPY millions)	Segment		Total	Adjustments	Consolidated
	OTA	Mobility Tech			
Revenue	**2,774**	**786**	**3,560**	**-**	**3,560**
YoY	▲0.9%	+23.0%	+3.6%	-	+3.6%
Operating Profit	**657**	**▲170**	**487**	**▲340**	**146**
YoY	+1.3%	-	+4.9%	-	+58.2%
FY2025 Q3 (Ref.)					
Revenue	2,799	639	3,438	-	3,438
Operating Profit	649	▲184	464	▲372	92

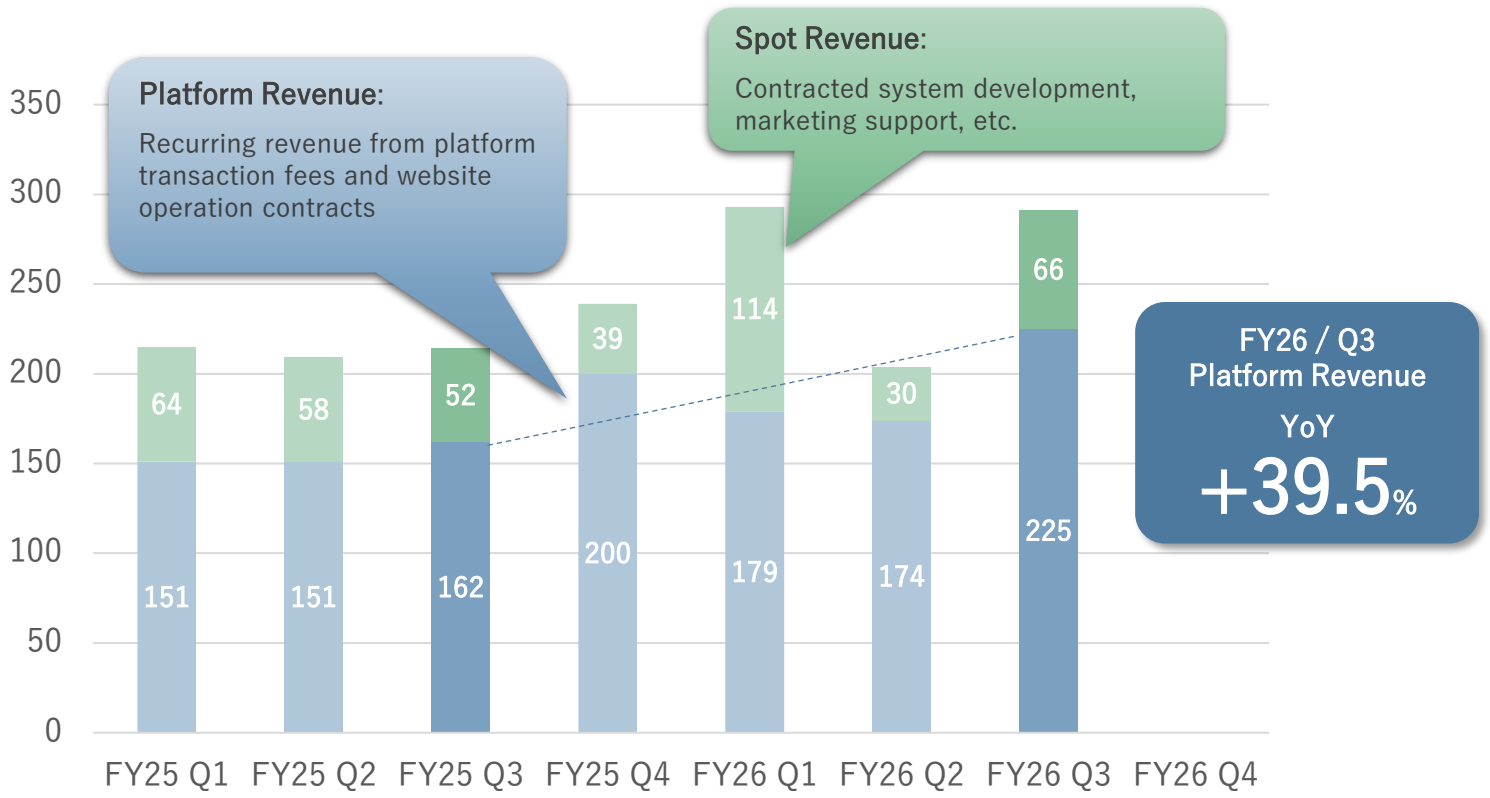
※ Reportable segments were reclassified from Q1 of this fiscal year to better manage and disclose business performance.
※ Segment revenue is shown after inter-segment transaction adjustments.
※ Adjustments of ▲JPY 340 million consist of inter-segment eliminations and corporate expenses (head office administrative costs not attributable to any reportable segment).

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Mobility Tech Business: Revenue Breakdown

Platform Revenue grew 39.5% YoY, supported in part by direct-sales website operation contracts. We have begun initiatives to turn contracted development into operation contracts (Platform Revenue) and are evaluating their potential to improve profitability.

Quarterly Revenue Trend by Type (JPY millions)



Platform Revenue keeps growing

Up from JPY 162M in FY2025 Q3 to JPY 225M (YoY +39.5%). Growth in suppliers and sales channels directly builds underlying revenue.

Expanding website operation contracts

Operating the TOKYO SKYTREE® domestic direct-sales website since Q2 and the Oigawa Railway Ikawa Line site since Q3 (both booked as Platform Revenue), turning contracted development into recurring revenue.

