

Financial Results Briefing for Q2 FY2023

May 12, 2023



This report contains forward-looking statements on business performance based on the judgments, assumptions, and beliefs of management using the information available at the time. Actual results may differ materially due to changes in domestic or overseas economic conditions or changes in internal or external business environments or aspects of uncertainty contained in the forecasts, latent risks or various other factors. In addition, risk and uncertainty factors include unpredictable elements that could arise from future events.

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Financial Results Overview for Q2 FY2023

Financial highlight

1

- Operating income declined and was below the forecast. Main cause: Loss-making projects in DX support business for major companies.
- Net sales: ¥13,613 million (+¥638 million, YoY, Performance forecast comparison: +¥913 million)
- Operating income: ¥(18) million (-¥617 million, YoY, Performance forecast comparison: -¥218 million)
- Ordinary income: ¥187 million (-¥105 million, YoY, Performance forecast comparison: +¥187 million)
- 2 The full-year forecasts are revised. (only operating income is revised downward)
 - Net sales: ¥26,800 million (Compared to the previous forecast +¥800)
 - Operating income: ¥200 million (Compared to the previous forecast -¥600)
 - Ordinary income: ¥400 million (Previous forecast unchanged)
- 3 Healthcare business and School DX business: Results improved as planned. Other business: Loss-making projects in the DX support business for major companies continued being dealt with the aim of winding them down in the course of this fiscal year.

Consolidated P/L

Net sales : increased Operating income : decreased

			(Unit : Mil yen)
	FY2022	FY2023	YoY
	Q2	Q2	Amount Percentage Q1: Posting of spot
Net sales	12,975	13,613	+638 +4.9% sales of the video- streaming service
Cost of sales	3,814	4,481	+666 +17.5%
(ratio)	29.4%	32.9%	Posting of spot cost of
Gross profit	9,160	9,132	(28) (0.3)% sales of the video-
(ratio)	70.6%	67.1 %	streaming service
SG&A	8,561	9,151	+589 +6.9%
(ratio)	66.0%	67.2 %	outsourcing expenses.
Operating income	599	(18)	(617) -% (School DX business)
(ratio)	4.6%	-%	Increase in advertising expenses (AdGuard)
Ordinary income	292	187	(105) (36.1)%
(ratio)	2.3%	1.4%	Q1: Posting of income
Profit attributable to owners of parent	123	(326)	(449) -% •taxes associated with the transfer of shares between Group
(ratio)	1.0%	-%	companies

Consolidated SG&A :

Advertising expenses and outsourcing expenses : increased

	FY2022	FY2023	Yo	Y	
	Q2	Q2	Amount	Percentage	
SG&A	8,561	9,151	+589	+6.9%	
Advertising expenses	758	1,016	+258	+34.1%	 Increase in sales promotion costs for AdGuard
Personnel expenses	3,835	3,947	+111	+2.9%	
Commission fee	1,538	1,491	(46)	(3.0)%	Stricter requirements for the posting of
Subcontract expenses	885	1,041	+156	+17.6%	software assets (School DX business)
Depreciation	633	591	(42)	(6.6)%	
Other	909	1,062	+153	+16.8%	

(Unit : Mil yen)



(Reference) Income tax-related settlement of gains on sale of shares in Boshimo Ltd.

Non-consolidated settlement

Contributing to increase of ¥1,096 million in profit

Gain on sale of shares of subsidiaries: ¥1,579 million Income taxes: ¥483 million

Consolidated settlement

Contributing to decrease of ¥483 million in profit

Gain on transfer of shares: ¥0 million (Consolidated elimination) Income taxes: ¥483 million (Deferred income taxes will not be posted)

Difference between earnings forecast and the actual for Q2

Net sales : Posting of spot sales of the video-streaming service. Operating income : Measures to deal with loss-making projects in DX support business (increase in cost of sales), decrease in orders received in AI business. Ordinary income : Recording of equity method investment income. Profit attributable to owners of parent : Recording of gain on change in equity (extraordinary income).

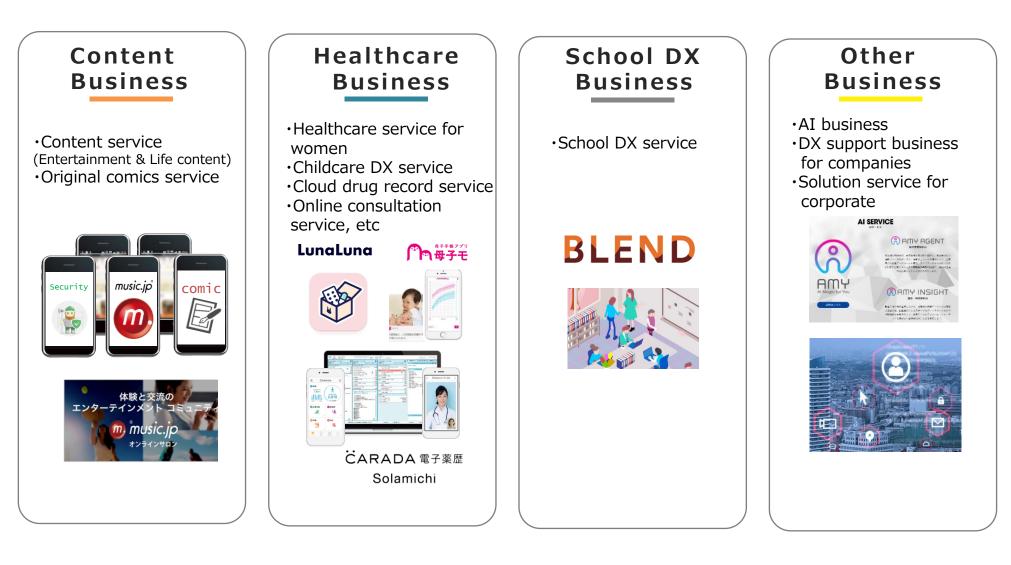
FY2023 H1 Difference The latest Actual Amount earnings forecast 13,613 12,700 +913Net sales (18)200 (218)Operating income 187 0 +187Ordinary income Profit (loss) attributable (326)(740) +414to owners of parent

Revision of earnings forecast of FY2023

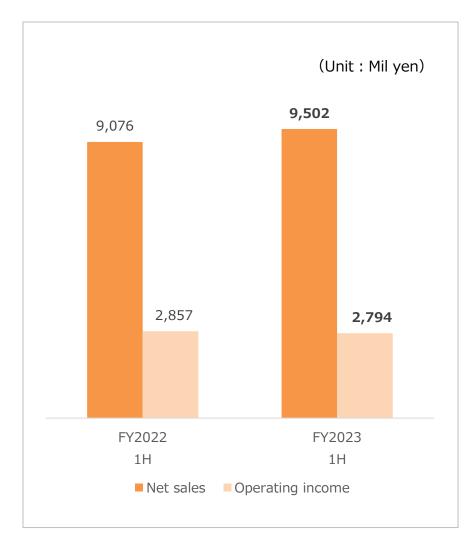
Net sales : Posting of spot sales of the video-streaming service. Operating income : Measures to deal with loss-making projects in DX support business (increase in cost of sales), decrease in orders received in AI business. Ordinary income : Recording of equity method investment income. Profit attributable to owners of parent : Recording of gain on change in equity (extraordinary income).

