



NS Solutions

2014年3月期 第3四半期決算 参考資料

Appendix of Financial Results for the Quarterly Period ended December 31, 2013

2014年1月30日

January 30, 2014

新日鉄住金ソリューションズ株式会社

NS Solutions Corporation

(注)この資料では百万円単位で切捨て表示をしております。

(Note) In this material, figures have been rounded down to the nearest millions of yen.

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)

| | | 2013/3 | | | | | 2014/3 | | | | |
|---------------|--|--------|--------|--------|--------|---------|--------|--------|--------|----|---------|
| | | Q1 | Q2 | Q3 | Q4 | Total | Q1 | Q2 | Q3 | Q4 | Total |
| 受注高 | Amount of order acceptance | 50,983 | 43,080 | 34,620 | 52,931 | 181,616 | 41,513 | 43,290 | 43,657 | | 128,462 |
| 業務ソリューション | Business solutions | 29,908 | 24,668 | 19,168 | 28,350 | 102,095 | 24,593 | 25,881 | 27,738 | | 78,213 |
| 基盤ソリューション | Platform solutions | 5,061 | 2,797 | 4,872 | 7,588 | 20,319 | 4,241 | 4,538 | 4,445 | | 13,226 |
| ビジネスサービス | Business services | 16,013 | 15,615 | 10,580 | 16,992 | 59,201 | 12,678 | 12,870 | 11,474 | | 37,022 |
| 期末受注残高 | Order backlog at end of period | 81,892 | 81,194 | 76,206 | 78,416 | 78,416 | 80,057 | 81,768 | 85,131 | | 85,131 |
| 業務ソリューション | Business solutions | 45,615 | 46,642 | 43,649 | 41,582 | 41,582 | 44,518 | 45,937 | 50,188 | | 50,188 |
| 基盤ソリューション | Platform solutions | 10,427 | 8,369 | 9,449 | 11,544 | 11,544 | 10,670 | 10,501 | 10,008 | | 10,008 |
| ビジネスサービス | Business services | 25,850 | 26,182 | 23,107 | 25,290 | 25,290 | 24,868 | 25,329 | 24,934 | | 24,934 |
| 売上高 | Net sales | 37,896 | 43,779 | 39,608 | 50,721 | 172,005 | 39,873 | 41,579 | 40,294 | | 121,747 |
| 業務ソリューション | Business solutions | 19,654 | 23,641 | 22,161 | 30,417 | 95,875 | 21,657 | 24,463 | 23,486 | | 69,607 |
| 基盤ソリューション | Platform solutions | 4,476 | 4,854 | 3,791 | 5,494 | 18,617 | 5,115 | 4,707 | 4,938 | | 14,762 |
| ビジネスサービス | Business services | 13,765 | 15,283 | 13,655 | 14,809 | 57,513 | 13,100 | 12,408 | 11,869 | | 37,377 |
| 売上総利益 | Gross profit | 7,195 | 8,075 | 7,101 | 8,955 | 31,328 | 7,300 | 8,199 | 7,685 | | 23,184 |
| 販売費及び一般管理費 | Selling, general and administrative expenses | 5,013 | 4,833 | 4,889 | 5,460 | 20,196 | 5,494 | 5,479 | 5,262 | | 16,235 |
| 営業利益 | Operating income | 2,182 | 3,241 | 2,211 | 3,495 | 11,131 | 1,806 | 2,719 | 2,423 | | 6,949 |
| 経常利益 | Ordinary income | 2,366 | 3,394 | 2,232 | 3,632 | 11,626 | 2,008 | 2,729 | 2,472 | | 7,210 |
| 四半期純利益 | Net income | 1,138 | 2,030 | 1,298 | 2,124 | 6,592 | 918 | 1,560 | 1,460 | | 3,938 |
| 四半期包括利益 | Comprehensive income | 1,212 | 2,132 | 1,403 | 2,368 | 7,117 | 1,016 | 1,712 | 1,560 | | 4,289 |
| 営業利益率(%) | Operating income margin (%) | 5.8% | 7.4% | 5.6% | 6.9% | 6.5% | 4.5% | 6.5% | 6.0% | | 5.7% |
| 売上高総利益率(%) | Gross profit margin (%) | 19.0% | 18.4% | 17.9% | 17.7% | 18.2% | 18.3% | 19.7% | 19.1% | | 19.0% |
| 新日鐵住金向け売上高 ※1 | Sales to Nippon Steel & Sumitomo Metal Corp. | 6,859 | 7,911 | 7,836 | 8,209 | 30,818 | 7,403 | 7,262 | 7,374 | | 22,039 |

