

Q1 for the Fiscal Year Ending March 2027 Results Presentation

August. 7, 2026

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Q1 FY2027/3 Results / Forecast

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<Disclaimer>

This document is a transcription from the financial results briefing presentation, and some edits and modifications have been made for ease of understanding.

Speaker: Makoto Takahashi (Senior Executive Vice President and Group CFO, Executive Officer, SEGA SAMMY HOLDINGS INC.)

I will explain the Q1 results for the fiscal year ending March 2027 and our future initiatives, etc.

Results Highlights (Consolidated)

(Billion yen)	FY2026/3		FY2027/3	
	Q1	Full Year Results	Q1	Full Year Forecast
Sales	81.0	487.5	95.0	510.0
Operating Income	-0.5	47.1	2.3	44.5
Ordinary Income	-2.1	54.2	3.6	47.5
Extraordinary income	0.0	0.8	0.1	0.0
Extraordinary losses	0.4	58.8	0.3	1.0
Profit attributable to owners of parent	-3.3	-5.7	2.1	32.5
Indicators in the Medium-Term Plan				
Adjusted EBITDA	1.4	16.6	7.8	64.0
ROE	-	-1.6%	-	8.9%

*Adjusted EBITDA: Ordinary income + Interest expenses + Depreciation and amortization ± Adjustment items
 Adjustment items:
 Extraordinary income of business, Extraordinary losses of business (impairment, title write-down, etc.),
 Profit attributable to non-controlling interests, Goodwill, trademark right amortization, etc. associated with M&A

Q1 FY2027/3 Results

➤ Off to a start that exceeds expectation across all segments

- Entertainment*¹ started above expectations
- Pachislot & Pachinko*² off to a strong start
- Existing businesses in Gaming performed steadily

Forecast

➤ Promote the launch of key titles in each business

- Launch key titles for Full Game from Q3 onward (Entertainment)
- Launch multiple key titles from Q2 onward (Pachislot & Pachinko)
- Rebuild the foundation for future growth and lead to profit improvement from FY2028/3 onward (Gaming)

*¹ Entertainment = Entertainment Contents Business

*² Pachislot & Pachinko = Pachislot & Pachinko Machines Business

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Although Q1 was a quarter with relatively few new products, sales were generally in line with our expectations. In terms of profit, all segments got off to a start that exceeded expectations. In particular, the Entertainment Contents Business and Pachislot & Pachinko Machines Businesses made strong starts.

Going forward, the Entertainment Contents Business plans to launch major new titles in the second half of the fiscal year, while the Pachislot & Pachinko Machines Business will launch key titles sequentially from Q2 onward.

In the Gaming Business, we will continue to build a foundation for future growth and pursue initiatives for profit improvement from the next fiscal year onward.

At our results briefing for FY2026/3 we explained the “Impact of the Middle East Situation on the Group,” and as of today, there has still been no significant impact.

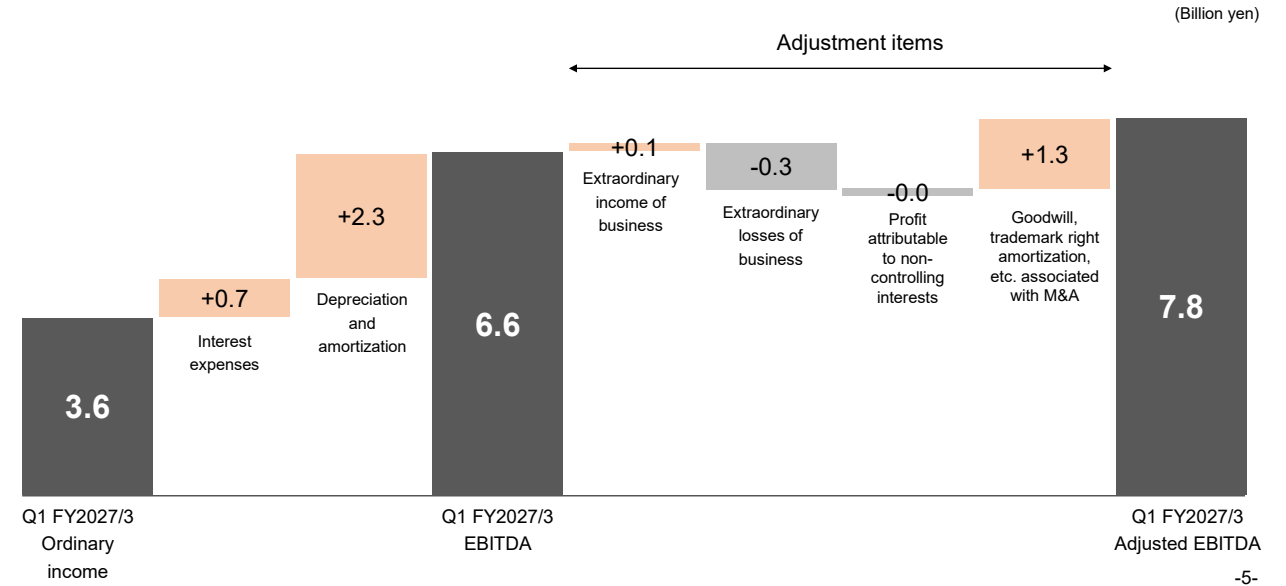
(Reference) Per Segments Results

(Billion yen)	FY2026/3		FY2027/3	
	Q1	Full Year Results	Q1	Full Year Forecast
Sales	81.0	487.5	95.0	510.0
Entertainment Contents	67.7	326.6	68.4	357.0
Pachislot & Pachinko Machines	11.0	132.0	17.5	115.5
Gaming	1.3	25.3	8.0	34.5
Other / Elimination	1.0	3.6	1.1	3.0
Operating Income	-0.5	47.1	2.3	44.5
Entertainment Contents	7.1	32.4	4.9	42.5
Pachislot & Pachinko Machines	-3.8	32.1	2.5	24.0
Gaming	-0.8	-7.2	-2.1	-10.0
Other / Elimination	-3.0	-10.2	-3.0	-12.0
Adjusted EBITDA	1.4	16.6	7.8	64.0
Entertainment Contents	7.9	13.3	8.0	52.5
Pachislot & Pachinko Machines	-2.8	33.7	3.6	27.5
Gaming	0.1	-18.4	-0.9	-4.0
Other / Elimination	-3.8	-12.0	-2.9	-12.0

*See P.11 for details about each business

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For your reference, here are per segments' results.