	FY2023	Difference	
_	The latest earnings forecast	Forecast this time	Amount
Net sales	26,000	26,800	+800
Operating income	800	200	(600)
Ordinary income	400	400	-
Profit (loss) attributable to owners of parent	(600)	(400)	+200

Performance by segment



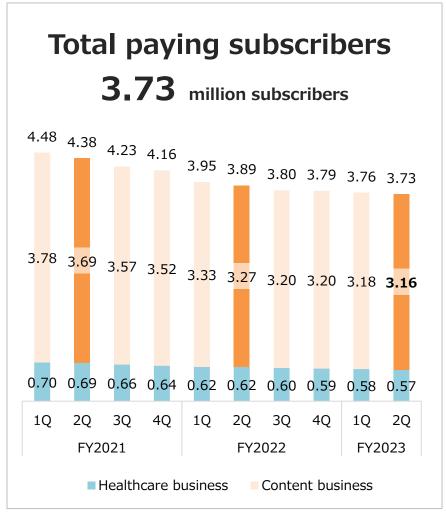
Content business: Net sales and operating income



Net sales increased, and the profit slightly decreased

- + : Posting of spot sales of the video-streaming service (Q1)
- The number of paying subscribers decreased Advertising expenses increased

Content business: The number of paying subscribers



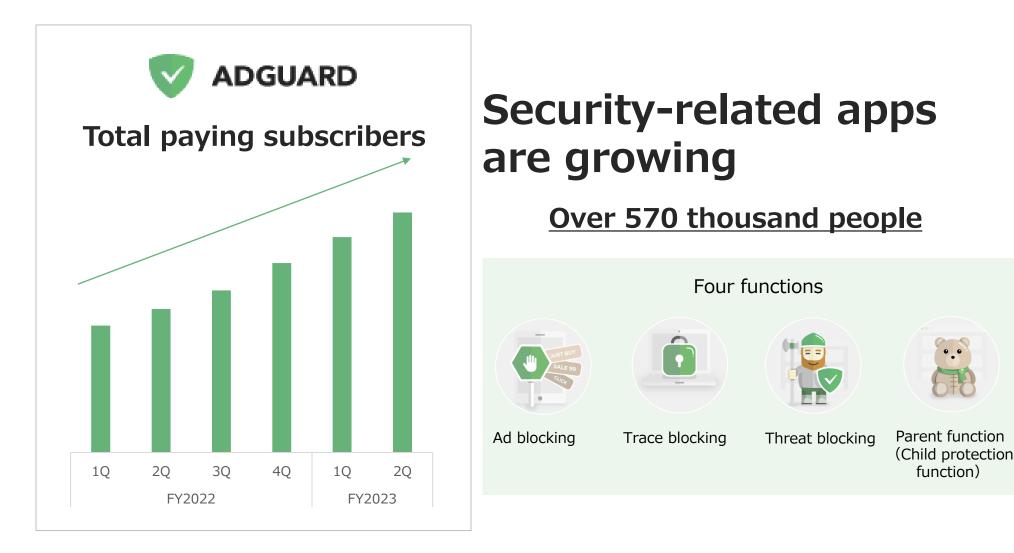
Degree of decrease is being reduced

- Brisk Security-related apps
- Mostly unchanged from the previous quarter

* The number of paying subscribers are including healthcare business 'Luna-luna and 'Caradamedica' whose business model are monthly paid business above.

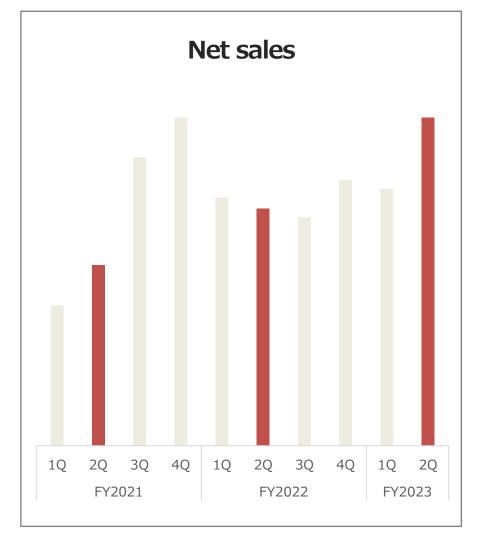


Content business: Security-related app



function)

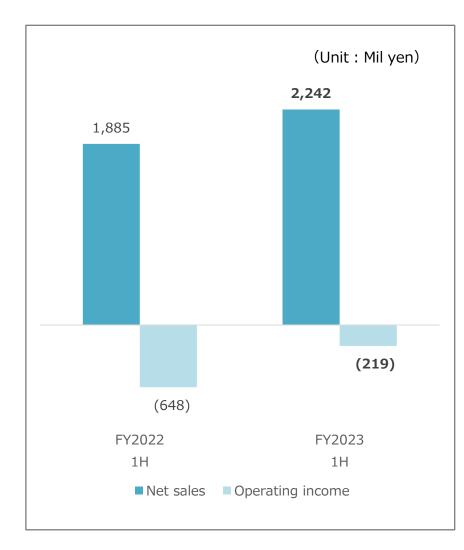
Content business: Original comics content business



Stable growth

The serialization of hit titles contributed Keep in comic titles introduced

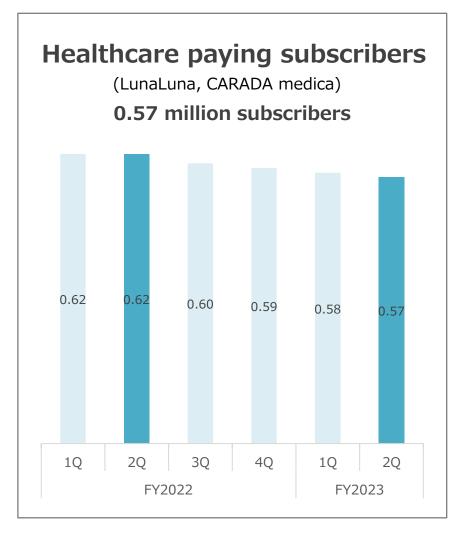
Healthcare business: Net sales and operating income



