2027年3月期 2Q決算補足資料
Financial Supplemental Data for the 2Q of the Fiscal Year Ending March 31, 2027

目次
Contents

開示の変更点 / Changes in Disclosure…… 1
連結損益計算書 / Consolidated Statement of Profit or Loss…… 2
連結損益計算書（セグメント） / Consolidated Statement of Profit or Loss (Segment)…… 3
事業別受注高・売上高 / Orders and Net Sales by Business…… 4
地域別売上高 / Net Sales by Region…… 5
連結貸借対照表/ Consolidated Statement of Financial Position…… 6
連結キャッシュ・フロー計算書/ Consolidated Statement of Cash Flows…… 7
主な経営指標/ Major Management Indicators…… 8
2027年3月期 上期 事業利益の増減要因/Factors in Business Profit Change for 1H FY2027…… 9
2027年3月期 通期の事業利益の増減要因/ Factors in Business Profit Change for FY2027…… 10

2026年11月5日
November 5, 2026

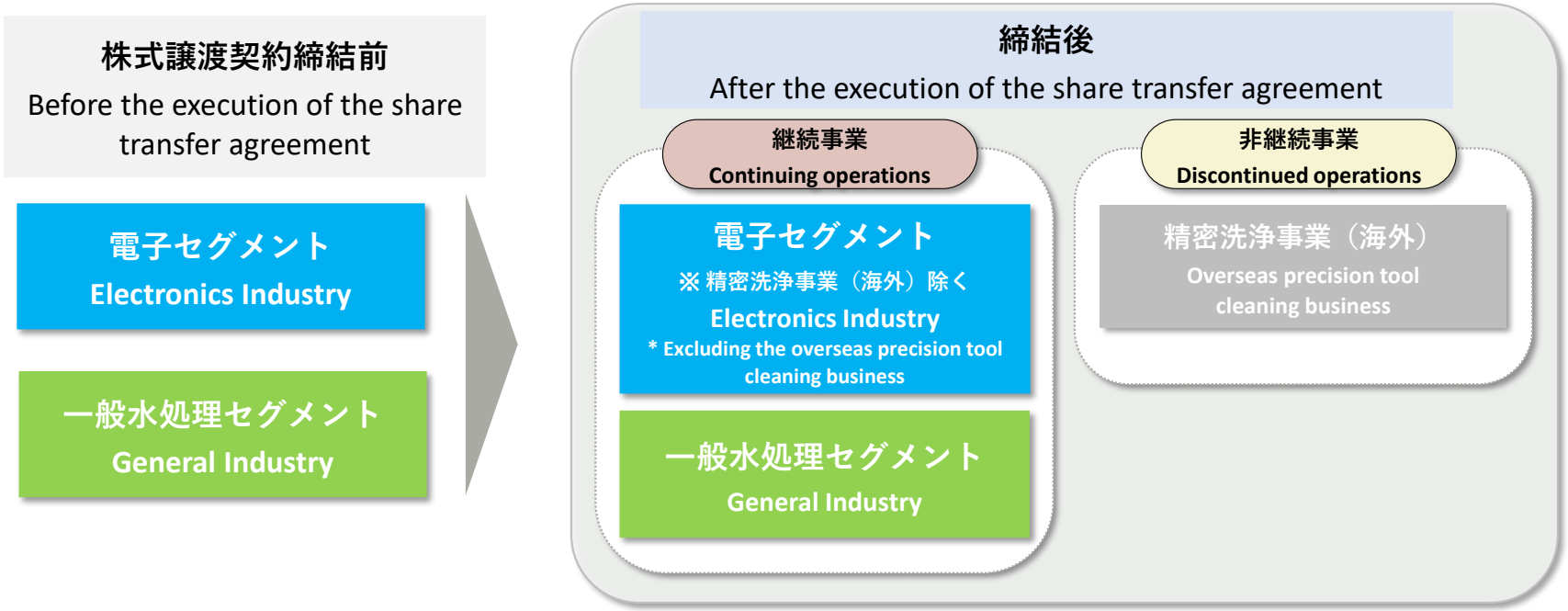
栗田工業株式会社
KURITA WATER INDUSTRIES LTD.

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Forecasts contained in this report are based on management’s assumption and beliefs in light of the information currently available.
But they may be subject to change due to a wide range of factors, and no warranty is made regarding their attainability.

開示の変更点/Changes in Disclosure

● 2026年5月13日におけるペンタゴン・テクノロジーズ・グループ社の株式譲渡契約の締結に伴い、
精密洗浄事業（海外）を非継続事業に分類し、税引前利益までの情報を継続事業ベースで開示
Following the execution of a share transfer agreement for Pentagon Technologies Group, Inc. on May 13, 2026, the overseas precision tool cleaning business has been classified as discontinued operations and results up to profit before tax are presented on a continuing operations basis.

● 2026年6月30日付で同社の株式譲渡が完了
The share transfer of Pentagon Technologies Group, Inc. was completed on June 30, 2026.



