

CYBERNET SYSTEMS CO., LTD.

(Delayed)

Results of Operations for the Year Ended December 31, 2018

7 February, 2019
CYBERNET SYSTEMS CO., LTD.



Code for periods

| | |
|----------|---|
| 16.12 | Fiscal year ended December 31, 2016 |
| 17.12/4Q | Fourth quarter of the fiscal year ended December 31, 2017 |
| 17.12 | Fiscal year ended December 31, 2017 |
| 18.12/4Q | Fourth quarter of the fiscal year ended December 31, 2018 |
| 18.12 | Fiscal year ended December 31, 2018 |
| 19.12E | Estimates for the fiscal year ending December 31, 2019 |

◆ Business Summary of Financial Results for the Fiscal Year Ended December 31, 2018

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Business Summary of Financial Results for the Year Ended December 31, 2018

[Consolidated] Business Summary

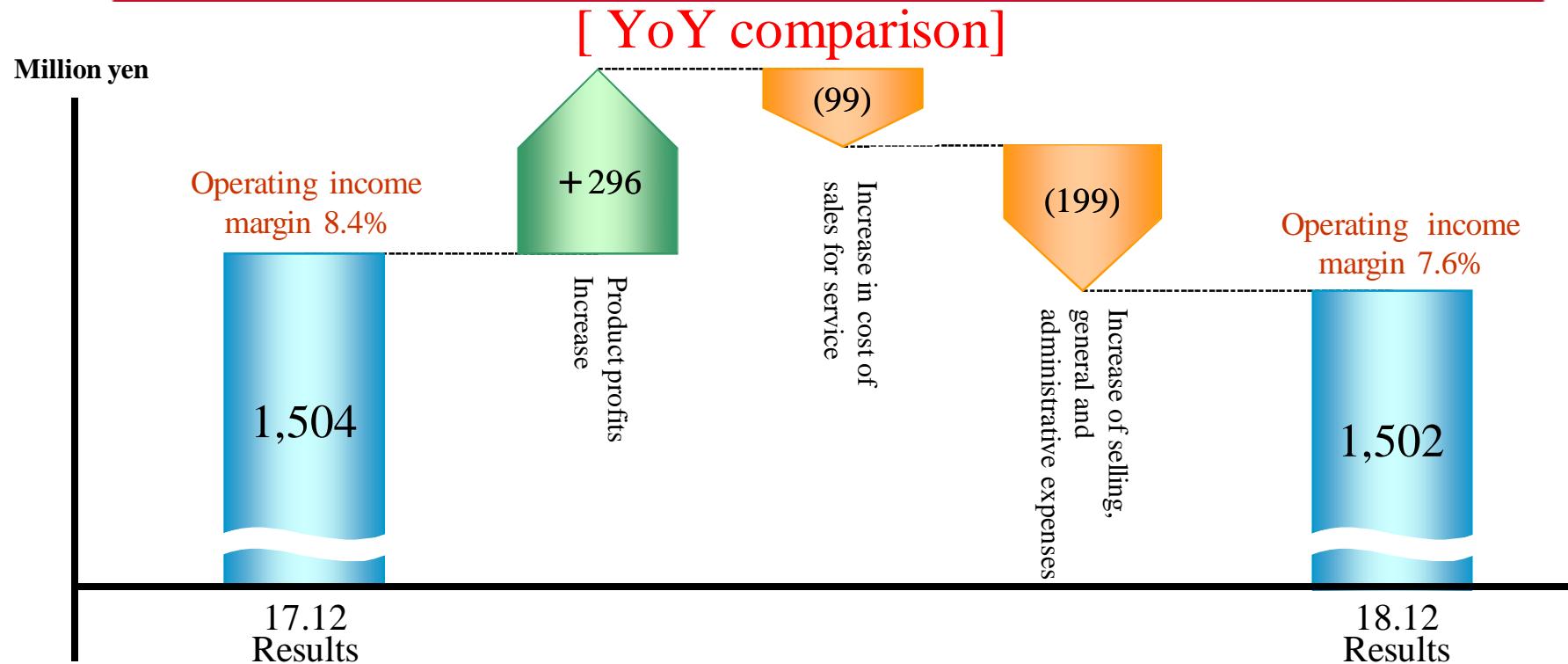
CYBERNET SYSTEMS CO.,LTD.

| | 18.12 Results | 17.12 Results | YoY Change Amount | YoY Change % | 18.12 Plan | Change Amount from Plan | Change % from Plan |
|--|------------------|------------------|-------------------------|--------------------|---------------|-------------------------------|--------------------------|
| Net sales | 19,719 | 17,987 | + 1,731 | 109.6% | 19,510 | + 209 | 101.1% |
| Operating income | 1,502 | 1,504 | (2) | 99.8% | 1,561 | (58) | 96.2% |
| Operating income margin | 7.6% | 8.4% | (0.8P) | | 8.0% | (0.4P) | |
| Ordinary income | 1,684 | 1,639 | + 45 | 102.8% | 1,709 | (24) | 98.6% |
| Ordinary income margin | 8.5% | 9.1% | (0.6P) | | 8.8% | (0.3P) | |
| Profit (loss) attributable to owners of parent | (656) | 937 | (1,594) | — | 1,029 | (1,685) | — |
| Profit attributable to owners of parent margin | (3.3%) | 5.2% | (8.5P) | | 5.3% | (8.6P) | |
| Before amortization of goodwill Operating income | 1,692 | 1,790 | (97) | 94.6% | 1,833 | (140) | 92.3% |
| Before amortization of goodwill Operating income margin | 8.6% | 10.0% | (1.4P) | | 9.4% | (0.8P) | |
| EBITDA | 1,991 | 2,064 | (72) | 96.5% | 1,949 | + 41 | 102.1% |
| EBITDA margin | 10.1% | 11.5% | (1.4P) | | 10.0% | + 0.1P | |

*P : Point

[Consolidated] Changes in Operating Income

CYBERNET SYSTEMS CO., LTD.



