



**Financial Results
FY2026 Second Quarter**

**Securities Code : 212A
FIT EASY Inc.
June 12, 2026**

AMUSEMENT FITNESS CLUB

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2. Financial Results Summary: 2Q FY2026

3. Key Initiatives

4. Full-Year Forecast & Dividend Revisions

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[FIT-EASY]
AMUSEMENT FITNESS CLUB

From the new TV commercial airing since Jan, 2026

AIN'T NOTHING TO IT
BUT TO DO IT.

Our Passion



From 「Fitness Business」 To 「Wellness Business」

We advocate not merely a habit of exercise, but a lifelong “culture” in its truest sense.
Our Mission is to create a new “wellness culture” that transforms the world for the better.

With this conviction at our core, we have renewed our Mission and Vision.

Our new Mission and Vision embody this unwavering commitment.

MISSION

Changing the world
By creating a new wellness culture

VISION

FIT YOUR STYLE

We aim to become the world's wellness chain by combining Amusement Fitness clubs with AI Healthcare Automation, providing a unique experience where health meets entertainment.

Business Overview ① Amusement Fitness Club

FIT-BEAUTY launched in April (2Q), followed by FIT-VOICE in May (3Q).
The Company now offers 28 amusement services across its locations.

FIT-BEAUTY
A Self-Service beauty experience with Beauty Devices
Launch April 2026

FIT-VOICE
Health Karaoke designed to help reduce stress and promote cardiovascular Activity.
Launch May 2026

FIT-SAUNA
Your exclusive space to recovery and refreshment

FIT-CHAIR
The highly popular pelvic training machine

GYM-AREA
TO HEART TO BODY...

FIT-LOUNGE
Exercise. Excel at work. Find your ideal work-life balance at FIT-EASY

FIT-AERO
Escape the everyday Virtual and live instructor led lessons available

FIT-GOLF
Perfect your swing in luxury.

SELF-ESTHE
All-in-one professional-grade machine

H₂ ROOM
Absorb health-protecting hydrogen and oxygen in a high-pressure environment

FIT-WHITENING
Achieve your dream white smile with self-whitening

AI facial recognition enables members to visit any locations nationwide, hands-free

O₂ ROOM
Cutting-edge physical care trusted by athletes

FIT-BASEBALL
Every Pitch, Every Swing. Fully visualized

FIT-BASKETBALL

FIT-RACE

TANNING MACHINE

BOULDERING MACHINE

FIT-PILATES

FIT-LAUNDRY

FIT-SHAPE

FIT-HYPOXIC

FIT-TENNIS

FIT-FUTSAL

FIT-RIDE

HYDROGEN WATER-SERVER

BLOCK SPA

PROTEIN-SERVER

Complete health management, all in one app

Designing Your Optimal Wellness Experience with AI

AI trainer delivers tailored recommendations for every member

Exercise

Nutrition

Sleep

Combining our stores and FE app to create a world where Staying healthy requires no effort – automating wellness



なりたい自分を目指す
F.Eアプリ 会員様専用
トレーニングメニューや食事管理をアプリでサポート。

App store
4.5 ★★★★★

Key Features

- ① AI body Composition Data Integration
- ② AI-Generated Training Program
- ③ AI Exercise Analysis
- ④ AI Dietary Analysis PFC Recommendations
- ⑤ Calorie balance & Program Visualizaion
- ⑥ Sleep Data Integration

Membership sign-ups driven by app Feature utilization are also on the rise

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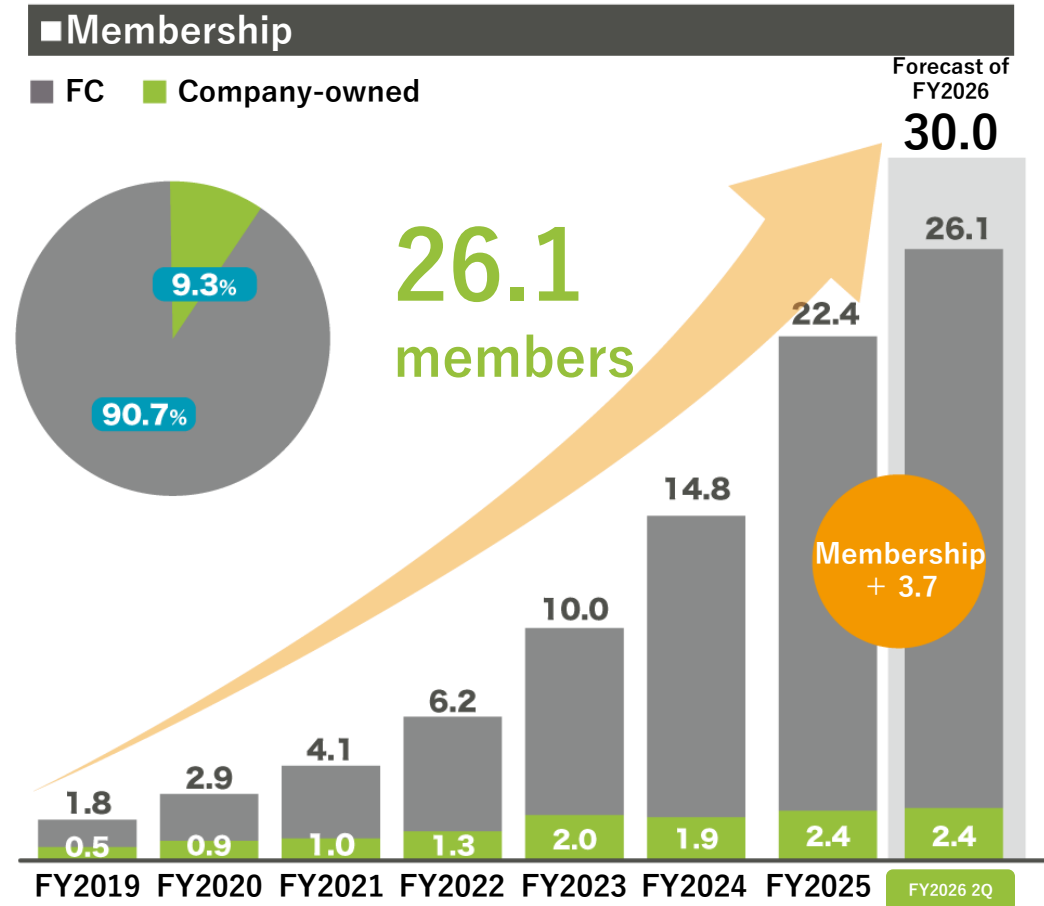
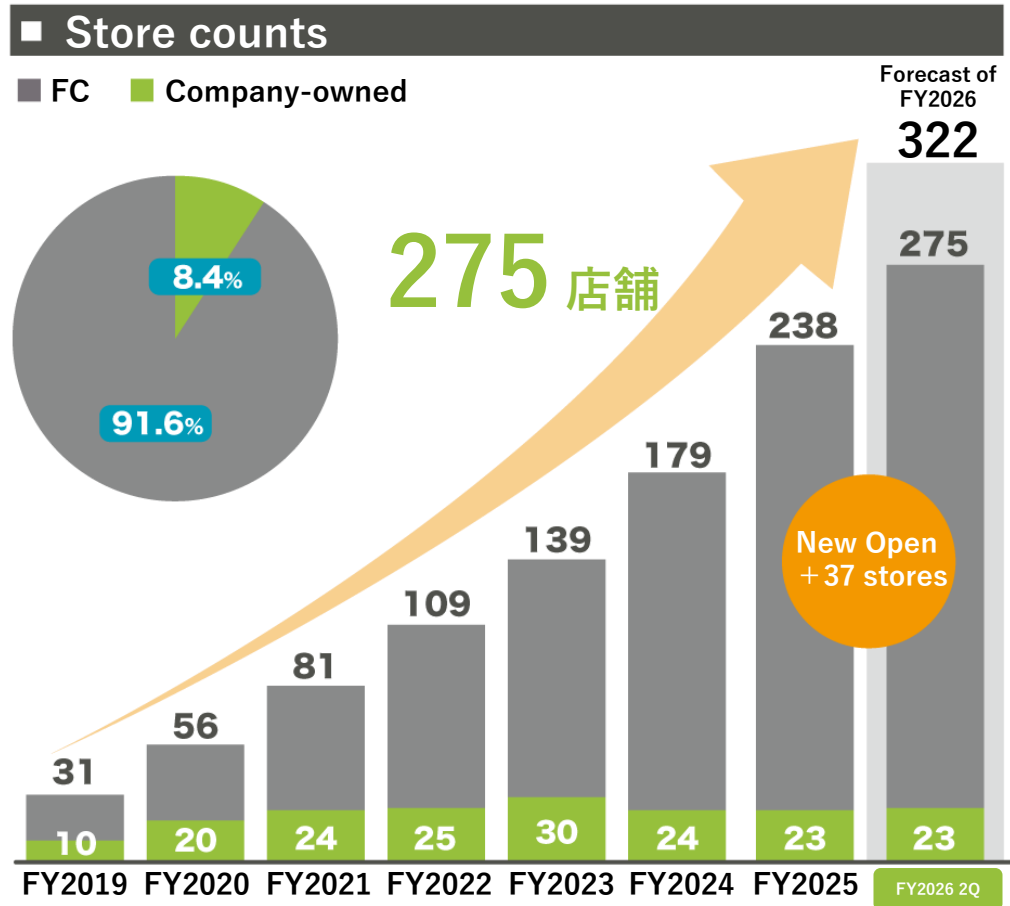
Financial highlights for the 2Q of the FY2026