| | | 2010/3 | 2011/3 | 2012/3 | 2013/3 | 2014/3 | 2009/9 | 2010/9 | 2011/9 | 2012/9 | 2013/9 |
|---------------|--|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-------------|-------------|
| | | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (見通し Outlook) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) |
| 受注高 | Amount of order acceptance | 155,075 | 162,023 | 169,374 | 181,616 | — | 72,005 | 74,687 | 80,833 | 94,063 | 84,804 |
| 業務ソリューション | Business solutions | 88,944 | 88,334 | 94,783 | 102,095 | — | 41,203 | 40,601 | 44,043 | 54,576 | 50,475 |
| 基盤ソリューション | Platform solutions | 20,470 | 20,835 | 18,863 | 20,319 | — | 8,250 | 9,290 | 8,763 | 7,858 | 8,780 |
| ビジネスサービス | Business services | 45,660 | 52,853 | 55,727 | 59,201 | — | 22,551 | 24,796 | 28,025 | 31,628 | 25,548 |
| 期末受注残高 | Order backlog at end of period | 58,685 | 61,010 | 68,805 | 78,416 | — | 57,969 | 59,648 | 65,632 | 81,194 | 81,768 |
| 業務ソリューション | Business solutions | 29,368 | 29,291 | 35,361 | 41,582 | — | 31,942 | 31,746 | 33,108 | 46,642 | 45,937 |
| 基盤ソリューション | Platform solutions | 8,427 | 10,459 | 9,842 | 11,544 | — | 4,339 | 8,979 | 9,475 | 8,369 | 10,501 |
| ビジネスサービス | Business services | 20,890 | 21,260 | 23,602 | 25,290 | — | 21,688 | 18,922 | 23,048 | 26,182 | 25,329 |
| 売上高 | Net sales | 152,158 | 159,697 | 161,579 | 172,005 | 178,000 | 69,803 | 73,724 | 76,211 | 81,675 | 81,453 |
| 業務ソリューション | Business solutions | 88,704 | 88,411 | 88,712 | 95,875 | 103,000 | 38,389 | 38,222 | 40,226 | 43,295 | 46,120 |
| 基盤ソリューション | Platform solutions | 15,537 | 18,802 | 19,480 | 18,617 | 21,500 | 7,404 | 8,737 | 9,747 | 9,331 | 9,823 |
| ビジネスサービス | Business services | 47,916 | 52,482 | 53,385 | 57,513 | 53,500 | 24,009 | 26,764 | 26,237 | 29,048 | 25,508 |
| 売上総利益 | Gross profit | 31,087 | 30,893 | 30,752 | 31,328 | 34,500 | 14,420 | 14,273 | 15,087 | 15,271 | 15,499 |
| 販売費及び一般管理費 | Selling, general and administrative expenses | 20,297 | 19,816 | 19,997 | 20,196 | 21,800 | 10,369 | 10,126 | 10,070 | 9,846 | 10,973 |
| 営業利益 | Operating income | 10,790 | 11,076 | 10,755 | 11,131 | 12,700 | 4,050 | 4,147 | 5,016 | 5,424 | 4,525 |
| 経常利益 | Ordinary income | 11,221 | 11,397 | 11,149 | 11,626 | 13,000 | 4,266 | 4,404 | 5,226 | 5,760 | 4,738 |
| 当期純利益 ※2 | Net income | 6,298 | 6,404 | 5,185 | 6,592 | 7,400 | 2,313 | 2,383 | 2,721 | 3,169 | 2,478 |
| 包括利益 ※2 | Comprehensive income | 6,558 | 6,541 | 5,390 | 7,117 | — | — | 2,435 | 2,786 | 3,345 | 2,728 |
| 営業利益率(%) | Operating income margin (%) | 7.1% | 6.9% | 6.7% | 6.5% | 7.1% | 5.8% | 5.6% | 6.6% | 6.6% | 5.6% |
| 売上高総利益率(%) | Gross profit margin (%) | 20.4% | 19.3% | 19.0% | 18.2% | 19.4% | 20.7% | 19.4% | 19.8% | 18.7% | 19.0% |
| 新日鐵住金向け売上高 ※1 | Sales to Nippon Steel & Sumitomo Metal Corp. | 27,700 | 29,170 | 26,784 | 30,818 | — | 14,204 | 16,204 | 12,933 | 14,771 | 14,665 |

