



NS Solutions

平成21年3月期 第3四半期決算 参考資料

Appendix of Financial Results for the Quarterly Period ended Dec. 31, 2008

平成21年1月29日
Jan. 29, 2009

新日鉄ソリューションズ株式会社 NS Solutions Corporation

(注)この資料において百万円もしくはパーセントで記載してある情報は四捨五入しておりますので、財務諸表と数値が異なる場合があります。

(Note) In this material, where information is presented in millions of yen or percentages, these amounts have been rounded. Accordingly, these amounts may differ from figures included in Consolidated Financial Results for the Third Quarter in some cases.

1.連結業績概要 Outline of Consolidated Business Results

(単位:百万円(他に指定ない限り) Millions of Yen, except as otherwise noted)

| | | 2008/3 | | | | | 2009/3 | | | | |
|------------|--|--------|--------|--------|--------|---------|--------|--------|--------|----|---------|
| | | Q1 | Q2 | Q3 | Q4 | Total | Q1 | Q2 | Q3 | Q4 | Total |
| 受注高 | Amount of order acceptance | 43,506 | 43,060 | 36,255 | 46,474 | 169,295 | 38,025 | 49,214 | 32,523 | | 119,762 |
| 業務ソリューション | Business solutions | 29,956 | 25,254 | 22,175 | 28,137 | 105,522 | 21,018 | 31,330 | 19,005 | | 71,353 |
| 基盤ソリューション | Platform solutions | 5,376 | 4,208 | 4,516 | 6,371 | 20,471 | 4,955 | 3,994 | 3,784 | | 12,733 |
| ビジネスサービス | Business services | 8,173 | 13,599 | 9,564 | 11,965 | 43,301 | 12,051 | 13,891 | 9,734 | | 35,676 |
| 期末受注残高 | Order backlog at end of period | 54,568 | 54,616 | 54,472 | 47,900 | 47,900 | 51,107 | 58,694 | 58,351 | | 58,351 |
| 業務ソリューション | Business solutions | 32,338 | 31,841 | 30,994 | 24,968 | 24,968 | 26,632 | 33,283 | 33,506 | | 33,506 |
| 基盤ソリューション | Platform solutions | 5,208 | 4,470 | 4,817 | 3,290 | 3,290 | 4,090 | 3,450 | 3,912 | | 3,912 |
| ビジネスサービス | Business services | 17,022 | 18,305 | 18,660 | 19,642 | 19,642 | 20,384 | 21,962 | 20,933 | | 20,933 |
| 売上高 | Net sales | 32,944 | 43,011 | 36,399 | 53,046 | 165,400 | 34,818 | 41,627 | 32,866 | | 109,311 |
| 業務ソリューション | Business solutions | 18,940 | 25,750 | 23,022 | 34,164 | 101,876 | 19,354 | 24,680 | 18,782 | | 62,815 |
| 基盤ソリューション | Platform solutions | 5,235 | 4,946 | 4,168 | 7,899 | 22,248 | 4,155 | 4,634 | 3,322 | | 12,111 |
| ビジネスサービス | Business services | 8,769 | 12,315 | 9,209 | 10,983 | 41,276 | 11,309 | 12,313 | 10,762 | | 34,385 |
| 売上総利益 | Gross profit | 7,753 | 8,778 | 8,201 | 10,901 | 35,633 | 7,244 | 8,129 | 7,450 | | 22,823 |
| 販売費及び一般管理費 | Selling, general and administrative expenses | 5,074 | 5,110 | 4,932 | 5,620 | 20,736 | 5,835 | 5,223 | 5,568 | | 16,626 |
| 営業利益 | Operating income | 2,679 | 3,668 | 3,268 | 5,281 | 14,896 | 1,409 | 2,906 | 1,882 | | 6,197 |
| 経常利益 | Recurring profit | 2,804 | 3,724 | 3,354 | 5,365 | 15,247 | 1,581 | 2,995 | 1,981 | | 6,558 |
| 当期純利益 | Net income | 1,472 | 2,066 | 1,822 | 3,065 | 8,425 | 761 | 1,577 | 1,093 | | 3,431 |
| 営業利益率(%) | Operating income margin (%) | 8.1% | 8.5% | 9.0% | 10.0% | 9.0% | 4.0% | 7.0% | 5.7% | | 5.7% |
| 売上総利益率(%) | Gross profit margin (%) | 23.5% | 20.4% | 22.5% | 20.6% | 21.5% | 20.8% | 19.5% | 22.7% | | 20.9% |
| 新日鉄向け売上高 | Sales to Nippon Steel Corp. | 4,565 | 6,692 | 4,985 | 6,135 | 22,377 | 6,436 | 6,336 | 5,426 | | 18,199 |