- In 2Q, 19 new stores opened, with net sales of ¥6.70B(158.2%YoY)
- Operating profit was ¥1.67B (148.2%YoY), ordinary profit ¥1.62B (149.6%YoY), and interim net profit ¥1.10B(152.9%YoY)
- Total chain-wide sales, including FC membership fees, reached ¥14.09B(157.8%YoY)

Net sales	Operating Profit	Ordinary Profit	Interim Net Profit	FC Membership Fees	Total Chain Sales
6.70 Billion yen	1.60 Billion yen	1.62 Billion yen	1.10 Billion yen	7.38 Billion yen	14.09 Billion yen Total Sales incl. FC Membership Fee
YoY 158.2%	YoY 148.2%	YoY 149.6%	YoY 152.9%	YoY 157.5%	YoY 157.8%

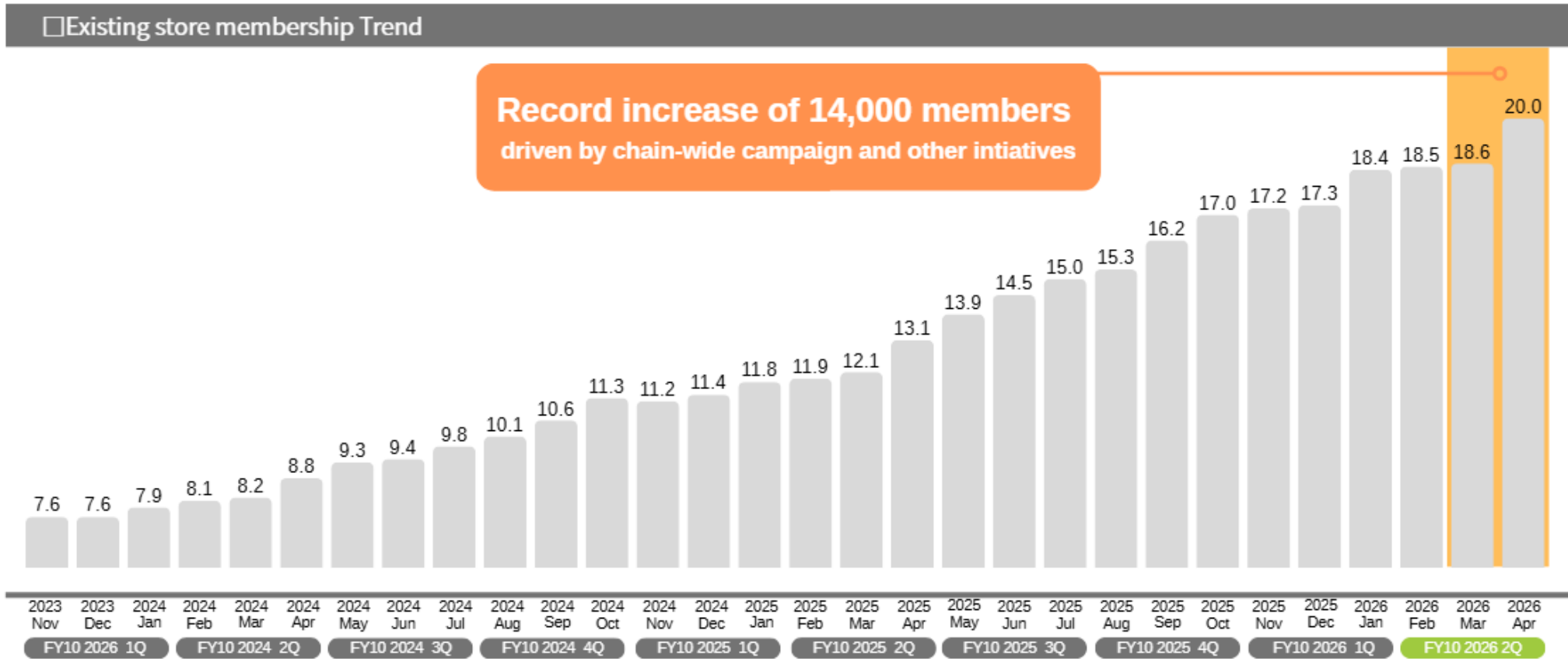
Key KPI

- In 2Q, 19 new stores opened, bringing the total to 275 locations
- Driven by new store openings and membership growth at existing stores, total members increased by 37,000 to 261,000



Existing store membership Trend (excl. new stores)

- Membership at existing stores grew via machine, amusement, and dominant strategies, along with chain-wide campaigns and PR in Kanto and Kansai area.
- This drove higher recurring revenue from membership fees and royalties across company-owned and FC stores.



Revenue Breakdown

- Recurring operational revenue grew to 161.2% YoY, driven by FC store count and membership expansion.^①
- FC wholesale revenue surged to 172.0% YoY, in line with new store opening targets ^②
- Other flow-based revenue rose to 164.7% YoY, supported by increased advertising sales^③

(Unit : Millions of Yen)

Revenue Category	Revenue model	Item	FY10 2025 2Q		FY10 2026 2Q		Change		YoY by Revenue Category
			Actual	% of Total	Actual	% of Total	Amount	YoY	
Owned store sales	Stock	Membership fee Revenue	710	16.8%	1,009	15.0%	294	141.7%	142.1%
Operational Revenue	Stock	Royalty Revenue	491	11.6%	856	12.8%	365	174.3%	^① 161.2%
		Agency Fee Revenue	291	6.9%	439	6.6%	147	150.7%	
		Other	144	3.4%	198	3.0%	54	137.5%	
Development Revenue	Flow	Franchise Fee Revenue	33	0.8%	46	0.7%	13	139.5%	161.7%
		FC wholesale	1,816	42.8%	3,124	46.6%	1,307	^② 172.0%	
		Store sale Revenue	265	6.3%	234	3.5%	△30	88.5%	
		Other	476	11.2%	784	11.7%	308	^③ 164.7%	
Other Revenue			10	0.2%	11	0.2%	1	111.6%	—
Total			4,239	100.0%	6,705	100.0%	2,466	158.2%	—

Balance sheet

- Net assets increased by ¥695M compared to the end of FY10 2025^①, driven by interim net profit of ¥1,105M, partially offset by dividend payments of ¥413M
- The equity ratio improved by 2.7% to 61.1%^②

(Unit : Millions of yen)

	End of FY10 2025	End of Fy10 2026 2Q	Change
Current Assets	6,021	6,070	91
Fixed Assets	4,042	4,968	613
Total Assets	10,063	10,768	704
Current Liabilities	2,872	2,644	△227
Non-current Liabilities	1,310	1,547	237
Total Liabilities	4,183	4,192	9
Net Assets	5,880	6,575	^① 695
Total Liabilities and Net Assets	10,063	10,768	704
Equity Ratio (%)	58.4%	^② 61.1%	2.7%

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[FIT-EASY]
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From the new TV commercial airing since Jan, 2026

AIN'T NOTHING TO IT
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Key Initiatives

(1) New store Openings Nationwide – 2Q Highlights (19 stores)

1.Okazaki Inaguma (Aichi)

