



NS Solutions

平成17年3月期 第3四半期財務・業績の概況 補足資料

Appendix of Financial Information and Business Results Outline for the Quarterly Period ended Dec. 31, 2004

2005年2月3日

Feb. 3, 2005

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、第3四半期財務・業績の概況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 *outline of 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)

| | 2004/3 | | | | | 2005/3 | | | | |
|---|-------------|--------|--------|--------|---------|-------------|--------|--------|----|---------|
| | Q1 | Q2 | Q3 | Q4 | Total | Q1 | Q2 | Q3 | Q4 | Total |
| サービス区分の分類方法 Categorization method by business line | ← 新区分 New → | | | | | ← 新区分 New → | | | | |
| 受注高 Amount of order acceptance | 30,847 | 40,784 | 30,452 | 45,399 | 147,482 | 32,749 | 43,540 | 29,543 | | 105,832 |
| 業務ソリューション Business solutions | 19,790 | 20,272 | 17,519 | 22,088 | 79,671 | 19,202 | 21,951 | 16,669 | | 57,822 |
| 基盤ソリューション Platform solutions | 4,976 | 6,375 | 7,056 | 11,244 | 29,648 | 7,090 | 7,066 | 5,403 | | 19,559 |
| ビジネスサービス Business services | 6,082 | 14,137 | 5,877 | 12,067 | 38,163 | 6,457 | 14,522 | 7,472 | | 28,451 |
| 期末受注残高 Order backlog at end of period | 31,377 | 31,577 | 33,496 | 21,158 | 21,158 | 24,216 | 31,724 | 33,992 | | 33,992 |
| 業務ソリューション Business solutions | 22,113 | 20,351 | 22,964 | 10,806 | 10,806 | 15,610 | 18,545 | 20,750 | | 20,750 |
| 基盤ソリューション Platform solutions | 3,808 | 2,666 | 4,054 | 2,802 | 2,802 | 2,961 | 3,207 | 4,450 | | 4,450 |
| ビジネスサービス Business services | 5,456 | 8,560 | 6,478 | 7,550 | 7,550 | 5,645 | 9,972 | 8,793 | | 8,793 |
| 売上高 Net sales | 23,990 | 40,584 | 28,533 | 57,737 | 150,844 | 29,692 | 36,032 | 27,275 | | 92,998 |
| 業務ソリューション Business solutions | 12,276 | 22,035 | 14,906 | 34,247 | 83,463 | 14,398 | 19,016 | 14,464 | | 47,878 |
| 基盤ソリューション Platform solutions | 4,268 | 7,517 | 5,668 | 12,496 | 29,948 | 6,932 | 6,820 | 4,160 | | 17,912 |
| ビジネスサービス Business services | 7,446 | 11,033 | 7,959 | 10,995 | 37,433 | 8,362 | 10,195 | 8,651 | | 27,208 |
| 売上総利益 Gross profit | 4,788 | 7,847 | 5,949 | 8,901 | 27,485 | 6,090 | 6,824 | 5,901 | | 18,815 |
| 販売費及び一般管理費 Selling, general and administrative expenses | 4,529 | 4,447 | 4,279 | 4,503 | 17,759 | 4,381 | 4,320 | 4,015 | | 12,716 |
| 営業利益 Operating income | 259 | 3,400 | 1,669 | 4,398 | 9,726 | 1,710 | 2,502 | 1,887 | | 6,099 |
| 経常利益 Recurring profit | 253 | 3,439 | 1,778 | 4,316 | 9,785 | 1,736 | 2,536 | 1,961 | | 6,233 |
| 当期純利益 Net income | 51 | 1,883 | 1,115 | 2,274 | 5,324 | 937 | 1,350 | 1,240 | | 3,527 |
| 売上高営業利益率(%) Operating income margin (%) | 1.1% | 8.4% | 5.8% | 7.6% | 6.4% | 5.8% | 6.9% | 6.9% | | 6.6% |
| 新日鉄向け売上高 Sales to Nippon Steel Corp. | 5,240 | 7,470 | 4,974 | 5,647 | 23,332 | 4,450 | 6,425 | 4,413 | | 15,287 |

