(Delayed)

CYBERNET

TSE Code : 4312

CYBERNET SYSTEMS CO., LTD.

Results of Operations for the First Half of the Fiscal Year Ending December 31, 2022

3 August, 2022

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Understanding of the current external environment and its impact on the results of the first half of FY2022

Understanding of the current environment

- Rising resource prices and energy shortages due to the situation in Russia and Ukraine.

- Shortage of parts and materials such as semiconductors due to supply chain disruptions, etc.

- The global spread of COVID-19 has affected economic activities in some regions, such as lockdowns in China, although efforts are being made to normalize economic activities.

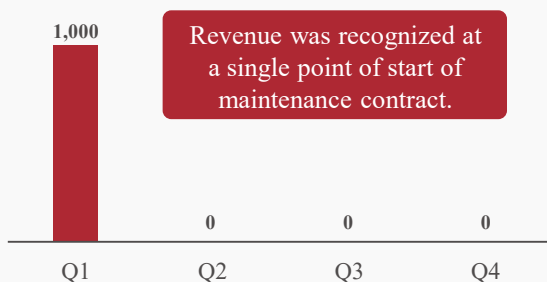- Decrease of Japanese Yes due to widening interest rates between Japan and the US.

Impact on results of the first half of FY2022

- Our business in Russia/Ukraine and EU is limited, and the impact on the results is limited.

- Although there are cases where customers' budget execution is postponed due to the impact of supply chain disruptions, etc., the impact on the results is limited because the products handled by the Company are mainly software used in research and development.

- Some orders delayed in China, due to the lockdown in China, Sales of IT security solutions for cloud environments was strong due to the establishment and permeation of the new normal work style.

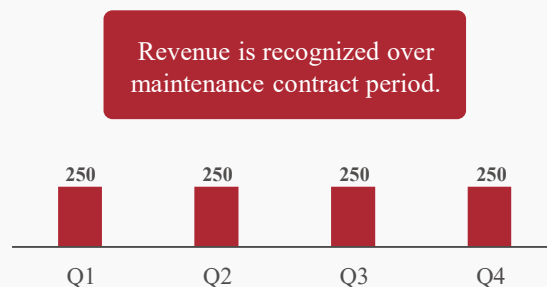- Exchange rate fluctuations have limited impact on the operating income.

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Application of Accounting Standard for Revenue Recognition

- "Accounting Standard for Revenue Recognition" (ASBJ Statement No. 29, March 31, 2020; hereinafter the "Revenue Recognition Standard") has been applied since the beginning of this fiscal year.

- By applying the standard, revenue recognition of software maintenance contract of the distribution business changed. Before applying the standard, the revenue was mainly recognized at the start of the contract and now the revenue is recognized over the contract period.

- Since transitional measures of Revenue Recognition Standard have been applied and retrospective adjustments have not been made in the past years, the year-on-year in financial figures in this material are only for reference (For some non-consolidated net sales, retroactively revised figure is disclosed).

Old (image diagram)

1,000

Revenue was recognized at a single point of start of maintenance contract.

0	0	0
Q1	Q2	Q3	Q4

New (image diagram)

Revenue is recognized over maintenance contract period.

250	250	250	250
Q1	Q2	Q3	Q4

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Financial Results for the First Quarter of FY2022

- Although sales decreased year-on-year due to the termination of the distribution agreement with Synopsys, sales exceeded the plan by 1.4% due to strong sales of multi-physics analysis tools, the company's main product.

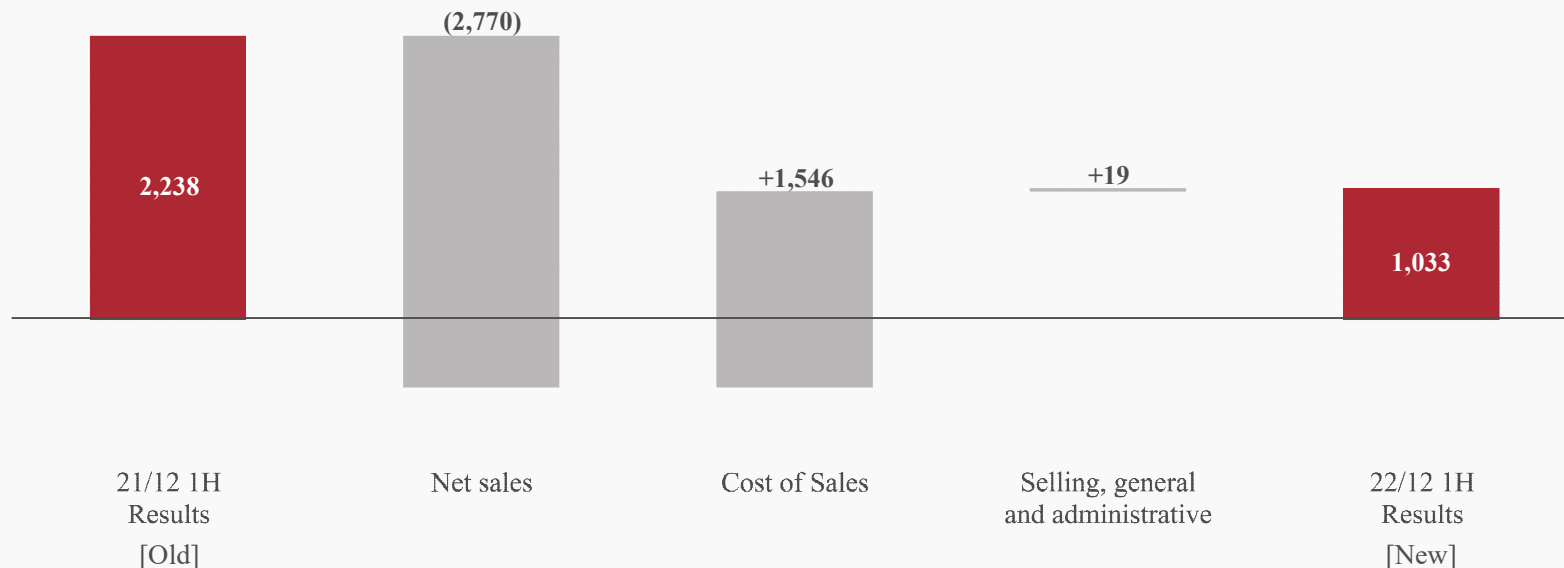- Operating income decreased due to the decrease in net sales.