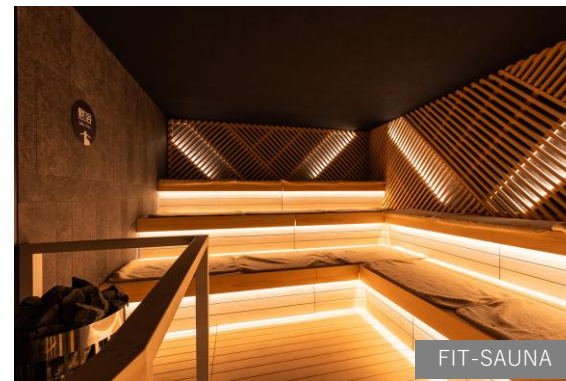
Pre-opening Feb 27, 2026
1-23,Inaguma,Okazaki-shi,Aichi



5th Location in Okazaki, Aichi
Expanding Dominant Strategy

2.Mikawa toyotaeki mae (Aichi)

Pre-opening Feb 27, 2026
4-152,Yamanote,Toyota-shi,Aichi



First Large Sauna in Aichi

3.Hamamatsu Dealer dori (Shizuoka)

Pre-opening Feb 27, 2026
2000,Shinogase,Tyuou-ku,
Hamamatsu,Shizuoka



3rd Location in Hamamatsu, Shizuoka
Expanding Dominant Strategy

4.Nabari (Mie)

Pre-opening Mar 27, 20226
3222-1,Natsumi,Nabari,Mie



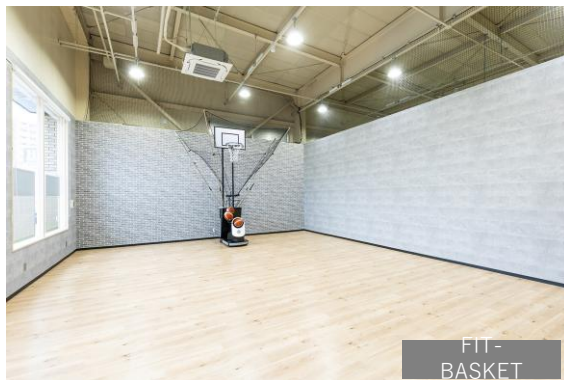
First store in Nabari, Mie

Key Initiatives

(1) New store Openings Nationwide – 2Q Highlights (19 stores)

5. Minamisendai (Miyagi)

Pre-opening Mar 27, 2026
1-6-3 Yagiu, Taihaku-ku, Sendai, Miyagi

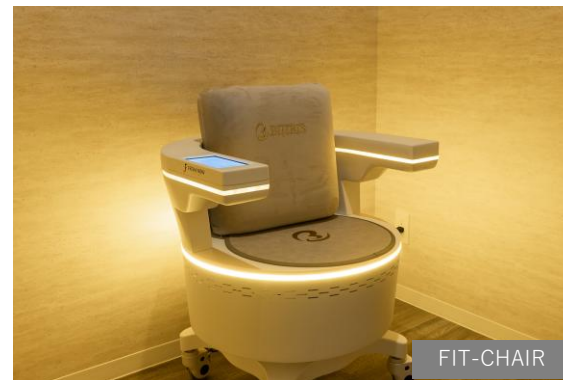


FIT-BASKET

First FIT-BASKETBALL in Miyagi
First store in Sendai, Miyagi

6. NakamuraIwatsuka (Aichi)

Pre-opening Mar 28, 2026
2-1-2 Iwatsuka hondori, Nakamura-ku, Nagoya, Aichi



FIT-CHAIR

Compact workout machine-focused store

7. Oobukyowa (Aichi)

Pre-opening Mar 31, 2026
6-179-3 Kajita-cho, Obu, Aichi



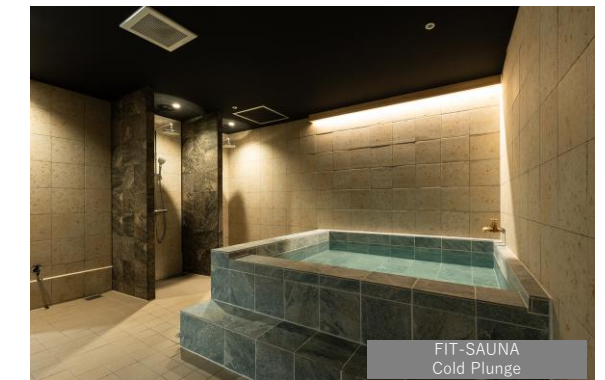
FIT-SAUNA

Outdoor Relaxation Area

2nd Location in Obu, Aichi

8. Across Plaza Miyoshi (Saitama)

Pre-opening Mar 31, 2026
855-403 Fujikubo, Miyoshi Machi, Iruma-gun, Saitama



FIT-SAUNA
Cold Plunge

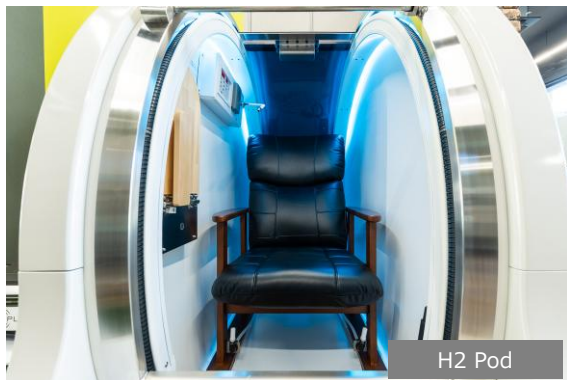
5th Location in Saitama

Key Initiatives

(1) New store Openings Nationwide – 2Q Highlights (19 stores)

9. Tenpaku Takasaka (Aichi)

Pre-opening Apr 17, 2026
338-3 Takasaka-cho, Tenpaku, Nagoya, Aichi



H2 Pod

Compact workout machine-focused store

10. Across Plaza KitaKashiwa (Chiba)

Pre-opening Apr 18, 2026
411-11 Nedo, Kashiwa, Chiba



Power Plate

First Store in Chiba

11. Tsuchiura (Ibaraki)

Pre-opening Apr 23, 2026
5-8-15 Manabe, Tsuchiura, Ibaraki



Women's only Area

2nd Location in Ibaraki

12. Kawagoemataba (Saitama)

Apr 30, 2026
21-4 Matoba Shinmachi, Kawagoe, Saitama



FIT-SHAPE

First store in Kawagoe, Saitama

Key Initiatives

(1) New store Openings Nationwide – 2Q Highlights (19 stores)

13. Nakarokugo Zoushiki (Tokyo)

Apr 30, 2026
2-39-1 Nakarokugo, Ota-ku, Tokyo

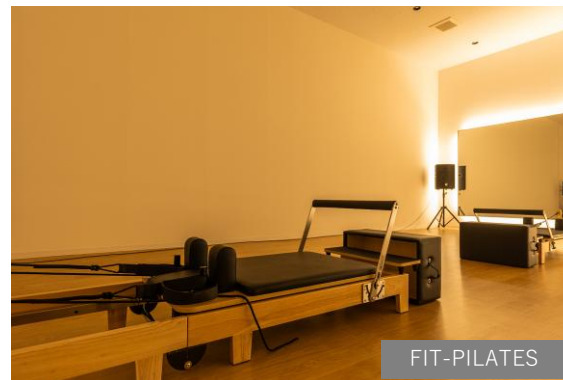


FIT-LOUNGE

3rd Locations in Ota-ku, Tokyo
Expanding Dominant Strategy

14. Moriyamashidami (Aichi)

Apr 30, 2026
628-4 Aoyamadai, Moriyama, Nagoya, Aichi

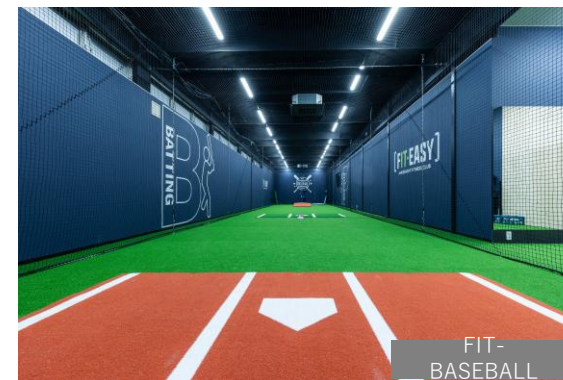


FIT-PILATES

3rd Locations in Moriyama, Aichi
Expanding Dominant Strategy

15. Ikeda (Gifu)

Apr 30, 2026
228-1 Ikeno, Ikeda-cho, Ibigawa, Gifu

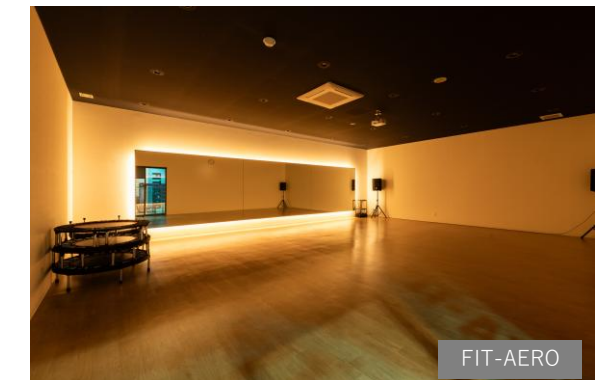


FIT-BASEBALL

33rd Locations in Gifu

16. Kashiwazaki Iwagami (Niigata)

Apr 30, 2026
7-16 Iwagami, Kashiwazaki, Niigata



FIT-AERO

5th Locations in Niigata

Key Initiatives

(1) New store Openings Nationwide – 2Q Highlights (19 stores)