Main Causes of Year-on-Year Changes

○ Main causes of product profit changes

Decrease due to the impact of foreign currency translation -7 million yen/ Increase due to net sales increase +411 million yen/ Decrease due to cost rate increase -77 million yen

Increase profits from good trend of main MCAE business, Optical design business, and IT solution business/ Korean sales subsidiary founded in 2017 contribute the increasing of profit with good trends.

○ Main causes of cost of sales for service and selling, general and administrative expenses changes

Increase due to the impact of foreign currency translation +0 million yen/ Increasing of outsourcing due to order increasing +18 million yen/ R&D cost due to new products development +68 million yen/ The impact of Korean sales subsidiary which started business in November 2017 +81 million yen

○ Main causes of operating income changes

The impact of foreign currency translation on operating income is -7 million yen

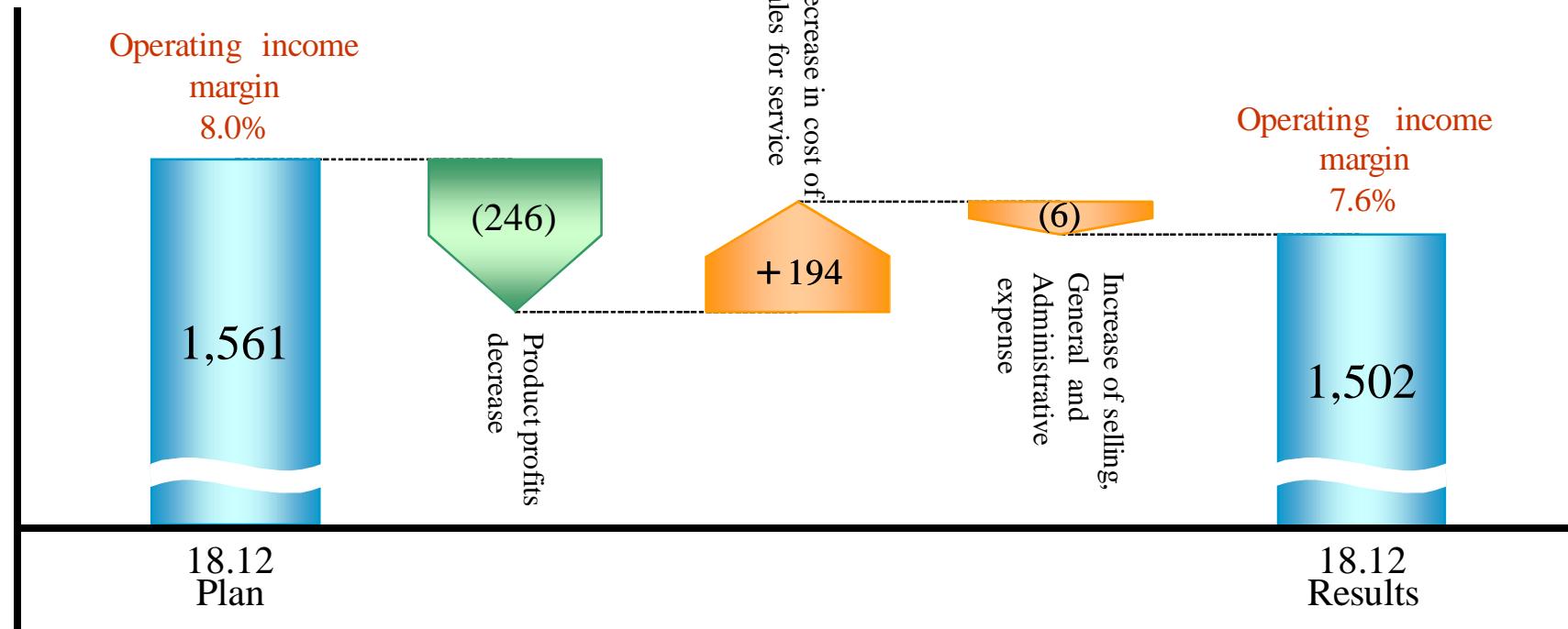
Although product profit increased due to an increase in net sales, operating income remained almost flat due to increasing of cost.

[Consolidated] Changes in Operating Income

CYBERNET SYSTEMS CO.,LTD.

[Against Plan]

Million yen



Main Causes of Changes Against Plan

○ Main causes of product profits changes

Increase due to the impact of foreign currency translation +173 million yen/ Decrease due to cost rate increase -90 million yen/ Decrease due to net sales decrease -329 million yen

○ Main causes of cost of sales for service and selling, general and administrative expenses changes

Cost increase due to the impact of foreign currency translation +168 million yen/ Decreasing of personnel expenses due to unachieved hiring -339 million yen/ cost decrease -16 million yen

○ Main causes of operating income changes

The impact of foreign currency translation on operating income is +4 million yen

Decrease operating income compare to the plan due to net sales decrease and to cost rate increase.

[Consolidated] Balance Sheet

CYBERNET SYSTEMS CO.,LTD.