※1 2012年10月1日より新日本製鐵株式会社は住友金属工業株式会社との合併により社名を新日鐵住金株式会社に変更しております。

そのため2013年3月期第2四半期までは新日本製鐵向け売上高を、2013年3月期第3四半期からは新日鐵住金向け売上高をそれぞれ集計しております。

On October 1, 2012, Nippon Steel Corporation and Sumitomo Metal Industries, Ltd. merged to become Nippon Steel & Sumitomo Metal Corporation.

Accordingly, figures until the Second Quarter of FY2012 indicate Sales to Nippon Steel Corporation, and figures from the Third Quarter of FY2012 indicate Sales to Nippon Steel & Sumitomo Metal Corporation.

※2 2012年3月期第3四半期決算において、法人税法改正等に伴う繰延税金資産の取崩しにより法人税等の金額が増加しております。影響額については2012年3月期決算短信をご参照下さい。

In the third quarter ended March 31, 2012, the income taxes increased owing to the reversal of deferred tax assets due to the amendment of Corporate Tax Act.

For cumulative effect of this change, please refer to the Consolidated Financial Results for FY2011.

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

2.個別業績概要 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)

| | | 2013/3 | | | | | 2014/3 | | | | |
|------------|--|--------|--------|--------|--------|---------|--------|--------|--------|----|---------|
| | | Q1 | Q2 | Q3 | Q4 | Total | Q1 | Q2 | Q3 | Q4 | Total |
| 受注高 | Amount of order acceptance | 46,727 | 38,127 | 30,789 | 47,171 | 162,815 | 36,524 | 38,379 | 38,931 | | 113,835 |
| 業務ソリューション | Business solutions | 26,024 | 20,038 | 15,612 | 23,869 | 85,544 | 20,062 | 21,628 | 23,351 | | 65,042 |
| 基盤ソリューション | Platform solutions | 4,774 | 2,539 | 4,652 | 6,391 | 18,358 | 3,829 | 3,963 | 4,127 | | 11,921 |
| ビジネスサービス | Business services | 15,928 | 15,549 | 10,524 | 16,910 | 58,912 | 12,632 | 12,786 | 11,452 | | 36,871 |
| 期末受注残高 | Order backlog at end of period | 77,796 | 77,462 | 72,350 | 74,586 | 74,586 | 75,781 | 77,913 | 80,697 | | 80,697 |
| 業務ソリューション | Business solutions | 42,525 | 43,477 | 40,229 | 38,843 | 38,843 | 41,285 | 42,997 | 46,429 | | 46,429 |
| 基盤ソリューション | Platform solutions | 9,421 | 7,803 | 9,013 | 10,453 | 10,453 | 9,627 | 9,585 | 9,333 | | 9,333 |
| ビジネスサービス | Business services | 25,850 | 26,182 | 23,107 | 25,290 | 25,290 | 24,868 | 25,329 | 24,934 | | 24,934 |
| 売上高 | Net sales | 33,854 | 38,461 | 35,901 | 44,935 | 153,153 | 35,330 | 36,247 | 36,147 | | 107,724 |
| 業務ソリューション | Business solutions | 16,175 | 19,086 | 18,860 | 25,256 | 79,378 | 17,620 | 19,916 | 19,919 | | 57,456 |
| 基盤ソリューション | Platform solutions | 3,998 | 4,157 | 3,442 | 4,952 | 16,550 | 4,654 | 4,005 | 4,380 | | 13,040 |
| ビジネスサービス | Business services | 13,680 | 15,217 | 13,599 | 14,727 | 57,224 | 13,054 | 12,324 | 11,847 | | 37,227 |
| 売上総利益 | Gross profit | 5,643 | 6,183 | 5,361 | 6,791 | 23,979 | 5,916 | 6,023 | 5,968 | | 17,908 |
| 販売費及び一般管理費 | Selling, general and administrative expenses | 4,167 | 3,848 | 4,025 | 4,435 | 16,477 | 4,520 | 4,373 | 4,416 | | 13,309 |
| 営業利益 | Operating income | 1,475 | 2,334 | 1,336 | 2,355 | 7,501 | 1,396 | 1,650 | 1,552 | | 4,598 |
| 経常利益 | Ordinary income | 2,148 | 2,485 | 1,381 | 2,493 | 8,508 | 2,402 | 1,670 | 1,592 | | 5,665 |
| 四半期純利益 | Net income | 1,329 | 1,608 | 884 | 1,579 | 5,402 | 1,568 | 1,088 | 1,027 | | 3,683 |