17.Hamamatsu Shitoro(Shizuoka) 18.Tachikawa (Tokyo)

Pre-opening Apr 30,2026
1-25-14 Shitoro,Chuo,Hamamatsu,Shizuoka

Pre-opening Apr 30,20206
5-5-2 Shibasaki,Tachikawa,Tokyo



19.Across Plaza Tokushima Omatsu(Tokushima)

Pre-opening Apr 30,20206
77-50 Enokibarazoto,Omatsu,Tokushima



O2ルーム

4th Locations in Hamamatsu
Expanding Dominant Strategy



FIT-SAUNA

ととのいスペース

First Store in Tachikawa,Tokyo



FIT-GOLF

3rd Locations in Tokushima

Key Initiatives

(2) introduction of New Amusement Services

- Two new services launching sequentially: FIT-BEAUTY and FIT-VOICE
- To enhance member satisfaction and drive new membership growth, strengthening the revenue base.



Fostering inner vitality and well-being through self-improvement

Premium self-directed beauty experience

Powered by YA-MAN Ltd.'s premium beauty devices



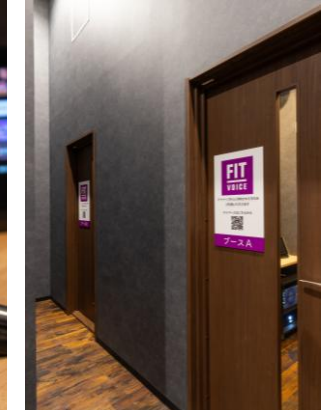
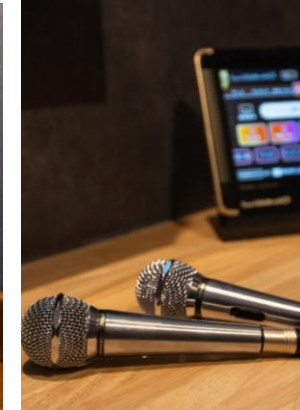
Following the pre-opening launch at Gifu Godo on Jan 30,2026, the service is now live at the following 6 locations



Health Karaoke – harnessing the proven wellness benefits of singing

Stress relief, aerobic benefits via diaphragmatic breathing, and sublingual prevention

Featuring the latest flagship model from Daiichi Kosho Co.,Ltd. **LIVEDAM WAO!**



Pre-opening Mar 29,2026
Launching at Motosu Monju, with further rollouts
Planned across additional locations

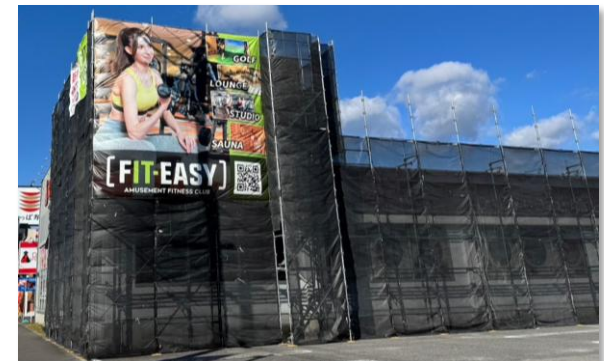
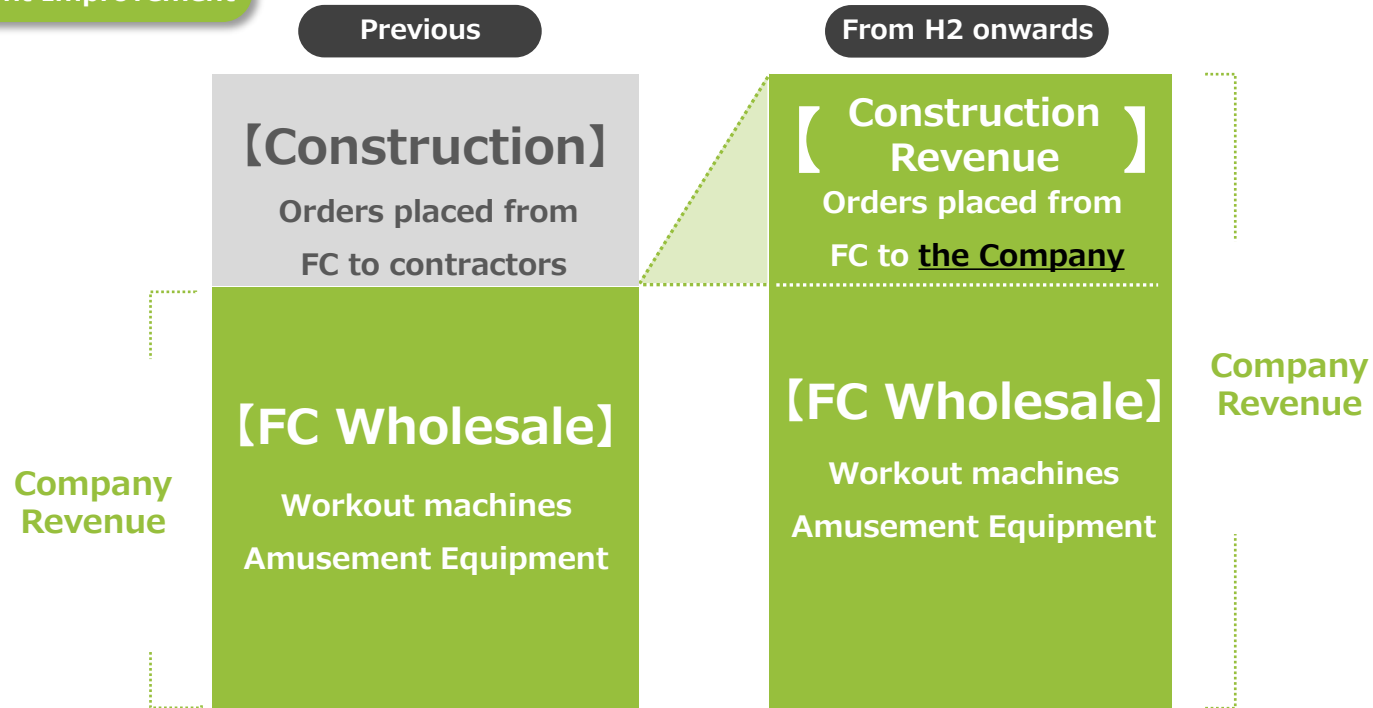
Key Initiatives

(3) Establishment of Construction Management Framework through Special Construction Business License

- Following the acquisition of the license, we commenced general contracting and separate procurement in the second half of FY2026.*
- Outsourced costs can now be converted into in-house revenue and profit, directly to higher revenue and profit.

*Separated procurement: Direct contracting with specialized trades instead of a single general contractor.