For your reference, here is the breakdown of adjustment items in Adjusted EBITDA in Q1.

Various Expenses, etc.

(Billion yen)		FY2026/3		FY2027/3	
		Q1	Full Year Results	Q1	Full Year Forecast
Entertainment Contents	R&D / Content production	15.3	78.4	16.2	75.3
	Advertising	5.1	30.8	5.4	32.2
	Depreciation	1.1	4.5	1.1	4.4
	Cap-ex	2.3	7.6	1.6	5.8
Pachislot & Pachinko	R&D / Content production	3.2	15.3	3.2	14.7
	Advertising	0.4	3.4	0.6	4.2
	Depreciation	0.6	2.8	0.8	2.7
	Cap-ex	1.3	5.4	0.9	5.0
Gaming	R&D / Content production	0.2	5.1	1.7	5.8
	Advertising	0.0	2.9	1.0	4.5
	Depreciation	0.0	0.7	0.1	2.4
	Cap-ex	0.1	1.9	0.5	3.0
Consolidated total	R&D / Content production	18.8	98.8	21.1	95.9
	Advertising	5.8	38.2	7.3	42.4
	Depreciation	2.0	9.1	2.3	10.6
	Cap-ex	4.1	16.5	3.5	15.0

Q1 FY2027/3 Results (Compared to Q1 FY2026/3)

- Cap-ex:
 - A reactionary decline due to the launch of new F2P titles in FY2026/3 (CS^{*1})
- Impact of the consolidation of GAN (Gaming)
 - R&D / Content production and advertising expenses increased

Forecast (Compared to FY2026/3)

- R&D / Content production expenses:
 - Increase due to the higher number of key titles (CS), while overall expenses decrease due to the decline of one-time expenses
- Depreciation:
 - Increase due to a change in the accounting treatment for leased machines (Gaming)
- Impact of the consolidation of GAN (Gaming)
 - Advertising expenses and depreciation increase

^{*1} CS=Consumer Area

^{*}The expenses for "other/elimination" are included in "Data Appendix (FY2027/3)"

^{*}Recognition criteria of R&D and Content Production Expenses by business segments

- Entertainment Contents Business (Full Game (CS)): Expenses are capitalized as inventory assets or intangible assets during development and booked as expenses after launch. 25% will be amortized in first month and the rest will be amortized over a period of 23 months using the straight-line method (Total amortization period is 24 months)
- Entertainment Contents Business (F2P (CS)): Expenses are capitalized as intangible assets during development and booked as expenses after launch. Expenses are amortized over a period of 24 or 36 months using the straight-line method
- Entertainment Contents Business (AM): Expenses are capitalized as inventory assets during development and booked as expenses after launch. 30% will be amortized in first 2 months with 15% per month, and the rest will be amortized 7% per 10 months using the straight-line method (Total amortization period is 12 months)
- Pachislot & Pachinko Machines Business: Expenses aren't capitalized but are recognized as they arise (outsourced process expenses are recognized when work is inspected)

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Here are the various expenses.

In the Entertainment Contents Business, R&D / content production expenses increased in Q1 due to an increase in titles under amortization and basic research expenses.

In the Pachislot & Pachinko Machines Business, there were no significant changes compared with Q1 FY2026/3.

In the Gaming Business, various expenses increased compared with Q1 FY2026/3. This is because the consolidation of GAN and Stakelogic in our P&L had not yet started in Q1 FY2026/3.

Going forward, in the Entertainment Contents Business, where we plan to launch key new titles, we expect R&D / content production expenses, and advertising expenses to increase.

Consolidated Balance Sheet Summary

(Billion yen)				[Assets]				[Liabilities and Net Assets]			
Account	As of the end of Mar. 2026	As of the end of Jun. 2026	Increase /Decrease	Account	As of the end of Mar. 2026	As of the end of Jun. 2026	Increase /Decrease	Account	As of the end of Mar. 2026	As of the end of Jun. 2026	Increase /Decrease
Cash and Deposits	153.3	141.2	-12.1	Accounts Payable	17.4	19.7	+2.3				
Notes and Accounts Receivable	67.5	49.0	-18.5	Short Term Borrowings	7.5	7.5	-				
Securities	0.5	0.4	-0.1	Other	84.2	64.1	-20.1				
Inventories	110.9	125.0	+14.1	Total Current Liabilities	109.1	91.3	-17.8				
Other	42.5	38.3	-4.2	Corporate Bonds	10.0	10.0	-				
Total Current Assets	374.7	353.9	-20.8	Long Term Borrowings	124.5	124.5	-				
Tangible Fixed Assets	51.0	51.1	+0.1	Other	28.7	29.1	+0.4				
Intangible Fixed Assets	80.1	79.5	-0.6	Total Noncurrent Liabilities	163.2	163.6	+0.4				
Goodwill (included in Intangible Fixed Assets)	14.5	14.3	-0.2	Total Liabilities	272.4	255.0	-17.4				
Trademark right (same as above)	45.3	45.3	+0.0	Shareholders' Equity	311.0	308.1	-2.9				
Investment Securities	53.3	53.8	+0.5	Total accumulated other comprehensive income	43.5	47.1	+3.6				
Other	68.2	71.9	+3.7	Non-controlling interests	0.0	0.0	+0.0				
Total Noncurrent Assets	252.6	256.3	+3.7	Total Net Assets	354.9	355.3	+0.4				
Total Assets	627.3	610.3	-17.0	Total Liabilities and Net Assets	627.3	610.3	-17.0				