※ Revenue Recognition Standard has been applied since the beginning of this fiscal year (reference P.4), and the year-on-year in financial figures in this material are only for reference.

※ EBITDA: Operating income + Depreciation

Million yen

	21/12 1H Results [Old]	22/12 1H Results [New]	YoY Change %	22/12 1H Plan [New]	Change % From Plan
Net sales	12,507	9,736	(22.2%)	9,600	+1.4%
Gross profit	5,253	4,029	(23.3%)	-	-
Selling, general and administrative expenses	3,015	2,995	(0.6%)	-	-
Operating income	2,238	1,033	(53.8%)	850	+21.6%
(Operating profit margin)	17.9%	10.6%	-	8.9%	-
Ordinary income	2,227	979	(56.0%)	850	+15.3%
Profit attributable to owners of parent	1,426	573	(59.8%)	550	+4.3%
EBITDA	2,360	1,153	(51.1%)	1,000	+15.4%
(EBITDA margin)	18.9%	11.8%	-	10.4%	-
EPS (yen)	45.73	18.49	(59.6%)	17.64	+4.8%

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Changes in Operating Income (YoY Comparison)

■ Cost of sales decreased due to decrease in net sales. Selling, general and administrative were almost the same as that of the previous fiscal year, and operating income decreased.

2,238	(2,770)	+1,546	+19	**1,033**
21/12 1H Results [Old]	Net sales	Cost of Sales	Selling, general and administrative	22/12 1H Results [New]

Million yen

※ Revenue Recognition Standard has been applied since the beginning of this fiscal year (reference P.4), and the year-on-year in financial figures in this material are only for reference.

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Financial impact by applying Revenue Recognition Standard

■ Financial impact in net sales is a decrease by 619 million yen and that in Operating income is a decrease by 294 million yen.

Million yen

| | 22/12 1H [Old] | Financial effect | | | 22/12 1H [New] |
		Simulation	IT	Total	
Net sales	10,356	(488)	(131)	(619)	9,736
Cost of sales	6,032	(217)	(108)	(325)	5,707
Gross profit	4,323	(271)	(22)	(294)	4,029
Selling general and administrative expenses	2,995	-	-	-	2,995
Operating income	1,327	(271)	(22)	(294)	1,033

※ Simulation：Simulation Solution Services
※ IT：Information Technology Solution Services

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Overview of Results by Segment

Simulation Segment

- Renewal of maintenance contracts for main products and engineering services such as MBSE performed well, but sales and profits decreased due to the termination of the distribution agreement with Synopsys.

IT Segment

- Net sales increased due to the strong sales of next-generation endpoint security and security solutions for cloud environments.

※ Simulation : Simulation Solution Services
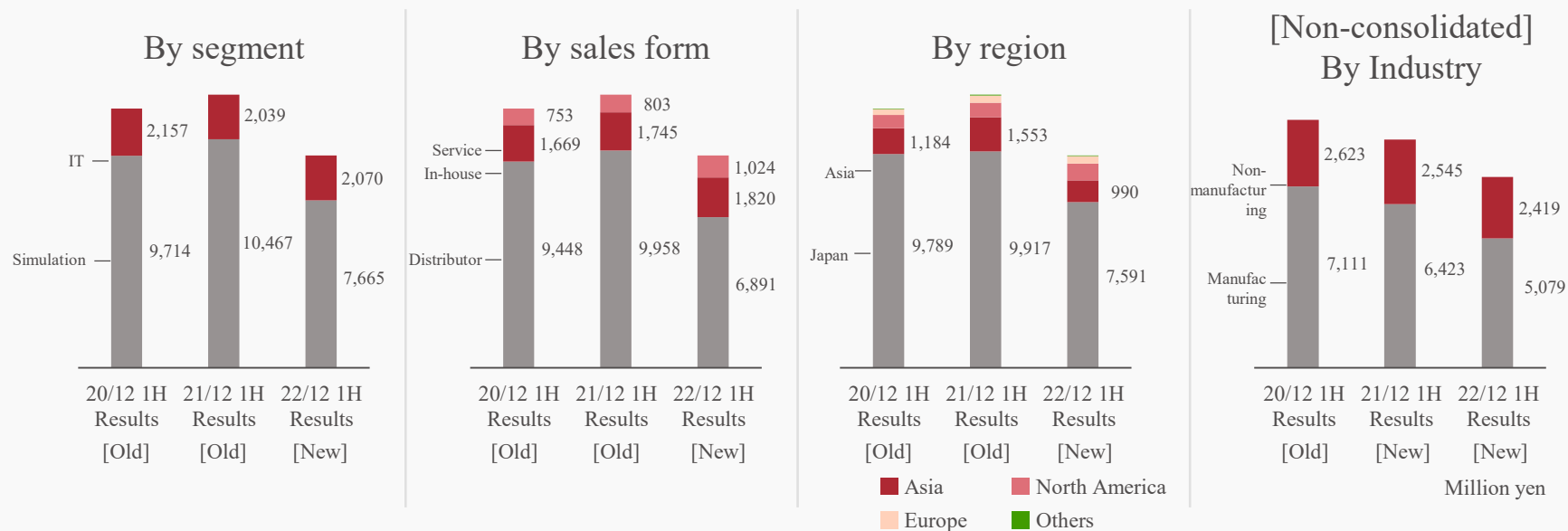※ IT : Information Technology Solution Services
※ Revenue Recognition Standard has been applied since the beginning of this fiscal year (reference P.4), and the figures of Q1 FY2021, with some exception, is before applying the standard.
※ From the first quarter of the current fiscal year, the name of the reporting segment was changed from "CAE Solution Services" to "Simulation Solution Services". In addition, the segment classification has been changed, and the results for the same period of the previous year are described by the changed segment classification.