| | | 2005/3 | | 2006/3 | | 2007/3 | | 2008/3 | | 2009/3 | | 2009/3 | |
|------------|--|-------------|-------------|-------------|-------------|-------------|-------------|--|------------------|-------------|-------------|-------------|-------------|
| | | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | H20.10.29 (前回見通し Previous Outlook) | (見通し Outlook) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) |
| 受注高 | Amount of order acceptance | 152,210 | 150,790 | 162,487 | 169,295 | 169,295 | — | — | — | 76,289 | 74,602 | 79,972 | 86,566 |
| 業務ソリューション | Business solutions | 84,363 | 86,652 | 98,027 | 105,522 | 105,522 | — | — | — | 41,153 | 41,870 | 48,313 | 55,210 |
| 基盤ソリューション | Platform solutions | 27,417 | 24,369 | 24,874 | 20,471 | 20,471 | — | — | — | 14,156 | 11,528 | 10,953 | 9,584 |
| ビジネスサービス | Business services ※ | 40,430 | 39,769 | 39,587 | 43,301 | 43,301 | — | — | — | 20,979 | 21,205 | 20,705 | 21,772 |
| 期末受注残高 | Order backlog at end of period | 35,516 | 37,997 | 44,005 | 47,900 | 47,900 | — | — | — | 31,724 | 45,354 | 47,880 | 54,616 |
| 業務ソリューション | Business solutions | 13,213 | 15,867 | 21,321 | 24,968 | 24,968 | — | — | — | 18,545 | 21,542 | 24,785 | 31,841 |
| 基盤ソリューション | Platform solutions | 4,520 | 4,708 | 5,067 | 3,290 | 3,290 | — | — | — | 3,207 | 3,713 | 3,596 | 4,470 |
| ビジネスサービス | Business services ※ | 17,782 | 17,422 | 17,617 | 19,642 | 19,642 | — | — | — | 9,972 | 20,099 | 19,499 | 18,305 |
| 売上高 | Net sales | 146,526 | 148,308 | 156,479 | 165,400 | 165,400 | 165,000 | 165,000 | 165,000 | 65,723 | 64,764 | 70,089 | 75,955 |
| 業務ソリューション | Business solutions | 81,956 | 83,999 | 92,572 | 101,876 | 101,876 | 99,500 | 99,500 | 99,500 | 33,414 | 33,541 | 39,395 | 44,690 |
| 基盤ソリューション | Platform solutions | 25,700 | 24,181 | 24,515 | 22,248 | 22,248 | 20,000 | 20,000 | 20,000 | 13,752 | 12,334 | 12,066 | 10,181 |
| ビジネスサービス | Business services | 38,871 | 40,129 | 39,392 | 41,276 | 41,276 | 45,500 | 45,500 | 45,500 | 18,557 | 18,888 | 18,628 | 21,084 |
| 売上総利益 | Gross profit | 29,464 | 30,519 | 33,361 | 35,633 | 35,633 | 34,600 | 34,600 | 34,600 | 12,914 | 13,429 | 14,553 | 16,531 |
| 販売費及び一般管理費 | Selling, general and administrative expenses | 17,754 | 18,402 | 19,223 | 20,736 | 20,736 | 22,000 | 22,000 | 22,000 | 8,701 | 8,840 | 9,409 | 10,184 |
| 営業利益 | Operating income | 11,710 | 12,117 | 14,138 | 14,896 | 14,896 | 12,600 | 12,600 | 12,600 | 4,212 | 4,589 | 5,144 | 6,347 |
| 経常利益 | Recurring profit | 11,791 | 12,356 | 14,367 | 15,247 | 15,247 | 13,000 | 13,000 | 13,000 | 4,272 | 4,752 | 5,238 | 6,528 |
| 当期純利益 | Net income | 6,621 | 7,482 | 8,120 | 8,425 | 8,425 | 7,000 | 7,000 | 7,000 | 2,287 | 2,706 | 3,026 | 3,538 |
| 営業利益率(%) | Operating income margin (%) | 8.0% | 8.2% | 9.0% | 9.0% | 9.0% | 7.6% | 7.6% | 7.6% | 6.4% | 7.1% | 7.3% | 8.4% |