| | | | | | | | | | | |
|------------|-----------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 営業利益率(%) | Operating income margin (%) | 4.4% | 6.1% | 3.7% | 5.2% | 4.9% | 4.0% | 4.6% | 4.3% | 4.3% |
| 売上高総利益率(%) | Gross profit margin (%) | 16.7% | 16.1% | 14.9% | 15.1% | 15.7% | 16.7% | 16.6% | 16.5% | 16.6% |

| | | | | | | | | | | |
|---------------|--|-------|-------|-------|-------|--------|-------|-------|-------|--------|
| 新日鐵住金向け売上高 ※1 | Sales to Nippon Steel & Sumitomo Metal Corp. | 6,556 | 7,387 | 7,554 | 7,845 | 29,343 | 7,089 | 6,808 | 7,042 | 20,940 |
|---------------|--|-------|-------|-------|-------|--------|-------|-------|-------|--------|

| | | 2010/3 | 2011/3 | 2012/3 | 2013/3 | 2014/3 | 2009/9 | 2010/9 | 2011/9 | 2012/9 | 2013/9 |
|------------|--|-------------|-------------|-------------|-------------|---------------|-------------|-------------|-------------|-------------|-------------|
| | | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (見通し Outlook) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) | (実績 Actual) |
| 受注高 | Amount of order acceptance | 138,424 | 145,467 | 151,284 | 162,815 | — | 64,127 | 66,425 | 72,978 | 84,854 | 74,903 |
| 業務ソリューション | Business solutions | 75,035 | 74,287 | 79,465 | 85,544 | — | 34,175 | 33,328 | 36,931 | 46,062 | 41,691 |
| 基盤ソリューション | Platform solutions | 18,009 | 18,701 | 16,452 | 18,358 | — | 7,527 | 8,497 | 8,205 | 7,314 | 7,793 |
| ビジネスサービス | Business services | 45,379 | 52,479 | 55,366 | 58,912 | — | 22,424 | 24,599 | 27,841 | 31,477 | 25,419 |
| 期末受注残高 | Order backlog at end of period | 54,959 | 58,162 | 64,924 | 74,586 | — | 54,384 | 56,604 | 62,642 | 77,462 | 77,913 |
| 業務ソリューション | Business solutions | 27,178 | 27,417 | 32,677 | 38,843 | — | 29,028 | 29,372 | 30,695 | 43,477 | 42,997 |
| 基盤ソリューション | Platform solutions | 6,891 | 9,484 | 8,645 | 10,453 | — | 3,667 | 8,309 | 8,898 | 7,803 | 9,585 |
| ビジネスサービス | Business services | 20,890 | 21,260 | 23,602 | 25,290 | — | 21,688 | 18,922 | 23,048 | 26,182 | 25,329 |
| 売上高 | Net sales | 135,002 | 142,264 | 144,522 | 153,153 | 158,000 | 61,280 | 64,780 | 68,498 | 72,316 | 71,577 |
| 業務ソリューション | Business solutions | 73,718 | 74,047 | 74,206 | 79,378 | 86,000 | 31,008 | 31,133 | 33,654 | 35,262 | 37,536 |
| 基盤ソリューション | Platform solutions | 13,648 | 16,107 | 17,292 | 16,550 | 19,000 | 6,389 | 7,079 | 8,791 | 8,156 | 8,660 |