連結損益計算書 / Consolidated Statement of Profit or Loss

	(単位：十億円) (Billions of yen)	2024.4-2025.3				2025.4-2026.3				2026.4-2027.3							
		(参考/ Reference)			通期/ 12M	1Q/ 3M	上期/1H	(参考/ Reference)	通期/ 12M	実績/Results		予想/Forecasts (Nov 5th announced)	期初予想/ Forecasts(Aug 6th accounced)		前期差/ YoY Change		
		1Q/3M	上期/1H	3Q累計/9M				3Q累計/9M		1Q/3M	上期/1H	通期/ 12M	上期/1H	通期/ 12M	1Q/3M	上期/1H	通期/ 12M
		4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-12月 Apr.-Dec.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-12月 Apr.-Dec.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.
全社/Consolidated	受注高/Orders	94.2	202.0	297.3	412.9	93.5	197.8	300.6	443.0	165.7	359.6	555.0	260.0	470.0	+72.1	+161.8	+112.0
	売上高/Net sales	88.9	185.3	285.6	388.8	87.4	189.3	290.0	402.9	99.9	206.9	455.0	198.0	425.0	+12.5	+17.5	+52.1
	売上原価/Cost of sales	57.6	117.6	180.6	245.1	55.9	117.8	179.4	249.7	65.8	149.8	317.0	128.5	268.0	+9.9	+32.0	+67.3
	売上総利益/Gross profit	31.3	67.7	104.9	143.7	31.5	71.5	110.7	153.2	34.1	57.0	138.0	69.5	157.0	+2.6	-14.5	-15.2
	販売費及び一般管理費/SG&A expenses	22.8	46.1	69.1	92.8	23.3	47.4	70.8	95.8	25.2	50.7	98.0	46.0	95.5	+1.9	+3.4	+2.2
	事業利益/Business profit	8.5	21.6	35.9	50.9	8.2	24.2	39.8	57.3	8.8	6.3	40.0	23.5	61.5	+0.6	-17.9	-17.3
	（事業利益率/Business profit margin）	9.6%	11.7%	12.6%	13.1%	9.4%	12.8%	13.7%	14.2%	8.8%	3.0%	8.8%	11.9%	14.5%	(-0.5pp)	(-9.7pp)	(-5.4pp)
	その他収支/Net of other income and expenses	0.3	0.4	-0.7	-1.0	0.8	1.2	1.4	0.9	5.5	3.3	3.5	4.5	4.0	+4.6	+2.0	+2.6
	営業利益/Operating profit	8.8	22.0	35.2	49.9	9.0	25.4	41.2	58.3	14.3	9.5	43.5	28.0	65.5	+5.3	-15.9	-14.8
	（営業利益率/Operating profit margin）	9.9%	11.8%	12.3%	12.8%	10.3%	13.4%	14.2%	14.5%	14.3%	4.6%	9.6%	14.1%	15.4%	(+4.0pp)	(-8.8pp)	(-4.9pp)
	金融収支/Net of finance income and costs				0.7	-0.1	-0.2		-0.2	0.3	1.6	-0.5	-0.2	-0.5	+0.4	1.9	-0.3
	持分法による投資損益/Share of profit (loss) of investments accounted for using equity method				0.1	0.0	0.0		0.1	0.0	0.0	0.0	0.0	0.0	-0.0	-0.0	-0.1
	税引前利益/Profit before tax				50.7	8.9	25.2		58.2	14.6	11.2	43.0	27.8	65.0	+5.7	-14.0	-15.2
	親会社の所有者に帰属する当期利益/Profit attributable to owners of parent	5.7	14.9	24.2	20.3	5.6	17.2	27.4	16.0	14.3	7.4	28.7	24.6	50.7	+8.7	-9.8	+12.7
	基本的1株当たり当期利益(円)/Basic earnings per share (yen)	50.74	132.83	215.55	180.66	50.84	155.90	249.32	145.34	131.83	68.71	269.41	228.11	475.47	+80.99	-87.19	+124.07

為替レート（円）/Currency exchange(yen)

	米ドル/USD	155.9	152.6	152.6	152.6	144.6	146.0	148.7	150.8	159.5	159.4	150.8	150.8	150.8	-	-	-
	ユーロ/EUR	167.9	166.0	164.8	163.8	163.8	168.1	171.8	174.8	185.4	184.4	174.8	174.8	174.8	-	-	-
	中国元/CNY	21.5	21.2	21.2	21.1	20.0	20.3	20.8	21.3	23.4	23.5	21.3	21.3	21.3	-	-	-

連結損益計算書（セグメント） / Consolidated Statement of Profit or Loss (Segment)

（単位：十億円） (Billions of yen)		2024.4-2025.3				2025.4-2026.3				2026.4-2027.3					前期差/YoY Change		
		（参考/Reference）			通期/12M	1Q/3M	上期/1H	（参考/Reference）	通期/12M	実績/Results		予想/Forecasts (Nov 5th announced)	期初予想/Forecasts(Aug 6th accounced)				
		1Q/3M	上期/1H	3Q累計/9M				3Q累計/9M		1Q/3M	上期/1H	通期/12M	上期/1H	通期/12M	1Q/3M	上期/1H	通期/12M
		4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-12月 Apr.-Dec.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-12月 Apr.-Dec.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.
全社/Consolidated	受注高/Orders	94.2	202.0	297.3	412.9	93.5	197.8	300.6	443.0	165.7	359.6	555.0	260.0	470.0	+72.1	+161.8	+112.0
	売上高/Net sales	88.9	185.3	285.6	388.8	87.4	189.3	290.0	402.9	99.9	206.9	455.0	198.0	425.0	+12.5	+17.5	+52.1
	売上原価/Cost of sales	57.6	117.6	180.6	245.1	55.9	117.8	179.4	249.7	65.8	149.8	317.0	128.5	268.0	+9.9	+32.0	+67.3
	売上総利益/Gross profit	31.3	67.7	104.9	143.7	31.5	71.5	110.7	153.2	34.1	57.0	138.0	69.5	157.0	+2.6	-14.5	-15.2
	販売費及び一般管理費/SG&A expenses	22.8	46.1	69.1	92.8	23.3	47.4	70.8	95.8	25.2	50.7	98.0	46.0	95.5	+1.9	+3.4	+2.2
	事業利益/Business profit	8.5	21.6	35.9	50.9	8.2	24.2	39.8	57.3	8.8	6.3	40.0	23.5	61.5	+0.6	-17.9	-17.3
	（事業利益率/Business profit margin）	9.6%	11.7%	12.6%	13.1%	9.4%	12.8%	13.7%	14.2%	8.8%	3.0%	8.8%	11.9%	14.5%	(-0.5pp)	(-9.7pp)	(-5.4pp)
	その他収支/Net of other income and expenses	0.3	0.4	-0.7	-1.0	0.8	1.2	1.4	0.9	5.5	3.3	3.5	4.5	4.0	+4.6	+2.0	+2.6
	営業利益/Operating profit	8.8	22.0	35.2	49.9	9.0	25.4	41.2	58.3	14.3	9.5	43.5	28.0	65.5	+5.3	-15.9	-14.8
	（営業利益率/Operating profit margin）	9.9%	11.8%	12.3%	12.8%	10.3%	13.4%	14.2%	14.5%	14.3%	4.6%	9.6%	14.1%	15.4%	(+4.0pp)	(-8.8pp)	(-4.9pp)
電子/Electronics Industry	受注高/Orders	33.2	87.3	133.5	194.3	33.5	78.6	129.7	209.0	97.9	231.3	325.0	145.0	240.0	+64.4	+152.7	+116.0
	売上高/Net sales	39.4	79.4	124.7	169.5	37.3	81.1	122.9	171.8	45.9	93.7	225.0	93.0	195.0	+8.7	+12.6	+53.2
	事業利益/Business profit	4.6	11.0	19.4	26.2	4.6	12.5	19.4	27.7	4.1	-6.0	9.0	12.5	30.5	-0.5	-18.4	-18.7
	（事業利益率/Business profit margin）	11.6%	13.9%	15.5%	15.4%	12.3%	15.4%	15.8%	16.1%	8.9%	-6.4%	4.0%	13.4%	15.6%	(-3.3pp)	(-21.7pp)	(-12.1pp)
	その他収支/Net of other income and expenses	0.1	-0.2	0.1	1.7	0.4	0.9	1.0	1.1	5.4	3.2	4.0	4.8	4.5	+5.0	+2.3	+2.9
	営業利益/Operating profit	4.6	10.8	19.4	27.8	5.0	13.4	20.5	28.7	9.5	-2.7	13.0	17.3	35.0	+4.5	-16.1	-15.7
	（営業利益率/Operating profit margin）	11.7%	13.6%	15.6%	16.4%	13.3%	16.5%	16.6%	16.7%	20.6%	-2.9%	5.8%	18.6%	17.9%	(+7.3pp)	(-19.5pp)	(-10.9pp)
一般水処理/General Industry	受注高/Orders	60.9	114.7	163.8	218.5	60.1	119.2	170.9	234.0	67.7	128.3	230.0	115.0	230.0	+7.7	+9.0	-4.0
	売上高/Net sales	11.7	105.9	160.9	219.3	50.2	108.2	167.1	231.1	54.0	113.1	230.0	105.0	230.0	+3.8	+4.9	-1.1
	事業利益/Business profit	3.9	10.6	16.5	24.7	3.6	11.7	20.4	29.7	4.7	12.3	31.0	11.0	31.0	+1.1	+0.6	+1.3
	（事業利益率/Business profit margin）	8.0%	10.0%	10.2%	11.3%	7.3%	10.8%	12.2%	12.9%	8.8%	10.8%	13.5%	10.5%	13.5%	(+1.5pp)	(+0.0pp)	(+0.6pp)
	その他収支/Net of other income and expenses	0.2	0.6	-0.7	-2.6	0.4	0.3	0.4	-0.1	0.1	0.0	-0.5	-0.3	-0.5	-0.3	-0.3	-0.4
	営業利益/Operating profit	4.2	11.1	15.8	22.1	4.1	12.0	20.7	29.6	4.8	12.3	30.5	10.7	30.5	+0.7	+0.3	+0.9
	（営業利益率/Operating profit margin）	8.4%	10.5%	9.8%	10.1%	8.1%	11.1%	12.4%	12.8%	9.0%	10.8%	13.3%	10.2%	13.3%	(+0.8pp)	(-0.2pp)	(+0.5pp)