※ 2005年3月末に、新日本製鐵(株)向けサービスの受注高の把握方法を売上高計上時点での把握から、契約締結時点での把握に変更しております。

In terms of the order acceptance from Nippon Steel Corporation, the company changed its recognition timing from sales-recognition basis to contract-date basis on March 31, 2005.

巻末の開示事項をご覧ください。 Please see the important disclosures at the end of this material.

2.単独業績概要 Outline of Non-consolidated Business Results

(単位:百万円(他に指定ない限り) Millions of Yen, except as otherwise noted)

| | | 2008/3 | | | | |
|------------|--|--------|--------|--------|--------|---------|
| | | Q1 | Q2 | Q3 | Q4 | Total |
| 受注高 | Amount of order acceptance | 40,760 | 37,338 | 32,019 | 39,672 | 149,789 |
| 業務ソリューション | Business solutions | 27,612 | 20,339 | 18,492 | 22,804 | 89,247 |
| 基盤ソリューション | Platform solutions | 5,097 | 3,486 | 4,046 | 4,979 | 17,608 |
| ビジネスサービス | Business services | 8,052 | 13,512 | 9,480 | 11,891 | 42,935 |
| 期末受注残高 | Order backlog at end of period | 50,557 | 50,127 | 50,134 | 42,976 | 42,976 |
| 業務ソリューション | Business solutions | 29,182 | 28,293 | 27,621 | 21,045 | 21,045 |
| 基盤ソリューション | Platform solutions | 4,354 | 3,529 | 3,854 | 2,289 | 2,289 |
| ビジネスサービス | Business services | 17,022 | 18,305 | 18,660 | 19,642 | 19,642 |
| 売上高 | Net sales | 30,103 | 37,768 | 32,012 | 46,831 | 146,714 |
| 業務ソリューション | Business solutions | 16,700 | 21,227 | 19,165 | 29,380 | 86,472 |
| 基盤ソリューション | Platform solutions | 4,757 | 4,311 | 3,722 | 6,543 | 19,333 |
| ビジネスサービス | Business services | 8,647 | 12,229 | 9,125 | 10,909 | 40,910 |
| 売上総利益 | Gross profit | 6,732 | 6,867 | 6,800 | 6,600 | 28,999 |
| 販売費及び一般管理費 | Selling, general and administrative expenses | 4,315 | 4,197 | 4,114 | 4,636 | 17,262 |
| 営業利益 | Operating income | 2,417 | 2,670 | 2,686 | 3,964 | 11,737 |
| 経常利益 | Recurring profit | 2,866 | 2,722 | 2,754 | 4,039 | 12,381 |
| 当期純利益 | Net income | 1,701 | 1,630 | 1,669 | 2,458 | 7,458 |