More operation contracts expected from Q4

Website operation for tourist facilities in Japan and overseas to begin; bookings expected to rise with new services and products.

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BS Summary

The equity ratio declined to 26.7% (▲1.6pt), reflecting the expansion of total assets as trade receivables and trade payables increased with higher transaction volume in the peak season. The equity ratio excluding advances received was 34.6%. Interest-bearing debt remains at zero.

Balance Sheet

JPY millions	FY2025	FY2026 Q3	Change	Details
Current Assets	8,336	9,005	+668	Cash and deposits ▲688M, trade receivables +357M, securities +698M
Cash and Deposits	5,686	4,998	▲688	
Fixed Assets	986	1,236	+250	Software +26M, software in progress +217M
Total Assets	**9,323**	**10,241**	**+918**	
Current Liabilities	6,353	7,225	+872	Trade payables +624M, advances received +243M
Interest-bearing Debt	0	0	-	
Non-current Liabilities	0	0	-	
Total Liabilities	**6,353**	**7,225**	**+872**	
Total Net Assets	**2,969**	**3,016**	+46	Retained earnings +92M, non-controlling interests ▲52M
Equity Ratio	**28.3%**	**26.7%**	**▲1.6pt**	
(Excl. Advances Received)	36.4%	34.6%	**▲1.8pt**	

※ Due to the nature of our business model, the equity ratio tends to decline as performance improves and advances received increase; we therefore present the equity ratio excluding advances received as a reference metric.

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Strategic Progress Summary: Initiative Execution Status

OTA prioritized B2B expansion of its cruise business, while Mobility Tech prioritized expanding suppliers and sales channels.

Both progressed steadily, and we also secured new revenue opportunities such as direct-sales website operation contracts.

Area	Initiatives Outlined through Q2	Q3 Progress	Status
OTA | Organization	Eliminate offshore development (Malaysia)	■ Company-wide personnel costs down JPY 112M YoY (Q3 cumulative) ■ AI in customer support also improved organizational efficiency	Complete
Priority OTA | Cruise	B2B provision of cruise booking system (JST / Yomiuri Travel)	■ Partners expanded from 2 to 7, and courses offered grew to approx. 10,000	In Progress
OTA | New	MOU with Big Bus Tours	■ Discussions continuing toward selecting candidate cities and partner operators	In Progress
Priority Mobility Tech | Foundation	Expand suppliers and sales channels (FY2025: 710 / 492 companies)	■ Suppliers: 753 companies (vs. FY2025-end +43) / Sales channels: 538 companies (vs. FY2025-end +46), steadily building barriers to entry	In Progress
Mobility Tech | Overseas	East Asia expansion centered on the Korean subsidiary	■ Negotiating contracts with major railway operators and tourist facilities in Korea	In Progress
Mobility Tech | New	-	■ Operation of the TOKYO SKYTREE® domestic direct-sales website (Apr) ■ Operation of the Oigawa Railway Ikawa Line direct-sales website (Jul) ■ System support for GO × Huawei “Quick App” integration (Aug)	New
Management Foundation	Tighten subsidiary management systems Renew the management structure	■ Reviewed internal control processes and strengthened monitoring functions ■ Strengthened group-wide governance incl. subsidiaries	In Progress

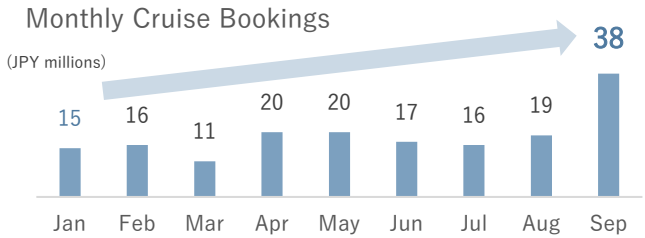
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Q3 Topics: Expanding Our Revenue Base

In OTA, VELTRA Cruise bookings hit a record high. In Mobility Tech, direct-sales website operation contracts for tourist facilities expanded.

OTA Business: VELTRA Cruise

Monthly bookings hit a record high



vs. January
2.5x
Record high

Key KPIs & Growth Drivers

■ **B2B partners**
7 (Q2: 2)

■ **Courses offered**
~10K (approx. 2x YoY)

■ **Ad spend** Flat, as SEO, newsletters and repeat visitors drive more site traffic

News

- Launched a dedicated shore excursion website (https://shore.veltra.com/)

※ Revenue is recognized at embarkation (avg. ~180 days after booking)

Mobility Tech Business

NEW

Operating direct-sales sites
Aiming for recurring revenue



Overview of Initiatives

- TOKYO SKYTREE® direct-sales site (from Apr)
- Oigawa Railway Ikawa Line direct-sales site (from Jul)
- Preparing more contracts with popular facilities in Japan and East Asia

➡ From contracted development to recurring revenue

Challenges

- DX of ticket sales for tourist facilities
- Building direct-sales channels to diverse travelers, including inbound visitors

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The World We Aim to Create as the VELTRA Group

2030 Mid-Term Vision

A comprehensive solutions company addressing every travel challenge

Shifting the core of our business from “selling travel-related products” to “solving challenges”

Profit Pillar OTA Business

For domestic and international travel,
discovering and providing experiences and activities (“points”)



Business Mission

Accompanying every moment of travel, connecting experiences and travelers worldwide to co-create a better cycle of travel