為替レート（円）/Currency exchange(yen)

米ドル/USD	155.9	152.6	152.6	152.6	144.6	146.0	148.7	150.8	159.5	159.4	150.8	150.8	150.8	-	-	-
ユーロ/EUR	167.9	166.0	164.8	163.8	163.8	168.1	171.8	174.8	185.4	184.4	174.8	174.8	174.8	-	-	-
中国元/CNY	21.5	21.2	21.2	21.1	20.0	20.3	20.8	21.3	23.4	23.5	21.3	21.3	21.3	-	-	-

事業別受注高・売上高 / Orders and Net Sales by Business

	(単位：十億円) (Billions of yen)	2024.4-2025.3				2025.4-2026.3				2026.4-2027.3					前年差/YoY Change		
		(参考/Reference)			通期/12M	1Q/3M	上期/1H	(参考/Reference)	通期/12M	実績/Results		予想/Forecasts (Nov 5th announced)	期初予想/Forecasts (Aug 6th accounced)				
		1Q/3M	上期/1H	3Q累計/9M				3Q累計/9M		1Q/3M	上期/1H	通期/12M	上期/1H	通期/12M	1Q/3M	上期/1H	通期/12M
		4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-12月 Apr.-Dec.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-12月 Apr.-Dec.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.
受注高/Orders	電子/Electronics Industry	33.2	87.3	133.5	194.3	33.5	78.6	129.7	209.0	97.9	231.3	325.0	145.0	240.0	+64.4	+152.7	+116.0
	装置/Facilities	7.4	40.1	62.0	96.2	6.9	26.8	53.9	104.2	70.1	176.4	215.4	94.7	135.7	+63.2	+149.7	+111.2
	継続契約型サービス/Recurring Contract-Based Service	11.9	25.6	40.2	54.8	13.2	28.5	41.2	54.6	14.6	29.9	58.8	26.8	54.4	+1.4	+1.5	+4.2
	サービス/Service	13.9	21.6	31.3	43.3	13.3	23.4	34.5	50.2	13.2	24.9	50.8	23.4	50.0	-0.1	+1.6	+0.6
	薬品/Chemicals	3.0	6.1	9.1	11.6	2.8	5.8	9.3	12.1	3.2	6.5	11.9	6.1	12.1	+0.4	+0.7	-0.2
	精密洗浄/Precision Tool Cleaning	2.1	4.3	6.5	8.5	2.0	4.1	6.2	8.5	2.1	4.5	9.2	4.4	9.0	+0.1	+0.4	+0.6
	メンテナンス/Maintenance	8.8	11.2	15.7	23.2	8.6	13.4	18.9	29.6	7.9	13.9	29.7	12.9	28.9	-0.7	+0.5	+0.2
	一般水処理/General Industry	60.9	114.7	163.8	218.5	60.1	119.2	170.9	234.0	67.7	128.3	230.0	115.0	230.0	+7.7	+9.0	-4.0
	装置/Facilities	7.8	16.3	22.5	31.1	7.5	17.5	23.9	37.1	11.2	20.9	38.0	20.1	36.6	+3.7	+3.4	+0.9
	継続契約型サービス/Recurring Contract-Based Service	3.2	5.4	7.3	11.4	3.7	5.9	8.5	13.0	4.1	6.5	14.4	6.1	13.2	+0.4	+0.5	+1.4
	サービス/Service	50.0	92.9	133.9	176.1	48.8	95.8	138.5	183.9	52.5	100.9	177.6	88.7	180.2	+3.7	+5.1	-6.3
	薬品/Chemicals	29.0	59.8	89.4	118.3	28.6	59.8	90.1	122.0	32.0	66.3	120.8	56.1	120.9	+3.3	+6.6	-1.3
	メンテナンス/Maintenance	17.9	27.6	37.3	48.8	18.4	28.5	38.5	50.2	18.7	31.7	50.3	29.7	52.5	+0.3	+3.2	+0.2
	その他/Others	3.1	5.4	7.2	8.9	1.7	7.6	10.0	11.7	1.8	2.9	6.5	2.9	6.8	+0.1	-4.7	-5.2
	全社/Consolidated	94.2	202.0	297.3	412.9	93.5	197.8	300.6	443.0	165.7	359.6	555.0	260.0	470.0	+72.1	+161.8	+112.0
売上高/Net Sales	電子/Electronics Industry	39.4	79.4	124.7	169.5	37.3	81.1	122.9	171.8	45.9	93.7	225.0	93.0	195.0	+8.7	+12.6	+53.2
	装置/Facilities	18.9	34.8	53.7	73.8	14.4	31.4	48.5	71.8	21.3	41.2	114.8	44.0	91.7	+7.0	+9.8	+42.9
	継続契約型サービス/Recurring Contract-Based Service	11.9	25.7	40.3	54.8	13.2	28.4	41.2	54.5	14.5	30.0	58.2	26.7	54.3	+1.2	+1.6	+3.7
	サービス/Service	8.5	18.9	30.8	40.9	9.7	21.3	33.2	45.4	10.1	22.5	52.0	22.3	49.1	+0.5	+1.3	+6.6
	薬品/Chemicals	2.9	6.1	9.0	11.6	2.8	5.8	8.9	11.8	3.2	6.6	11.9	6.1	12.1	+0.4	+0.8	+0.1
	精密洗浄/Precision Tool Cleaning	2.0	4.1	6.5	8.5	1.9	4.1	6.2	8.5	2.2	4.5	9.1	4.4	9.0	+0.3	+0.4	+0.6
	メンテナンス/Maintenance	3.7	8.7	152.0	20.8	5.0	11.4	18.2	25.1	4.8	11.5	30.9	11.8	28.0	-0.2	+0.1	+5.8
	一般水処理/General Industry	49.5	105.9	160.9	219.3	50.2	108.2	167.1	231.1	54.0	113.1	230.0	105.0	230.0	+3.8	+4.9	-1.1