Net sales increased, and the loss decreased

- +: <u>Cloud drug record</u> <u>service going well</u>
- +: Brisk Childcare DX services
- -: The number of paying subscribers decreased

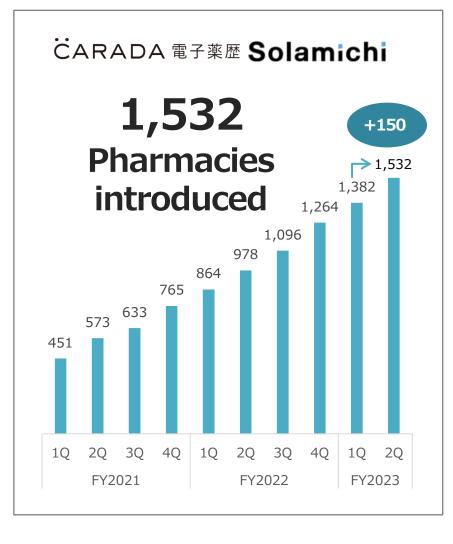
Healthcare business: The number of paying subscribers



Mostly unchanged from the previous quarter

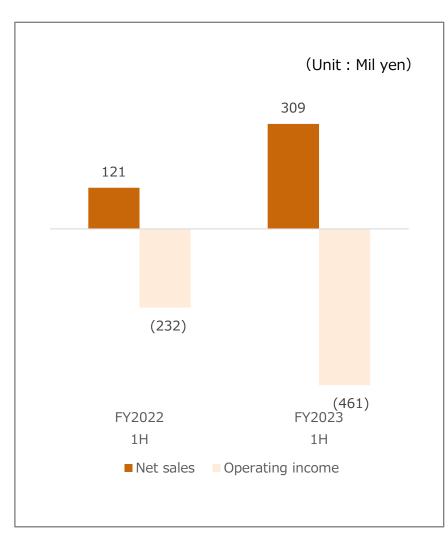


Healthcare business: Cloud drug record service



Steady expansion in the number of pharmacies that introduced the service

School DX business: Net sales and operating income



Sales expansion

- +155%, YoY
- Increase in number of schools introducing

Operating loss

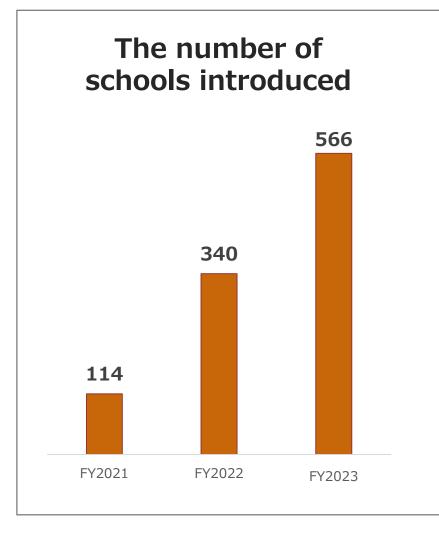
- Stricter requirements for the posting of software assets (FY2022 Q3~)
- Large-scale upfront investment to respond to a surge in orders

MTI Ltd.

School DX business

Cloud-based school affairs support system

BLEND



Expansion in number of schools introducing the system from April 2023

- Definite orders received for October 2023 introduction (26 schools)
- Many potential projects for April 2024 introduction

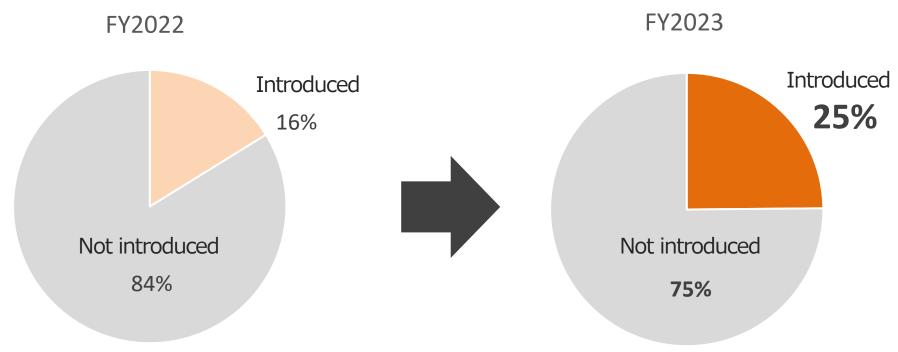
Cloud-based school affairs support system

MTI Ltd.

Motivation Works Inc.

Share grew to 25% of all private high schools in Japan

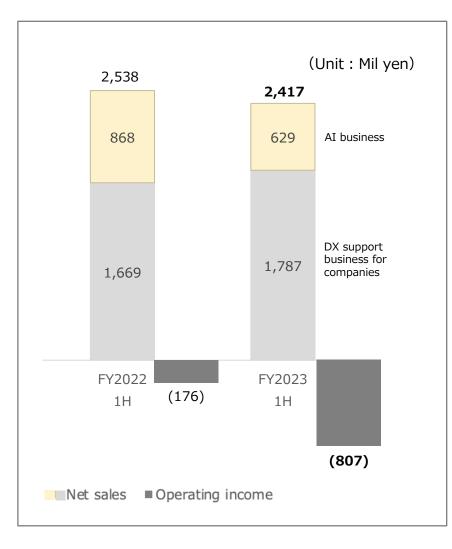
School DX business



*Includes some elementary and junior high schools

Document: Created by our company, sourced from the Ministry of Education, Culture, Sports, Science and Technology (MEXT) website. (<u>https://www.mext.go.jp/a_menu/koutou/shinkou/main5_a3_00003.htm#topic1</u>)

Other business (Includes DX support business for companies, AI): Net sales and operating income



Sales slight decreased

• AI business

Operating loss

 Responded to loss-making projects in part of the DX support business for major companies

에는 것 같은 것으로 가지고 있는 것 같아.