Million yen

	21/12 1H [Old]	22/12 1H [New]	YoY Change %
Total Net sales	12,507	9,736	-22.2%
Simulation	10,467	7,665	-26.8%
IT	2,039	2,070	+1.5%
Elimination	-	-	-
Total Operating income	2,238	1,033	-53.8%
Simulation	2,710	1,410	-48.0%
IT	292	290	-0.6%
Elimination	-764	-666	-

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Composition of Net sales

By segment

	20/12 1H Results [Old]	21/12 1H Results [Old]	22/12 1H Results [New]
IT	2,157	2,039	2,070
Simulation	9,714	10,467	7,665

By sales form

	20/12 1H Results [Old]	21/12 1H Results [Old]	22/12 1H Results [New]
Service	753	803	1,024
In-house	1,669	1,745	1,820
Distributor	9,448	9,958	6,891

By region

	20/12 1H Results [Old]	21/12 1H Results [Old]	22/12 1H Results [New]
Asia	1,184	1,553	990
Japan	9,789	9,917	7,591

Asia North America Europe Others

[Non-consolidated] By Industry

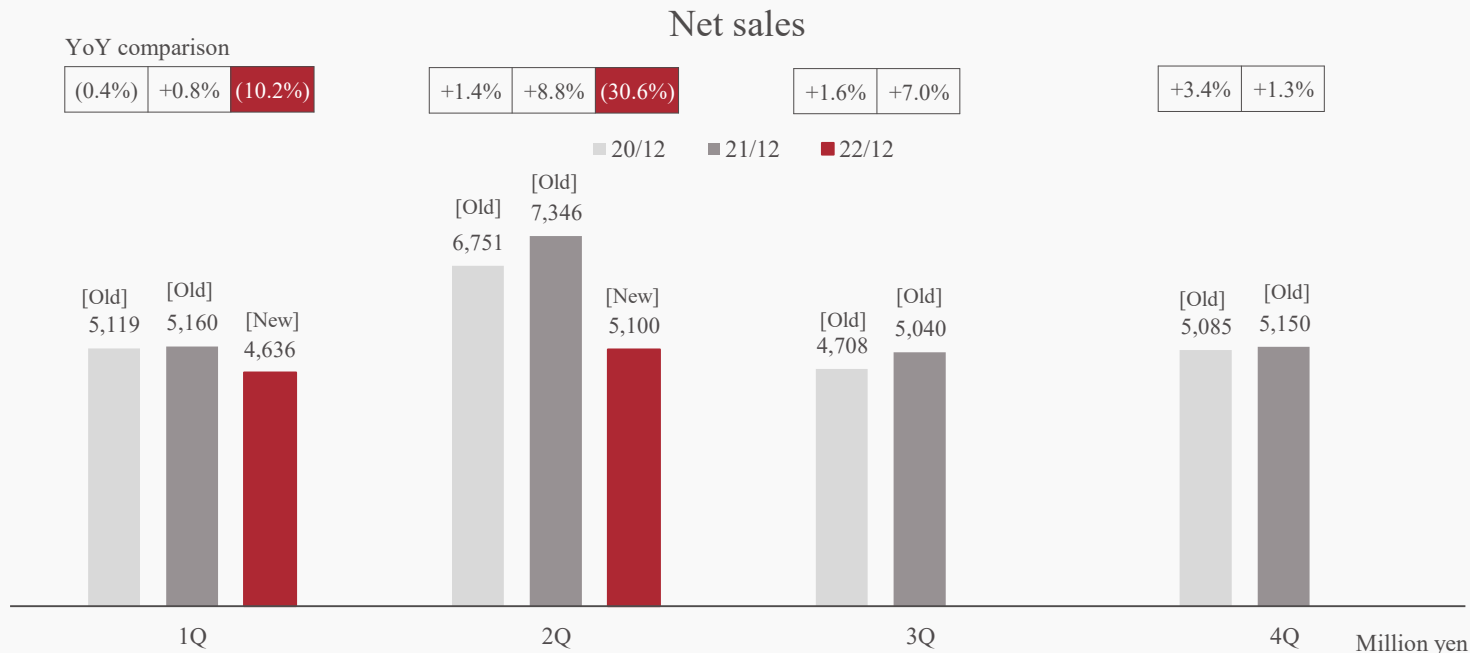|	20/12 1H Results [Old]	21/12 1H Results [New]	22/12 1H Results [New]
Non-manufacturing	2,623	2,545	2,419
Manufacturing	7,111	6,423	5,079

Million yen

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※ From the first quarter of the current fiscal year, the name of the reporting segment was changed from "CAE Solution Services" to "Simulation Solution Services". In addition, the segment classification has been changed, and the results for the same period of the previous year are described by the changed segment classification.

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Quarterly Net Sales

■ Net sales decreased 30.6% year-on-year due to the termination of the distribution agreement with Synopsys and applying Revenue Recognition Standard.