| | | | Million yen | |
|---|---------------|---------------|-------------------------|-------|
| | 17.12 | 18.12 | YoY Change Amount | |
| Current assets | 17,142 | 17,722 | 579 | |
| Cash and deposits | 2,890 | 4,467 | 1,577 | |
| Notes and accounts receivable-trade | 4,604 | 4,570 | (34) | |
| Short-term investment securities | 5,200 | 4,000 | (1,200) | (i) |
| Short-term loans receivable | 2,905 | 3,086 | 181 | |
| Others | 1,541 | 1,597 | 55 | |
| Noncurrent assets | 3,744 | 1,494 | (2,249) | |
| Property, plant and equipment | 393 | 299 | (94) | |
| Intangible assets | 2,569 | 322 | (2,247) | (ii) |
| Investments and other assets | 781 | 873 | 91 | |
| Total Assets | 20,887 | 19,217 | (1,670) | |
| Current liabilities | 5,282 | 4,987 | (295) | |
| Accounts payable-trade | 1,255 | 1,391 | 136 | |
| Income taxes payable | 437 | 161 | (276) | |
| Advances received | 2,028 | 1,995 | (33) | |
| Provision for bonuses | 603 | 553 | (49) | |
| Others | 957 | 885 | (72) | |
| Noncurrent liabilities | 1,393 | 1,362 | (30) | |
| Provision for retirement benefits | 1,327 | 1,327 | 0 | |
| Others | 65 | 35 | (30) | |
| Total liabilities | 6,675 | 6,349 | (325) | |
| Total net assets | 14,211 | 12,867 | (1,344) | (iii) |
| Total liabilities and net assets | 20,887 | 19,217 | (1,670) | |

Main Causes of Changes from the End of the Previous Fiscal Year

- (i) Short-term investment securities (down 1,200 million yen from the end of the previous fiscal year)
Investments decreased -1,200 million yen
- (ii) Goodwill (down 1,810 million yen from the end of the previous fiscal year)
impairment -1,536 million yen
amortization -190 million yen
foreign currency translation -83 million yen
- (iii) Total net assets (down 1,344 million from the end of the previous fiscal year)
Loss attributable to owners of parent -656 million yen
dividend of earnings -506 million yen
foreign currency translation adjustment decreased -218 million yen

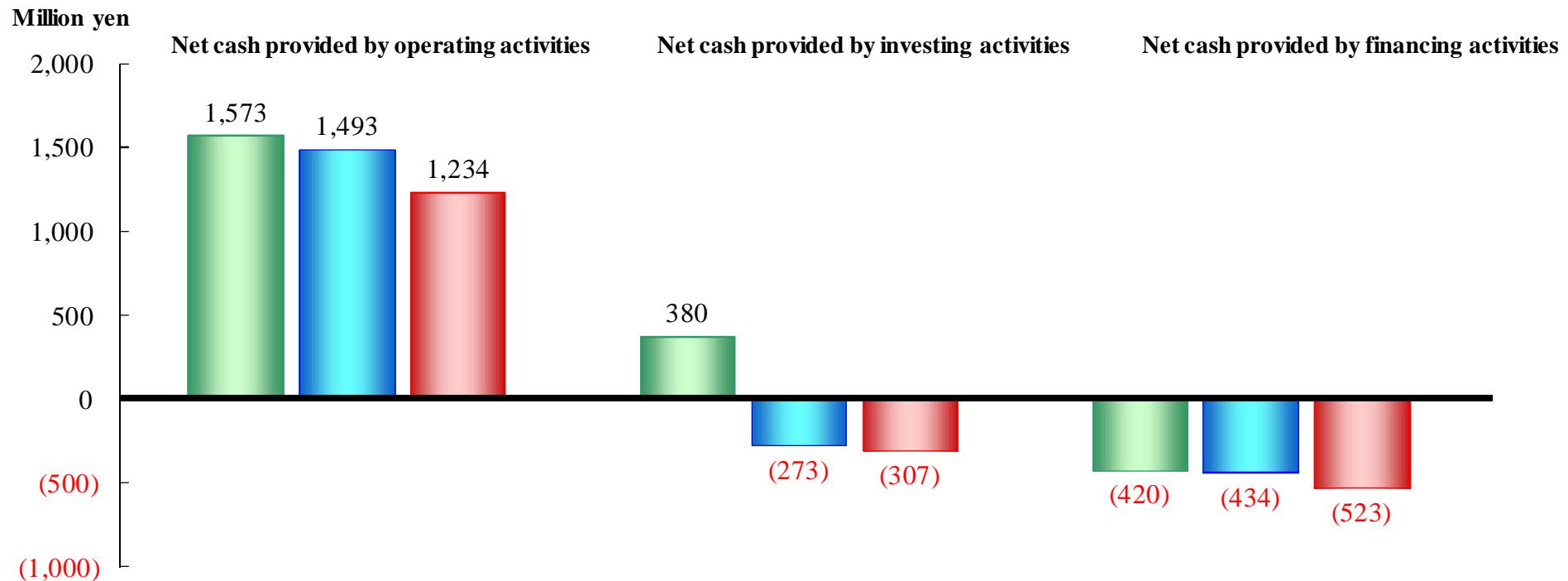
[Consolidated] Cash Flow Statement

CYBERNET SYSTEMS CO.,LTD.

16.12

17.12

18.12



Main Causes of Changes from the Previous Fiscal Year

- Net cash provided by operating activities
 - ⇒ Mainly due to decreasing of trade payables
- Net cash provided by investing activities
 - ⇒ Mainly due to increasing of payments of loans
- Net cash provided by financing activities
 - ⇒ Mainly due to increasing of dividends paid