Business Assets FY2025

- Members: 2.85M / Tour Operators: approx. 9,000 companies
- Products: 22,000 types (150 countries)

Growth Pillar Mobility Tech Business

Connecting inbound travelers’ tourism resources through transportation (“lines”), a B2B platform that resolves travel challenges



Business Mission

Removing all barriers to movement and experience,
building infrastructure that lets everyone express their own journey

Business Assets FY2025

- Suppliers: 710 companies (vs. prior year +164)
- Sales Channels: 492 companies (vs. prior year +67)

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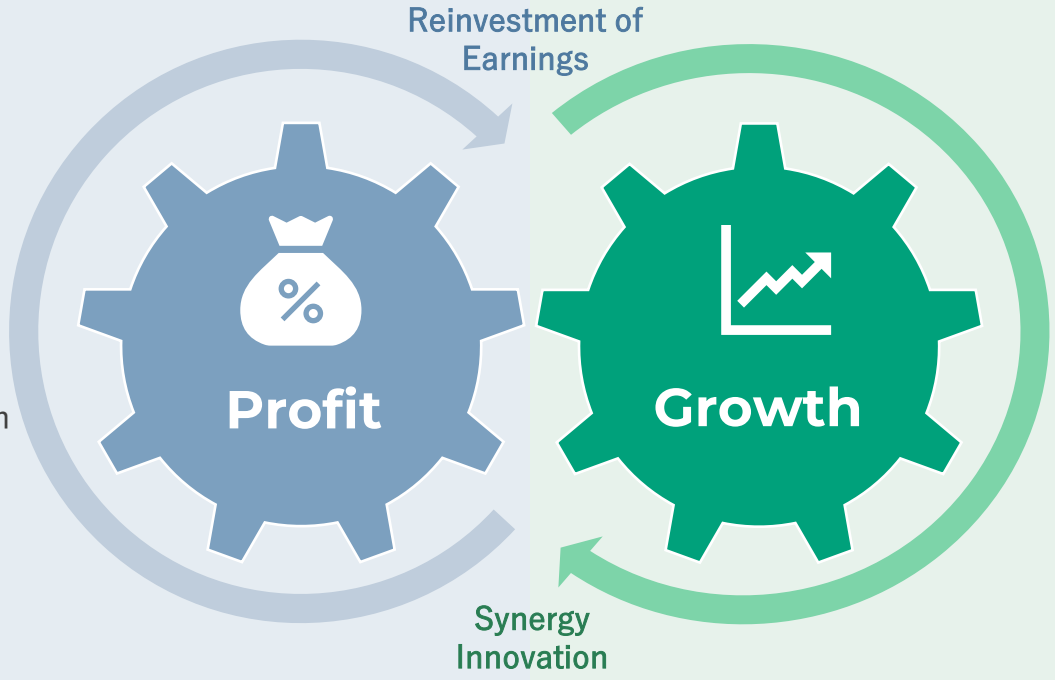
“Dual Engine” Value Creation: The Foundation Supporting Company-wide Growth

The highly profitable OTA business (VELTRA) and the growth-driving Mobility Tech business (LINKTIVITY) — 2 core businesses maximize company-wide capital efficiency and underpin growth. We continue building our revenue base with these two engines.

OTA Business

B2C/Profit Engine

- Operates local experience activity booking sites VELTRA and HawaiiActivities
- Role: Maintain High Profitability / Cash Generation
- Track record: Q3 cumulative operating margin remained high at **23.7%**



Mobility Tech Business

B2B/Growth Engine

- Transportation & tourism facility DX / Sales Channel Expansion Platform
- Role: Expand Market Share Building Tourism Infrastructure
- Track record: 2-year CAGR **36.2%**

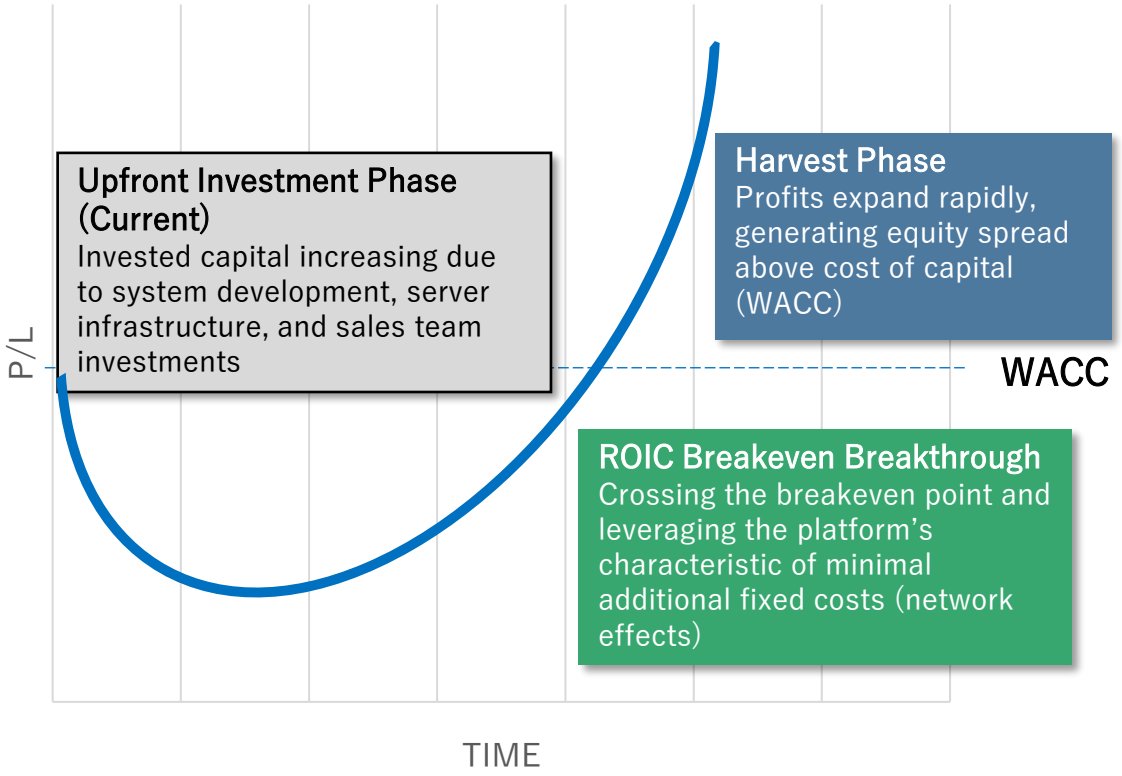
  Rapid growth as inbound tourism infrastructure (FY2025)