	装置/Facilities	5.4	12.8	20.6	32.2	5.9	15.2	25.1	37.3	6.7	14.4	33.8	13.6	36.0	+0.8	-0.8	-3.5
	継続契約型サービス/Recurring Contract-Based Service	2.7	5.5	8.3	11.2	3.0	6.1	9.2	12.5	3.3	6.7	13.6	6.2	12.6	+0.3	+0.6	+1.2
	サービス/Service	41.4	87.5	132.0	176.0	41.3	86.9	132.8	181.3	44.0	92.0	182.6	85.2	181.3	+2.7	+5.0	+1.2
	薬品/Chemicals	28.5	59.9	89.2	118.1	28.1	59.3	89.7	121.2	31.6	65.6	124.8	56.8	121.4	+3.6	+6.4	+3.6
	メンテナンス/Maintenance	10.9	23.0	36.0	48.9	11.4	23.9	37.1	50.7	10.8	22.7	50.3	24.3	51.4	-0.6	-1.2	-0.5
	その他/Others	1.9	4.7	6.8	9.0	1.8	3.7	6.0	9.4	1.6	3.6	7.6	4.1	8.5	-0.2	-0.1	-1.9
	全社/Consolidated	88.9	185.3	285.6	388.8	87.4	189.3	290.0	402.9	99.9	206.9	455.0	198.0	425.0	+12.5	+17.5	+52.1
	サービス事業売上高構成比/ Service Business Sales Ratio																
	(電子/Electronics Industry)	51.9%	56.1%	56.9%	56.4%	61.3%	61.2%	60.5%	58.1%	53.5%	56.0%	49.0%	52.7%	53.0%	-7.9pp	-5.2pp	-9.2pp
	(一般水処理/General Industry)	87.7%	86.6%	85.9%	84.1%	86.9%	84.7%	83.7%	82.6%	87.1%	87.0%	85.0%	86.1%	83.5%	+0.2pp	+2.2pp	+2.4pp
	(全社/Consolidated)	71.8%	73.5%	73.3%	72.0%	76.0%	74.7%	73.9%	72.1%	71.6%	72.9%	67.2%	70.4%	69.5%	-4.4pp	-1.7pp	-5.0pp

地域別売上高 / Net Sales by Region

(単位：十億円) (Billions of yen)		2024.4-2025.3				2025.4-2026.3				2026.4-2027.3					前年差/YoY Change		
		(参考/Reference)			通期/12M	1Q/3M	上期/1H	(参考/Reference)	通期/12M	実績/Results		予想/Forecasts (Nov 5th announced)	期初予想/Forecasts(Aug 6th accounced)				
		1Q/3M	上期/1H	3Q累計/9M				3Q累計/9M		1Q/3M	上期/1H	通期/12M	上期/1H	通期/12M	1Q/3M	上期/1H	通期/12M
		4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-12月 Apr.-Dec.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-12月 Apr.-Dec.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-3月 Apr.-Mar.
売上高/Net Sales	電子/Electronics Industry	39.4	79.4	124.7	169.5	37.3	81.1	122.9	171.8	45.9	93.7	225.0	93.0	195.0	+8.7	+12.6	+53.2
	日本/Japan	18.6	39.5	62.1	84.8	20.0	44.3	66.2	91.0	22.0	46.5	95.4	42.6	85.5	+2.0	+2.1	+4.4
	アジア/Asia	19.9	37.6	58.5	76.3	15.5	30.9	45.8	65.8	19.3	41.4	91.5	39.2	76.3	+3.8	+10.5	+25.7
	北南米/North & South America	0.2	0.8	1.7	5.3	1.2	3.5	5.7	6.9	2.2	1.5	29.4	9.3	29.6	+1.1	-2.1	+22.5
	EMEA	0.7	1.6	2.5	3.1	0.6	2.4	5.3	8.0	2.4	4.4	8.6	1.9	3.6	+1.7	+2.0	+0.6
	一般水処理/General Industry	49.5	105.9	160.9	219.3	50.2	108.2	167.1	231.1	54.0	113.1	230.0	105.0	230.0	+3.8	+4.9	-1.1
	日本/Japan	23.8	52.7	81.5	111.8	25.5	56.3	87.6	120.8	26.4	55.4	114.6	54.6	119.5	+0.9	-0.9	-6.2
	アジア/Asia	5.3	11.0	17.7	24.2	5.6	11.4	17.3	24.1	5.7	11.9	24.9	10.0	23.2	+0.1	+0.5	+0.8
	北南米/North & South America	12.2	24.9	36.4	49.8	10.7	23.2	35.8	50.2	12.6	26.3	53.0	23.4	51.3	+1.9	+3.1	+2.8
	EMEA	8.2	17.3	25.3	33.5	8.4	17.3	26.5	35.9	9.3	19.4	37.5	17.0	36.1	+1.0	+2.2	+1.5
	全社/Consolidated	88.9	185.3	285.6	388.8	87.4	189.3	290.0	402.9	99.9	206.9	455.0	198.0	425.0	+12.5	+17.5	+52.1
	日本/Japan	42.4	92.2	143.6	196.6	45.5	100.6	153.7	211.9	48.4	101.9	210.1	97.2	205.0	+2.9	+1.3	-1.8
	アジア/Asia	25.2	48.6	76.1	100.5	21.0	42.3	63.1	89.9	25.0	53.3	116.4	49.2	99.5	+4.0	+11.0	+26.5
	北南米/North & South America	12.3	25.6	38.1	55.0	11.9	26.7	41.4	57.1	14.8	27.8	82.4	32.6	80.9	+2.9	+1.1	+25.3
	EMEA	8.9	18.9	27.8	36.6	9.0	19.7	31.8	44.0	11.7	23.9	46.1	18.9	39.6	+2.7	+4.2	+2.2