[Consolidated] Quarterly Net Sales

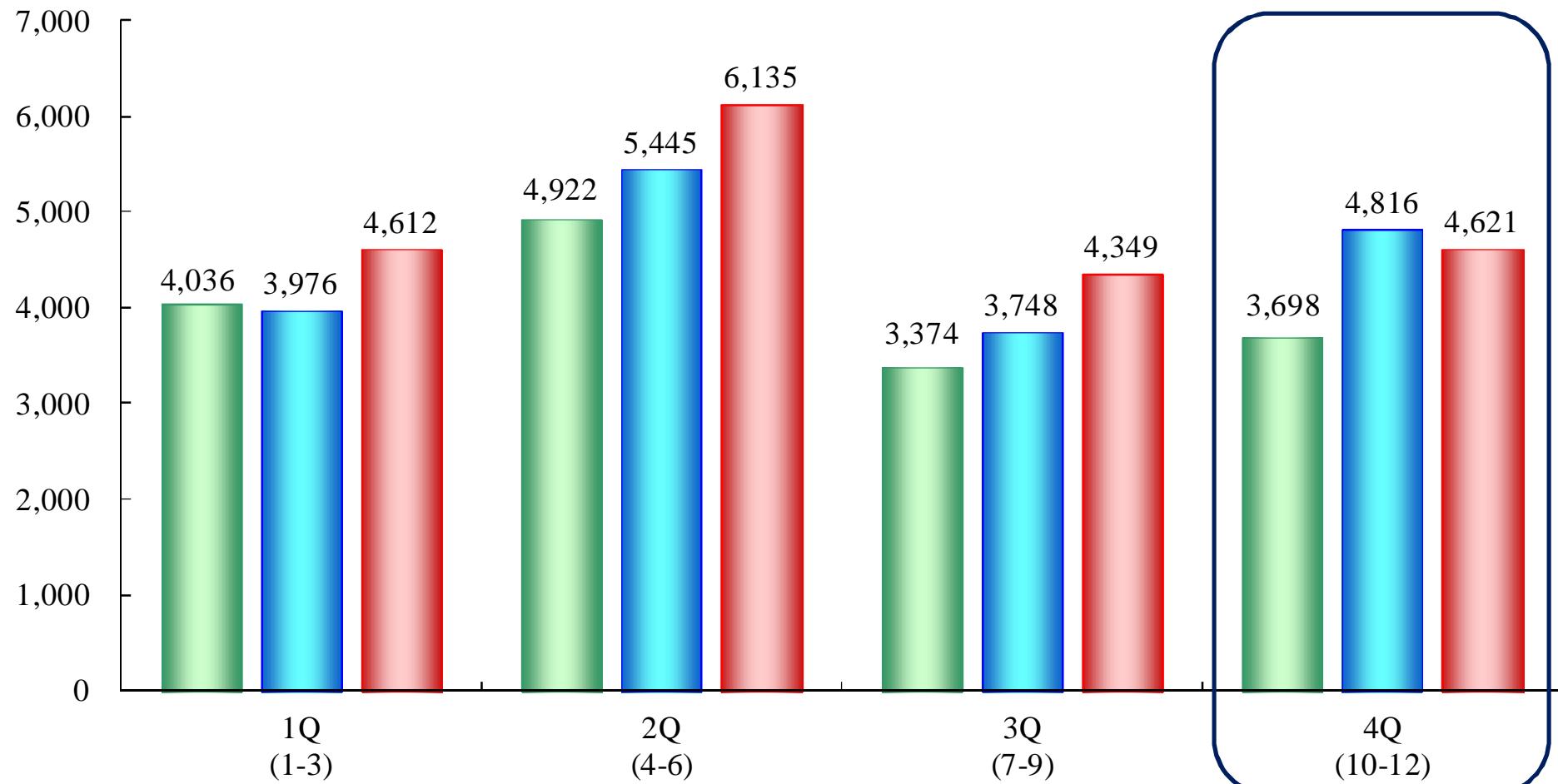
CYBERNET SYSTEMS CO.,LTD.

Million yen

16.12

17.12

18.12



[Consolidated] Overview of Results by Segment

CYBERNET SYSTEMS CO.,LTD.

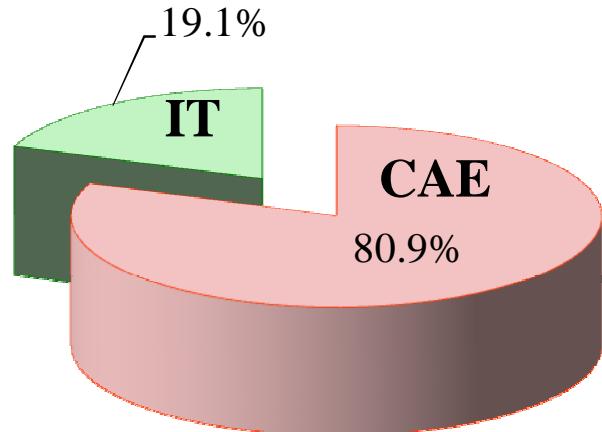
| | 17.12 | 18.12 | Million yen | |
|-------------------------------|---------------|---------------|-------------------|---------------|
| | Results | Results | YoY Change Amount | YoY Change % |
| Total Net sales | 17,987 | 19,719 | + 1,731 | 109.6% |
| CAE Solution Services | 14,910 | 16,345 | + 1,434 | 109.6% |
| IT Solution Services | 3,262 | 3,874 | + 612 | 118.8% |
| Elimination | (185) | (500) | (314) | — |
| Total Operating income | 1,504 | 1,502 | (2) | 99.8% |
| CAE Solution Services | 2,732 | 2,687 | (44) | 98.4% |
| IT Solution Services | 324 | 396 | + 71 | 122.2% |
| Elimination | (1,552) | (1,582) | (30) | — |

(Note) Elimination for segment profit (operating income) includes overhead costs that are not allocated to respective reporting segments, primarily consisting of general and administrative expenses that cannot be conveniently attributed to or identified with any particular reporting segment.

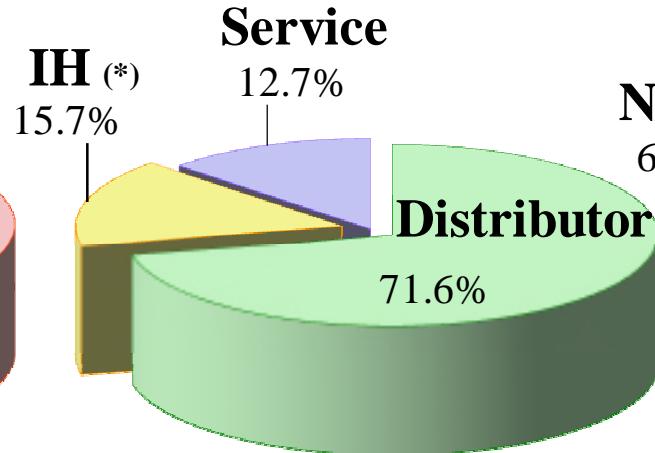
(Note) The figures for CAE Solution Services indicate the total of CAE, development subsidiaries and sales subsidiaries.