Net sales

YoY comparison

(0.4%)	+0.8%	(10.2%)

+1.4%	+8.8%	(30.6%)

+1.6%	+7.0%

+3.4%	+1.3%

■ 20/12   ■ 21/12   ■ 22/12

1Q
- [Old] 5,119
- [Old] 5,160
- [New] 4,636

2Q
- [Old] 6,751
- [Old] 7,346
- [New] 5,100

3Q
- [Old] 4,708
- [Old] 5,040

4Q
- [Old] 5,085
- [Old] 5,150

Million yen

※ Revenue Recognition Standard has been applied since the beginning of this fiscal year (reference P.4), and the year-on-year in financial figures in this material are only for reference.

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Balance Sheet

- Financial assets decreased by 294 million yen. Total net assets decrease by 829 million yen. The equity ratio was 61.6%.

- Short-term loans receivables decreased by 3,579 million yen due to collection of loans to the parent company (Cash Management System of the parent company).

- Beginning balance of legal retained earnings included in shareholder' equity of this fiscal year decreased by 911 million yen due to applying Revenue Recognition Standard.

※ Financial assets: total of cash and deposits, short-term investment securities and short-term loans receivable

Million yen

	21/12 [Old]	22/12 2Q [New]	YoY Change Amount
Current assets	**21,526**	**21,959**	**+433**
Financial assets(※)	**16,009**	**15,715**	**(294)**
Cash and deposits	7,429	9,215	+1,785
Short-term investment securities	5,000	6,500	+1,500
Short-term loans receivables	3,579	-	(3,579)
Non-current assets	1,744	1,953	+209
Total Assets	**23,270**	**23,913**	**+643**
Total liabilities	**7,538**	**9,010**	**+1,472**
Current liabilities	6,472	7,991	+1,519
Non-current liabilities	1,065	1,019	(46)
Total net assets	**15,732**	**14,902**	**(829)**
Shareholders' equity	15,287	14,244	(1,043)
Total liabilities and net assets	23,270	23,913	+643
Equity ratio	66.3%	61.6%	(4.8pt)

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Cash Flow Statement

Net cash provided by operating activities

- Decreased due to decrease in Profit before income taxes, etc.

Net cash provided by investing activities

- Increased due to increase in proceeds from collection of loans receivables, etc.

Net cash provided by financing activities

- Decreased due to increase of purchase of treasury shares, increase in payment of dividends, etc.

Million yen

	21/12 1H	22/12 1H	YoY Change Amount
Net cash provided by operating activities	746	352	(394)
Net cash provided by investing activities	609	3,369	+2,760
Net cash provided by financing activities	(468)	(865)	(397)
Cash and cash equivalents at end of period	11,396	15,609	+4,212

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Net Sales by Segment and by sales form

Million yen

	21/12 2Q		22/12 2Q		YoY Change %	21/12 1H		22/12 1H		YoY Change %
	Results [Old]	Component ratio	Results [New]	Component ratio		Results [Old]	Component ratio	Results [New]	Component ratio	
Total Net sales	7,346	100.0%	5,100	100.0%	(30.6%)	12,507	100.0%	9,736	100.0%	(22.2%)
Simulation	6,231	84.8%	4,012	78.7%	(35.6%)	10,467	83.7%	7,665	78.7%	(26.8%)
Distributor	5,205	70.9%	2,832	55.5%	(45.6%)	8,141	65.1%	5,089	52.3%	(37.5%)
In-house products	773	10.5%	846	16.6%	+9.5%	1,583	12.7%	1,652	17.0%	+4.4%
Service	252	3.4%	332	6.5%	+31.6%	743	5.9%	923	9.5%	+24.3%
IT	1,115	15.2%	1,088	21.3%	(2.4%)	2,039	16.3%	2,070	21.3%	+1.5%
Distributor	994	13.5%	955	18.7%	(3.9%)	1,817	14.5%	1,802	18.5%	(0.8%)
In-house products	82	1.1%	84	1.6%	+1.9%	162	1.3%	168	1.7%	+3.8%
Service	38	0.5%	48	1.0%	+25.7%	60	0.5%	100	1.0%	+66.7%

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Net Sales by sales form

Million yen

	21/12 2Q		22/12 2Q		YoY Change %	21/12 1H		22/12 1H		YoY Change %
	Results [Old]	Component ratio	Results [New]	Component ratio		Results [Old]	Component ratio	Results [New]	Component ratio	
Distributor	6,199	84.4%	3,788	74.3%	(38.9%)	9,958	79.6%	6,891	70.8%	(30.8%)
In-house products	855	11.6%	930	18.3%	+8.8%	1,745	14.0%	1,820	18.7%	+4.3%
Service	291	4.0%	381	7.5%	+30.8%	803	6.4%	1,024	10.5%	+27.5%
Total	7,346	100.0%	5,100	100.0%	(30.6%)	12,507	100.0%	9,736	100.0%	(22.2%)

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※ Due to the review of some sales formats, the figures for the same period of the previous year are applied after reclassification.