| ビジネスサービス | Business services | 47,635 | 52,109 | 53,024 | 57,224 | 53,000 | 23,882 | 26,567 | 26,053 | 28,897 | 25,379 |
| 売上総利益 | Gross profit | 24,937 | 24,280 | 24,270 | 23,979 | 26,500 | 11,546 | 11,241 | 12,085 | 11,826 | 11,939 |
| 販売費及び一般管理費 | Selling, general and administrative expenses | 16,372 | 16,070 | 16,414 | 16,477 | 17,800 | 8,296 | 8,156 | 8,240 | 8,016 | 8,893 |
| 営業利益 | Operating income | 8,565 | 8,210 | 7,856 | 7,501 | 8,700 | 3,249 | 3,085 | 3,845 | 3,810 | 3,046 |
| 経常利益 | Ordinary income | 9,578 | 9,020 | 8,722 | 8,508 | 9,800 | 4,046 | 3,793 | 4,533 | 4,633 | 4,072 |
| 当期純利益 ※2 | Net income | 5,820 | 5,565 | 4,565 | 5,402 | 6,200 | 2,554 | 2,385 | 2,732 | 2,938 | 2,656 |

| | | | | | | | | | | | |
|----------|-----------------------------|------|------|------|------|------|------|------|------|------|------|
| 営業利益率(%) | Operating income margin (%) | 6.3% | 5.8% | 5.4% | 4.9% | 5.5% | 5.3% | 4.8% | 5.6% | 5.3% | 4.3% |
|----------|-----------------------------|------|------|------|------|------|------|------|------|------|------|

| | | | | | | | | | | | |
|------------|-------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 売上高総利益率(%) | Gross profit margin (%) | 18.5% | 17.1% | 16.8% | 15.7% | 16.8% | 18.8% | 17.4% | 17.6% | 16.4% | 16.7% |
| 業務ソリューション | Business solutions | 18.4% | 16.9% | 17.5% | 17.9% | 18.8% | 19.7% | 16.4% | 18.7% | 19.1% | 18.6% |
| 基盤ソリューション | Platform solutions | 22.3% | 17.5% | 19.1% | 18.7% | 18.0% | 23.5% | 19.1% | 18.0% | 19.3% | 18.3% |
| ビジネスサービス | Business services | 17.5% | 17.1% | 15.1% | 11.6% | 13.1% | 16.4% | 18.0% | 16.1% | 12.2% | 13.2% |

| | | | | | | | | | | | |
|---------------|--|--------|--------|--------|--------|---|--------|--------|--------|--------|--------|
| 新日鐵住金向け売上高 ※1 | Sales to Nippon Steel & Sumitomo Metal Corp. | 26,506 | 27,632 | 25,308 | 29,343 | — | 13,611 | 15,198 | 12,355 | 13,943 | 13,897 |
|---------------|--|--------|--------|--------|--------|---|--------|--------|--------|--------|--------|

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 On October 1, 2012, Nippon Steel Corporation and Sumitomo Metal Industries, Ltd. merged to become Nippon Steel & Sumitomo Metal Corporation.
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 For cumulative effect of this change, please refer to the Consolidated Financial Results for FY2011.

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。

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.