Composition ratio of Net Sales

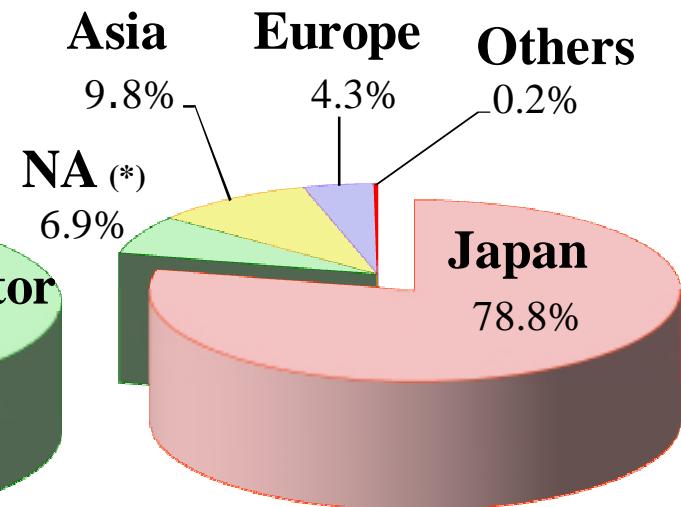
[Full year]



Net sales by business



Net sales by sales form
(*) in-house



Net sales by region
(*) North America

(Note) Composition ratio of net sales by product excludes consolidate adjustment.

Each product classification is as follows:

- CAE means CYBERNET SYSTEMS' and Subsidiaries' CAE solution services.
- IT means CYBERNET SYSTEMS' IT solution services.

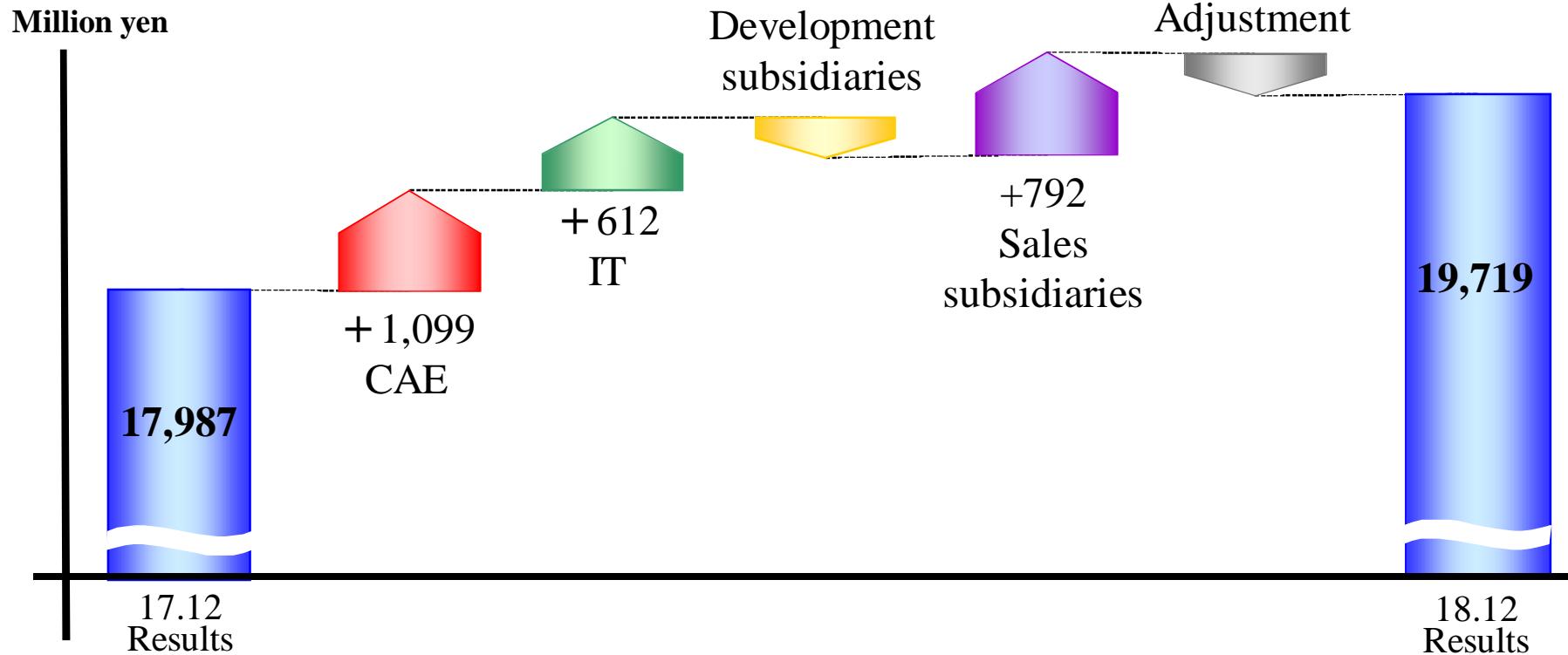
(Note) Classification of each sales form is as follows:

- Distributor means CAE and IT distribution business.
- IH means CAE and IT in-house developed products.
- Service means service providing for CAE and IT.

[Consolidated] Changes in Net Sales by Business

CYBERNET SYSTEMS CO., LTD.

[YoY comparison]



(Note) The figures above are changes in net sales by business line from the same period of the previous fiscal year.