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Net Sales by region

Million yen

	21/12 2Q		22/12 2Q		YoY Change %	21/12 1H		22/12 1H		YoY Change %
	Results [Old]	Component ratio	Results [New]	Component ratio		Results [Old]	Component ratio	Results [New]	Component ratio	
Japan	6,058	82.5%	3,846	75.4%	(36.5%)	9,917	79.3%	7,591	78.0%	(23.5%)
Asia	745	10.1%	668	13.1%	(10.4%)	1,553	12.4%	990	10.2%	(36.2%)
North America	365	5.0%	393	7.7%	+7.8%	663	5.3%	771	7.9%	+16.2%
Europe	164	2.2%	178	3.5%	+8.3%	341	2.7%	355	3.6%	+4.0%
Others	12	0.2%	14	0.3%	+14.9%	31	0.2%	27	0.3%	(10.8%)
Total	7,346	100.0%	5,100	100.0%	(30.6%)	12,507	100.0%	9,736	100.0%	(22.2%)

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[Non-consolidated] Net sales by Category of Industry

Million yen

	21/12 2Q		22/12 2Q		YoY Change %	21/12 1H		22/12 1H		YoY Change %
	Results [Old]	Component ratio	Results [New]	Component ratio		Results [Old]	Component ratio	Results [New]	Component ratio	
Electrical equipment	1,354	29.5%	893	23.5%	(34.1%)	2,395	26.7%	1,667	22.2%	(30.4%)
Machinery and precision machinery	854	18.6%	626	16.5%	(26.6%)	1,550	17.3%	1,117	14.9%	(27.9%)
Transportation equipment	522	11.4%	484	12.8%	(7.2%)	1,078	12.0%	982	13.1%	(8.9%)
Other manufacturing industries	632	13.8%	618	16.3%	(2.2%)	1,399	15.6%	1,312	17.5%	(6.2%)
Education institution/ government and municipal offices	300	6.5%	309	8.1%	+3.0%	628	7.0%	673	9.0%	+7.2%
Telecommunications industry	231	5.0%	201	5.3%	(13.0%)	492	5.5%	429	5.7%	(12.6%)
Others	701	15.3%	661	17.4%	(5.7%)	1,424	15.9%	1,315	17.5%	(7.7%)
Total	4,596	100.0%	3,795	100.0%	(17.4%)	8,969	100.0%	7,499	100.0%	(16.4%)

※ The results for the same period of the previous year are reference information for comparing the results calculated by Revenue Recognition Standard.
※ Due to the review of some sales formats, the figures for the same period of the previous year are applied after reclassification.

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[Non-consolidated] Net sales by Contract Type

Million yen

	21/12 2Q		22/12 2Q		YoY Change %	21/12 1H		22/12 1H		YoY Change %
	Results [Old]	Component ratio	Results [New]	Component ratio		Results [Old]	Component ratio	Results [New]	Component ratio	
Licenses	4,139	100.0%	3,321	100.0%	(19.8%)	7,693	100.0%	6,263	100.0%	(18.6%)
New licenses	1,249	30.2%	1,082	32.6%	(13.4%)	2,286	29.7%	2,062	32.9%	(9.8%)
Renewals	2,890	69.8%	2,239	67.4%	(22.5%)	5,406	70.3%	4,200	67.1%	(22.3%)
Others	456		473		＋3.8%	1,275		1,235		(3.1%)
Total	4,596		3,795		(17.4%)	8,969		7,499		(16.4%)

※ The results for the same period of the previous year are reference information for comparing the results calculated by Revenue Recognition Standard.

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Projection for FY2022

- Due to the termination of the distribution agreement with Synopsys, the plan of net sales and profits in FY2022 will decrease.

- Sales of products related to distribution business is expected to decrease and sales of in-house products and DX support for manufacturing customers are expected to increase.

Million yen

	21/12 Results [Old]	22/12 Projection [New]	YoY Change %
Net sales	22,697	20,000	(11.9%)
Operating income	2,830	1,800	(36.4%)
(Operating income margin)	12.5%	9.0%	-
Ordinary income	2,822	1,800	(36.2%)
Profit attributable to owners of parent	1,786	1,150	(35.6%)
EBITDA	3,072	2,100	(32.7%)
(EBITDA margin)	13.5%	10.5%	-
EPS (yen)	57.29	36.87	(35.6%)
ROE	12.0%	7.4%	-

※ EBITDA: Operating income + Depreciation

※ Revenue Recognition Standard has been applied since the beginning of this fiscal year (reference P.4), and the year-on-year in financial figures in this material are only for reference.

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Dividend Estimate for FY2022

■ The projection of dividend is 29.60 yen per share.

Basic Policies on Profit Distribution : We recognize the return of profits to our shareholders as an important management issue, and improve capital efficiency while maintaining financial soundness. For the time being, we will place importance on stable dividends and continuous increases of dividend. Dividend on equity ratio (DOE) of 6.0% is used for the indicator of dividend and the cap is "Profit attributable to owners of parent" of the fiscal year.

Dividend

14/12	15/12	16/12	17/12	18/12	19/12	20/12	21/12	22/12 (E)
13.80	13.80	13.00	15.05	16.52	20.19	25.05	28.65	29.60

yen

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Long-Term Initiatives to increase Corporate Value

Corporate Value Improvement

Increase of Stock price and increase of dividend

Top Line Growth

Net sales increase by 30% in 5 years
Investment personnel expenses, M&A, etc.

1 Strengthen in-house products

2 Expansion of Asian business

3 Promotion of DX in manufacturing, etc.

4 Use of simulation technology in SDGs and other fields

Long-term growth drivers

High level of profit margin
EBITDA margin 12%

Strengthen high profitability businesses and Balance of investments for growth

Healthy shareholder returns

Focusing on stable dividends, DOE6% (※)
Stock buyback

※ Previously, dividend payout ratio 50% or DOE 3% were used as indicators.

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Our main efforts in the first half of FY2022 1/2

Item	Our main efforts
1. **Strengthen in-house products**	■ Launch of the visualization software for big data "BIGDAT@Analysis". Started sales of software that visualizes and analyzes huge amounts of IoT data, quickly grasps the current status of production equipment and factory lines, and makes predictive maintenance more efficient. ■ Launch of a functionally enhanced version of the 3D tolerance analysis software "CETOL 6σ". Started sales of the new version with enhanced functions of CETOL 6σ developed, sold and supported by Sigmetrix, a software development subsidiary. ■ Progress rate of the Annual sales plan for In-house product is 52.0%.
2. **Expansion of Asian business**	■ Sales of Ansys products were strong, despite the impact of the lockdown from March 28th to June 1st due to the spread of the new coronavirus in Shanghai, China, . Started IoT services. ■ Progress rate of the Annual sales plan for Asian business is 49.5%.