| | | 2009/3 | | | | |
|--|--|--------|--------|--------|----|---------|
| | | Q1 | Q2 | Q3 | Q4 | Total |
| | | 35,096 | 43,412 | 28,932 | | 107,440 |
| | | 18,583 | 25,870 | 15,731 | | 60,183 |
| | | 4,569 | 3,739 | 3,550 | | 11,858 |
| | | 11,944 | 13,804 | 9,652 | | 35,399 |
| | | 46,887 | 54,619 | 54,520 | | 54,520 |
| | | 23,302 | 29,764 | 30,058 | | 30,058 |
| | | 3,201 | 2,894 | 3,529 | | 3,529 |
| | | 20,384 | 21,962 | 20,933 | | 20,933 |
| | | 31,185 | 35,680 | 29,030 | | 95,896 |
| | | 16,325 | 19,408 | 15,436 | | 51,169 |
| | | 3,658 | 4,046 | 2,914 | | 10,619 |
| | | 11,202 | 12,227 | 10,680 | | 34,108 |
| | | 5,821 | 6,084 | 6,043 | | 17,948 |
| | | 4,822 | 4,223 | 4,599 | | 13,644 |
| | | 999 | 1,861 | 1,444 | | 4,304 |
| | | 1,457 | 1,944 | 1,527 | | 4,928 |
| | | 886 | 1,155 | 849 | | 2,890 |

| | | | | | | |
|-----------|-----------------------------|-------|-------|-------|-------|-------|
| 営業利益率(%) | Operating income margin (%) | 8.0% | 7.1% | 8.4% | 8.5% | 8.0% |
| 売上総利益率(%) | Gross profit margin (%) | 22.4% | 18.2% | 21.2% | 18.4% | 19.8% |

| | | | | | | |
|--|--|-------|-------|-------|--|-------|
| | | 3.2% | 5.2% | 5.0% | | 4.5% |
| | | 18.7% | 17.1% | 20.8% | | 18.7% |

| | | | | | | |
|----------|-----------------------------|-------|-------|-------|-------|--------|
| 新日鉄向け売上高 | Sales to Nippon Steel Corp. | 4,317 | 6,414 | 4,731 | 5,494 | 20,956 |
|----------|-----------------------------|-------|-------|-------|-------|--------|

| | | | | | | |
|--|--|-------|-------|-------|--|--------|
| | | 6,136 | 6,051 | 5,146 | | 17,333 |
|--|--|-------|-------|-------|--|--------|

| | | 2005/3 | 2006/3 | 2007/3 | 2008/3 | 2009/3 | 2009/3 |
|-------------|--|-------------|-------------|-------------|-------------|--|---------------|
| | | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | H20.10.29 (前回見直し Previous Outlook) | (見直し Outlook) |
| 受注高 | Amount of order acceptance | 137,385 | 134,374 | 146,282 | 149,789 | — | — |
| 業務ソリューション | Business solutions | 72,905 | 73,456 | 84,489 | 89,247 | — | — |
| 基盤ソリューション | Platform solutions | 24,821 | 21,627 | 22,650 | 17,608 | — | — |
| ビジネスサービス | Business services ※ | 39,659 | 39,291 | 39,143 | 42,935 | — | — |
| 期末受注残高 | Order backlog at end of period | 32,139 | 33,370 | 39,901 | 42,976 | — | — |
| 業務ソリューション | Business solutions | 10,923 | 12,359 | 18,269 | 21,045 | — | — |
| 基盤ソリューション | Platform solutions | 3,433 | 3,589 | 4,014 | 2,289 | — | — |
| ビジネスサービス | Business services ※ | 17,782 | 17,422 | 17,617 | 19,642 | — | — |
| 売上高 | Net sales | 131,889 | 133,143 | 139,752 | 146,714 | 145,000 | 145,000 |
| 業務ソリューション | Business solutions | 70,591 | 72,020 | 78,578 | 86,472 | 82,000 | — |
| 基盤ソリューション | Platform solutions | 23,198 | 21,471 | 22,225 | 19,333 | 18,000 | — |
| ビジネスサービス | Business services | 38,100 | 39,652 | 38,948 | 40,910 | 45,000 | — |
| 売上総利益 | Gross profit | 24,705 | 24,883 | 26,985 | 28,999 | 27,000 | — |
| 販売費及び一般管理費 | Selling, general and administrative expenses | 15,101 | 15,399 | 15,984 | 17,262 | 17,900 | — |
| 営業利益 | Operating income | 9,604 | 9,484 | 11,001 | 11,737 | 9,100 | 9,100 |
| 経常利益 | Recurring profit | 9,737 | 9,794 | 11,362 | 12,381 | 9,800 | 9,800 |
| 当期純利益 | Net income | 5,721 | 6,732 | 6,851 | 7,458 | 5,800 | 5,800 |
| 営業利益率(%) | Operating income margin (%) | 7.3% | 7.1% | 7.9% | 8.0% | 6.3% | — |
| 売上総利益率(%) | Gross profit margin (%) | 18.7% | 18.7% | 19.3% | 19.8% | 18.6% | — |
| 業務ソリューション | Business solutions | 20.7% | 20.1% | 22.2% | 21.6% | 19.1% | — |
| 基盤ソリューション | Platform solutions | 16.8% | 18.4% | 18.0% | 19.2% | 18.7% | — |
| ビジネスサービス | Business services | 16.8% | 16.3% | 14.3% | 16.2% | 17.7% | — |
| 一株当たり配当金(円) | Cash dividends per share (yen) | 17.50 | 25.00 | 35.00 | 40.00 | 45.00 | 45.00 |