| | 2000/3 | | 2001/3 | | 2002/3 | | 2003/3 | | 2004/3 | | 2005/3 | | 2001/9 | | 2002/9 | | 2003/9 | | 2004/9 | |
|---|---|---|-------------|-------------|-------------|-------------|-------------|-------------|--------------------------|---------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| | (みなし連結 Pro forma consolidated, including EI Division) | (みなし連結 Pro forma consolidated, including EI Division) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (前回見通し Previous Outlook) | (見通し Outlook) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) |
| サービス区分の分類方法 Categorization method by business line | 従来区分 Old | | 従来区分 Old | | 従来区分 Old | | 従来区分 Old | | 新区分 New | | 新区分 New | | 従来区分 Old | | 従来区分 Old | | 従来区分 Old | | 新区分 New | |
| 受注高 Amount of order acceptance | | | 143,202 | 153,844 | 147,482 | 147,482 | | | | | | | | 69,794 | 76,514 | 71,630 | 71,630 | 76,289 | | |
| 業務ソリューション Business solutions | | | 73,029 | 81,859 | 74,011 | 79,671 | | | | | | | | 30,900 | 42,435 | 36,950 | 40,063 | 41,153 | | |
| 基盤ソリューション Platform solutions | | | 34,394 | 34,488 | 36,194 | 29,648 | | | | | | | | 16,463 | 15,708 | 14,756 | 11,349 | 14,156 | | |
| ビジネスサービス Business services | | | 35,779 | 37,496 | 37,277 | 38,163 | | | | | | | | 22,431 | 18,372 | 19,924 | 20,218 | 20,979 | | |
| 期末受注残高 Order backlog at end of period | | | 1 23,775 | 24,520 | 21,158 | 21,158 | | | | | | | | 28,478 | 31,533 | 31,577 | 31,577 | 31,724 | | |
| 業務ソリューション Business solutions | | | 14,501 | 14,599 | 10,806 | 10,806 | | | | | | | | 17,209 | 21,619 | 20,351 | 20,351 | 18,545 | | |
| 基盤ソリューション Platform solutions | | | 3,603 | 3,101 | 2,802 | 2,802 | | | | | | | | 2,180 | 2,874 | 2,666 | 2,666 | 3,207 | | |
| ビジネスサービス Business services | | | 5,670 | 6,820 | 7,550 | 7,550 | | | | | | | | 9,089 | 7,040 | 8,560 | 8,560 | 9,972 | | |
| 売上高 Net sales | 132,683 | 145,952 | 148,922 | 153,098 | 150,844 | 150,844 | 152,000 | 152,000 | | | | | | 67,902 | 68,756 | 64,574 | 64,574 | 65,723 | | |
| 業務ソリューション Business solutions | 55,048 | 72,558 | 78,534 | 81,761 | 77,804 | 83,463 | 85,000 | 85,000 | | | | | | 33,778 | 35,317 | 31,199 | 34,312 | 33,414 | | |
| 基盤ソリューション Platform solutions | 25,459 | 29,824 | 35,169 | 34,990 | 36,493 | 29,948 | 27,000 | 27,000 | | | | | | 16,369 | 16,437 | 15,191 | 11,784 | 13,752 | | |
| ビジネスサービス Business services | 52,176 | 43,570 | 35,219 | 36,347 | 36,547 | 37,433 | 40,000 | 40,000 | | | | | | 17,755 | 17,002 | 18,184 | 18,478 | 18,557 | | |
| 売上総利益 Gross profit | 24,184 | 31,770 | 29,719 | 30,332 | 27,485 | 30,300 | | | | | | | | 13,803 | 14,585 | 12,635 | | 12,914 | | |
| 販売費及び一般管理費 Selling, general and administrative expenses | 16,661 | 20,703 | 17,240 | 18,235 | 17,759 | 18,400 | | | | | | | | 8,058 | 9,142 | 8,976 | | 8,701 | | |
| 営業利益 Operating income | 7,523 | 11,067 | 12,479 | 12,097 | 9,726 | 11,900 | | | | | | | | 5,745 | 5,443 | 3,659 | | 4,212 | | |
| 経常利益 Recurring profit | 6,948 | 10,669 | 12,422 | 12,086 | 9,785 | 12,000 | 12,000 | | | | | | | 5,736 | 5,454 | 3,691 | | 4,272 | | |
| 当期純利益 Net income | 3,425 | 5,827 | 6,422 | 6,247 | 5,324 | 6,700 | 6,700 | | | | | | | 2,915 | 2,718 | 1,935 | | 2,287 | | |
| 売上高営業利益率(%) Operating income margin (%) | 5.7% | 7.6% | 8.4% | 7.9% | 6.4% | 7.8% | | | | | | | | 8.5% | 7.9% | 5.7% | | 6.4% | | |

1 連結子会社の一部で2002年4月より受注残高管理を開始しました。2002年3月末の受注残高は、2002年4月以降の受注残高との比較可能性を補うため、当該子会社が2002年3月以前から受注残高管理を開始していた場合を想定し算出したものであります。

One of our consolidated subsidiaries has newly started to manage its order backlogs through figures since April 2002. Order backlogs at the end of March 2002 have been estimated as if this change had occurred before March 2002 in order to raise the comparability between the figures in March 2002 and those in and after April 2002.