	As of the end of Mar. 2026	As of the end of Jun. 2026	Increase /Decrease	Main Reason for increase/decrease	
Cash, deposits and cash equivalents	153.7	141.7	-12.0	(Assets)	• Cash and deposits decreased due to payment of cash dividends, payment of bonus, income taxes paid, etc.
Interest bearing debt	142.0	142.0	-		• Collection of notes and accounts receivable progressed
Net cash	11.7	-0.3	-12.0		• Inventories, etc. in connection with game development in the Entertainment Contents Business increased
Equity ratio	56.5%	58.2%	+1.7p	(Liabilities)	• Income taxes payable and provision for bonuses, etc. decreased
				(Net assets)	• Shareholders' equity decreased due to payment of dividends
					• Foreign currency translation adjustment increased

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Here is the consolidated balance sheet.

Regarding current assets, cash and deposits declined due to payment of cash dividends, income taxes, bonus, etc. In addition, while notes and accounts receivable etc. decreased as collections progressed, inventories increased due to content work in progress, etc.

Regarding current liabilities, income taxes payable and provision for bonuses etc. decreased. In net assets, while shareholders' equity decreased due to payment of dividends, accumulated other comprehensive income increased as the foreign currency translation adjustment increased.

As of the end of June, DE ratio stood at 0.4 times.

Net cash also decreased by 12.0 billion yen from the end of FY2026/3, resulting in a negative balance of 0.3 billion yen.

The cash flow has not been audited yet, but we will provide approximate results for reference.

Operating cash flow is negative 0.8 billion yen,

investing cash flow is negative 7.6 billion yen,

financing cash flow is negative 5.6 billion yen

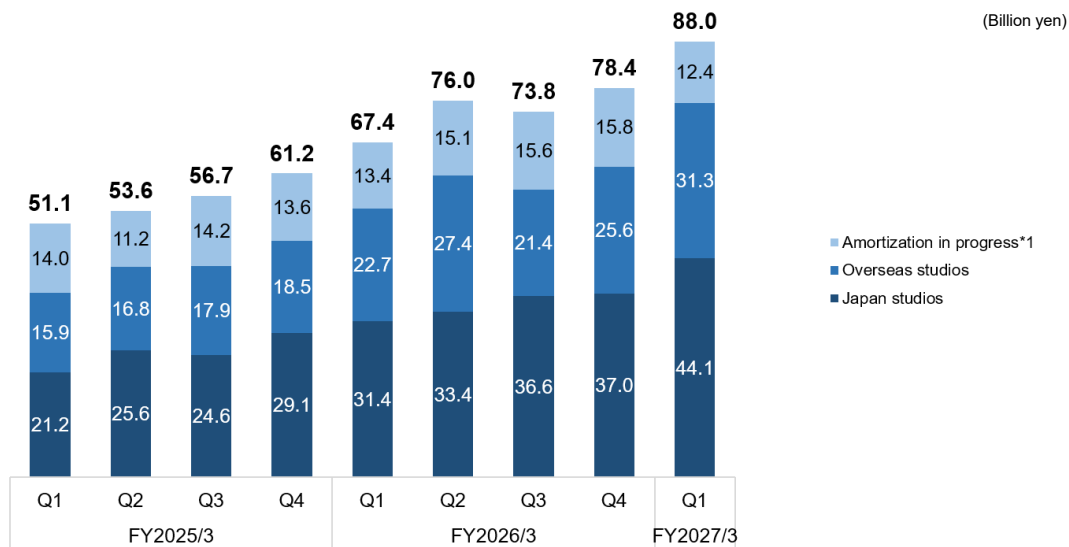
and overall cash flow, including an effect of foreign currency exchange rate changes related to cash, and cash equivalents of positive 2.0 billion yen, is expected to be negative 12.0 billion yen.

Balance of goodwill and other intangible assets		End of FY2026/3	End of Q1 FY2027/3	Remaining amortization period
Rovio	Other intangible assets (trademark rights)	44.3 billion yen (241 million euro)	44.3 billion yen (238 million euro)	20 years, 2 months
	Other intangible assets (tech-related)	4.3 billion yen (23 million euro)	4.3 billion yen (23 million euro)	7 years, 2 months
GAN	Goodwill/Other intangible assets (trademark rights and customer- related)	16.4 billion yen (104 million US dollars)	16.2 billion yen (102 million US dollars)	9 years, 0 months
	Other intangible assets (tech-related)	2.6 billion yen (16 million US dollars)	2.5 billion yen (15 million US dollars)	4 years, 0 months

This shows the balance of goodwill and other intangible assets, as well as their remaining amortization periods.

Regarding Rovio, the total balance of other intangible assets at the end of Q1 was 48.6 billion yen, or 260 million euros on a local-currency basis.

For GAN, the total amount of other intangible assets and goodwill was approximately 18.7 billion yen, or 110 million US dollars on a local-currency basis.



*Amortization in progress: Unamortized portion of title assets that have been released and begun to be amortized

This shows the trend in the balance of content production expenses.

The balance at the end of Q1 was 88.0 billion yen, resulting in an increase of 9.6 billion yen from the end of FY2026/3.