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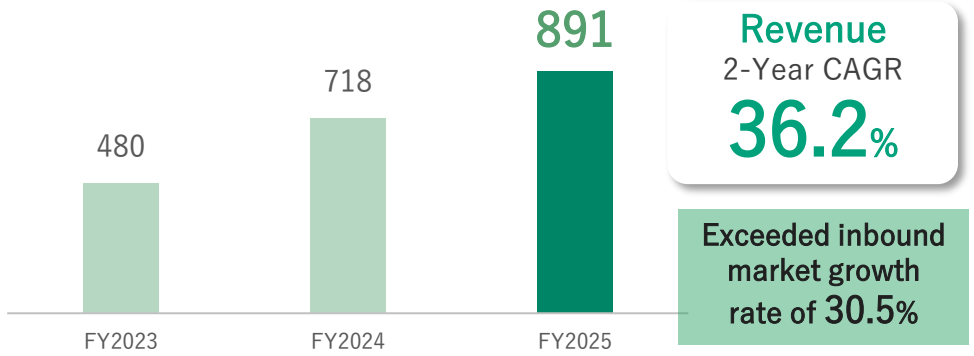
Mobility Tech Business Continues Its Upfront Investment Phase

Continuing upfront investment to build a dominant position as a transportation/tourism infrastructure DX platform. Revenue reached 107.0% of plan even as inbound visitor numbers declined YoY. Q3 standalone operating loss narrowed from ▲JPY 68 million in the prior year to ▲JPY 26 million.

LINKTIVITY Business J-Curve



LINKTIVITY Revenue Trend (JPY millions)



Platform Foundation Expansion (FY2025)

Suppliers
710 companies
(YoY+164 companies)

×

Sales Channels
492 companies
(YoY +67 companies)

Network effects strengthen as domestic and overseas facilities and sales channels expand, steadily building barriers to entry

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FY2026 Earnings Forecast

Advancing the transition to a “profit-drives-growth” structure, targeting operating profit +262% YoY. Although Q3 cumulative operating profit was slightly below plan, we expect the effects of cost structure reform to continue, and there is no change to our earnings forecast at this time.

JPY millions	FY2025	FY2026	YoY %	Change
Revenue	4,581	5,000	+9%	+419
Operating Expenses	4,476	4,620	+3%	+144
Operating Profit	**105**	**380**	**+262%**	**+275**
Ordinary Profit	99	366	+268%	+267
Profit attributable to owners of parent	140	340	+142%	+200

Toward a Profit-led Growth Model

Revenue Growth +9% × Profitability Improvement Structural Reform = Profit Growth +262%

Rather than relying solely on top-line maximization, reinvesting generated profits (cash) into growth areas.

※ For FY2026, the following extraordinary items are planned, with minimal impact on net profit.

[Extraordinary Gains] Gain on sale of TableCross Inc. shares; distribution gains from Malaysia subsidiary closure

[Extraordinary Losses] Loss from LINKTIVITY fund outflow incident and severance and legal fees from Malaysia subsidiary closure

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Appendix

FY2026 Strategic Policy / Changes to Reporting Segments / VELTRA Cruise B2B Expansion	P.18
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Strategic Policy for FY2026

Strategic “selection and concentration” to maximize the high profitability of the main OTA business.

Promote reinvestment in growth opportunities and transform into a leaner management structure.

1 Disciplined Cost Control → 2 Maximize profit margins → 3 Reinvest in growth areas

OTA Business

Maximizing CF and expanding business areas by leveraging assets

Improve organizational agility

Restructuring of the business structure:
Elimination of offshore development (Malaysia).
Full-scale introduction of an autonomous cross-functional model throughout the company.

Maximizing Operating Leverage

We will concentrate resources on winning markets, products, and UX, and increase investment efficiency to the limit.

AI and new business utilization of data assets

Strengthening the cruise business by leveraging its customer base.
Monetizing data assets with AI support.

Mobility Tech

Balancing service expansion and revenue expansion

Stable growth scenario

Inbound demand is estimated conservatively. Growth was secured by strengthening existing sales networks.

Monetization of the platform business

While continuing to expand the product lineup, we will enter the profit securing phase.