2 サービス区分別の受注高・期末受注残高・売上高などの金額は、従来、個別プロジェクト毎に分類していましたが、2004年3月期より部門別に分類する方法に変更致しました。2004年3月期については、前年との比較を容易にするため従来区分と新区分の両方を記載しております。 Business line-related figures such as order acceptance, order backlog and sales had been categorized on a project-by-project basis. NS Solutions has just started to categorize these figures on a division-by-division basis for the fiscal year ended Mar. 2004. NS Solutions prepared both categorization data for the fiscal year ended Mar. 2004 in order to raise the year-on-year comparability.

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)

| サービス区分の分類方法 Categorization method by business line | 2004/3 | | | | | 2005/3 | | | | |
|---|--------|--------|--------|--------|---------|--------|--------|--------|----|--------|
| | Q1 | Q2 | Q3 | Q4 | Total | Q1 | Q2 | Q3 | Q4 | Total |
| 受注高 Amount of order acceptance | 28,888 | 36,606 | 27,638 | 39,699 | 132,831 | 30,370 | 38,928 | 27,141 | | 96,439 |
| 業務ソリューション Business solutions | 18,212 | 16,846 | 15,391 | 18,366 | 68,815 | 17,467 | 17,956 | 14,830 | | 50,253 |
| 基盤ソリューション Platform solutions | 4,803 | 5,799 | 6,554 | 9,643 | 26,799 | 6,675 | 6,636 | 5,022 | | 18,333 |
| ビジネスサービス Business services | 5,873 | 13,961 | 5,693 | 11,690 | 37,217 | 6,228 | 14,336 | 7,290 | | 27,854 |
| 期末受注残高 Order backlog at end of period | 28,789 | 29,112 | 30,889 | 17,970 | 17,970 | 21,359 | 28,634 | 31,134 | | 31,134 |
| 業務ソリューション Business solutions | 20,409 | 18,402 | 20,924 | 8,610 | 8,610 | 13,702 | 16,027 | 18,395 | | 18,395 |
| 基盤ソリューション Platform solutions | 2,924 | 2,150 | 3,487 | 1,810 | 1,810 | 2,013 | 2,635 | 3,946 | | 3,946 |
| ビジネスサービス Business services | 5,456 | 8,560 | 6,478 | 7,550 | 7,550 | 5,645 | 9,972 | 8,793 | | 8,793 |
| 売上高 Net sales | 21,374 | 36,283 | 25,861 | 52,618 | 136,136 | 26,981 | 31,653 | 24,642 | | 83,276 |
| 業務ソリューション Business solutions | 10,257 | 18,853 | 12,869 | 30,680 | 72,659 | 12,376 | 15,630 | 12,462 | | 40,468 |
| 基盤ソリューション Platform solutions | 3,880 | 6,573 | 5,217 | 11,320 | 26,990 | 6,472 | 6,014 | 3,711 | | 16,197 |
| ビジネスサービス Business services | 7,237 | 10,857 | 7,775 | 10,618 | 36,487 | 8,133 | 10,009 | 8,469 | | 26,611 |
| 売上総利益 Gross profit | 3,998 | 6,434 | 4,982 | 7,393 | 22,808 | 5,263 | 5,622 | 5,098 | | 15,983 |
| 販売費及び一般管理費 Selling, general and administrative expenses | 3,836 | 3,799 | 3,620 | 3,902 | 15,157 | 3,753 | 3,597 | 3,404 | | 10,754 |
| 営業利益 Operating income | 162 | 2,636 | 1,363 | 3,490 | 7,651 | 1,510 | 2,025 | 1,693 | | 5,228 |
| 経常利益 Recurring profit | 402 | 2,639 | 1,365 | 3,381 | 7,787 | 1,727 | 2,002 | 1,724 | | 5,453 |
| 当期純利益 Net income | 234 | 1,513 | 836 | 1,912 | 4,496 | 1,006 | 1,142 | 1,048 | | 3,196 |
| 売上高営業利益率(%) Operating income margin (%) | 0.8% | 7.3% | 5.3% | 6.6% | 5.6% | 5.6% | 6.4% | 6.9% | | 6.3% |
| 新日鉄向け売上高 Sales to Nippon Steel Corp. | 5,001 | 7,002 | 4,759 | 5,402 | 22,164 | 4,124 | 6,044 | 4,082 | | 14,250 |