The balances increased at both the domestic and overseas studios, due to the absence of new key titles in Q1, as well as the ongoing development of multiple key titles to be launched.

As for the breakdown by release timing of the balance excluding titles currently under amortization, titles scheduled for release in FY2027/3 are 35%, while ones in FY2028/3 are 48%. Both are primarily composed of key IPs.

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Per Segments Results / Forecast

(Billion yen)	FY2026/3		FY2027/3	
	Q1	Full Year Results	Q1	Full Year Forecast
Sales	67.7	326.6	68.4	357.0
Consumer	44.6	219.9	43.3	246.0
Animation	7.0	28.4	5.5	29.0
AM & TOY	16.0	78.1	19.5	82.0
Operating Income	7.1	32.4	4.9	42.5
Consumer	5.2	19.2	1.3	30.0
Animation	1.4	7.6	0.9	5.5
AM & TOY	0.4	5.6	2.5	7.0
Ordinary Income	5.0	34.4	5.8	43.5
Indicators in the Medium-Term Plan				
Adjusted EBITDA	7.9	13.3	8.0	52.5
Full Game Sales	11.5	67.2	9.8	95.3
New titles	2.6	29.8	0.1	55.6
Catalogue sales	8.8	37.4	9.7	39.7
F2P Sales	11.5	53.7	12.9	58.4
Full Game Unit Sales (Thousand)	4,210	22,950	5,070	25,060
New titles	610	5,660	20	6,450
Catalogue sales	3,600	17,280	5,040	18,610

Q1 FY2027/3 Results

➤ Started above expectations

- Catalogue sales*¹ in Full Game generally performed in line with expectations (CS*²)
- Licensing revenue and Rovio performed in line with expectations (CS)
- Absence of anticipated costs (CS)
- Performed above expectations due to a strong performance of amusement machine sales (AM*³&TOY)

➤ Began marketing activities for launch of this fiscal year's key titles (CS)

Forecast

➤ Proceed the launch of new titles

- Launch new key titles for Full Game (CS)
STRANGER THAN HEAVEN (Jan. 15, 2027)
Persona 4 Revival (Feb. 18, 2027), etc.

*¹ Catalogue sales includes the titles released in the previous fiscal year or earlier

*² CS = Consumer Area

*³ AM = Amusement Machine

*() indicates release schedule

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Here are the details by segment.

In the Entertainment Contents Business, both the Consumer and AM & TOY areas exceeded expectations. In the Consumer area, this was mainly due to certain anticipated costs not being incurred, while catalogue sales, licensing revenue, and Rovio's performance were generally in line with expectations. In AM & TOY, sales of amusement machines, led by *UFO CATCHER 10*, performed strongly.

This fiscal year, our key new Full Game releases are scheduled to be concentrated in the second half of this fiscal year. In preparation for their launch, we have begun marketing activities earlier than usual. We are seeing encouraging signs, including views of title-related videos and wishlist registrations, and will continue working to maximize sales.

Going forward, we plan to launch four titles sequentially, including this fiscal year's key new titles: *STRANGER THAN HEAVEN* and *Persona 4 Revival*.

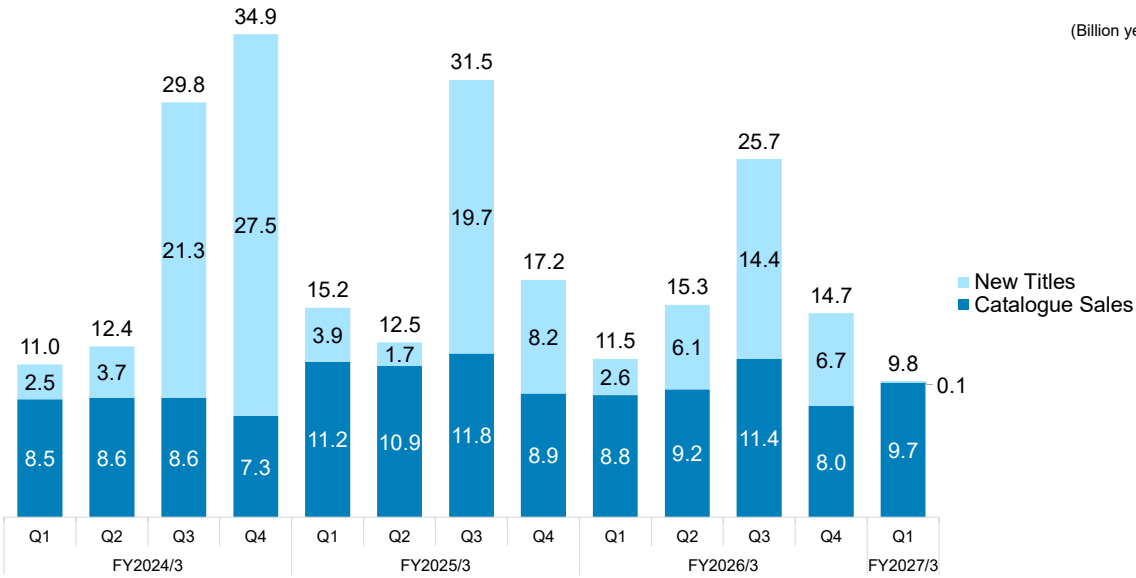
		Q1 FY2027/3 Results	Forecast
Consumer	Full Game	- Catalogue sales off to a start generally in line with expectations - Started the promotions for key titles in the second half	- Launch new key titles from Q4 onward, including <i>STRANGER THAN HEAVEN</i> and <i>Persona 4 Revival</i> - Continue to focus on title promotions
	F2P	Results fell slightly short of expectations	Strengthen operations of existing titles
	Other	- Recorded licensing revenue - Rovio performed in line with expectations	- Expect the licensing revenue to increase driven by key IPs' anniversaries and video adaptations, etc. - Launch new titles of Rovio
Animation		- Movie, <i>Detective Conan: Fallen Angel of the Highway</i> surpassed 13.6 billion yen^{**} at the box-office revenue, ranking 4th in the series history - Continued to record allocated revenue of the first and second <i>Sonic</i> movies	- Record allocated revenue of <i>Detective Conan: Fallen Angel of the Highway</i> - Start broadcast of <i>SAKAMOTO DAYS Season 2</i>, <i>MAGIC KNIGHT RAYEARTH</i>, etc.
AM&TOY	AM	Amusement machine sales exceeded expectations due to strong sales of <i>UFO CATCHER 10</i>	- Plan to sell centered on prize category - Launch multiple titles for children, medal games, etc.
	TOY	Performed in line with expectations, mainly through sales of regular products, etc.	Sell new products centered on "<i>ANPANMAN</i>" <i>Talking Picture Book 3000</i>