Each business classification is as follows:

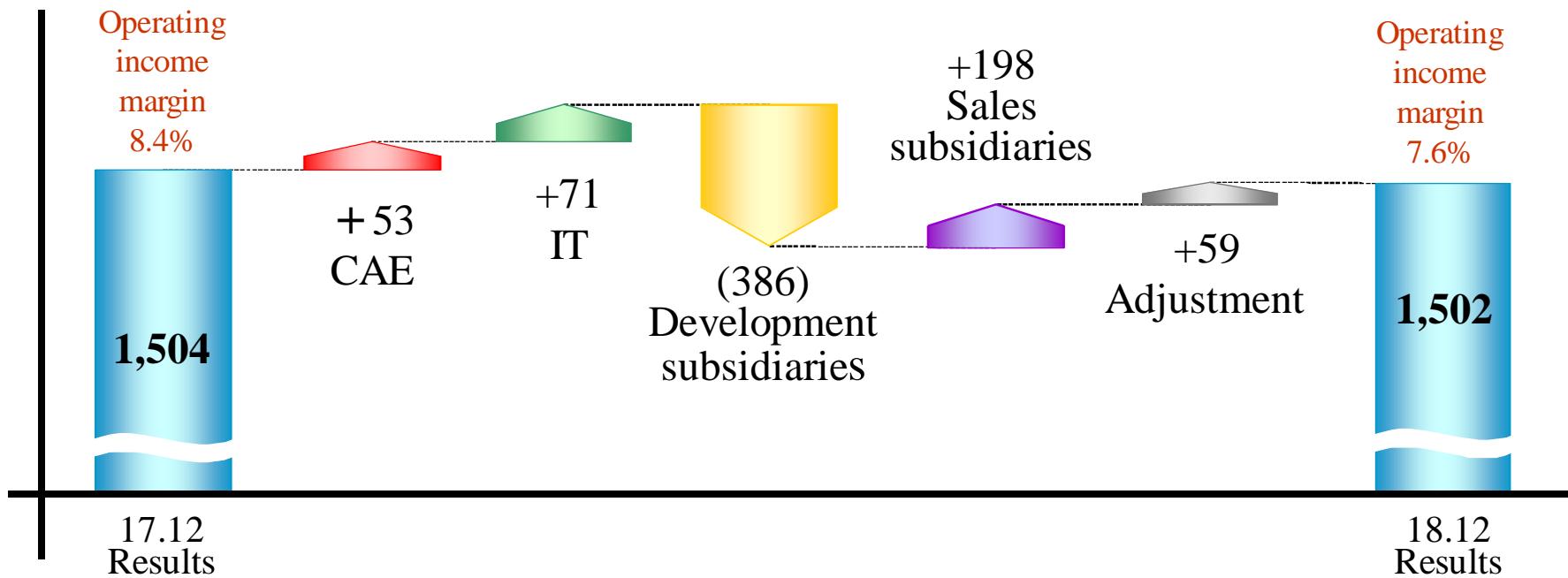
- CAE means CYBERNET SYSTEMS' CAE solution services.
- IT means CYBERNET SYSTEMS' IT solution services.
- Development subsidiaries means Europe and US 3 development subsidiaries subject to consolidation.
- Sales subsidiaries means 3 Asian sales subsidiaries subject to consolidation.

Adjustment means the total amount of consolidated adjustment and adjustment among segments.

Changes in Operating Income by Business

[YoY comparison]

Million yen



(Note) The figures above are changes in operating income by business line from the same period of the previous fiscal year.

The business lines are the same as those for the net sales on the previous page.

Adjustment includes consolidated adjustments and overhead costs.

[Non-consolidated]
Net Sales by Application Area

CYBERNET SYSTEMS CO.,LTD.

[Forth quarter of the fiscal year]

Million yen

| | 17.12/4Q | | 18.12/4Q | | | YoY Change Amount | YoY Change % |
|----------------------|----------|--------------------|----------|--------------------|-------|-------------------------|--------------------|
| | Results | Component ratio | Results | Component ratio | | | |
| MCAE | 1,483 | 42.9% | 1,591 | 44.3% | + 107 | 107.3% | |
| Optical Design | 385 | 11.1% | 406 | 11.3% | + 21 | 105.6% | |
| EDA | 246 | 7.1% | 95 | 2.7% | (150) | 38.8% | |
| MBD | 323 | 9.4% | 355 | 9.9% | + 31 | 109.9% | |
| Test and Measurement | 22 | 0.6% | 17 | 0.5% | (4) | 77.5% | |
| Others | 123 | 3.6% | 85 | 2.4% | (37) | 69.3% | |
| CAE Total | 2,584 | 74.7% | 2,552 | 71.1% | (32) | 98.7% | |
| IT Solution | 622 | 18.0% | 711 | 19.8% | + 88 | 114.2% | |
| Data Solution | 251 | 7.3% | 327 | 9.1% | + 76 | 130.4% | |
| IT Total | 873 | 25.3% | 1,038 | 28.9% | + 164 | 118.8% | |
| Total | 3,458 | 100.0% | 3,590 | 100.0% | + 132 | 103.8% | |

[Non-consolidated]
Net Sales by Application Area

CYBERNET SYSTEMS CO.,LTD.

[Full Year]

Million yen

| | 17.12 | | 18.12 | | YoY Change Amount | YoY Change % |
|----------------------|---------|--------------------|---------|--------------------|-------------------------|--------------------|
| | Results | Component ratio | Results | Component ratio | | |
| MCAE | 6,281 | 43.8% | 6,937 | 44.1% | + 655 | 110.4% |
| Optical Design | 2,756 | 19.2% | 2,975 | 18.9% | + 218 | 107.9% |
| EDA | 520 | 3.6% | 382 | 2.4% | (137) | 73.5% |
| MBD | 936 | 6.5% | 1,027 | 6.5% | + 90 | 109.7% |
| Test and Measurement | 143 | 1.0% | 132 | 0.8% | (10) | 92.6% |
| Others | 413 | 2.9% | 371 | 2.4% | (42) | 89.7% |
| CAE Total | 11,053 | 77.1% | 11,827 | 75.2% | + 774 | 107.0% |
| IT Solution | 2,263 | 15.8% | 2,771 | 17.6% | + 508 | 122.4% |
| Data Solution | 1,015 | 7.1% | 1,130 | 7.2% | + 114 | 111.3% |
| IT Total | 3,279 | 22.9% | 3,902 | 24.8% | + 622 | 119.0% |
| Total | 14,332 | 100.0% | 15,729 | 100.0% | + 1,397 | 109.7% |