Approach in Q3 and beyond

Basic policies and priority issues for FY2023

1. Healthcare business: Further sales growth

Further expansion of the Cloud drug record service
 Promotion of the platform strategy of the childcare DX, "Boshimo"

2. School DX business: Further sales growth

"BLEND" version upgrade
 Increased number of schools introduced in April

3. Content business: Securing profit

Original comics content business growth
 Security-related app growth

4. Other business: Sales growth

- 1 AI business expansion
- ② DX support business expansion



Connecting pharmacies and patients

Cloud drug record service

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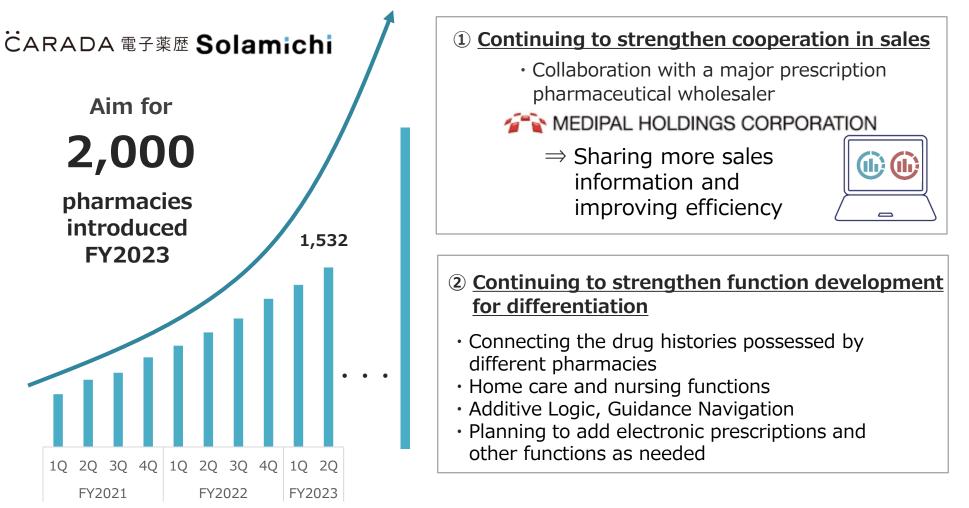
Solamichi

System

Healthcare business: Cloud drug record service



Continuing to strengthen cooperation in sales and to reinforce function development





Healthcare business: Maternal and child health handbook app + Childcare DX services

Connecting parenting households and municipalities

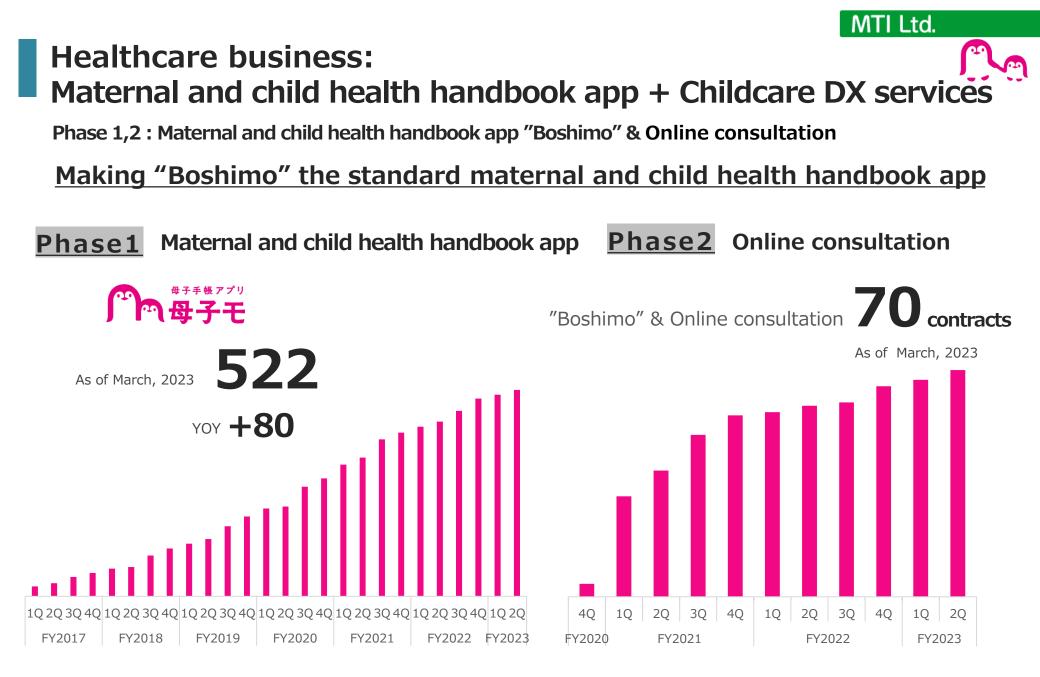
Maternal and child health handbook app + Childcare DX services



Healthcare business: Maternal and child health handbook app + Childcare DX services

Development of the platform business starting with the maternal and child health handbook app "Boshimo"

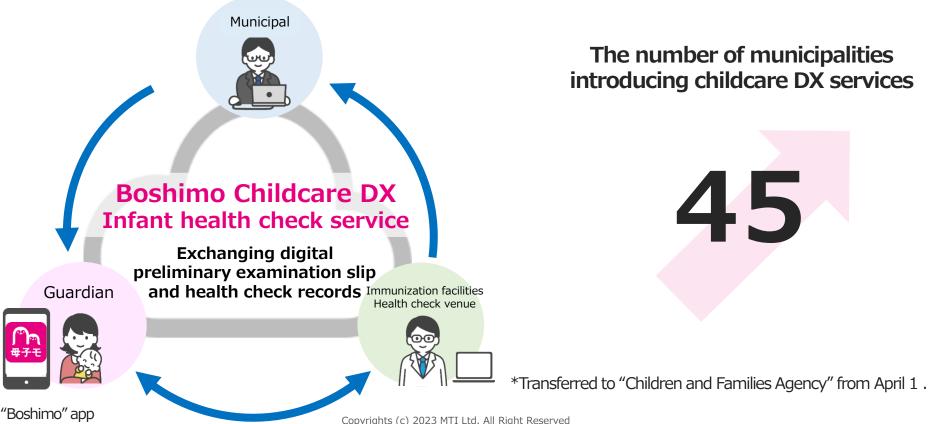
Phase 1 : Introducing maternal and child health handbook app "Boshimo" Phase 2 : Online consultation Phase 3 : Childcare DX services



Healthcare business:

Maternal and child health handbook app + Childcare DX services Phase 3 : Childcare DX services