^{**} According to Kogyo Tsushinsha (as of July 26, 2026) -12-

Here is an explanation of the sub-segments.

In the Animation area, the movie, *Detective Conan: Fallen Angel of the Highway*, has exceeded 13.6 billion yen in box-office revenue as of now. As in previous years, we expect to record allocated revenue for this movie in Q2. We also continued to record allocated revenue for the *Sonic* movies.

In AM & TOY, where sales of *UFO CATCHER 10* performed strongly, we will continue to focus primarily on the prize category while also launching medal games, etc.



Here is the quarterly sales trend for Full Game.

Although no new key titles were released this Q1, catalogue sales reached 9.7 billion yen, exceeding the same period of the previous fiscal year. Catalogue sales were driven mainly by strong sales of the *Persona* series.

Main New Titles_Sales/Launch Schedule (Consumer)



	FY2027/3	Upcoming Plans	
Full Game	Sonic Frontiers - Definitive Edition* ¹ (Jun. 24, 2026)	Crazy Taxi: World Tour (2027)	Alien: Isolation 2 (Release Date TBD)
	Metaphor: ReFantazio* ² (Nov. 12, 2026)	VIRTUA FIGHTER CROSSROADS (2027)	Golden Axe (Title / Release Date TBD)
	STRANGER THAN HEAVEN (Jan. 15, 2027)	Persona 6 (Release Date TBD)	Jet Set Radio (Title / Release Date TBD)
	Persona 4 Revival (Feb. 18, 2027)	Total War: WARHAMMER 40,000 (Release Date TBD)	Streets of Rage (Title / Release Date TBD)
		Total War: MEDIEVAL III (Release Date TBD)	

^{*1} Only digital version is available, package version to be released on Sep. 17, 2026
^{*1} *Sonic Frontiers* is also available on other platforms (available on PlayStation®5 / PlayStation®4 / Nintendo Switch™ / XBOX Series X|S / XBOX One / Steam / Epic Games Store)
^{*2} Available on platforms other than Nintendo Switch 2™ (XBOX Series X|S / Windows / PlayStation®5 / PlayStation®4 / Steam)
*Only announced titles are listed in "Upcoming Plans"

For reference, here is the product rollout schedule for Full Game.

Jan. 2027	Feb. 2027	TBD
 STRANGER THAN HEAVEN (Jan. 15, 2027) 	 Persona 4 Revival (Feb. 18, 2027) 	 FOOTBALL MANAGER™ (Title and release timing: TBD)

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For your reference, we have highlighted three of our major titles from this fiscal year onward.



Crazy Taxi: World Tour (2027)



VIRTUA FIGHTER CROSSROADS (2027)



Persona 6



Total War: WARHAMMER 40,000



Total War: MEDIEVAL III



Alien: Isolation 2

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Here is the lineup of other announced titles.

We are currently developing multiple key titles and will announce details and release timing for each title in due course, once preparations are finalized.

(Billion yen)	FY2026/3		FY2027/3	
	Q1	Full Year Results	Q1	Full Year Forecast
Sales	11.0	132.0	17.5	115.5
Pachislot	0.0	75.3	11.4	67.2
Pachinko	7.7	44.3	3.6	36.0
Other / Elimination	3.3	12.5	2.5	12.3
Operating Income	-3.8	32.1	2.5	24.0
Ordinary Income	-3.6	33.3	2.8	25.0

Indicators in the Medium-Term Plan

Adjusted EBITDA	-2.8	33.7	3.6	27.5
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Pachislot

Number of Titles	-	5 titles	2 titles	10 titles
Unit Sales (units)	52	135,702	22,631	139,000
Cabinet + Reel Unit	-	132,617	18,148	106,000
Reel Unit	-	3,085	4,483	33,000

Pachinko

Number of Titles	1 title	5 titles	1 title	5 titles
Unit Sales (units)	18,596	97,728	8,466	84,000
Board + Frame	6,407	73,764	4,226	69,000
Board	12,189	23,964	4,240	15,000

*1 New series are counted as a single title
(Titles which installation started from previous FY, specification changed titles, etc. are not included)

*Title sold in FY2026/3

Q1 FY2027/3 Results

➤ Off to a strong start compared to expectations

- In addition to new titles, additional sales of pachislot title released in FY2026/3 also contributed
- Main titles sold:
Smart Pachislot BIG DREAM THE GOLDEN PUSHER
*Smart Pachislot Kabaneri of the Iron Fortress: The Battle of Unato**1 (additional sales), etc.