連結貸借対照表/Consolidated Statement of Financial Position

（単位：十億円） (Billions of yen)	2024.4-2025.3				2025.4-2026.3					2026.4-2027.3	
					6月/Jun.	9月/Sep.	12月/Dec.	3月/Mar.			
								売却目的保有資産・負債/ Assets held for sale Liabilities directly associated with assets held for sale			
	6月/Jun.	9月/Sep.	12月/Dec.	3月/Mar.				分類前/ Before reclassification	分類後/ After reclassification	6月/Jun.	9月/Sep.
現金及び現金同等物/Cash and cash equivalents	53.1	51.8	61.2	63.0	53.6	65.2	65.8	65.3	62.2	65.8	55.3
営業債権、その他の債権及び契約資産/ Trade and other receivables, and contract assets	135.5	130.4	127.3	126.4	119.8	127.9	139.1	149.6	145.6	140.8	145.9
棚卸資産/Inventories	23.6	21.3	22.9	20.7	21.0	21.2	22.3	21.1	20.4	21.1	20.9
その他/Others	17.4	11.4	11.3	10.9	11.9	10.6	9.2	13.0	12.6	14.3	15.2
売却目的で保有する資産/Assets held for sale	-	-	-	-	-	-	-	-	8.2	-	-
流動資産合計/Total current assets	229.6	214.8	222.6	221.0	206.3	225.0	236.4	248.9	249.0	242.0	237.2
有形固定資産/Property, plant and equipment	197.6	201.2	205.8	195.4	195.4	195.2	194.7	186.8	186.8	182.9	178.7
のれん/Goodwill	75.2	67.8	73.0	66.3	66.2	67.9	71.4	61.5	61.5	62.3	60.9
その他/Others	67.1	64.0	66.7	66.2	64.9	65.9	68.7	67.2	67.2	70.5	71.0
非流動資産合計/Total non-current assets	339.9	333.0	345.6	328.0	326.6	329.0	334.8	315.5	315.4	315.7	310.6
資産合計/Total assets	569.5	547.8	568.2	548.9	532.9	553.9	571.2	564.4	564.4	557.6	547.9
営業債務及びその他の債務/Trade and other payables	73.9	69.4	72.8	64.4	60.1	59.0	56.6	54.9	53.5	56.3	60.0
社債及び借入金/Bonds and borrowings	22.0	13.1	35.0	33.9	42.9	37.3	24.5	15.9	15.9	33.0	41.3
リース負債/Lease liabilities	5.0	4.4	4.4	4.4	4.6	5.0	5.2	5.2	4.8	4.7	4.6
その他/Others	21.4	23.0	23.0	29.8	22.7	28.1	27.7	37.5	34.6	25.7	36.6
売却目的で保有する資産に直接関連する負債/ Liabilities directly associated with assets held for sale	-	-	-	-	-	-	-	-	10.3	-	-
流動負債合計/Total current liabilities	122.3	110.0	135.3	132.6	130.3	129.4	113.9	113.5	119.1	119.7	142.4
社債及び借入金/Bonds and borrowings	57.7	57.5	36.5	36.3	35.3	45.1	64.0	63.9	63.9	62.9	62.9
リース負債/Lease liabilities	18.2	17.1	19.2	18.8	18.6	18.5	18.5	17.7	14.4	14.4	13.8
その他/Others	27.4	26.3	25.1	22.7	22.8	22.2	22.0	25.4	23.0	22.7	22.4
非流動負債合計/Total non-current liabilities	103.3	100.9	80.9	77.9	76.6	85.9	104.5	107.0	101.4	100.0	99.1
負債合計/Total liabilities	225.6	210.9	216.2	210.4	207.0	215.2	218.5	220.4	220.4	219.7	241.6
親会社の所有者に帰属する持分合計/Equity attributable to owners of parent	341.6	334.7	349.5	336.0	323.5	336.1	349.9	341.2	341.2	335.1	303.1
非支配持分/Non-controlling interests	2.3	2.3	2.5	2.5	2.5	2.6	2.8	2.8	2.8	2.9	3.2
資本合計/Total equity	343.9	336.9	352.0	338.5	325.9	338.7	352.7	344.0	344.0	338.0	306.3
負債及び資本合計/Total liabilities and equity	569.5	547.8	568.2	548.9	532.9	553.9	571.2	564.4	564.4	557.6	547.9