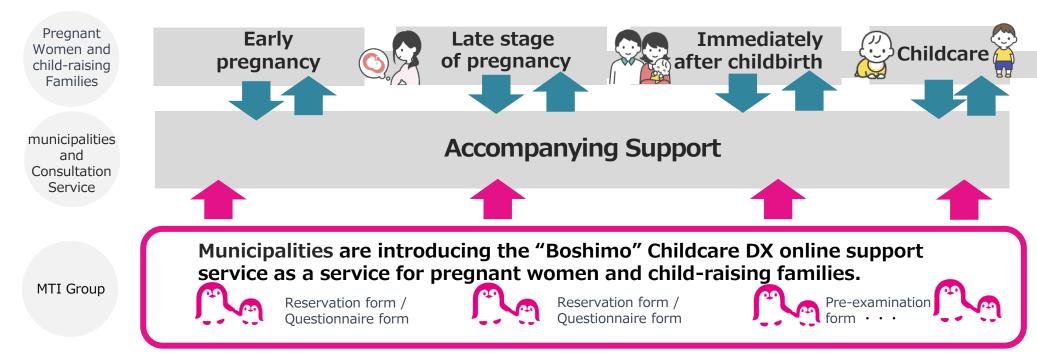
<u>Rapid increase in introduction of "Questionnaire" and "Appointment function"</u> <u>as add-on functions of maternal and child health handbook app.</u> <u>The "Accompanying Support Program " initiative launched by the Ministry of</u> <u>Health, Labour and Welfare in January has provided a tailwind.</u>



(Reference) Healthcare business: Maternal and child health handbook app + Childcare DX services

What is 'Accompanying Support Program'?

Government pregnancy and childcare support service launched in January 2023. Supports pregnant women and child-raising families with children below the age of 3 to plan for childbirth and raising children. Includes a total of three face-to-face meetings (upon registration of pregnancy and directly before and after birth) and a gift voucher of 100,000 yen. Parents are also put in contact with a local counselling organizations to give them peace of mind and provide a supportive environment for childbirth and parenting.



Healthcare business: Maternal and child health handbook app + Childcare DX services The "Boshimo" app and Childcare DX service are evolving into a platform.

Phase	1	2	3	
Service functionalities	Maternal and child health handbook app	Online consultation	 Childcare DX services Childhood immunizations (Digital preliminary examination slip , etc.) Infant health check Visits to all households with infants Questionnaire and reservation form functionality 	
Fee	¥50,000~ ¥100,000/ month	Monthly : Tens of thousands of yen	Initial : Millions of yen ~ Monthly : Hundreds of thousands of yen ~	
The number of municipalities introduced (Number of municipalities nationwide 1,741)	522	70	45	

Kitakyushu City, Ichihara City, **Fukuoka Prefecture Chiba Prefecture**

Electronic filing of pregnancy notifications(APP)

 Prior applications for issuance of a maternal and child health handbook can be submitted via the app. Pregnancies registered via the app account for more than 93% of the total birth rate.

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(Reference) Healthcare business: Maternal and child health handbook app + Childcare DX services Phase 3 : Childcare DX services

Municipalities which were quick off the mark with childcare measures are pushing ahead with DX through the introduction of MTI's services.

seconds.











Digital pre-vaccination form for childhood immunizations

 Digital pre-vaccination forms are being used at medical institutions that have introduced the service. Time taken for verification between vaccinations has been shortened from 3 minutes to several



Motivation Works Inc.

School DX business

Connecting students and teachers

Cloud-based school affairs support system







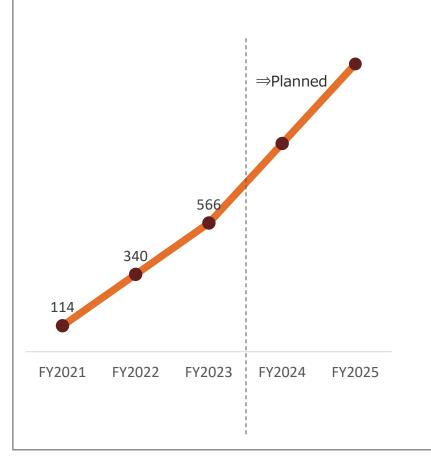
BLEND

Motivation Works Inc.

School DX business

Cloud-based school affairs support system





Aiming to expand the number of schools to be introduced in the next fiscal year

- Definite orders received for October 2023 introduction (26 schools)
- Many potential projects for April 2024 introduction

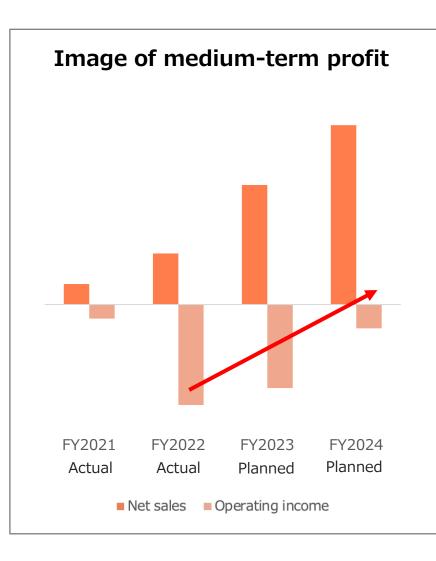
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School DX business

Cloud-based school affairs support system

Motivation Works Inc.



<u>Aiming to significant</u> <u>reduce loss next fiscal</u> <u>year</u>

Net sales : Expansion of the number of schools that introduced the system Operating income : Significantly reducing introduction expenses per school

Image of medium-term profit

(by segment)

Content business

Degree of decrease in the number of paying subscribers is reduced Focus on highly in-demand contents Healthcare business

Focus on expansion of stock sales (=profit)

School DX business

Sharp growth in a short period of time

Other business (Includes DX support business for companies, AI)

[철말] 블럼드 스타이트 소설

Appendix

Earnings forecast for FY2023

	FY2022 (Actual)			FY2023	(Revised f	YoY		
	Full year	H1	H2	Full year	H1 (Actual)	H2 (Forecast)	Amount Full year	Ratio Full year
Net sales	26,479	12,975	13,503	26,800	13,613	13,186	+320	+1.2%
Cost of sales	7,787	3,814	3,972	8,200	4,481	3,718	+412	+5.3%
Gross profit	18,691	9,160	9,530	18,600	9,132	9,467	(91)	(0.5)%
SG&A	17,820	8,561	9,259	18,400	9,151	9,248	+579	+3.2%
Operating income	870	599	271	200	(18)	218	(670)	(77.0)%
(Ratio)	3.3%	4.6%	2.0%	0.7%	-%	1.7%		
Ordinary income	485	292	193	400	187	212	(85)	(17.7)%
(Ratio)	1.8%	2.3%	1.4%	1.5%	1.4%	1.6%		
Profit attributable to owners of parent	(930)	123	(1,053)	(400)	(326)	(73)	+530	-%
(Ratio)	-	1.0%	-%	-%	-%	-%		

Consolidated B/S

MTI Ltd.