Forecast

➤ Launch multiple new titles using popular IP and in-house IP

- Pachislot:
Smart Pachislot Lycoris Recoil (Sep.)
Smart Pachislot Beast King (Oct.)
Smart Pachislot Kabaneri of the Iron Fortress: The Battle of Unato (additional sales), etc.
- Pachinko:
e The Seven deadly Sins 3 (Aug.)
e Beast King Shishi no Ichigeki (Nov.), etc.

Here is about the Pachislot & Pachinko Machines Business.

In Q1, in addition to the new pachislot title, *Smart Pachislot BIG DREAM THE GOLDEN PUSHER*, additional sales of *Smart Pachislot Bakemonogatari* and *Smart Pachislot Kabaneri of the Iron Fortress: The Battle of Unato*, which were launched in FY2026/3, also contributed, resulting in a strong start that exceeded expectations.

In addition, reel unit sales of reel-exchangeable cabinet for pachislot, which began in March 2026, also progressed well, accounting for approximately 20% of pachislot unit sales in Q1.

Going forward, in Q2, we plan to launch new titles using popular IPs, including *Smart Pachislot Lycoris Recoil* and *e The Seven Deadly Sins 3*, while continuing additional sales of *Smart Pachislot Kabaneri of the Iron Fortress: The Battle of Unato*.

In addition, in Q3 we plan to launch new titles using Sammy's key IP *Beast King* in both pachislot and pachinko.

We still need to obtain approval for future titles, but the process has been progressing steadily to date.

Main New Titles_Sales Schedule

	Q1 FY2027/3	Q2 FY2027/3	Q3 FY2027/3 onward
Pachislot	A-SLOT+ Isekai Quartet BT (Apr. 2026) Smart Pachislot BIG DREAM THE GOLDEN PUSHER (May 2026) Smart Pachislot Bakemonogatari (Additional sales) Smart Pachislot Kabaneri of the Iron Fortress: The Battle of Unato (Additional sales)	Smart Pachislot Lycoris Recoil (Sep. 2026) Smart Pachislot Kabaneri of the Iron Fortress: The Battle of Unato (Additional sales)	Smart Pachislot Beast King (Oct. 2026)
Pachinko	e Record of Ragnarok (Apr. 2026) e Bakemonogatari Oni99ver. (Jun. 2026) *Specification change	e Tokyo Revengers Christmas Showdown Arc (Jul. 2026) *Specification change e The Seven deadly Sins 3 (Aug. 2026) e Kabaneri of the Iron Fortress 2 Rinne no Kahou 119ver. (Sep. 2026) *Specification change	e Beast King Shishi no Ichigeki (Nov. 2026)

*Among the announced titles, only those with confirmed title names are listed

For your reference, this is the sales schedule for the Pachislot & Pachinko Machines Business.

Featured Titles from Q2 Onward

➤ Sales of each title are progressing strongly



Smart Pachislot Lycoris Recoil

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LYCORIS RECOIL
リコリス・リコイル



Smart Pachislot Beast King



I would like to introduce the featured upcoming titles.

In Q2, we will launch *Smart Pachislot Lycoris Recoil*, using a popular IP attracting significant attention in the pachislot industry. In Q3, we plan to launch *Smart Pachislot Beast King*. Both titles have been highly acclaimed and have received greater inquiries than we initially expected.

(Billion yen)	FY2026/3		FY2027/3	
	Q1	Full Year Results	Q1	Full Year Forecast
Sales	1.3	25.3	8.0	34.5
Gaming machine sales	1.3	8.3	2.1	9.1
GAN*1	-	14.5	5.1	22.8
B2B	-	2.1	0.5	3.2
B2C	-	12.4	4.4	19.6
Stakelogic*1	-	2.2	0.7	2.6
Operating Income	-0.8	-7.2	-2.1	-10.0
Gaming machine sales	0.2	1.6	0.5	0.4
GAN*1	-	-2.7	-1.2	-3.2
Stakelogic*1	-	-1.5	-0.6	-1.6
Goodwill amortization, etc.	-	-3.3	-0.5	-2.3
Other common expenses*2/ Elimination	-1.0	-1.4	-0.3	-3.3
Equity method earnings amount (PARADISE SEGASAMMY*3)	1.1	4.5	0.1	2.0
Ordinary Income	0.1	-0.8	-1.7	-8.0
Indicators in the Medium-Term Plan				
Adjusted EBITDA	0.1	-18.4	-0.9	-4.0

*GAN and Stakelogic are recorded with a three-month delay due to the December fiscal year-end Consolidation of both companies' results began from Q2 FY2026/3
 **Other common expenses*2/ Elimination
 ***PARADISE SEGASAMMY is an equity-method affiliate of the Group, PARADISE SEGASAMMY is recorded with a three-month delay due to the December fiscal year-end, Local accounting standards
 **For business revitalization programs of GAN and Stakelogic, please refer to the Management Meeting 2026 materials
<https://www.segasammy.co.jp/en/ir/library/presentation/>

Q1 FY2027/3 Results

➤ Existing businesses performed steadily

- Gaming machine sales: Steady sales of video slot machines in the key series
- PARADISE SEGASAMMY: Although equity method earnings amount decreased, the contribution to profit was in line with expectations

➤ Promoted business revitalization programs*4 for the two acquired companies

Forecast

➤ Rebuild a foundation for future growth and lead to profit improvement from FY2028/3 onward

- Implement upfront investments in development and marketing, etc.
- Promote fixed cost reductions through structural reforms and business efficiency improvements

➤ Establish a structure to realize the Omnichannel strategy

- Advance the migration to the new platform, V2
- Promote the online port of IPs with a track record in gaming machine sales

-20-

I will explain the Gaming Business.