連結キャッシュ・フロー計算書/Consolidated Statement of Cash Flows

（単位：十億円） (Billions of yen)	2024.4-2025.3				2025.4-2026.3				2026.4-2027.3	
	1Q/3M	上期/1H	3Q累計/9M	通期/12M	1Q/3M	上期/1H	3Q累計/9M	通期/12M	1Q/3M	上期/1H
	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-12月 Apr.-Dec.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.	4-12月 Apr.-Dec.	4-3月 Apr.-Mar.	4-6月 Apr.-Jun.	4-9月 Apr.-Sep.
営業活動によるキャッシュ・フロー/Cash flows from operating activities										
税引前利益/Profit before tax	8.7	21.4	34.7	50.7	8.9	25.2	40.0	58.2	14.6	11.2
非継続事業からの税引前利益（-は損失）/Profit (loss) from discontinued operation	-	-	-	-18.9	-0.3	-0.7	-	-21.8	3.2	3.2
減価償却費、償却費及び減損損失/Depreciation, amortization and impairment losses	8.4	17.1	26.1	54.7	8.7	17.3	26.2	35.2	9.0	19.7
売却目的で保有する処分グループを売却コスト控除後の公正価値で測定したことにより認識した損失/Loss recognized on the measurement to fair value less costs to sell of the disposal group held for sale	-	-	-	-	-	-	-	19.9	-	-
持分法による投資損益（- は益）/Share of loss (profit) of investments accounted for using equity method	-0.0	-0.1	-0.1	-0.1	-0.0	-0.0	-0.1	-0.1	-0.0	-0.0
在外営業活動体の換算差額の実現益/Realized gain on exchange differences on translation of foreign operations	-	-	-	-	-	-	-	-	-5.0	-5.0
固定資産売却損益（- は益）/Loss (gain) on sale of fixed assets	-0.0	-0.0	1.0	0.4	-0.0	-0.0	-0.0	-0.1	-0.4	-0.5
棚卸資産の増減額（- は増加）/Decrease (increase) in inventories	-1.7	-0.7	-1.4	0.1	-0.8	-0.6	-0.8	0.7	-1.4	-1.5
営業債権、その他の債権及び契約資産の増減額（- は増加）/Decrease (increase) in trade and other receivables, and contract assets	6.4	5.7	11.2	9.8	5.5	-1.0	-8.9	-17.5	4.6	-1.5
営業債務及びその他の債務の増減額（- は減少）/Increase (decrease) in trade and other payables	0.0	3.8	4.6	1.3	-2.6	-1.7	-5.0	-6.7	1.4	7.5
その他/Other	-1.0	-1.1	-0.6	0.5	-3.1	-2.2	-1.1	3.2	-5.8	-1.6
小計/Subtotal	20.9	46.1	75.5	98.5	16.4	36.3	50.2	70.9	20.1	31.5
利息・配当金・その他の収支/Net of interest/dividends received/paid	0.0	0.2	0.3	0.4	0.1	-0.3	-0.5	-0.9	-0.3	-0.5
法人所得税の支払額/Income taxes paid	-4.2	-5.7	-10.8	-11.2	-6.1	-7.6	-13.5	-14.5	-9.7	-11.1
営業活動によるキャッシュ・フロー/Net cash provided by (used in) operating activities	16.7	40.6	65.1	87.8	10.3	28.3	36.1	55.6	10.1	19.9
投資活動によるキャッシュ・フロー/Cash flows from investing activities										
定期預金等の純増減/Net decrease (increase) in time deposits	-3.0	0.7	0.8	1.8	-0.7	-0.4	1.1	-0.8	0.2	-0.0
有形固定資産の取得による支出/Purchase of property, plant and equipment	-10.6	-26.4	-35.9	-49.9	-8.5	-14.5	-19.8	-26.0	-4.1	-7.0
有形固定資産の売却による収入/Proceeds from sale of property, plant and equipment	0.0	0.1	0.1	0.3	0.6	0.6	0.6	0.8	0.4	0.5
無形固定資産の取得・売却による収支/Purchase of intangible assets	-0.7	-1.6	-2.6	-3.8	-1.0	-2.1	-2.8	-3.7	-0.5	-1.1
投資有価証券の取得・売却及び償還による収支/Proceeds from sale of investment securities	-	-	-0.0	0.3	-0.0	-0.0	-2.0	-2.0	-1.0	-3.1
子会社の売却による支出/ Payments for the sale of subsidiaries	-	-	-	-	-	-	-	-	-2.5	-2.5
その他/Other	-1.0	-0.4	-0.6	-0.8	-0.4	-0.6	-1.6	-2.4	0.2	0.8
投資活動によるキャッシュ・フロー/Net cash provided by (used in) investing activities	-15.2	-27.7	-38.2	-52.1	-10.1	-17.0	-24.5	-34.0	-7.2	-12.5
財務活動によるキャッシュ・フロー/Cash flows from financing activities										
短期借入金及びコマーシャル・ペーパーの純増減額/Net increase (decrease) in short-term borrowings and commercial paper	2.9	-5.8	-14.1	-15.1	9.1	3.3	20.2	11.3	7.1	15.7
長期借入による収入/Proceeds from long-term borrowings	-	0.0	10.0	10.0	-	-	19.9	19.9	-	-
長期借入金の返済による支出/Repayments of long-term borrowings	-1.1	-1.2	-2.3	-2.4	-1.1	-1.2	-2.2	-2.3	-1.1	-1.2
社債の発行による収入/Proceeds from issuance of bonds	-	-	-	-	-	10.0	10.0	10.0	10.0	10.0
社債の償還による支出/Redemption of bonds	-	-	-	-	-	-	-30.0	-30.0	-	-
自己株式の取得による支出/Payments for purchase of treasury stock, net	-	-	-	-1.6	-12.2	-15.2	-15.2	-15.2	-11.1	-34.3
リース負債の返済による支出/Repayments of lease liabilities	-1.3	-2.6	-3.9	-6.3	-1.3	-2.7	-4.3	-5.7	-1.5	-2.8
配当金の支払額/Dividends paid	-4.8	-4.8	-10.0	-10.0	-5.2	-5.2	-11.3	-11.3	-6.2	-6.2
その他/Other	-0.0	0.0	0.0	0.0	-	0.0	0.0	0.0	-	0.0
財務活動によるキャッシュ・フロー/Net cash provided by (used in) financing activities	-4.3	-14.3	-20.3	-25.4	-10.7	-10.9	-12.9	-23.3	-2.8	-18.8
フリー・キャッシュ・フロー/Free cash flow	1.5	12.9	26.9	35.7	0.2	11.3	11.6	21.6	2.8	7.4
現金及び現金同等物に係る換算差額/Effect of exchange rate changes on cash and cash equivalents	1.8	-0.9	0.6	-1.3	1.2	1.9	4.1	4.0	0.5	1.4
現金及び現金同等物の増減額（- は減少）/Net increase (decrease) in cash and cash equivalents	-1.0	-2.3	7.2	8.9	-9.3	2.3	2.9	2.3	0.5	-10.0
現金及び現金同等物の期首残高/Cash and cash equivalents at beginning of period	54.0	54.0	54.0	54.0	63.0	63.0	63.0	63.0	65.3	65.3
現金及び現金同等物の期末残高/Cash and cash equivalents at end of period	53.1	51.8	61.2	63.0	53.6	65.2	65.8	65.3	65.8	55.3