	FY2022	FY2023-Q2	Change		FY2022	FY2023-Q2	Change
Current assets	18,778	18,224	(553)	Current liabilities	6,386	7,128	+741
Cash and deposits	12,097	12,763	+665	Account payable-trade	1,068	1,112	+43
Notes and accounts receivable - trade, and contract assets	4,294	4,512	+218	Short-term borrowings	-	9	+9
Other	2,420	981	(1,439)	Current portion of long-term borrowings	751	751	-
Allowance for doubtful accounts	(34)	(32)	+1	Account payable-other	1,221	1,202	(19)
				Income taxes payable	19	772	+752
				Contract liabilities	2,356	2,097	(277)
				Other	968	1,201	+232
Non-current assets	10,487	10,654	+167	Non-current liabilities	5,001	4,698	(302)
Property, plant and equipment	193	221	+28	Long-term borrowings	3,178	2,802	(375)
Intangible assets	3,790	3,582	(208)	Retirement benefit liability	1,816	1,889	+73
Software	2,058	2,165	+106	Other	7	7	(0)
Goodwill	655	510	(145)	Total liabilities	11,387	11,826	+438
Customer-related assets	912	702	(210)	Shareholders' equity	13,954	13,228	(725)
Investments and other assets	6,503	6,850	+347	Share capital	5,218	5,232	+13
Investment securities	3,675	4,001	+326	Capital surplus	6,768	6,769	+0
Leasehold and guarantee deposits	337	333	(4)	Retained earning	5,224	4,458	(766)
Deferred tax assets	2,394	2,404	+10	Treasury shares	(3,257)	(3,230)	+26
				Accumulated other comprehensive income	111	121	+9
				Subscription rights to shares	110	107	(3)
				Non-controlling interests	3,701	3,594	(106)
				Total net assets	17,877	17,052	(825)
Total assets	29,265	28,879	(386)	Total liabilities and net assets	29,265	28,879	(386)

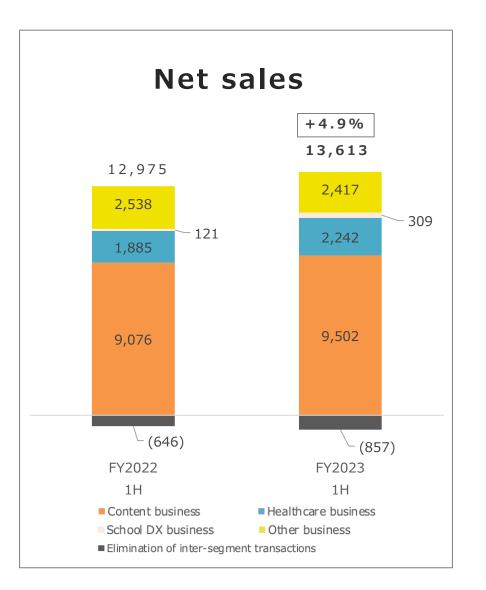
Trends in consolidated P/L

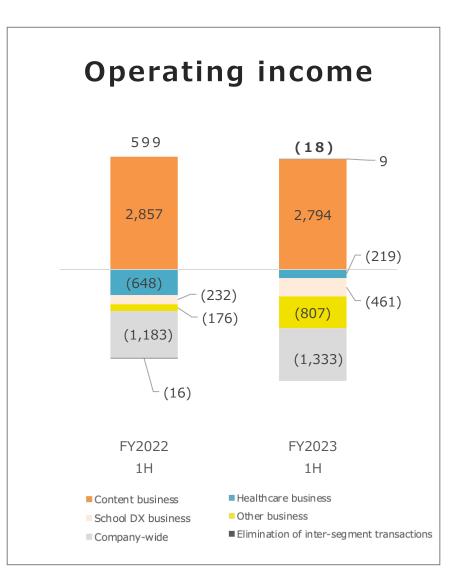
		FY2	021			FY2	FY2023			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Net sales	6,304	6,742	6,457	6,238	6,551	6,424	6,378	7,125	7,080	6,532
Cost of sales	1,593	1,826	1,728	1,853	1,895	1,919	1,941	2,031	2,538	1,942
Gross profit	4,711	4,916	4,728	4,385	4,656	4,504	4,437	5,093	4,542	4,590
(Ratio)	74.7%	72.9%	73.2%	70.3%	71.1%	70.1%	69.6%	71.5%	64.1%	70.3%
SG&A	4,157	4,237	4,164	4,251	4,204	4,356	4,613	4,645	4,603	4,547
Operating income	553	678	563	133	451	147	(176)	447	(61)	42
(ratio)	8.8%	10.1%	8.7%	2.1%	6.9%	2.3%	-	6.3%	-	0.7%
Ordinary income	495	345	428	101	395	(102)	(204)	397	(88)	275
(Ratio)	7.9%	5.1%	6.6%	1.6%	6.0%	-	-	5.6%	-	4.2%
Profit attributable to owners of parent	220	(1,637)	322	(69)	252	(129)	(211)	(841)	(590)	264
(Ratio)	3.5%	-	5.0%	-	3.9%	-	-	-	-	4.0%

Trends in consolidated SG&A

	FY2021				FY2022				FY2023	
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
SG&A	4,157	4,237	4,164	4,251	4,204	4,356	4,613	4,645	4,603	4,547
Advertising expense	337	373	393	413	360	397	379	442	479	537
Personnel expenses	1,743	1,700	1,808	1,847	1,912	1,923	1,950	1,932	1,989	1,958
Commission fee	789	785	777	806	753	785	777	778	746	745
Subcontract expenses	441	445	452	464	440	445	657	593	549	491
Depreciation	272	312	261	286	303	330	358	360	289	301
Other	573	620	472	434	435	473	490	537	549	513