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Our main efforts in the first half of FY2022 2/2

Item	Our main efforts
3. Promotion of DX in manufacturing, etc.	■ Started providing a one-stop support for predictive maintenance system that prevents sudden stoppages of belt conveyors. We provide one-stop service, from consulting service for introduction of system to data analysis, which enables predictive maintenance of factory and plant equipment through automatic monitoring with IoT and machine learning. ■ Achieved No. 1 sales among Japanese distributors in 2021 for cloud product "OneLogin". Received the highest partner award "Japan Partner of the Year" from OneLogin, which develop and sell "OneLogin" that realizes single sign-on for companies using cloud services.
4. Use of simulation technology in SDGs and other fields	■ EndoBRAIN, AI-equipped colonoscopy imaging support software, obtains approval under the new system of the Pharmaceutical Affairs Law. ■ Providing construction industry with the simulation services regarding new coronavirus droplet calculation developed for one of the solutions for environmental problems.

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1   Business Summary of Financial Results for the First Half of FY2022

2   Projection for FY2022

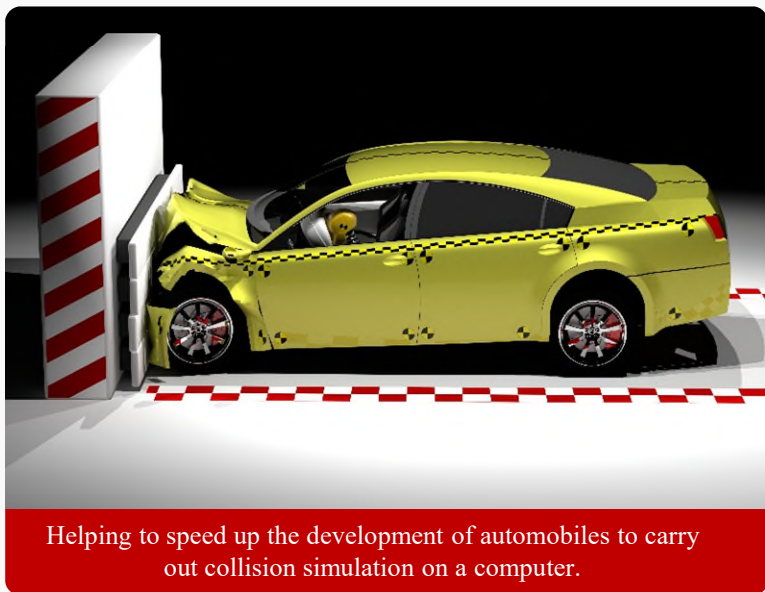**3**   Our main efforts against Medium-term Business Plan

4   **References**
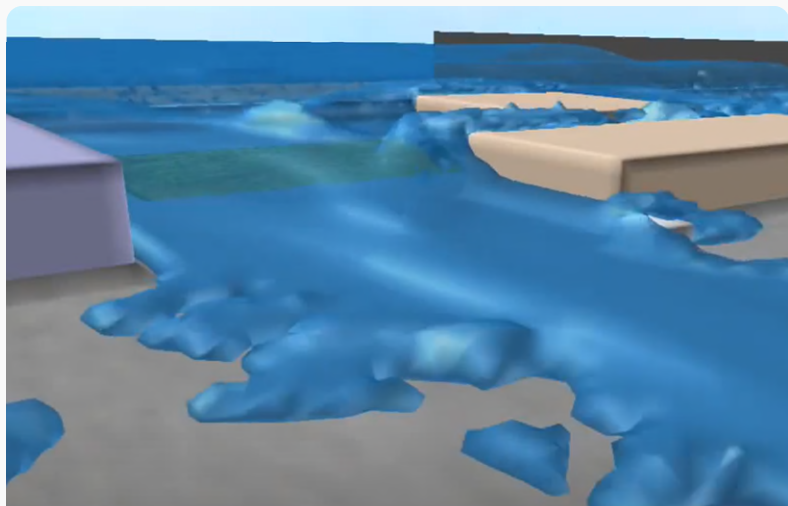
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Corporate Overview

Company name	Cybernet Systems Co., Ltd. （Standard Market of TSE 4312）
Head office	FUJISOFT Bldg. 3 Kanda-neribeicho, Chiyoda-ku, Tokyo
Other office	Nishi-Nihon Branch Office (Osaka), Chubu Branch Office (Nagoya)
Establishment	April 17, 1985
Capital	995 million yen
Representative	Representative Director : Reiko Yasue
Number of employee	Consolidated/ 573, Non-Consolidated / 350(as of December 31, 2021)
Business	Providing software and services (technical support, consulting, introduction support seminars, CAE comprehensive education, etc.) in the fields of CAE, MBSE / MBD, platforms, IoT / XR, cyber security, etc.
Development partners	More than 35 companies mostly located in the US, including such as ANSYS, Inc. and Broadcom Inc.

Consolidated Subsidiaries	[Domestic subsidiaries]
	    • CYBERNET MBSE Co., Ltd.
	[Development subsidiaries]
	    • Sigmetrix, LLC (US)
	    • Maplesoft(Canada)
	    • Noesis Solutions NV (Belgium)
	[Sales subsidiaries]
	    • CYBERNET SYSTEMS (SHANGHAI) CO., LTD. (China)
	    • CYBERNET SYSTEMS TAIWAN CO., LTD. (Taiwan)
	    • CYBERNET SYSTEMS MALAYSIA SDN.BHD. (Malaysia)

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We aim to be a leading company in simulation

Our simulation technology contributes to **reducing the number of prototypes, shortening the development period, cost reduction, and innovation** by predicting the performance and reliability of products through numerical simulations on computers in the **development and design process of manufacturing**. Simulation technology is **not limited to manufacturing**, but is also useful in solving social issues such as sustainability, and is expanding its field of application.