Selection and concentration of development resources

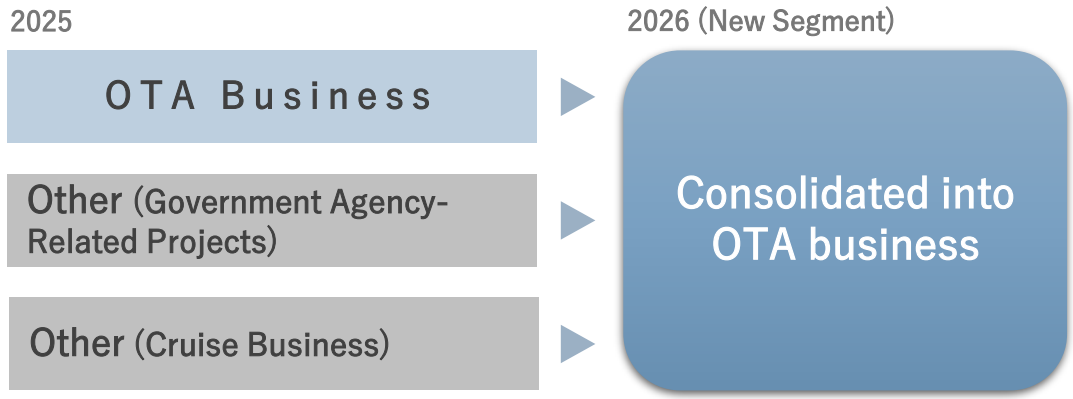
In anticipation of an uncertain market environment, we have restrained the development of new services.

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Changes to Reporting Segment Classification and Business Name

To better present the actual business situation, we have changed the classification of reporting segments and changed the business name in line with the shift in business definition.

Change in Reporting Segment Classification



- Consolidation of government and agency-related projects: As the company shifted to a system that strengthened collaboration with domestic businesses and enhanced added value through experience provision, it was consolidated into OTA businesses.
- Cruise business: To utilize the existing OTA membership base and pursue sales synergies, the organization was integrated and disclosed to include the OTA business.

* The segment performance figures for 2025 have also been restated to reflect the new segments to match the new reporting segment categories

Change of Business Name and Objectives



■ Business that Eliminates Mobility Barriers for Travelers

Beyond DX for public transport and tourist facilities, the core value of this business lies in resolving traveler pain points across the entire journey—from transit to admission and activity participation.

■ Clarifying the Core Focus and Growth Areas

Rebranded from “Tourism IT Business,” which was easily misunderstood as a mere IT provider, to a name that clearly reflects the expansion into areas such as Triplabo Kiosk and highlights the growth potential of this business.

■ Establishing a Second Core Business Alongside the OTA Business

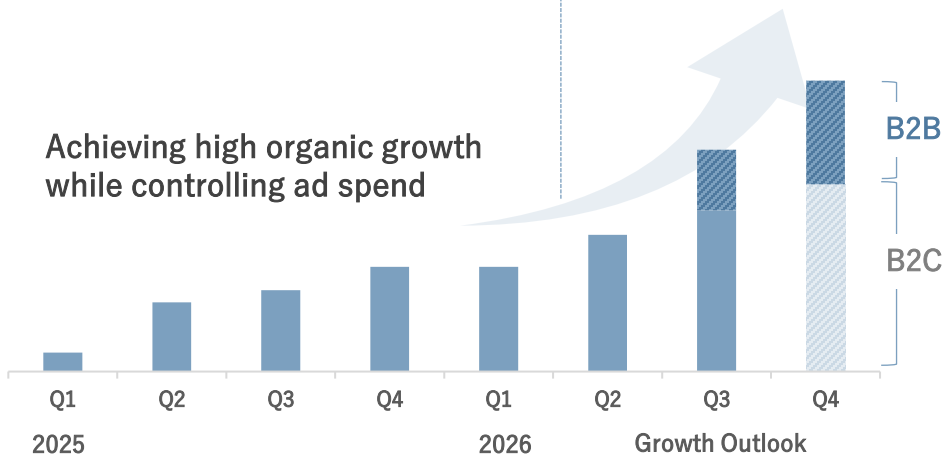
Positioning Mobility Tech as our second core pillar: connecting travel experiences seamlessly as a “line” (from mobility to participation), alongside our OTA business, which provides experiences as “points.”

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OTA Business (VELTRA Cruise): B2B Full-scale Expansion

Began offering VELTRA Cruise’s booking system to major travel agencies as a B2B white-label solution. Expanding reach to partners' massive customer bases while reducing acquisition costs.

Cruise Booking Volume Trends and Growth Outlook



Accelerating B2B partnerships from 2026

2026 Feb Partnership launched with overseas travel specialist JST

→Integration with specialized consulting

2026 Apr Partnership launched with Yomiuri Shimbun Group’s Yomiuri Travel

→Connecting to a nationwide customer base

B2B Expansion: Strategic Value Created

Improved Margins

Direct access to partners' vast existing active member bases without proprietary ad spend. Strongly driving OTA business margin improvement.

Economies of Scale

Deploying an already-completed system laterally minimizes additional development costs. A high-margin model where revenue growth directly translates to profit.

Strong Partner Synergies

Combining Yomiuri Travel’s nationwide customer base and JST’s face-to-face consulting expertise with VELTRA’s online booking DX capabilities to reach new customer segments.

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Mobility Tech (LINKTIVITY): Tourism Infrastructure Linked to Global Sales Networks

LINKTIVITY is a B2B platform connecting Japan's transportation and tourism facilities with travel agencies worldwide.
Its strength as infrastructure supplying inventory to over 530 channels worldwide sustained growth, with Q3 cumulative revenue at 107.0% of plan.