Performance by segment



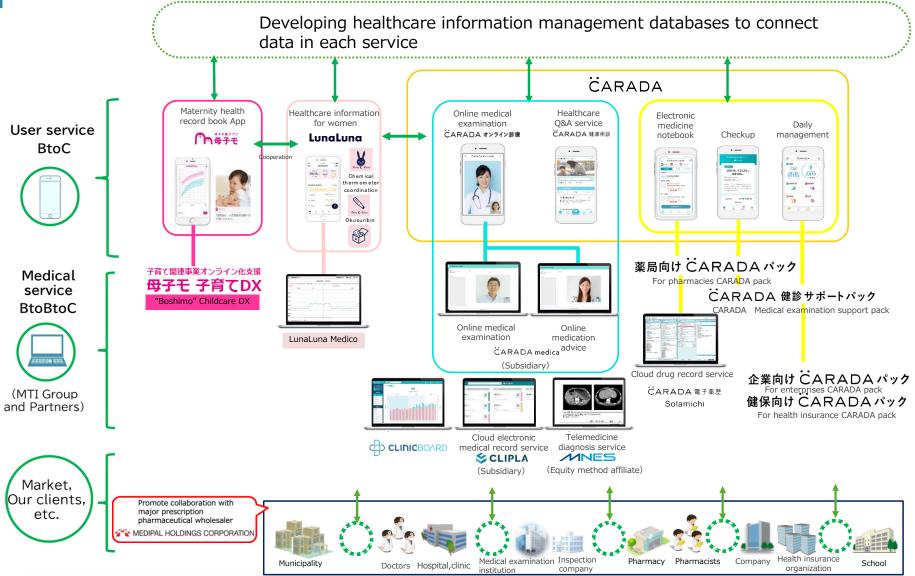


The list of main healthcare services

Figures are the actual as of end of March 2023.

Name of service	Service of function	Business model				
ゆう ゆう しょう ひょう ひょう ゆう ひょう ひょう しょう しょう しょう しょう しょう しょう しょう しょう しょう し	Maternal and Child Health Handbook service app. Vaccine scheduling function, parenting curve and information provided by municipalities.	BtoBtoC. The app is provided at no additional charge for those of childbearing age including mothers. Collects monthly usage fees from contracted municipalities nationwide. The service has been adopted by 522 of 1,741 municipalities nationwide.				
LunaLuna	Healthcare info service for women. Forecasting menstrual day & ovulation day.	BtoC. Over 19 million DL cumulative.(Free APP) More than 500 thousand people have registered for "Pill mode". 300 yen fee or higher for fertility mode and other modes.				
'Luna luna medico'	LunaLuna linkage function for gynecologists. Daily health information for female patients is shown on hospital computers. The service is for fertility treatment.	BtoBtoC. The service is currently provided at no additional charge. The service has been adopted by over 1,000 gynecologists. (Patients are LunaLuna users [free/additional charge])				
LunaLuna online medical examination	Complete online service provided in a single system, from making reservations for gynecological examinations to delivery of drugs from pharmacies	BtoBtoC. The service charged from February 2021.				
CARADA 健康相談	Q&A service for doctors and people engaged in medical services. Helps eliminate daily health concerns.	BtoC. ¥400/month				
(CARADA Health consultation) CARADA オンライン診療 (CARADA Online medical examination)	the system offers full features that are necessary for online medical examination, from reservations to delivery of drugs and prescriptions .	BtoBtoC. Contracts with clinics and pharmacies. The service charged from February 2021.				
ĊARADA	Service for medical examination institutions. Results of health checkups, including previous records, are sent to relevant smartphones as a graphic. The service, which enhances users' convenience, contributes to increasing the rate of checkups at health examination institutions.	BtoBtoC. Collects monthly usage fees from health examination institutions.				
CARADA 電子薬歴 Solamichi (CARADA Cloud drug history service)	Cloud drug administration record service for pharmacies The drug administration record navigation function is highly rated. Links with the CARADA medical history notebook app.	BtoB. Initial cost for introduction + monthly usage fee 1,532 orders have been received.				

Healthcare business: Overview of Healthcare services



*Some images are under development and may differ from the actual ones.

*The services provided by the Group include some services that provide support for medical sites, but do not perform medical activities. Copyrights (c) 2023 MTI Ltd. All Right Reserved



Cloud drug record service

CARADA 電子薬歴 Solamichi

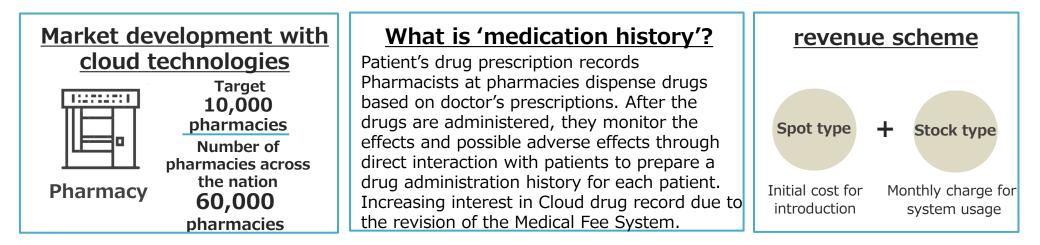


1,532 pharmacies introduced

As of March, 2023

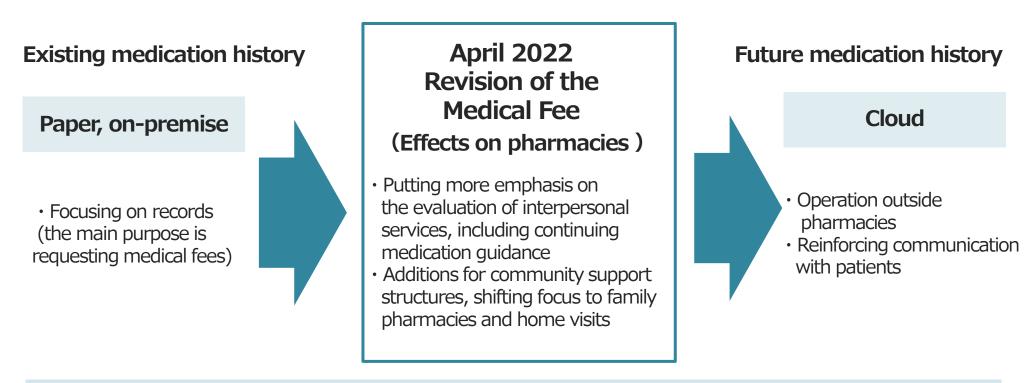
Aim for more than 2,000

at an Early stage



Cloud drug record service

In response to the medical fee revision, the Company will promote a shift "from services handling materials to interpersonal services" at pharmacies and promote ICT at pharmacies as well.



Demand for cloud drug record that has a wealth of medication advice and medication follow-up functions will increase.