Helping to speed up the development of automobiles to carry out collision simulation on a computer.

Helping to speed up product development by combining simulation and VR

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Simulation is being used in a variety of areas

Visualization of tsunami simulation results to reproduce the impact of the disaster

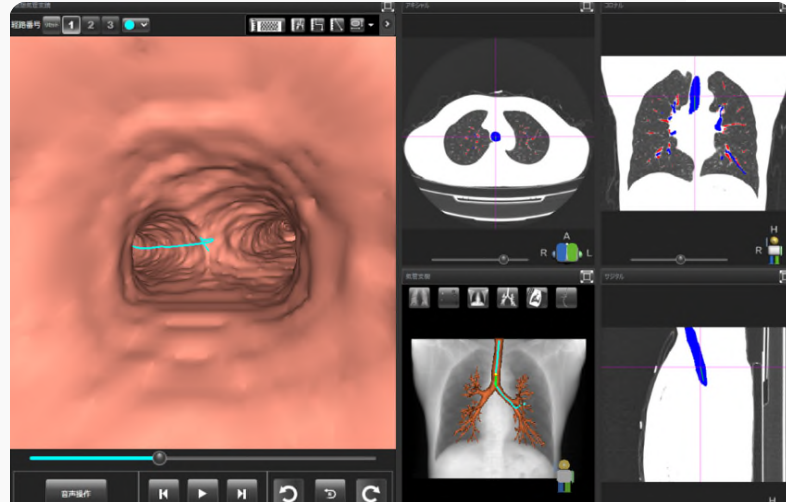Contributes to the optimum design of drone vibration and blade shape

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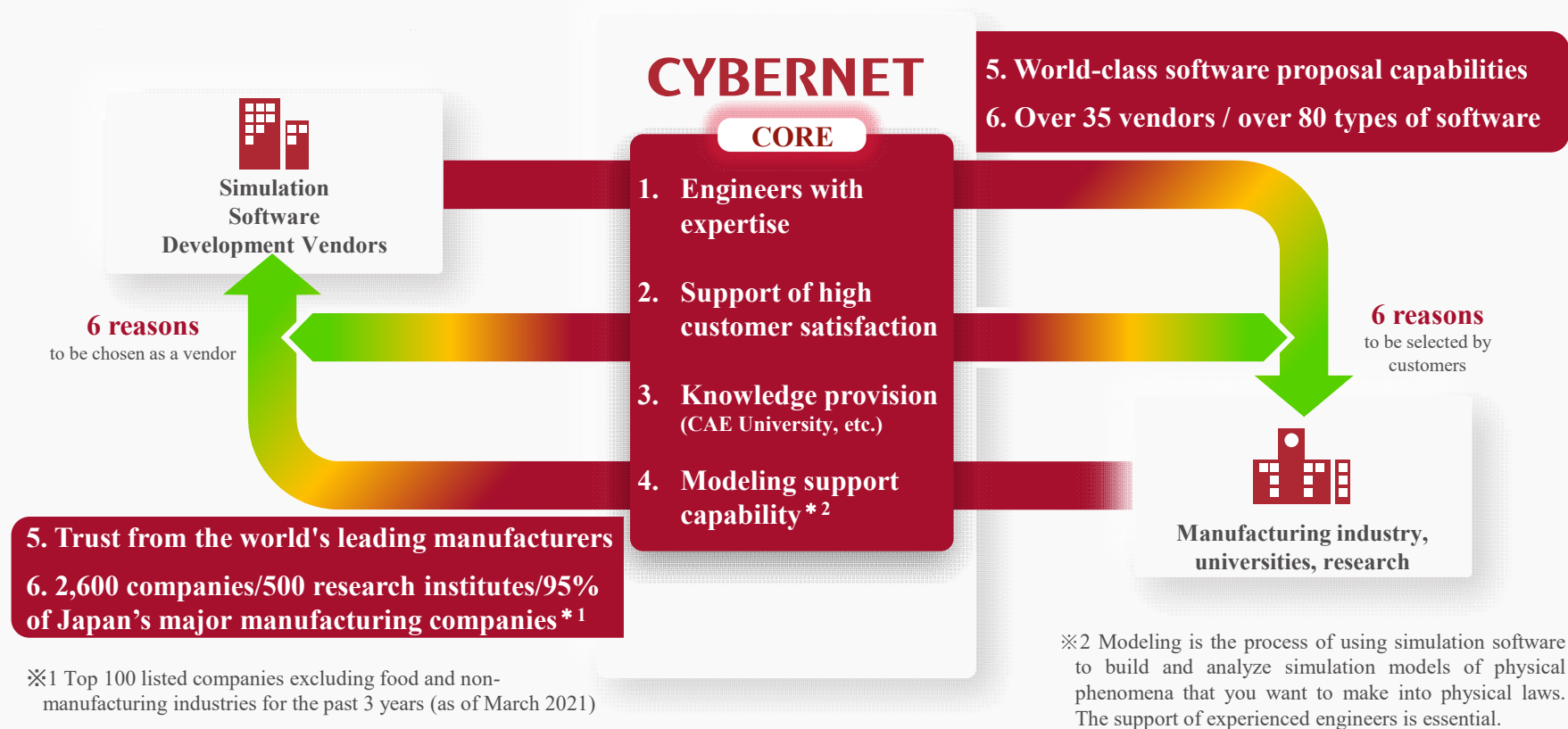# Simulation is an essential technology for achieving sustainability