Service Providers

Major Japanese transportation & tourist facilities

- Railways / Shinkansen
- Route Buses
- Tourist Facilities
- Ferries
- Museums / Galleries
- Activities

E-Ticket System (QR Code)
Inventory Mgmt System
Sales & Settlement System
Product Planning

LINKTIVITY



VALUE

Promoting DX and digitization for transportation operators, tourism businesses, and municipalities, connecting them to all sales channels to drive transportation/tourism usage and regional revitalization.

B2B Booking Platform
Operator Direct Sales Solutions

Distributors

Connected to Japanese & global B2B sales networks

- Travel Agencies/OTA
- Airlines/Hotels
- IT Platform
- MaaS

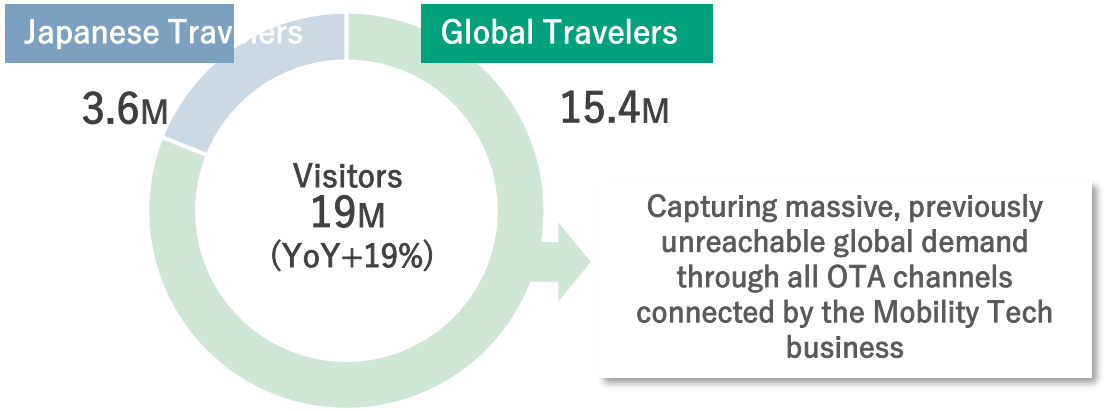
- Operator Website (Direct Sales Service)

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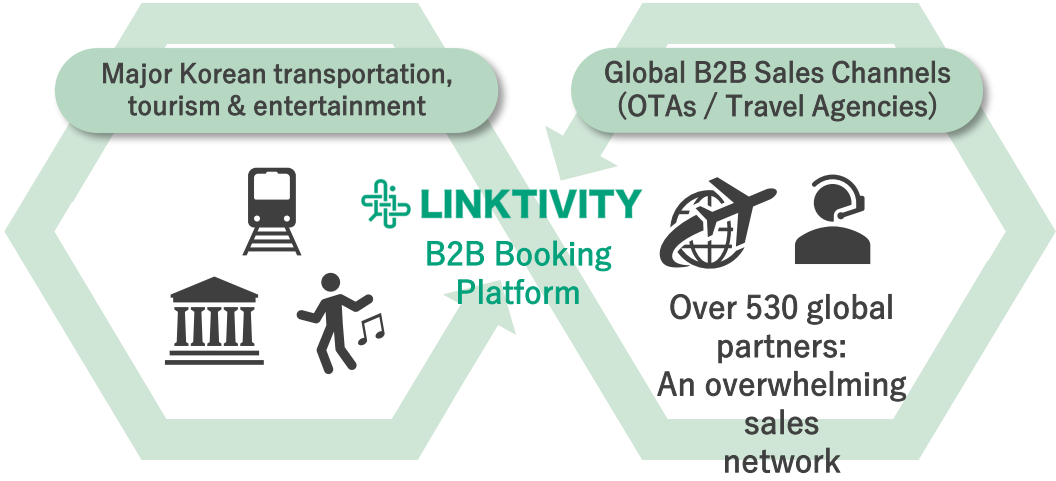
Mobility Tech (LINKTIVITY): East Asia Expansion (Korean Market)

Leveraging our Korean subsidiary (LINKTIVITY KOREA INC.), we are scaling up, as a B2B platform, the supply of Korean inbound products to global sales networks (over 530 channels), aiming to build tourism DX infrastructure across East Asia.

Korean Inbound Market (2025)



Global Tourism DX Hub: LINKTIVITY



3 Strategic Advantages

1 Massive Market Expansion

Targeting not just the Japanese market (3.6M annually) but the 15.4M multinational market. Accelerating broad-based expansion by leveraging the Mobility Tech business's global network.

2 Maximizing Capital Efficiency

Reusing core systems already built in Japan. Minimizing additional development investment and achieving revenue expansion in new markets with high marginal profit margins.