Q1 got off to a slightly better-than-expected start due to steady sales of gaming machines. On the other hand, due to the impact of the consolidation of GAN and Stakelogic's results, sales increased but the operating loss widened compared with Q1 FY2026/3. Regarding PARADISE CITY in South Korea, which I will discuss in more detail later, the equity method earnings amount decreased compared with Q1 FY2026/3, but the contribution to profit was in line with expectations.

Going forward, in gaming machine sales, in addition to the key series *Railroad RICHES™* and *Super Burst™*, we will launch *BONANZA BROS. GOLDEN HEIST™*, a new title based on SEGA IP.

At PARADISE CITY, we will also continue to strengthen operations.

At GAN and Stakelogic, we are rebuilding the foundation for future growth by promoting the business revitalization programs.

As a key initiative, GAN is proceeding with the migration of the platform from V1 to V2, with the aim of introducing V2 to existing major customers and establishing model cases within this fiscal year. In addition, as part of our cost structural reforms, we aim to close the UK office, the V1 development base, within this calendar year to reduce fixed costs.

At Stakelogic, in addition to the structural reforms implemented in April, including the downsizing of its Netherlands base, we will improve business efficiency by narrowing the development pipeline. Furthermore, within this fiscal year we plan to launch online port of our gaming machine IP with a track record, including *Railroad RICHES™*, with the aim of building a new earnings base.

Cabinet		Game Titles	
			
GENESIS NOVA™		Railroad RICHES Link™	
GENESIS ATMOS™		BONANZA BROS. GOLDEN HEIST™ (Scheduled for introduction)	
© SEGA SAMMY CREATION INC. © SEGA		-21-	

For your reference, these are our key products in gaming machines.

(KRW Billion)		FY2026/3		FY2027/3
		Q1	Full year Results	Q1
Sales		139.1	597.4	145.9
	Casino	110.0	479.6	112.7
	Hotel	23.6	96.6	28.2
	Other	5.4	21.2	5.0
Cost of sales		94.4	429.0	111.6
	Casino	57.7	260.9	58.9
	Hotel	29.8	130.9	41.7
	Other	6.9	37.2	11.0
Gross profit		44.7	168.4	34.3
	SG&A	11.2	66.0	18.9
Operating profit		33.5	102.5	15.4
EBITDA		42.4	138.3	26.3
Net profit		27.1	104.2	5.6
Number of casino visitors (Thousands)		98	434	117
Source: Paradise IR				
SEGASAMMY Equity method earnings amount (Billion yen)		1.1	4.5	0.1

Q1 FY2027/3 Results

➤ Casino sales performed steadily

- Casino sales performed steadily, driven by Japanese VIP and mass market customers
- Although equity method earnings amount decreased due to one-time initial expenses for the newly opened hotel and a decline in tax refunds etc., the profit contribution was in line with expectations

Forecast

➤ Expect contribution to profit through equity-method

- Casino drop in May reached a record high since its opening (Q2)
- Hotel reservations for the summer peak season are also strong

*PARADISE SEGASAMMY is an equity-method affiliate of the Group
*PARADISE SEGASAMMY is recorded with a three-month delay due to the December fiscal year-end
*Local accounting standards

I will explain PARADISE SEGASAMMY in South Korea.

The results for PARADISE SEGASAMMY shown here are from January to March 2026, as its inclusion in our results is recorded with a three-month delay.

Regarding casino revenue, Japanese VIP and mass customers continued to be the main drivers, and both the drop amount and the number of visitors exceeded Q1 FY2026/3,resulting in steady performance. Although the hold rate temporarily declined in March, we implemented agile cost control, and as a result, equity method earnings were in line with expectations. Casino revenue has remained strong recently, mainly among Japanese customers, and casino drop amount in May reached a record high since its opening. Hotel reservations for the summer peak season are also strong.

Meanwhile, due to one-time initial expenses associated with the newly opened hotel and a decline in tax refunds, equity method earnings amount decreased with Q1 FY2026/3, but the contribution to profit was in line with expectations.

That concludes my presentation.
Thank you very much.

03

Appendix

[Impact of foreign exchange in Q1 Results]

➤ Positive impact of approximately 1.0 billion yen for sales in the Entertainment Contents Business

		(Billion yen)
		Q1
Consumer	Sales	0.99
	Operating Income	0.19
Animation	Sales	0.02
	Operating Income	0.02
AM&TOY	Sales	-
	Operating Income	-0.26

- [Currency Rates]**
- 1 USD: Rate in Initial forecast 151.0 yen → AR 160.32 yen
 - 1 GBP: Rate in Initial forecast 219.0 yen → AR 214.22 yen
 - 1 EUR: Rate in Initial forecast 177.0 yen → AR 185.43 yen

➤ Recorded foreign exchange gains of 0.42 billion yen in non-operating income due to revaluation and settlement of receivables and payables denominated in foreign currencies

Roll-out Schedule (CS area)



		Title	Launch	Region	Platform	
Full Game	FY2027/3	Sonic Frontiers - Definitive Edition	Jun. 24, 2026	Global	Nintendo Switch™ 2	Sonic Frontiers is also available on other platforms
		Metaphor: ReFantazio	Nov. 12, 2026	Global	Nintendo Switch™ 2	Also available on other platforms
		STRANGER THAN HEAVEN	Jan. 15, 2027	Global	Multi-platform	
		Persona 4 Revival	Feb. 18, 2027	Global	Multi-platform	
	TBD	Crazy Taxi: World Tour	2027	Global	Multi-platform	
		VIRTUA FIGHTER CROSSROADS	2027	TBD	TBD	
		Persona 6	TBD	Global	Multi-platform	
		Total War: WARHAMMER 40,000	TBD	Global	Multi-platform	
		Total War: MEDIEVAL III	TBD	TBD	TBD	
		Alien: Isolation 2	TBD	Global	Multi-platform	
Delivery format: TBD	FY2027/3 onward	Golden Axe (Title TBD)	TBD	TBD	TBD	
		Jet Set Radio (Title TBD)	TBD	TBD	TBD	
		Streets of Rage (Title TBD)	TBD	TBD	TBD	