[Forth quarter of the fiscal year]

Million yen

| | 17.12/4Q | | 18.12/4Q | | | |
|--|--------------|-----------------|--------------|-----------------|-------------------|---------------|
| | Results | Component ratio | Results | Component ratio | YoY Change Amount | YoY Change % |
| Electrical equipment | 965 | 27.9% | 965 | 26.9% | + 0 | 100.0% |
| Machinery & Precision Machinery | 509 | 14.7% | 527 | 14.7% | + 18 | 103.5% |
| Transportation equipment | 717 | 20.7% | 660 | 18.4% | (56) | 92.1% |
| Other manufacturing industry | 443 | 12.8% | 515 | 14.4% | + 72 | 116.4% |
| Eductaion institution/government and municipal offices | 227 | 6.6% | 249 | 6.9% | + 21 | 109.4% |
| Telecommunication industry | 151 | 4.4% | 185 | 5.2% | + 33 | 122.4% |
| Others | 443 | 12.8% | 486 | 13.6% | + 42 | 109.6% |
| Total | 3,458 | 100.0% | 3,590 | 100.0% | + 132 | 103.8% |

[Non-consolidated] Net Sales by Category of Industry

CYBERNET SYSTEMS CO.,LTD.

[Full Year]

Million yen

| | 17.12 | | 18.12 | | YoY Change Amount | YoY Change % |
|--|---------------|--------------------|---------------|--------------------|-------------------------|--------------------|
| | Results | Component ratio | Results | Component ratio | | |
| Electrical equipment | 4,612 | 32.2% | 4,679 | 29.8% | + 67 | 101.5% |
| Machinery & Precision Machinery | 2,232 | 15.6% | 2,419 | 15.4% | + 187 | 108.4% |
| Transportation equipment | 2,036 | 14.2% | 2,295 | 14.6% | + 258 | 112.7% |
| Other manufacturing industry | 1,778 | 12.4% | 2,014 | 12.8% | + 235 | 113.3% |
| Eductaion institution/government and municipal offices | 1,224 | 8.5% | 1,356 | 8.6% | + 132 | 110.8% |
| Telecommunication industry | 794 | 5.5% | 876 | 5.6% | + 81 | 110.3% |
| Others | 1,653 | 11.5% | 2,087 | 13.3% | + 433 | 126.2% |
| Total | 14,332 | 100.0% | 15,729 | 100.0% | + 1,397 | 109.7% |

[Non-consolidated] Net Sales by Contract

CYBERNET SYSTEMS CO.,LTD.

[Forth quarter of the fiscal year]

Million yen

| | 17.12/4Q | | 18.12/4Q | | | |
|---------------------------------------|----------|-----------------|----------|-----------------|-------------------|--------------|
| | Results | Component ratio | Results | Component ratio | YoY Change Amount | YoY Change % |
| New licenses | 1,247 | 42.8% | 1,298 | 43.3% | + 50 | 104.0% |
| Renewals of the maintenance contracts | 1,666 | 57.2% | 1,698 | 56.7% | + 31 | 101.9% |
| Total | 2,914 | 100.0% | 2,997 | 100.0% | + 82 | 102.8% |

[Full Year]

Million yen

| | 17.12 | | 18.12 | | | |
|---------------------------------------|---------|-----------------|---------|-----------------|-------------------|--------------|
| | Results | Component ratio | Results | Component ratio | YoY Change Amount | YoY Change % |
| New licenses | 4,606 | 36.8% | 5,118 | 37.5% | + 511 | 111.1% |
| Renewals of the maintenance contracts | 7,918 | 63.2% | 8,527 | 62.5% | + 608 | 107.7% |
| Total | 12,525 | 100.0% | 13,646 | 100.0% | + 1,120 | 108.9% |

[Consolidated] Performance at Overseas Subsidiaries (Development subsidiaries)

CYBERNET SYSTEMS CO.,LTD.

| Development subsidiaries | WATERLOO MAPLE INC. | Noesis Solutions NV | Sigmetrix, L.L.C. |
|---|---|---|--|
| | Canada | Belgium | United States |
| Year-on-year change in sales (local currency) | 84.7% | 96.6% | 92.8% |
| Year-on-year change in sales (in yen) | 84.0% | 100.6% | 91.2% |
| Performance | Sales were steadily trend in Japan and Europe, but sluggish trend in North America and China. | Sales for process integration and domain optimization tool were steadily trend in North America and China but sluggish in Japan and Europe. | Sales for 3D tolerance management tool were steadily trend in Europe but sluggish in other region. |

[Consolidated] Performance at Overseas Subsidiaries (Sales subsidiaries)

CYBERNET SYSTEMS CO.,LTD.

| Sales subsidiaries | CYBERNET SYSTEMS (SHANGHAI) CO.,LTD. | CYBERNET SYSTEMS TAIWAN CO.,LTD. | CYFEM Inc. |
|--|--|--|---|
| | China | Taiwan | Korea |
| Year-on-year change in sales (local currency) | 122.1% | 130.8% | — |
| Year-on-year change in sales (in yen) | 123.5% | 130.8% | — |
| Performance | Sales for mainstay optical software and multi-physics analysis tool were Steadily trend. | Sales for mainstay optical software and multi-physics analysis tool were Steadily trend. | Sales of mainstay optical system software was steadily trend. |

[Consolidated]

CYBERNET SYSTEMS CO.,LTD.