| サービス区分の分類方法 Categorization method by business line | 2002/3 | | 2003/3 | | 2004/3 | | 2005/3 | | 2005/3 | |
|---|-------------|-------------|-------------|-------------|-------------------------|-------------------------|-------------------------|-------------------------|---------------|---------------|
| | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (前見通し Previous Outlook) | (前見通し Previous Outlook) | (前見通し Previous Outlook) | (前見通し Previous Outlook) | (見直し Outlook) | (見直し Outlook) |
| 受注高 Amount of order acceptance | 127,671 | 138,922 | 132,831 | 132,831 | | | | | | |
| 業務ソリューション Business solutions | 62,304 | 71,277 | 63,183 | 68,815 | | | | | | |
| 基盤ソリューション Platform solutions | 31,422 | 31,365 | 33,345 | 26,799 | | | | | | |
| ビジネスサービス Business services | 33,945 | 36,280 | 36,303 | 37,217 | | | | | | |
| 期末受注残高 Order backlog at end of period | 20,210 | 21,275 | 17,970 | 17,970 | | | | | | |
| 業務ソリューション Business solutions | 12,360 | 12,454 | 8,610 | 8,610 | | | | | | |
| 基盤ソリューション Platform solutions | 2,180 | 2,001 | 1,810 | 1,810 | | | | | | |
| ビジネスサービス Business services | 5,670 | 6,820 | 7,550 | 7,550 | | | | | | |
| 売上高 Net sales | 131,680 | 137,857 | 136,136 | 136,136 | 137,000 | 137,000 | | | | |
| 業務ソリューション Business solutions | 66,099 | 71,183 | 67,027 | 72,659 | 73,000 | 73,000 | | | | |
| 基盤ソリューション Platform solutions | 32,197 | 31,544 | 33,536 | 26,990 | 25,000 | 25,000 | | | | |
| ビジネスサービス Business services | 33,384 | 35,130 | 35,573 | 36,487 | 39,000 | 39,000 | | | | |
| 売上総利益 Gross profit | 24,469 | 25,234 | 22,808 | 25,600 | | | | | | |
| 販売費及び一般管理費 Selling, general and administrative expenses | 14,365 | 15,525 | 15,157 | 15,800 | | | | | | |
| 営業利益 Operating income | 10,104 | 9,709 | 7,651 | 9,800 | | | | | | |
| 経常利益 Recurring profit | 10,031 | 9,886 | 7,787 | 10,000 | | 10,000 | | | | |
| 当期純利益 Net income | 5,297 | 5,331 | 4,496 | 5,800 | | 5,800 | | | | |
| 売上高営業利益率(%) Operating income margin | 7.7% | 7.0% | 5.6% | 7.2% | | | | | | |
| 売上高売上総利益率(%) Gross profit margin (%) | 18.6% | 18.3% | 16.8% | 18.7% | | | | | | |
| 業務ソリューション Business solutions | | 19.0% | 16.4% | 18.3% | | 21.7% | | | | |
| 基盤ソリューション Platform solutions | | 21.0% | 17.2% | 12.5% | | 14.4% | | | | |
| ビジネスサービス Business services | | 14.5% | 17.0% | 16.8% | | 15.9% | | | | |
| 一株当たり配当金(円) Cash dividends per share (yen) | 14.58 | 17.50 | 17.50 | 17.50 | | 17.50 | | | | |