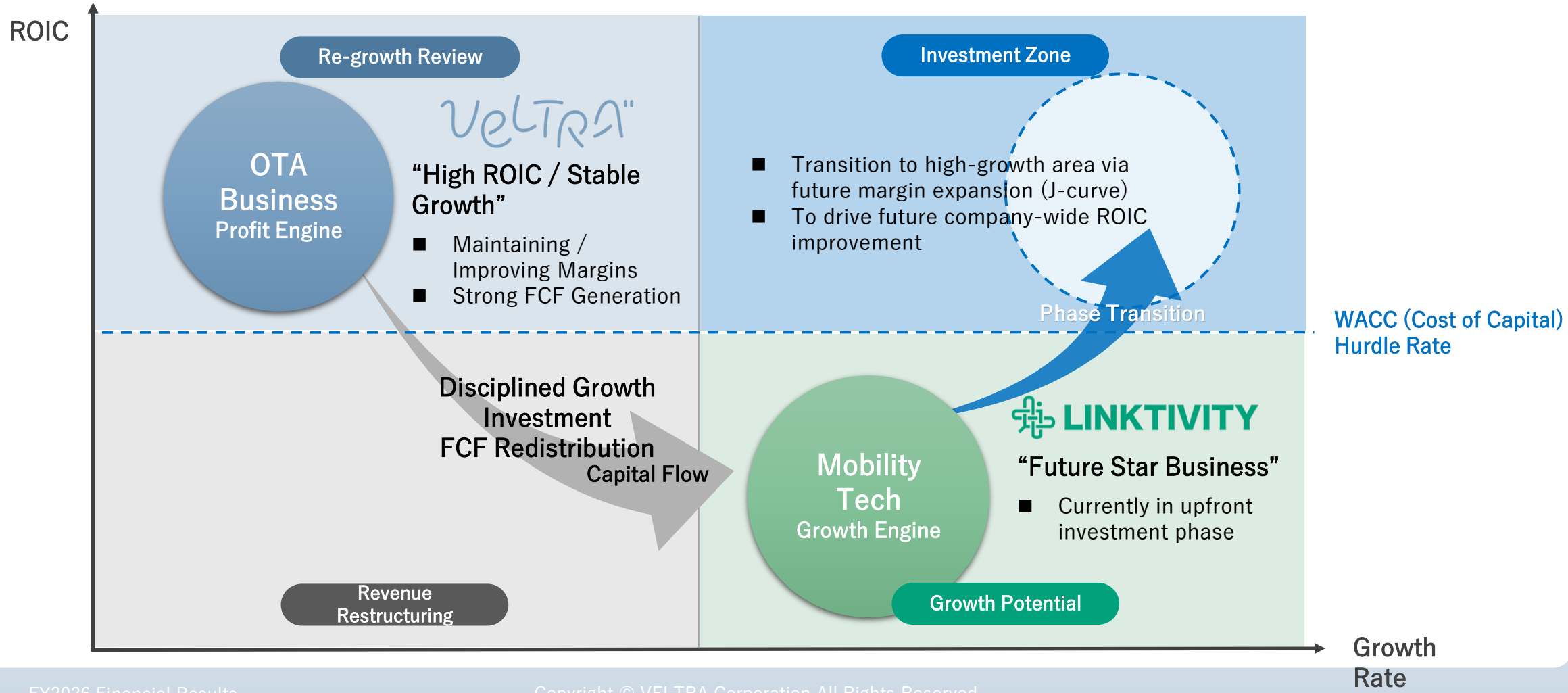
3 Ecosystem Development

Functioning as a procurement platform available to OTAs worldwide. A model where sales increases at other OTAs directly translate to revenue growth for the Mobility Tech business.

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Disciplined Capital Allocation: Focused Investment in “Growth Areas”

To maximize corporate value, we visualize capital efficiency (ROIC) and growth rate by business, executing disciplined capital allocation and portfolio management. This fiscal year’s strategic investments are concentrated in the area expected to yield the highest returns (LINKTIVITY infrastructure development).