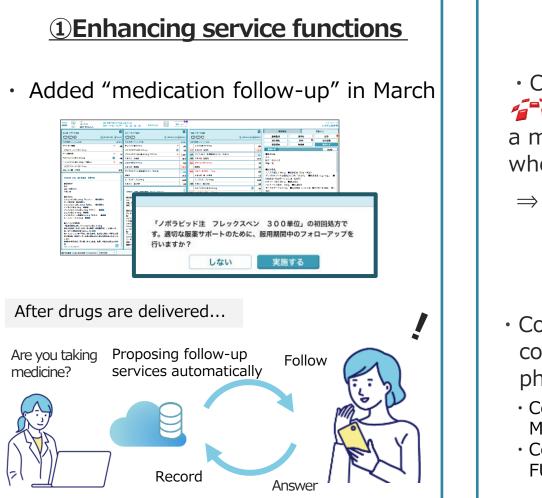
MTI Ltd.

Solamichi

System

Cloud drug record service

Increasing the number of pharmacies that introduce cloud drug record by enhancing service functions and strengthening cooperation in sales



② strengthening cooperation in sales

Collaboration with
 Medipal Holdings Corporation,
 a major prescription pharmaceutical
 wholesaler

⇒ Sharing more sales information and improving efficiency

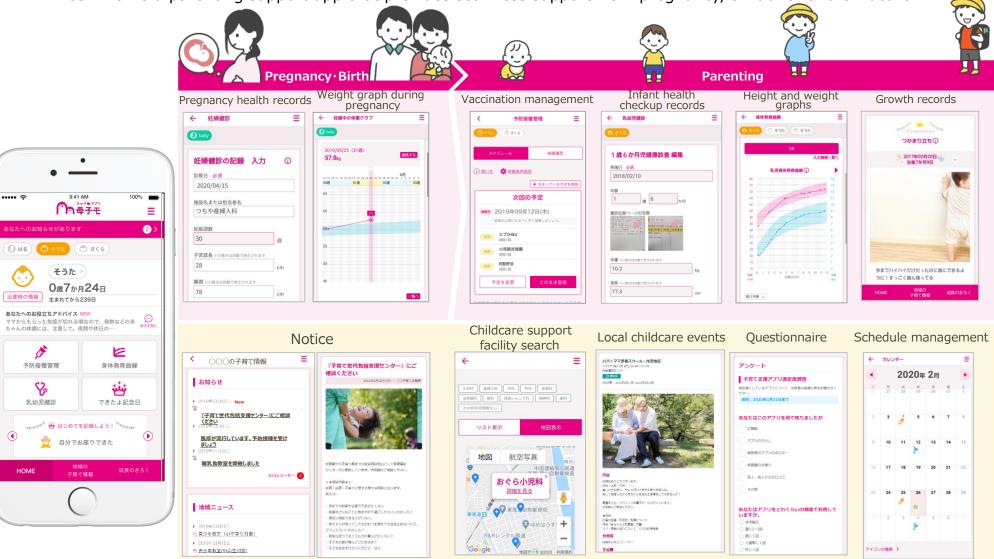


- Collaboration with large system companies that provide services to pharmacies
 - Commenced partnership with Mitsubishi Electric IT Solutions Corporation
 - Commenced partnership with FUJIFILM Healthcare Systems Corporation



Maternal and child health handbook app "Boshimo"

"Boshimo" is a parenting support app that provides seamless support from pregnancy, childbirth and childcare.

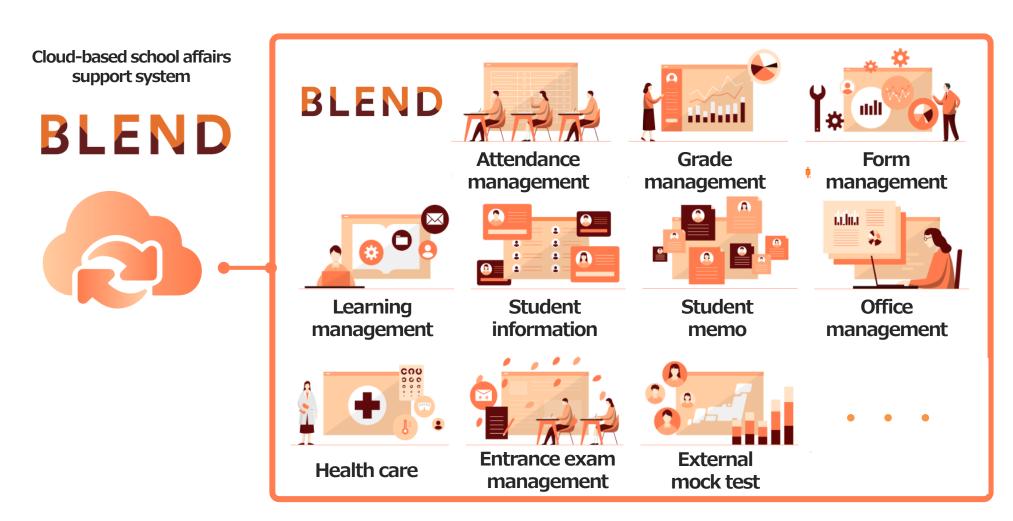




Motivation Works Inc.

School DX business

Improving efficiency in school administration and he quality of education

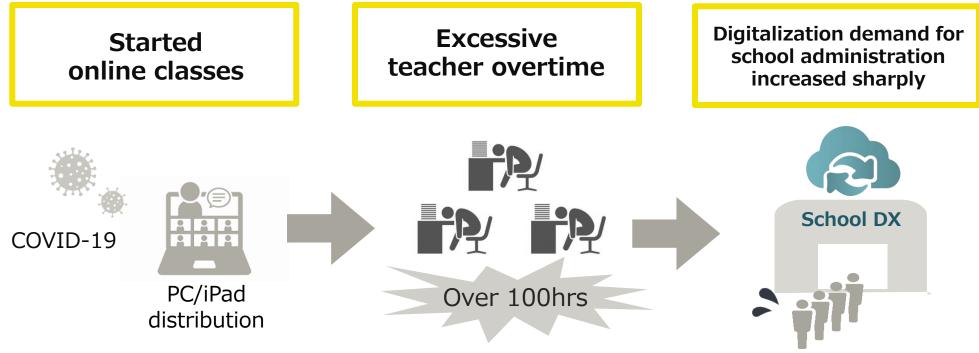




Motivation Works Inc.

School DX business

Following an online classes boom, demand for the school DX business increased sharply



- Investment in <u>cloud school administration (school DX)</u> increased in response to a sharp increase in demand
- $\boldsymbol{\cdot}$ Digitalization is slow in this area, and the business is expected to grow