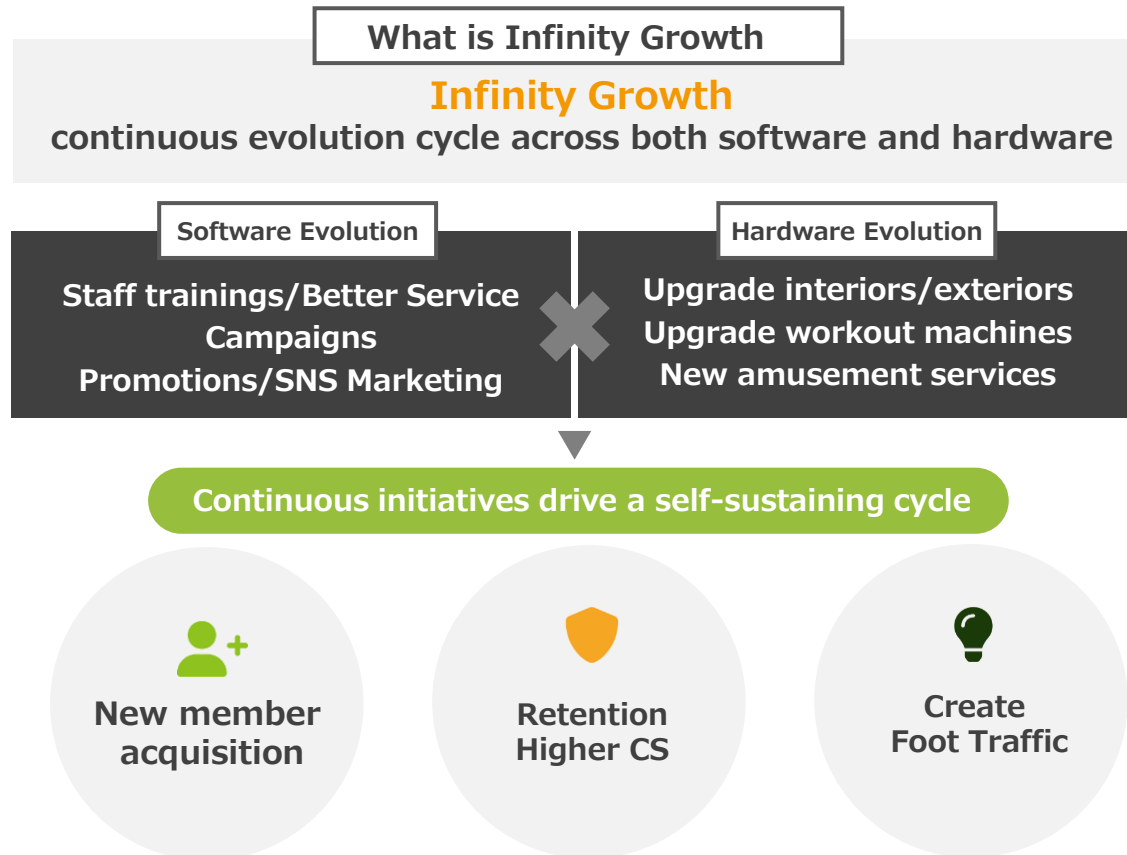
Revenue & Profit Improvement



Key Initiatives

(4) Infinity Growth

- **Infinity Growth Framework:** Established a continuous evolution cycle across both software and hardware.
- **Chain-wide rollout** to sustainably boost store value and membership



■ Proven Success : Company-owned store (Gifu Motosu)

Continuous implementation doubled membership

From 708 members(Jan 2022) to **over 1,400** today

Grand Open Dec 2019

Services at Openings

O ₂ ROOM (酸素増加ルーム)	FIT-AERO (スタジオ)	FIT-RIDE (補助バイクマシン)
ボールドラッグ マシン	タンニング マシン	女性専用 エリア

Feb 2022

FIT-GOLF launch
Mar 2023

SELF ESTHE launch

プロ仕様高級マシンを
年会費内で使い放題!!

Aug 2022

FIT-LOUNGE launch
Aug 2024

FIT-WHITENING launch

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Full-Year Forecast and Dividend Revisions

(1) Full-Year Forecast Revision

- Given new stores openings, membership growth, and SG&A cost controls, the Company maintains a sustained growth trajectory and has revised its FY2026 earnings forecast upward.
- Compared to the initial forecast, net sales are revised upward by 5.2% to ¥14,322M(147.2% YoY) from ¥13,620M, and net profit by 15.0% to ¥2,473M(161.8% YoY) from ¥2,150M.

(Unit : Millions of yen)

	FY2025 Actual	FY2026			
		Initial Forecast	Revised Forecast	Change	YoY
Net Sales	9,732	13,620	<u>14,322</u>	<u>+5.2%</u>	<u>+47.2%</u>
Operating Profit	2,312	3,140	3,506	+11.7%	+51.7%
Ordinary Profit	2,318	3,160	3,558	+12.6%	+53.5%
Net Profit	1,529	2,150	<u>2,473</u>	<u>+15.0%</u>	<u>+61.8%</u>

Full-Year Forecast and Dividend Revisions

(2) Dividend Revision

- The year-end dividend for FY2026 has been revised upward by ¥5 to ¥25 per share, from the initial forecast of ¥20.
- From FY2026, raising target div. payout ratio by +5% (from 23% to 30%)
- FY2026 forecast, annual div. of ¥51 (Interim: ¥26 [incl. ¥6 commem.] Year-end: ¥25)

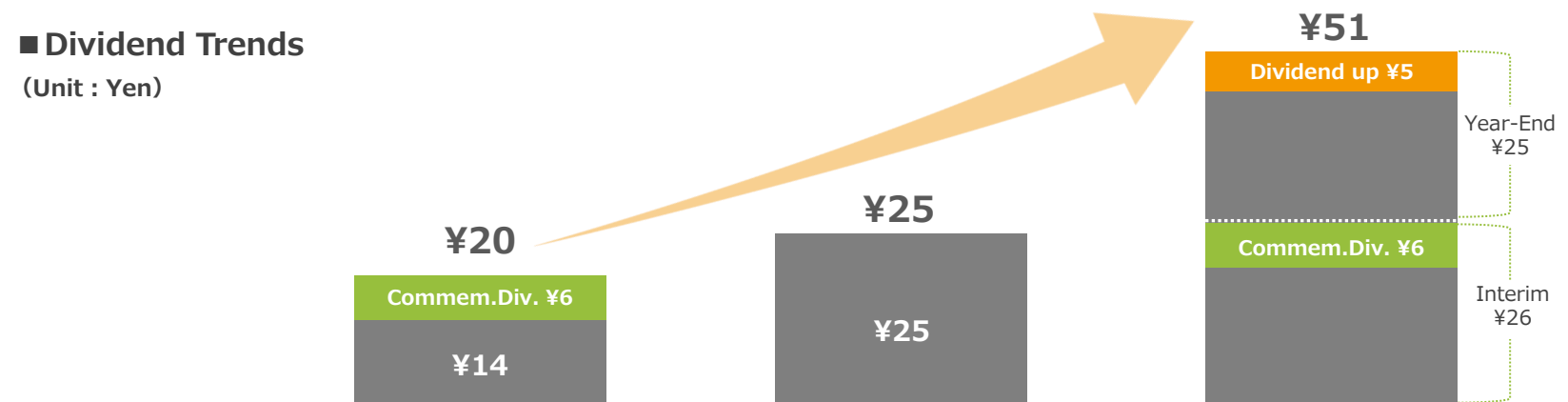
Dividend Policy

Div. payout ratio
Approx. 25%

↓

Div. payout ratio
Approx. 30%

■ Dividend Trends
(Unit : Yen)



	FY2024	FY2025	FY2026
Interim	0.00	0.00	26.00
Year-End	20.00	25.00	25.00
Total	20.00	25.00	51.00
(Commem. Div.)	(6.00)	-	(6.00)
Payout ratio	Approx. 20%	Approx. 25%	Approx. 30%

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Company Name

FIT EASY Inc.

Representative Director & President

Hisashi Kunie

Securities Code

212A

Tokyo Stock Exchange Prime Market/
Nagoya Stock Exchange Premier Market

Director & Executive Vice President

Yuki Nakamori

Date of Incorporation

July 2018

Head Office

3-2-1, Honmachi, Gifu-shi, Gifu, Japan, 500-8034

Capital Stock

¥1,357,449 thousand

Number of Employees

320 employees

※As of April 30, 2026, including part-time and temporary staff

Shares Outstanding

16,694,240 shares

MISSION

Changing the world
by creating a new wellness culture

VISION

FIT YOUR STYLE

We aim to become the world's wellness chain by combining Amusement Fitness Club with AI Healthcare Automation, providing a unique experience where health meets entertainment.

Global perspective with deep expertise
in real estate & construction



Representative

Director & President

Hisashi Kunie

Beginning his career in the construction and real estate sectors, he gained extensive experience in identifying business opportunities and strategic locations in response to changing market demands. He later expanded into nursing care, power generation, food service, and retail, while also developing international business expertise through overseas sourcing and procurement. Leveraging this experience, he launched an international fitness business to meet growing demand in Japan. Recognizing the increasing focus on health and wellness, he continues to pursue new business opportunities in the fitness industry.