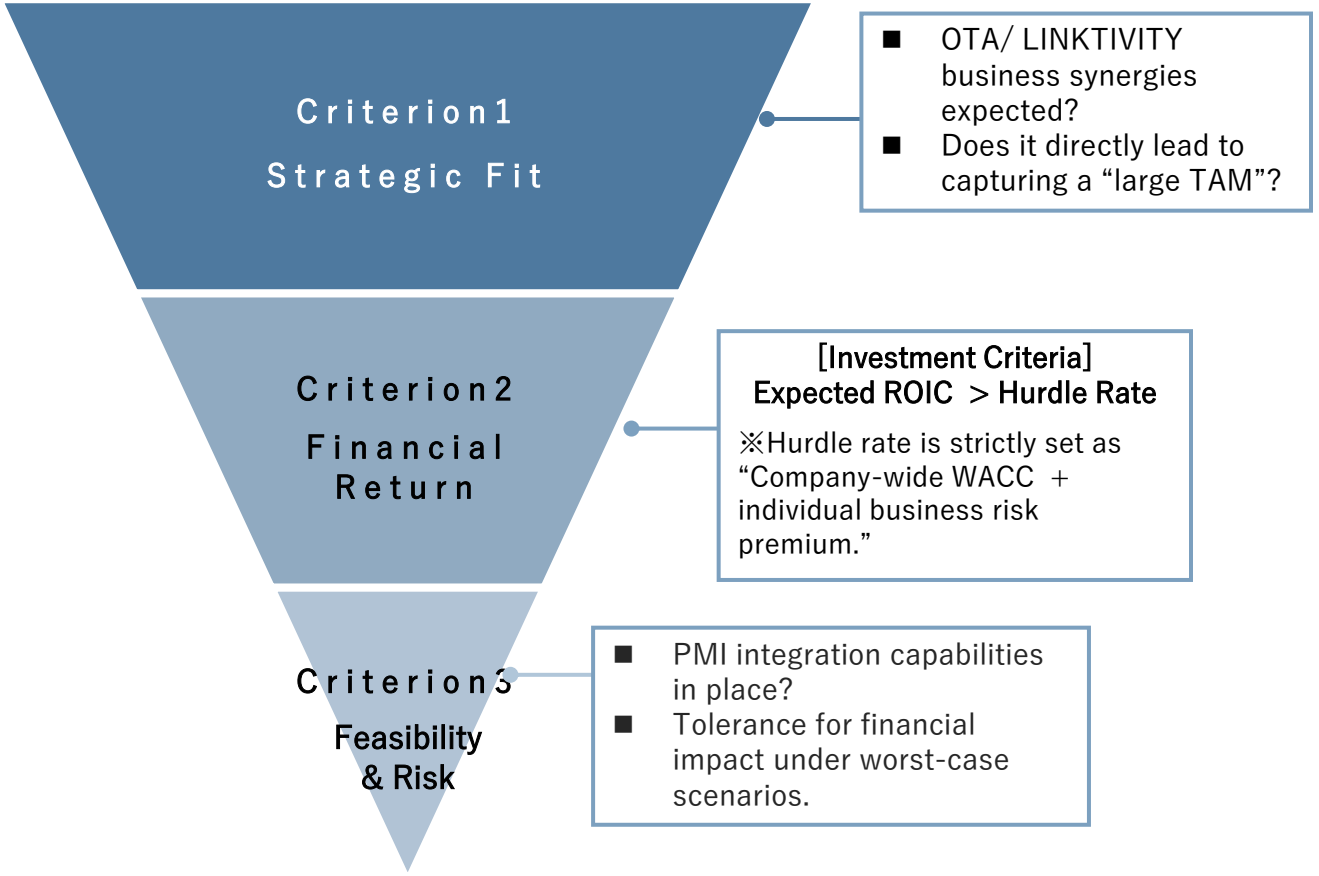


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Enforcing Investment Discipline: Risk Management Supporting “Proactive Investment”

To continuously enhance corporate value, we have codified “entry discipline” for new investments and “exit discipline” for existing projects, ensuring capital efficiency-conscious management. Strict investment discipline prevents destruction of corporate value.

Entry Discipline (3 Criteria for New Investments)



Exit Discipline (Monitoring & Exit Rules)

1. Regular Monitoring

Post-investment, periodically measuring progress vs. plan and actual ROIC.

2. Improvement Phase

Trigger:	Action:
Actual ROIC falls below WACC for a sustained period, or deviates by X% from the initial plan.	Formulate a fundamental improvement plan and intensify monitoring with defined deadlines.

3. Exit / Divestiture Decision

Trigger:	Action:
If ROIC is unlikely to exceed the hurdle rate (WACC) within the improvement deadline.	Mechanically and swiftly decide on business sale, downsizing, or exit. Recovered funds are reallocated to the next growth area.

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Strengthening Corporate Governance

Strengthen governance from both the “proactive” and “defensive” sides. We will review the formal plan and move to a highly effective management system that can respond immediately to changes in the environment.

Sustainable growth and increased profitability

Action **Transition to a cross-functional organization**

- Realizing a lean, high performance organization.
- Faster decision-making and optimized cost structure

To a capital-efficient system that not only grows but also generates profits.

Risk Management and Misconduct Prevention

Action **Tightening of the subsidiary management system**

- Review the entire internal control process and strengthen monitoring functions.

Eliminate the risk of governance vulnerabilities and rebuild the foundation for stable growth.

Ensuring Transparency and Fairness

Action **Transition to Interactive IR**

- Optimizing Disclosure
- Strengthening two-way dialogue with individual investors

Increase management transparency and restore trust from stakeholders.

Based on the policy, we fundamentally reviewed the approach to management planning.

Review and new operation of the Medium-Term Management Plan (2025-27)

Reviewing the publication of the fixed three-year plan, with maximum emphasis on effectiveness and flexibility.

Enhancement of Budget vs. Actual Management	We will thoroughly improve the accuracy of the annual budget and strengthen our current business execution capabilities.
Agile Strategy Updates	For faster decision-making, flexible revision of strategies in response to changes in the market environment.

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Company Profile

We operate two major travel tech businesses: an OTA business (VELTRA) focusing on “experiences” at travel destinations, such as local tours, activities, and transportation; and a transportation and tourism DX (Mobility Tech business / LINKTIVITY) in Japan and Asia.

Company Profile

Company Name	VELTRA Corporation	
HQ	2-13-12 Nihonbashi, Chuo-ku, Tokyo	
Capital	2,078.68 million yen (as of September 30, 2026)	
Founded	November 1991 (VELTRA.com business started in April 2004)	
Fiscal Year	December	
Employees	Head Office 127 (205) *including temporary staff Consolidated 209 (311) As of September 30, 2026	
Subsidiaries	[U.S. (Hawaii)] [Japan] [Korea]	VELTRA Inc. Linktivity Inc. LINKTIVITY KOREA INC.
Sales Office	Bangkok, Thailand	

Business Category

Experiences, Tours & Activities

- Outbound Travel
- Domestic Travel
- Corporate Services

Ticketing Platform

- Sales System for Railways and Facilities (B2B)

You can also check the company details from the link below.

About VELTRA

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Notes

The information contained in this document includes forward-looking statements such as earnings forecasts and business plans. This information is based on information currently available to the Company and certain assumptions that we believe to be reasonable, and involve risks and uncertainties. Please note that we do not guarantee its realization or future performance, and actual results may differ from these forward-looking expectations.

In the event of new events or changes in the situation that occur in the future, we do not plan to update or revise the description of this material.

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