主な経営指標/Major Management Indicators

(単位：十億円) (Billions of yen)	2018.4-2019.3	2019.4-2020.3	2020.4-2021.3	2021.4-2022.3	2022.4-2023.3	2023.4-2024.3	2024.4-2025.3	2025.4-2026.3
事業利益率/Business profit margin	10.0%	10.1%	11.0%	11.4%	11.2%	10.9%	13.1%	14.2%
設備投資（有形/ Capital expenditures (Property, plant and equipment*1)	40.0	31.7	32.6	66.4	46.6	38.9	37.2	21.9
減価償却費（有形/ Depreciation (Property, plant and equipment*1)	15.6	15.8	17.9	20.1	25.8	28.3	29.4	30.0
研究開発費/R&D expenses	5.5	5.7	5.3	5.4	6.3	7.4	8.1	8.1
売上高研究開発費比率/R&D expense ratio to net sales	2.1%	2.1%	2.0%	1.9%	1.8%	1.9%	2.1%	2.0%
ROA(資産合計当期利益率)/ROA(Return on assets)*2	3.5%	4.9%	4.7%	4.1%	4.1%	5.5%	3.7%	2.9%
資産合計回転率(回)/Total assets turnover (times)*2	0.74	0.71	0.66	0.64	0.71	0.73	0.74	0.76
財務レバレッジ(倍)/Financial leverage (times)	1.52	1.60	1.68	1.73	1.71	1.68	1.63	1.65
自己資本比率/Equity Ratio	66.0%	62.5%	59.6%	57.9%	58.6%	59.4%	61.2%	60.4%
ROE(親会社所有者帰属持分当期利益率)/ROE(Return on equity)*2	5.1%	7.6%	7.7%	7.0%	7.1%	9.3%	6.1%	4.7%
調整後ROE/Adjusted ROE *4								11.7%
ROIC(投下資本利益率)/ROIC(Return on invested capital)*2*3	6.8%	6.6%	6.7%	7.1%	8.0%	7.2%	8.8%	8.3%
調整後ROIC/Adjusted ROIC *4								9.1%
配当金（円）/Dividends per share(yen)	54.00	62.00	66.00	72.00	78.00	84.00	92.00	112.00
配当性向/Dividend payout ratio	50.3%	38.1%	38.8%	43.8%	43.5%	32.3%	50.9%	77.1%
期末従業員数（人）/Number of employees (at fiscal year-end)*2	6,613	6,737	7,465	7,661	7,784	7,981	8,151	8,268

*1 使用権資産含む/Including right-of-use assets

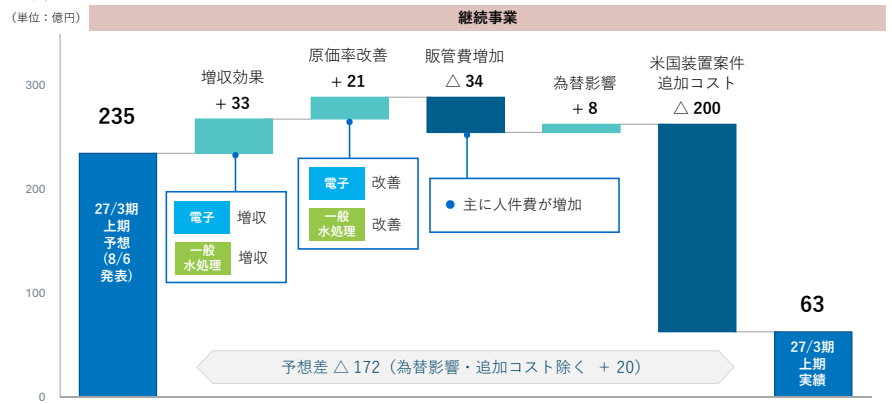
*2 非継続事業含む/Including discontinued operation

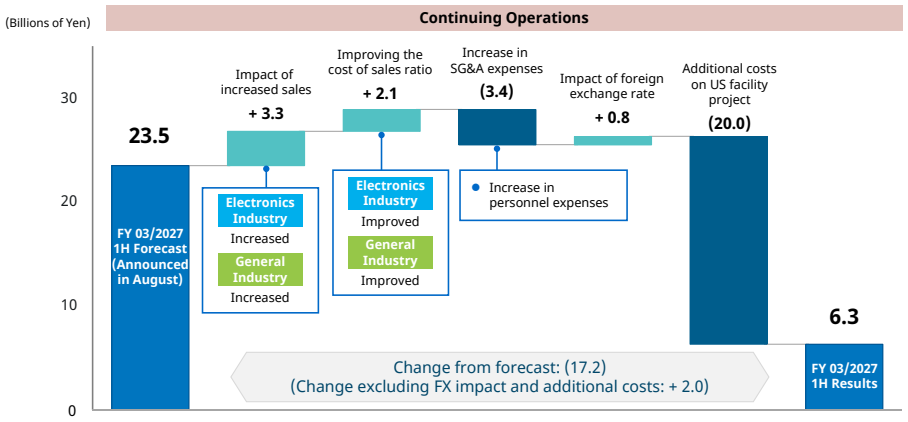
*3 ROIC=（事業利益ー法人税）÷（有利子負債＋株主資本）/ROIC=(Business profit-Income tax expence)÷(Interest-bearing debt+Equity)

*4 非継続事業を除いて試算した調整後の数値を使用/Adjusted figures excluding discontinued operations are used.