Franchise professional & Innovator



Director &

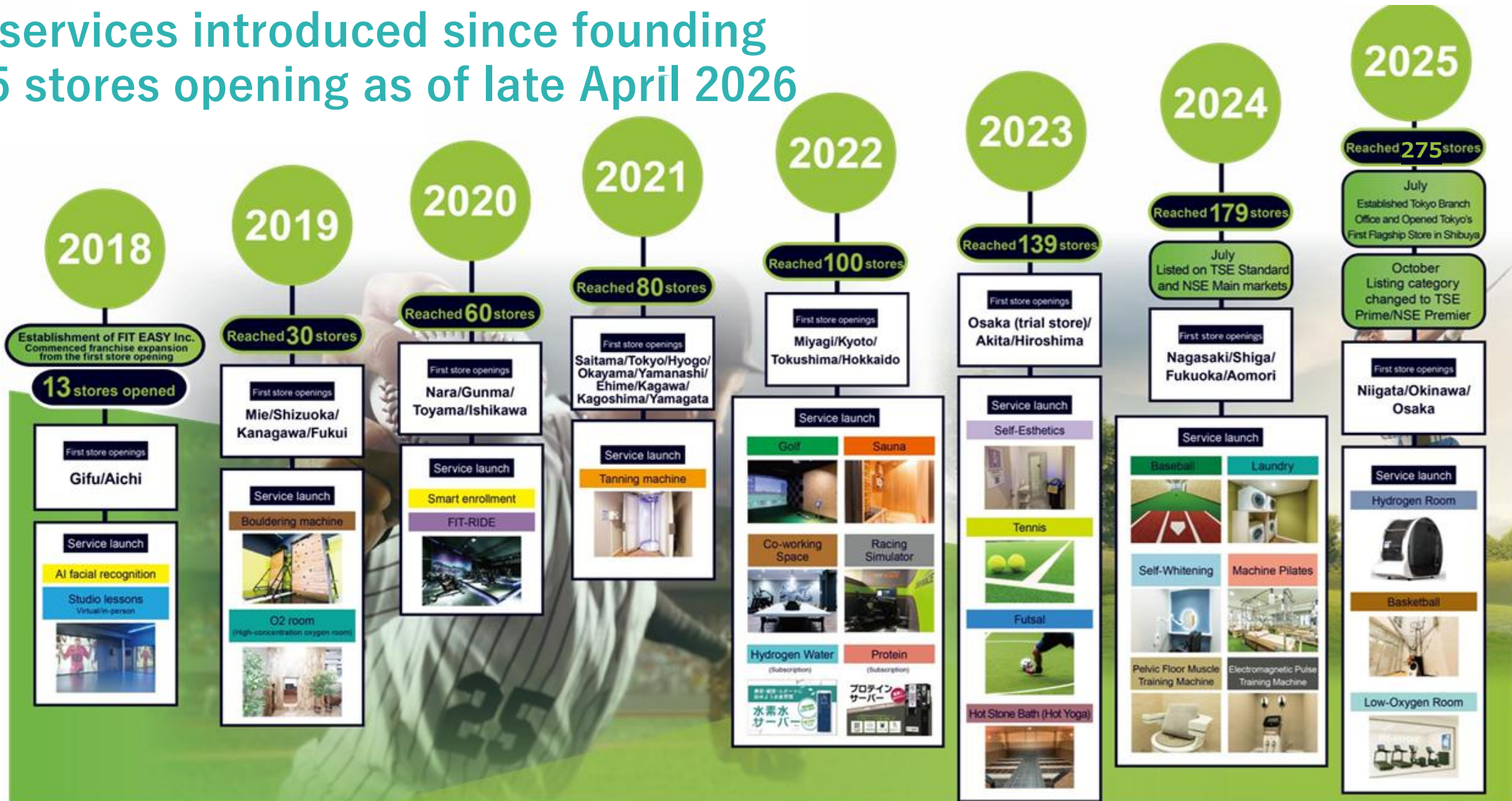
Executive Vice President

Yuki Nakamori

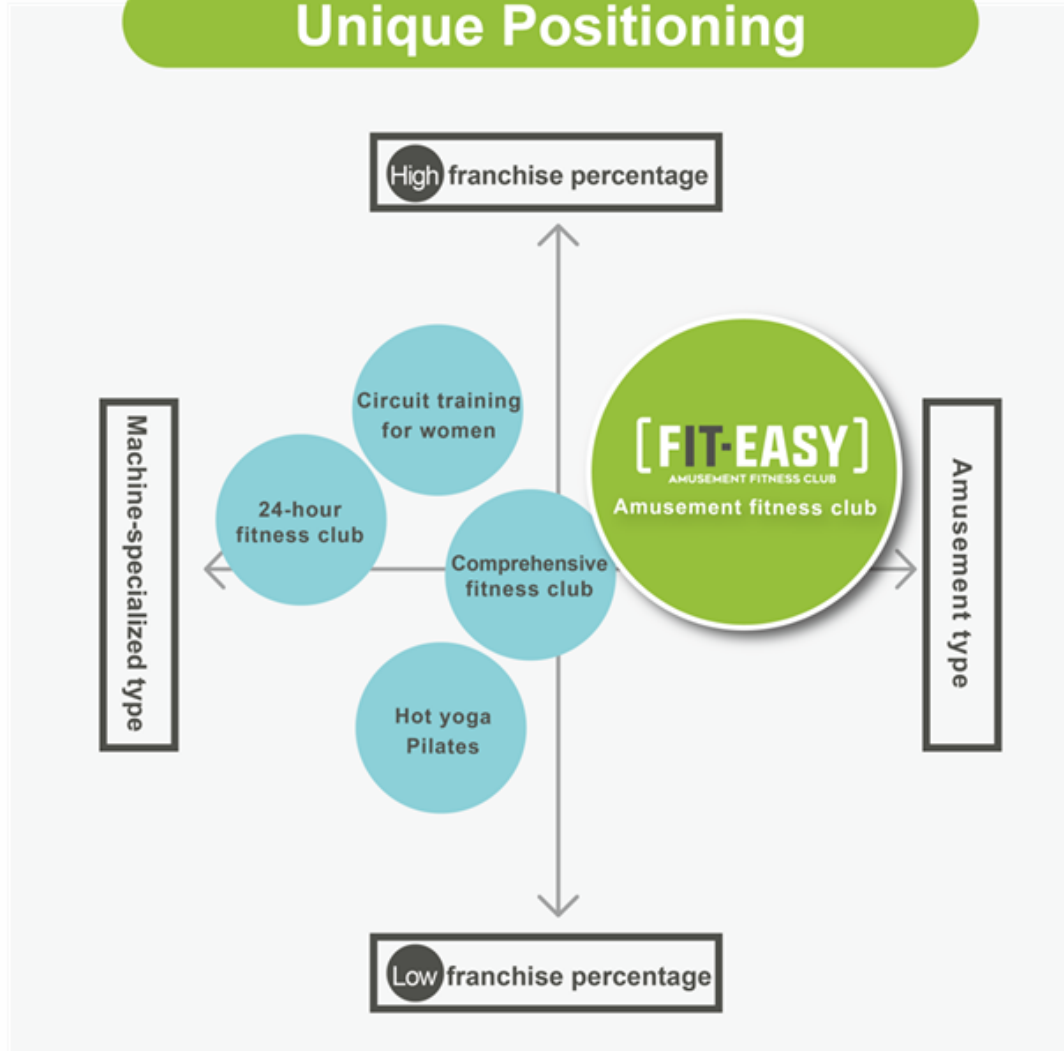
Since August 2021, he has served as Vice President of FIT EASY, Inc.. In his previous role, he successfully launched a reuse business and expanded franchise operations from a video rental business. He has extensive expertise in franchise development, business transformation, and new business creation. Over the past 25 years, he has contributed to the development of more than 500 stores while serving as a director of a nationwide reuse business company. He is highly experienced in franchise system development and headquarters management, driving profitability and growth through effective human resource training and business management systems.