| サービス区分の分類方法 Categorization method by business line | 2001/9 | | 2002/9 | | 2003/9 | | 2004/9 | |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) |
| 受注高 Amount of order acceptance | 62,072 | 69,217 | 65,493 | 65,493 | 69,298 | | | |
| 業務ソリューション Business solutions | 26,253 | 36,610 | 31,964 | 35,057 | 35,423 | | | |
| 基盤ソリューション Platform solutions | 15,027 | 14,927 | 14,009 | 10,602 | 13,311 | | | |
| ビジネスサービス Business services | 20,792 | 17,680 | 19,520 | 19,834 | 20,564 | | | |
| 期末受注残高 Order backlog at end of period | 27,789 | 27,660 | 29,112 | 29,112 | 28,634 | | | |
| 業務ソリューション Business solutions | 16,520 | 18,450 | 18,402 | 18,402 | 16,027 | | | |
| 基盤ソリューション Platform solutions | 2,180 | 2,170 | 2,150 | 2,150 | 2,635 | | | |
| ビジネスサービス Business services | 9,089 | 7,040 | 8,560 | 8,560 | 9,972 | | | |
| 売上高 Net sales | 58,503 | 61,767 | 57,656 | 57,656 | 58,634 | | | |
| 業務ソリューション Business solutions | 26,656 | 30,520 | 26,016 | 29,109 | 28,006 | | | |
| 基盤ソリューション Platform solutions | 14,958 | 14,937 | 13,860 | 10,453 | 12,486 | | | |
| ビジネスサービス Business services | 16,889 | 16,310 | 17,780 | 18,094 | 18,142 | | | |
| 売上総利益 Gross profit | 11,416 | 12,119 | 10,433 | 10,885 | | | | |
| 販売費及び一般管理費 Selling, general and administrative expenses | 6,675 | 7,581 | 7,635 | 7,350 | | | | |
| 営業利益 Operating income | 4,741 | 4,538 | 2,798 | 3,535 | | | | |
| 経常利益 Recurring profit | 4,743 | 4,774 | 3,041 | 3,729 | | | | |
| 当期純利益 Net income | 2,486 | 2,529 | 1,747 | 2,148 | | | | |
| 売上高営業利益率(%) Operating income margin | 8.1% | 7.3% | 4.9% | 6.0% | | | | |
| 売上高売上総利益率(%) Gross profit margin (%) | 19.5% | 19.6% | 18.1% | 18.1% | 18.6% | | | |
| 業務ソリューション Business solutions | | 21.2% | 18.4% | 20.4% | 20.9% | | | |
| 基盤ソリューション Platform solutions | | 22.3% | 19.8% | 14.6% | 14.7% | | | |
| ビジネスサービス Business services | | 14.2% | 16.3% | 16.5% | 17.6% | | | |
| 一株当たり配当金(円) Cash dividends per share (yen) | 5.21 | 7.50 | 8.75 | 8.75 | | | | |

1 2004/3期以前は2004/8に実施した株式分割を考慮し遡及修正後の数値 Figures for the fiscal years ended in and before Mar. 2004 have been retroactively revised to reflect stock split made in Aug. 2004.

2 サービス区分別の受注高・期末受注残高・売上高などの金額は、従来、個別プロジェクト毎に分類しておりましたが、2004年3月期より部門別に分類する方法に変更致しました。2004年3月期については、前年との比較を容易にするため従来区分と新区分の両方を記載しております。 Business line-related figures such as order acceptance, order backlog and sales had been categorized on a project-by-project basis. NS Solutions has just started to categorise these figures on a division-by-division basis for the fiscal year ended Mar. 2004. NS Solutions prepared both categorization data for the fiscal year ended Mar. 2004 in order to raise the year-on-year comparability.

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.

本資料には当社又は当社役員の当社の営業成績及び財政状態に関する意図、意見又は現時点の予想と関連する将来予想が記載されております。従って、この将来予想は、歴史的事実でも将来の業績を保証するものでもないため、リスクと不確定な要素を含んでおります。実際の業績は様々な要因により異なる可能性があります。当社は、この将来予想を、これらの変化要因を反映するために修正することを保証するものではありません。

当社は2001年4月1日に新日本製鐵(株)のエレクトロニクス・情報通信事業部(本文中「EI事業部」という。)の営業の一部並びに、新日本製鐵(株)が日鉄日立システムエンジニアリング(株)、エヌシーアイ総合システム(株)及びエヌエスアンドアイ・システムサービス(株)に有する株式持分を譲り受けました。本資料に「みなし連結」として記載されている2000年3月期及び2001年3月期の財務情報は、1999年4月1日及び2000年4月1日にそれぞれこれらの譲り受けが行われたものとみなして作成されております。日本において一般に公正妥当と認められる会計基準又は日本における手続き、法律若しくは規則において、みなし財務情報に関する定めは、現在ありません。また、このみなし財務情報は米国証券取引委員会のみなし財務情報に関する基準に従って作成したものではありません。

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.

The Company acquired part of the business of the Electronics and Information Systems Division of Nippon Steel (referred to “EI Division”), as well as the interests of Nippon Steel in Nittetsu Hitachi systems Engineering, Inc., NCI Systems Integration, Inc., and NS&I System Service Corporation, on April 1, 2001. Such acquisitions are reflected on Financial Information for the fiscal years ended March 31, 2000 and 2001 described as “Pro forma consolidated” as if they had occurred on April 1, 1999 and 2000 respectively. No presentation of “pro forma” financial information is currently required under Japanese GAAP or any procedure, law and regulation in Japan. Moreover, such “Pro forma consolidated” information is not prepared in accordance with the pro forma presentation requirements of the U.S. Securities and Exchange Commission.