Dividends for the Current Fiscal Year

(unit: yen)

| | 17.12 | 18.12 | | |
|---------------------------------|--------------|--------------|-----------------|----------------|
| | Total | End of 2Q | Fiscal year-end | Total |
| | Result | Result | Result | Result |
| Dividend per share | 15.05 | 8.26 | 8.26 | 16.52 |
| Net income per share | 30.09 | 30.59 | — | (21.07) |
| Dividend payout target ratio | 50.0% | — | — | — |
| (Ref.) Dividend on equity ratio | 3.4% | — | — | 3.8% |

Projection for FY2019

| | Full year | | | | Million yen |
|--|-----------|---------|-------------------------|--------------------|-------------|
| | 19.12E | 18.12 | YoY Change Amount | YoY Change % | |
| | Plan | Results | | | |
| Net sales | 20,000 | 19,719 | + 280 | 101.4% | |
| Operating income | 1,520 | 1,502 | + 17 | 101.2% | |
| Operating income margin | 7.6% | 7.6% | + 0.0P | | |
| Ordinary income | 1,608 | 1,684 | (76) | 95.4% | |
| Ordinary income margin | 8.0% | 8.5% | (0.5P) | | |
| Profit (loss) attributable to owners of parent | 958 | (656) | + 1,614 | — | |
| Profit attributable to owners of parent margin | 4.8% | (3.3%) | + 8.1P | | |

*P : Point

(unit: yen)

| | 15.12 | 16.12 | 17.12 | 18.12 | 19.12E |
|---------------------------------|--------------|--------------|--------------|----------------|--------------|
| | Result | Result | Result | Result | Projection |
| Dividend per share | 13.80 | 13.00 | 15.05 | 16.52 | 15.38 |
| Net income per share | 14.87 | 14.83 | 30.09 | (21.07) | 30.75 |
| Dividend payout target ratio | 92.8% | 87.7% | 50.0% | — | 50.0% |
| (Ref.) Dividend on equity ratio | 3.1% | 3.0% | 3.4% | 3.8% | 3.7% |

Dividends Policy

Starting from the fiscal year ended December 31, 2015, we adopt a higher dividend payout target ratio or DOE, whichever produces a higher dividend, and uses it as a benchmark in determining the dividend amount.

We also take into consideration the investment funds that will be required to achieve a higher corporate value over the medium and long term to make a comprehensive judgment regarding its ultimate dividend payment.

- Dividend payout target ratio: 50%
- Dividend on equity ratio: 3.0%

Mid-term Business Plan Basic Policies

Cybernet Group is addressing the management based on new mid-term business plan basic policy as follows toward to mid to long term, stable and continuous growth.

“Energy for your innovation” as our motto, continue to provide cutting edge solutions and service in scientific computing and engineering domain to build up the system to achieve continuous revenue and profit growth.

- Enhance management system foundation for further enhancing base earnings capability
- Rebuild group governance system for enhancing business management
- Promoting diversity management include utilization of further female, senior and global human resources
- Proactive investment for CAE solutions, AI, and security domain.
- Enhance overseas sales including ASEAN

CYBERNET SYSTEMS CO., LTD.

■ Corporate Planning and IR Department

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These materials were created from data obtained through our operations. We make no guarantees, however, with respect to integrity. In addition, the opinions and predictions provided in these materials relate to the Company's outlook at the time the materials were prepared. No guarantees whatsoever extend to any outcomes over the use of such opinions or predictions.

The contents of these materials are subject to change without notice.

Investors are requested to use their own judgment in making any final decisions regarding investments.

Reference Materials

Corporate Overview (as of December 31,2018)

CYBERNET SYSTEMS CO., LTD.

Company Name : CYBERNET SYSTEMS CO., LTD.
(Stock code: 4312, the First Section of Tokyo Stock Exchange)

Head Office : FUJISOFT Bldg. 3 Kandaneribei-cho, Chiyoda-ku, Tokyo 101-0022, Japan

Branch Offices : Nishi-Nihon Branch Office in Osaka, Chubu Branch Office in Nagoya

Founding date: April 17, 1985

Capital: 995 million yen

Number of Employees : Consolidated / 593, Non-Consolidated / 366

Business : Providing CAE and IT solutions, as well as professional services including consulting

Subsidiaries : Consolidated / WATERLOO MAPLE INC. (Canada)

Sigmetrix, L.L.C. (US)

Noesis Solutions NV (Belgium)

CYBERNET SYSTEMS (SHANGHAI) CO., LTD. (China)

CYBERNET SYSTEMS TAIWAN CO., LTD. (Taiwan)

CYFEM Inc.(Republic of Korea)

CYBERNET SYSTEMS MALAYSIA SDN. BHD. (Malaysia)

CAE stands for “Computer Aided Engineering”

| | 18.12 | 17.12 | YoY Change Amount | Million yen YoY Change % |
|-------------------------|----------------|---------------|-------------------------|-----------------------------------|
| | Results | Results | | |
| Net sales | 15,729 | 14,332 | + 1,397 | 109.7% |
| Operating income | 1,496 | 1,385 | + 110 | 108.0% |
| Operating income margin | 9.5% | 9.7% | (0.2P) | |
| Ordinary income | 1,610 | 1,476 | + 134 | 109.1% |
| Ordinary income margin | 10.2% | 10.3% | (0.1P) | |
| Net income (loss) | (2,114) | 608 | (2,722) | — |
| Net income margin | -13.4% | 4.2% | (17.6P) | |

*P: Point

Try our AR technology (cybARnet)!

Cybernet's corporate introduction movie is able to be easily viewed on smartphones.

- (i) Search “ARnex” through AppStore or Google Play (the marks as presented below are earmarks).
- (ii) Launch applications and tap “スタート” button.
- (iii) Reading the QR code below.
- (iv) Hold your smart device over the mark as presented below, push “動画再生” button, and the introduction movie will appear in the virtual space.