Company Overview ① Company History

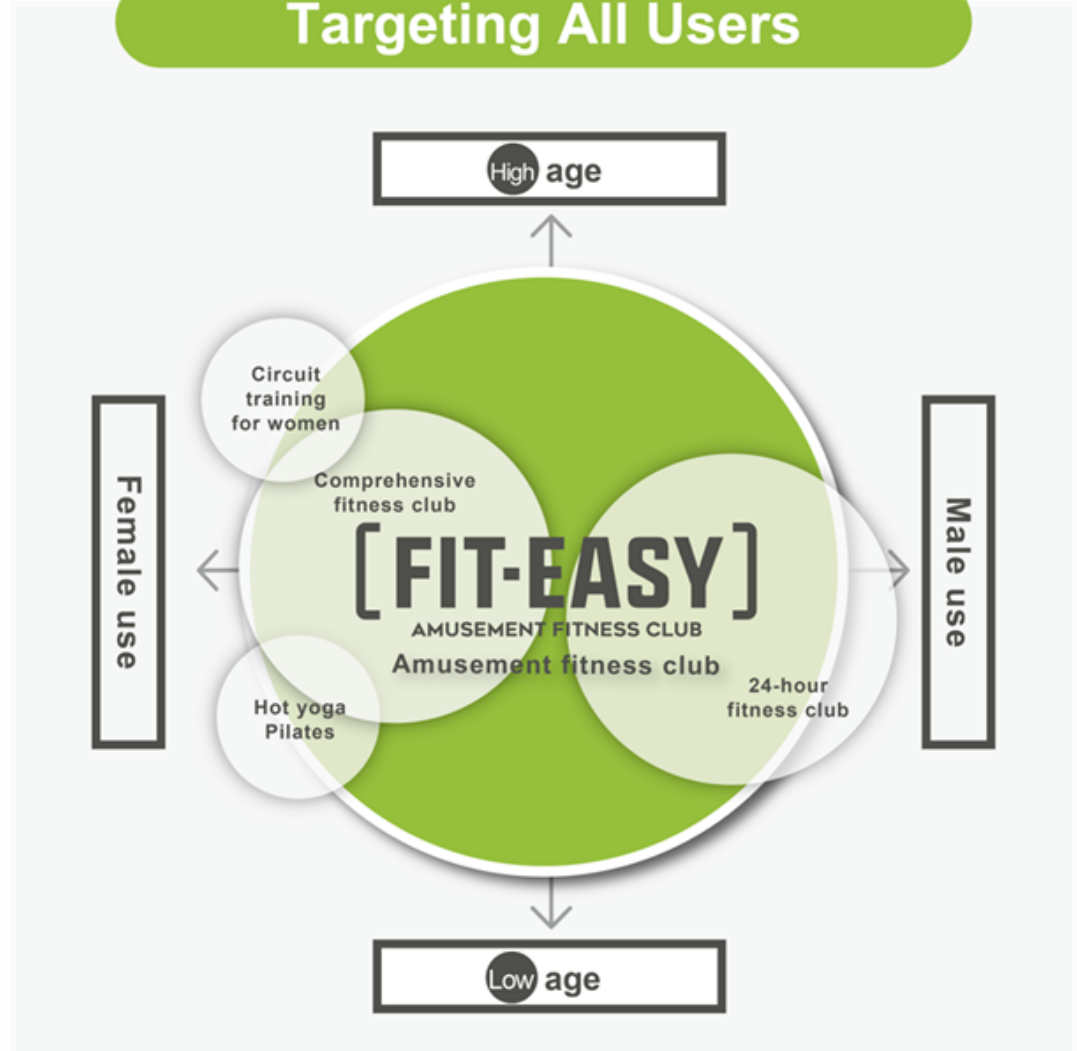
28 services introduced since founding
275 stores opening as of late April 2026



Unique Positioning



Targeting All Users



We aim to approach the wellness market by introducing a new amusement service.

Wellness Market

Amusement Fitness Club

(Fitness + Amusement Services)



Introduction of new services



A Proven, High-Profit Business Model as a Franchise HQ

(1) Membership fee management system

Optimization of
royalty management

Aggregation of all membership fees
from franchised stores at headquarters

(2) Property management system

Optimization of
rent management

Centralized management through subleasing
of properties by headquarters

Through the
management systems
in (1) and (2)

- Maintain better relationships with franchised stores
- Establish a system that simplifies accounting operations, allowing franchised stores to focus on store management

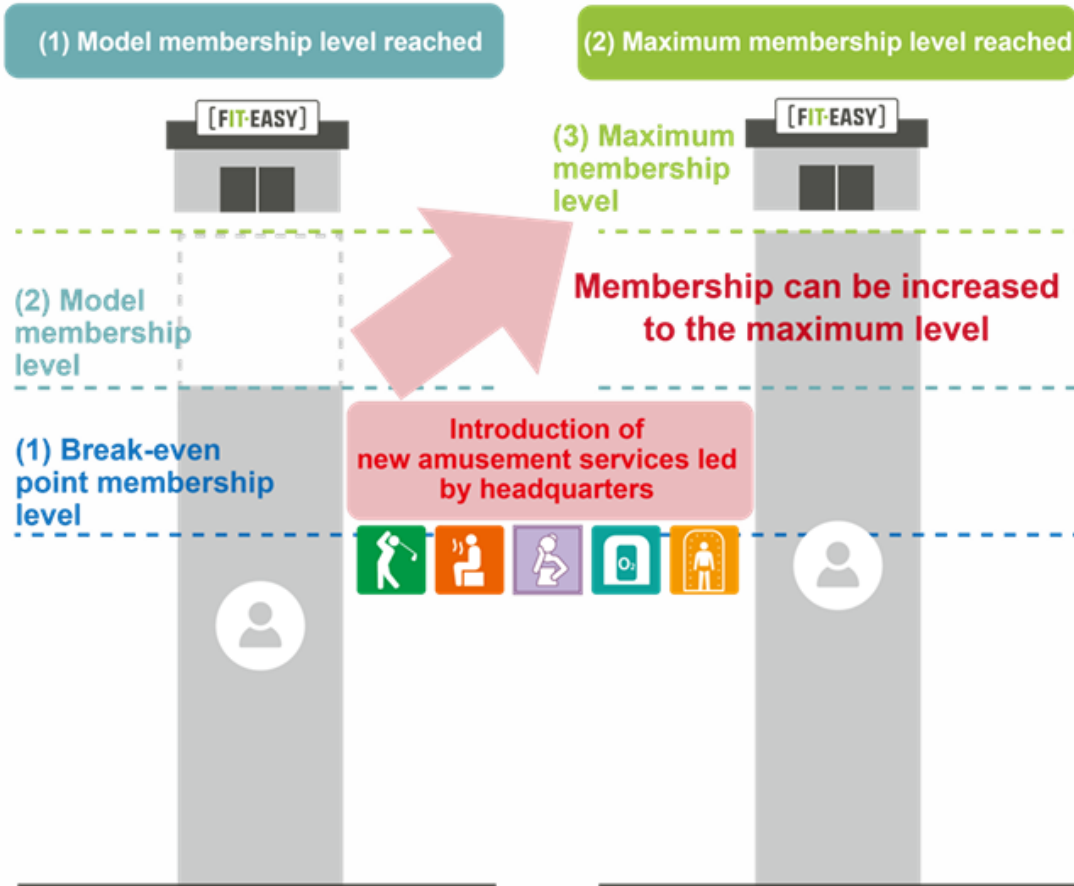
Result

System for opening multiple stores by a single owner

Reducing the effort required
for store setup costs
Accelerating human resource
development

Creating a plan for opening multiple stores
by a single owner

Introduction of new amusement services led by headquarters to increase membership