Contributes to improving power generation efficiency and safety of wind power generation equipment
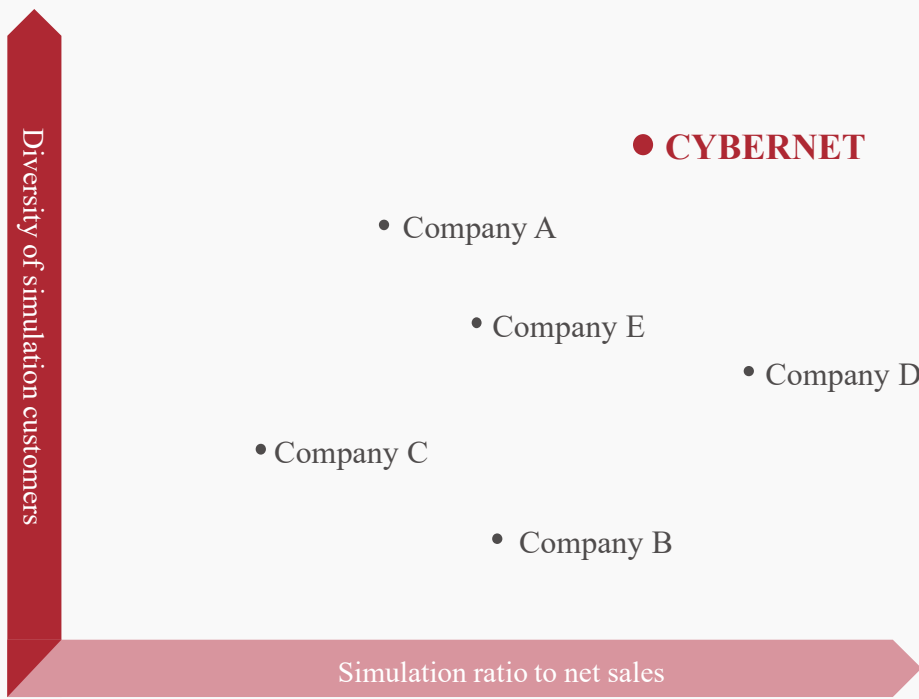

Real-time composite display of endoscopy results assist doctors in diagnosis

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Our competitiveness is based on our technical capabilities, support capabilities, knowledge provision capabilities, and modeling support capabilities

Simulation Software Development Vendors

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CORE

1. **Engineers with expertise**

2. **Support of high customer satisfaction**

3. **Knowledge provision** (CAE University, etc.)

4. **Modeling support capability** *2

5. **World-class software proposal capabilities**

6. **Over 35 vendors / over 80 types of software**

6 reasons
to be chosen as a vendor

6 reasons
to be selected by customers

Manufacturing industry, universities, research

5. **Trust from the world's leading manufacturers**

6. **2,600 companies/500 research institutes/95% of Japan's major manufacturing companies** *1

※1 Top 100 listed companies excluding food and non-manufacturing industries for the past 3 years (as of March 2021)

※2 Modeling is the process of using simulation software to build and analyze simulation models of physical phenomena that you want to make into physical laws. The support of experienced engineers is essential.

CYBERNET

Our company is characterized by its high degree of specialization in simulation and its wide range of simulation customers

Diversity of simulation customers

● **CYBERNET**

• Company A

• Company E

• Company D

• Company C

• Company B

Simulation ratio to net sales

※ Prepared by the Company based on IR materials.

Features of Cybernet Systems

- We cover a wide range of simulation areas with highly specialized technologies.

- We maintain good relationship with 2,600 companies & 500 universities and research institutes.

- Until now, we have provided simulations services mainly to manufacturing industry, but we are also focusing on non-manufacturing industries.

CYBERNET

Cybernet by the numbers

❶ Extensive experience and high trust

Experiences in Japan **36**years

Originated as the Tokyo office of a US supercomputer company. Consistently supports development and design simulations for the manufacturing industry.

❸ Engineers with strong technical skills

Ratio of engineer **45**%

45% of the group's employees are engineers.
Knowledge and experience regarding computer technology and engineering are our strengths.

❺ Good relationship with strongest CAE product development vendors

We deal with ANSYS CAE products — World **No.1**

Ansys is a leading company with 35% share of the global CAE product market. We have received the award for the highest level partner of the company for 7 consecutive years.

❼ Stable and high shareholder returns

DOE (dividend on equity ratio) **6**% ← 3%

Changed the DOE to 6.0%, aiming to increase in dividends over the medium to long term.
(Change from FY2022)

❷ Simulation leader

Mechanical CAE market — in Japan **No.1**

The largest seller of mechanical CAE software in the Japanese market.

❹ Proactive provision of knowledge

CAE University held [1] **116**times/year

Our unique approach that no other companies can match. We provide simulation practitioners with an overwhelming learning experience in terms of both quality and quantity.

❻ Strong financial position

Net finance resources[2] **16**billion yen

Strong financial position enables both investment in growth and shareholder returns.

※ As of December 31, 2021

[1] A seminar on CAE held by our company. Lectures by a diverse group of instructors.

[2] Cash and deposits + Marketable securities + Short term loans -Interest-bearing debt

CYBERNET

Vision and Mission

VISION

(Ideal future that CYBERNET SYSTEMS wants to help realize;

the reason for the company's existence)

Creating a sustainable society and inspiring the world through technology and ideas

MISSION

(The role of CYBERNET SYSTEMS in realizing this vision,

through its current business)

Guide customers towards breakthrough solutions with vigorous creativity

CYBERNET

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