| | | 2004/9 | 2005/9 | 2006/9 | 2007/9 | 2008/9 |
|--|--|-------------|-------------|-------------|-------------|-------------|
| | | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) |
| | | 69,298 | 67,718 | 72,801 | 78,098 | 78,508 |
| | | 35,423 | 36,171 | 41,900 | 47,951 | 44,452 |
| | | 13,311 | 10,596 | 10,447 | 8,583 | 8,308 |
| | | 20,564 | 20,951 | 20,454 | 21,564 | 25,748 |
| | | 28,634 | 42,187 | 43,623 | 50,127 | 54,619 |
| | | 16,027 | 19,009 | 21,290 | 28,293 | 29,764 |
| | | 2,635 | 3,079 | 2,834 | 3,529 | 2,894 |
| | | 9,972 | 20,099 | 19,499 | 18,305 | 21,962 |
| | | 58,634 | 57,670 | 62,549 | 67,871 | 66,865 |
| | | 28,006 | 28,086 | 32,970 | 37,927 | 35,733 |
| | | 12,486 | 10,950 | 11,202 | 9,068 | 7,704 |
| | | 18,142 | 18,634 | 18,377 | 20,876 | 23,428 |
| | | 10,885 | 11,201 | 11,744 | 13,599 | 11,905 |
| | | 7,350 | 7,598 | 7,784 | 8,512 | 9,045 |
| | | 3,535 | 3,603 | 3,960 | 5,087 | 2,860 |
| | | 3,729 | 3,898 | 4,281 | 5,588 | 3,401 |
| | | 2,148 | 2,381 | 2,698 | 3,331 | 2,041 |
| | | 6.0% | 6.2% | 6.3% | 7.5% | 4.3% |
| | | 18.6% | 19.4% | 18.8% | 20.0% | 17.8% |
| | | 20.9% | 20.5% | 22.2% | 21.7% | 17.0% |
| | | 14.7% | 19.9% | 17.9% | 20.8% | 21.0% |
| | | 17.6% | 17.6% | 13.1% | 16.6% | 18.1% |
| | | 8.75 | 12.50 | 17.50 | 20.00 | 22.50 |

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財務諸表の開示について

当社連結財務諸表及び、個別財務諸表につきましては、日本の金融商品取引法及びそれに関連する会計規則、日本基準における一般会計原則に従って作成されております。そのため国際財務報告基準とは開示方法が異なる部分がありますのでご注意ください。

This document includes statements of forward-looking descriptions regarding the intent, belief or current expectations of NS Solutions Corporation (the “Company”) or its officers in terms of its operation and financial condition. Accordingly, such statements contain risks and uncertainties since they are neither historical facts nor guarantees of future performance. Actual results may be varied and influenced by various factors. The Company does not undertake to revise such forward-looking descriptions to reflect those factors.

Basis of Presenting Financial Statements

The accompanying financial statements of the Company and its consolidated subsidiaries have been prepared in accordance with the provisions set forth in the Financial Instruments and Exchange Law and its related accounting regulations, and in conformity with accounting principles generally accepted in Japan (“Japanese GAAP”), which are different in certain respects as to application and disclosure requirements from International Financial Reporting Standards.