*Only announced titles are listed

Roll-out Schedule (Animation area)



		Title	Launch	Region	Platform	
TMS ENTERTAINMENT	FY2027/3	Always a Catch !	Apr. 1, 2026	-	-	A work of UNLIMITED PRODUCE Project ^{*1}
		Dr.STONE SCIENCE FUTURE (Final Season)	Apr. 2, 2026	-	-	
		Detective Conan: Fallen Angel of the Highway	Apr. 10, 2026	-	-	
		BAKI-DOU Part2	Jun. 18, 2026	Global	NETFLIX	Exclusively streaming worldwide on Netflix
		Anpanman: Pantan and the Promised Star	Jun. 26, 2026	-	-	
		BANANYA 10th Anniversary	Jul. 10, 2026	-	d Anime Store and other platforms	
		Blue Box Season 2	Oct. 4, 2026	-	-	A work of UNLIMITED PRODUCE Project ^{*1}
		MAGIC KNIGHT RAYEARTH	Oct. 7, 2026	-	-	A work of UNLIMITED PRODUCE Project ^{*1}
License-out/ Investment Project etc.	FY2027/3	SAKAMOTO DAYS Season 2	Jan. 2027	-	-	
		The Angry Birds Movie 3	Dec. 23, 2026	-	-	Date in "Launch" is the scheduled release date in U.S. Release date in other regions TBD
		Sonic the Hedgehog 4	Mar. 19, 2027	-	-	Date in "Launch" is the scheduled release date in U.S. Release date in other regions TBD
	TBD	Golden Axe (Title TBD)	TBD	TBD	TBD	Licensing out
		SHINOBI (Title TBD)	TBD	TBD	TBD	Licensing out
		Streets of Rage (Title TBD)	TBD	TBD	TBD	Licensing out
		Eternal Champions (Title TBD)	TBD	TBD	TBD	Licensing out
		THE HOUSE OF THE DEAD (Title TBD)	TBD	TBD	TBD	Licensing out
		OutRun (Title TBD)	TBD	TBD	TBD	Licensing out

^{*1}UNLIMITED PRODUCE Project: an initiative to produce animation works in collaboration with other studios, with the aim of strengthening the animation production business
^{*}Only main announced titles are listed

Roll-out Schedule (AM&TOY area)



		Title	Launch	Region	Platform	
AM	FY2027/3	PAW Patrol Fun with Marshall	Jul. 2, 2026	-	-	
		Curious George Ukitto-Carnival	Jul. 2, 2026	-	-	
		Curious George Ukitto-Drive	Jul. 2, 2026	-	-	
		cherit	Jul. 7, 2026	-	-	
		MOGURI A TALE	Jul. 8, 2026	-	-	
TOY	FY2027/3	"ANPANMAN" Talking Picture Book 3000	Aug. 6, 2026	-	-	

*Only main announced titles are listed

[Main titles sold in Q1 / titles planned to be sold from Q2 onward]

		Title	Initial Installation	Unit Sales	Specification Range ^{*1}	Sort
Pachislot	Q1	A-SLOT+ Isekai Quartet BT	Apr. 2026	3,400 units	Low	New Series
		Smart Pachislot BIG DREAM THE GOLDEN PUSHER	May. 2026	10,400 units	High	New Series
		[Additional sales]Smart Pachislot Kabaneri of the Iron Fortress: The Battle of Unato	Mar. 2026	6,000 units	Medium	-
		others	-	2,600 units	-	-
	Q2 onward	Smart Pachislot Lycoris Recoil	Sep. 2026	-	Medium	New Series
		Smart Pachislot Beast King	Oct. 2026	-	High	New Series
		[Additional sales]Smart Pachislot Kabaneri of the Iron Fortress: The Battle of Unato	Mar. 2026	-	Medium	-

[Cumulative unit sales] *Smart Pachislot Kabaneri of the Iron Fortress: The Battle of Unato*: 40,900 units, *Smart Pachislot Bakemonogatari*: 16,300 units

		Title	Initial Installation	Unit Sales	Specification Range ^{*2}	Sort
Pachinko	Q1	e Record of Ragnarok	Apr. 2026	3,900 units	Middle	New Series
		e Bakemonogatari Oni99ver.	Jun. 2026	3,000 units	Light	Specification Change
		others	-	1,300 units	-	-
	Q2 onward	e Tokyo Revengers Christmas Showdown Arc	Jul. 2026	-	Light Middle	Specification Change
		e The Seven deadly Sins 3	Aug. 2026	-	High Middle	New Series
		e Kabaneri of the Iron Fortress 2 Rinne no Kahou 119ver.	Sep. 2026	-	Light	Specification Change
		e Beast King Shishi no Ichigeki	Nov. 2026	-	High Middle	New Series

^{*1}Specification Range (Pachislot): Classified by gambling aspect level (High/Medium/Low). Calculated based on in-house definition
^{*2}Specification Range (Pachinko): Classified by symbol matching probability (High/High Middle/Middle/Light Middle/Light/Minimum/Other) Based on the jackpot probability classification of Daikoku Denki Co., Ltd.
High=1/320 or less, High Middle=1/280~1/319, Middle=1/200~1/279, Light Middle=1/120~1/199, Light=1/40~1/119, Minimum=1/39 or more

*Unit sales only in FY2027/3 are listed
*Among the announced titles, only those with confirmed title names are listed
*Sales unit figures are rounded down to the nearest hundred units



<https://www.segasammy.co.jp/en/ir/>

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