Increasing membership through dominant store openings

● Catchment area of existing store ○ Catchment area of new store

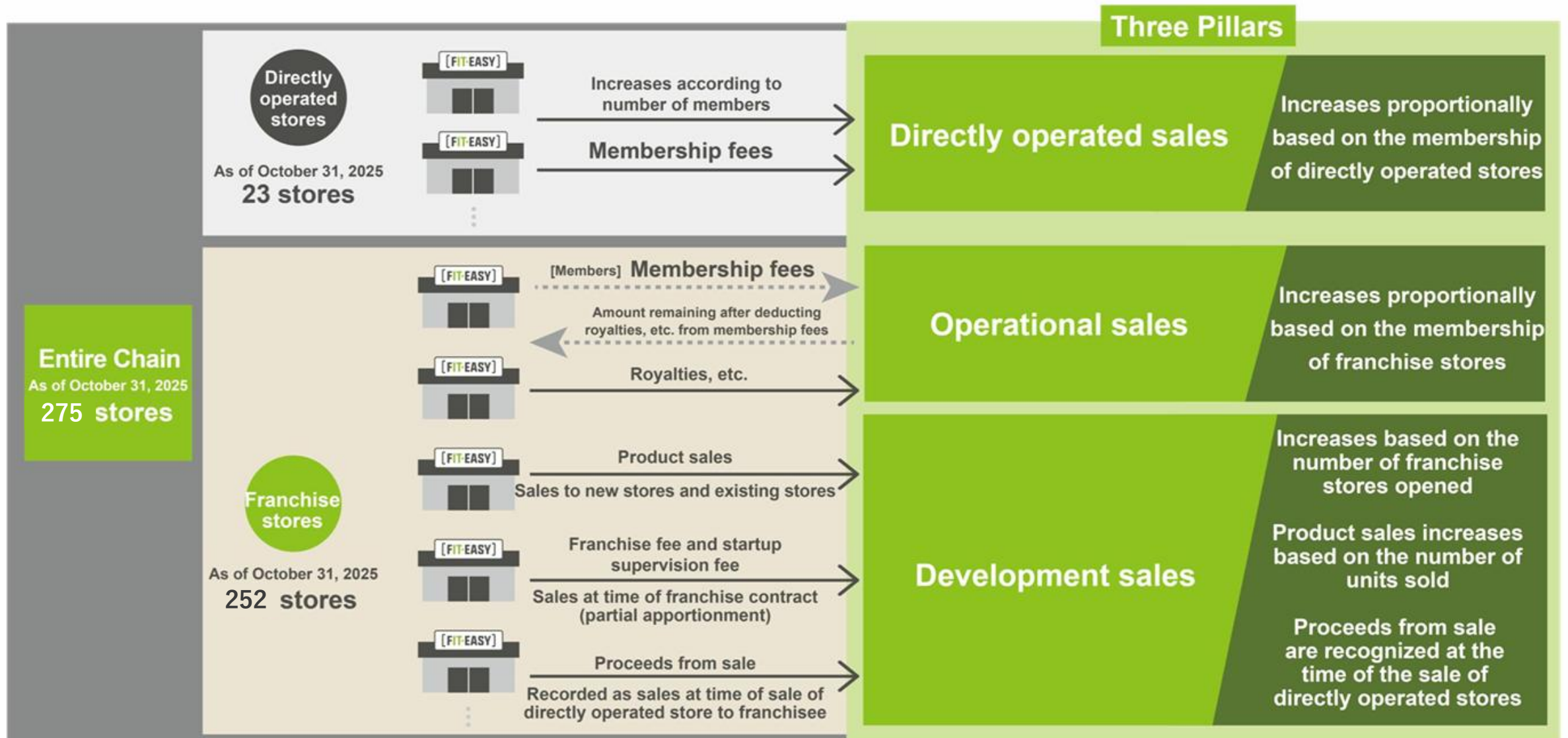


Synergistic effect of increased membership

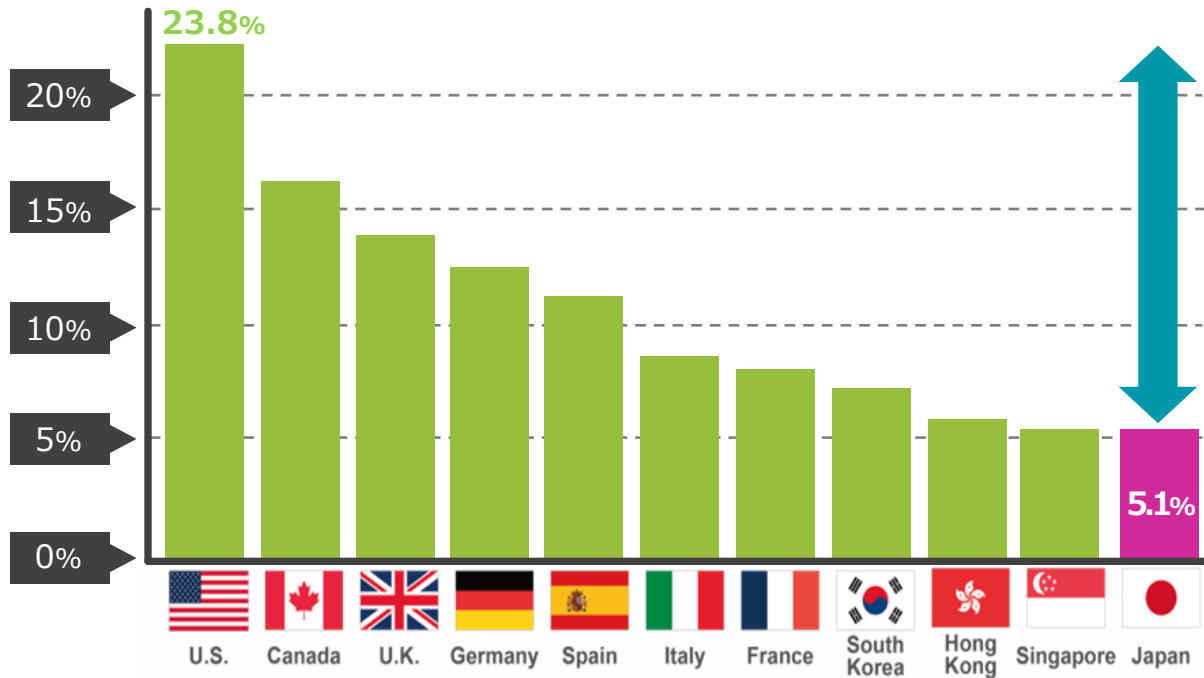
through the introduction of different amusement services, and changes in machine manufacturers and lineup

Dominant store openings are possible without cannibalization

Business Model



Global Fitness Participation & Japan Market Overview



Compared with leading fitness markets, Japan remains a largely untapped growth opportunity.

Reference :
Global Data : Health & Fitness Association (HFA / IBIHRSA) 「2025 HFA Global Report」
Japan Date : 一般社団法人 日本フィットネス産業協会 (FIA) 「2025年版 業界トレンド調査」および各社IRデータを基に推計

Background of Fitness in Japan



Driving Change to Improve wellness Levels

Store Expansion Strategy System①

Highly precise membership forecasting system utilizing performance-based trade area, traffic flow, and location evaluation (marketing research) alongside proprietary multiple regression analysis tools

(1) Trade area, traffic flow, and location evaluation (marketing research)

Properties are evaluated from three perspectives: trade area, traffic flow, and location
Only properties that meet the criteria are considered for store openings

(2) Forecasting membership acquisition using proprietary multiple regression analysis tools

Highly precise membership forecasts are calculated based on accumulated data

(3) Survey of local competitors

Real-time analysis of competitors' initiatives and gathering information on-site

Acquired over 1,400 members despite being an area where we were a latecomer

FIT-EASY M Store, Gifu Opened in September 2022



Equipment installed



1494 members * As of October 31, 2025



Opened a new store in an area already served by a 24-hour type competitor A, a comprehensive type competitor B, and a small-scale type competitor C. Reached 1,000 members on June 26, 2023 as a result

3 Proven Strategic Systems

① Amusement Strategy

② Workout machine Strategy

③ Area Dominant Strategy

Introduced the machines of nine manufacturers introduced in countries worldwide



Reasons and benefits for implementing multiple machine manufacturers

- ✓ Gain support from our core user base by positioning the ability to use diverse machines as a value proposition
- ✓ Gain broad support because the effective points for different body parts vary depending on the machine manufacturer
- ✓ Enhancing the machine lineup in the area for dominant store openings
- ✓ Enables procurement under better terms

Achievements in dominant store openings through two strategies in Toyota City, Aichi

Using three strategies, we acquired 6,645 members across five stores without cannibalizing sales



Strategic services, machine lineups, and dominant-area expansion enable strong member acquisition, even in late-entry markets

Wide Range of Location Options

① Roadside



② Residential Area



③ Mall



④ Commercial Building



⑤ Near Terminal Station



⑥ Station-Front Shopping St.



Opening Traffic Strategy

Targeted promotions tailored to each locations are launched two months prior to opening to maximize foot traffic from pre-opening

Online Ads

SNS Posts & Ads
LINE/Search Listing Ads
etc...



Offline Ads

Brochure Inserts
Flyer Distribution
etc...



Campaign Event

Referral/Switch Campaign
Trial Events/Free Access Day
etc...

Proven Success Store B in Aichi

Grand Opening Nov 4, 2025



Members Acquired by
Opening Day:

1,628

※Break-Even:850

Total
Members: **1,955**

(Membership Target:1,050)

※As of Apr 30,2026



1,628 members acquired by opening day – well above the break-even threshold of 850, Within just two months of launch. Total memberships reached 1,955 as of Apr 30,2026.

Long-Term Expansion Potential

|| Nationwide expansion Potential



|| MAP of Nationwide expansion Potential



Reference : e-Stat
Expansion potential calculated from municipalities with 50,000+ population, at one store per 50,000 residents.

Long-term target of approx. 2,500 stores nationwide

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