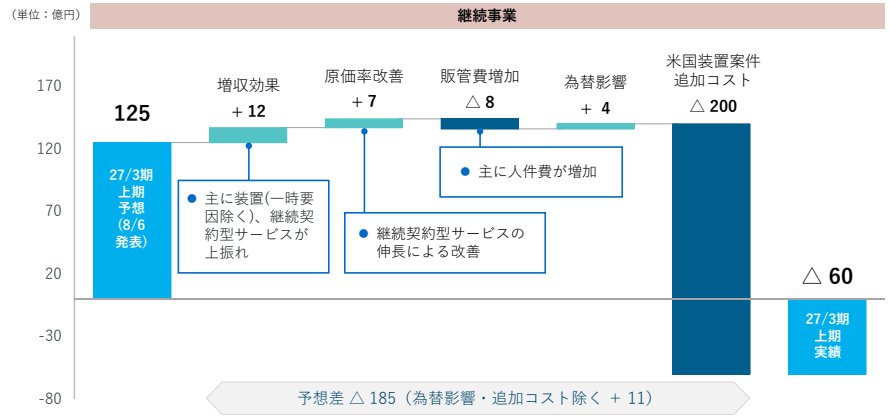
2027年3月期 上期 事業利益の増減要因（実績 vs. 前回予想［8月6日発表］）/ Factors in Business Profit Change (Actual vs. Previous Forecast Announced on August 6)

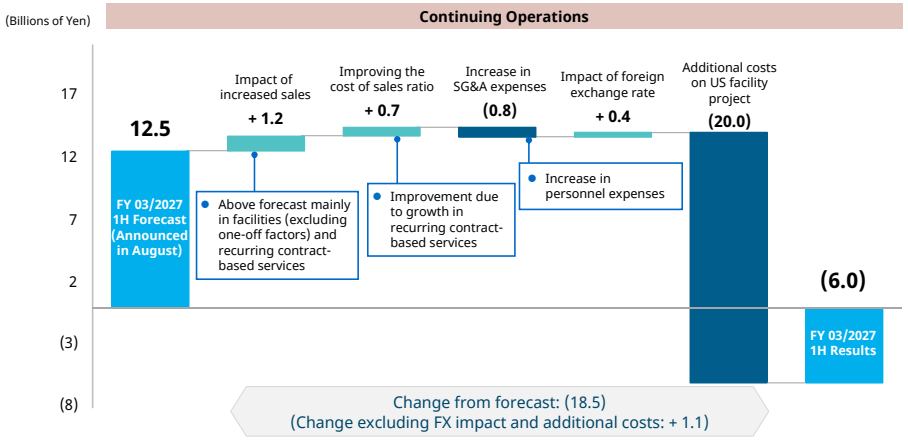
＜全社/Consolidated＞



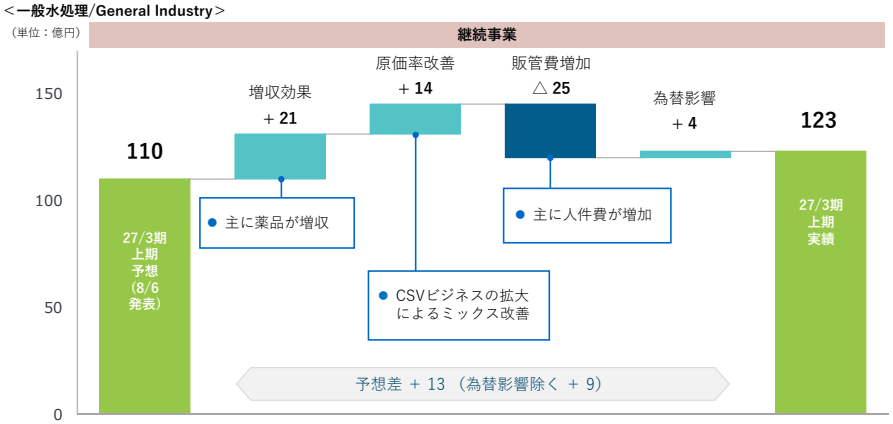


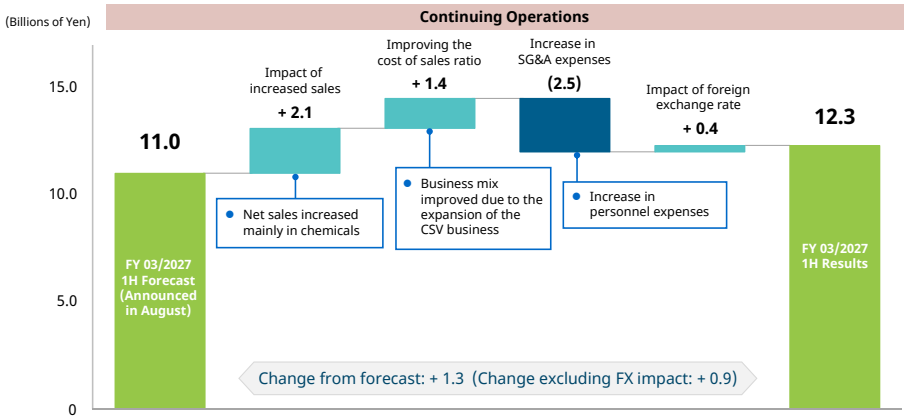
＜電子/Electronics Industry＞





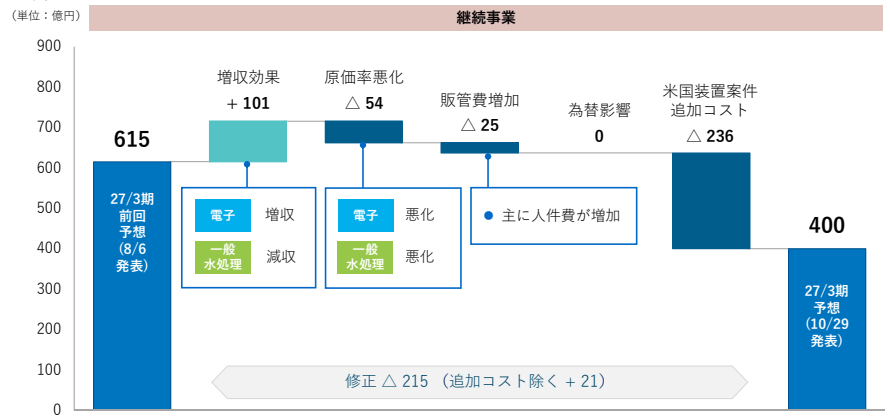
＜一般水処理/General Industry＞

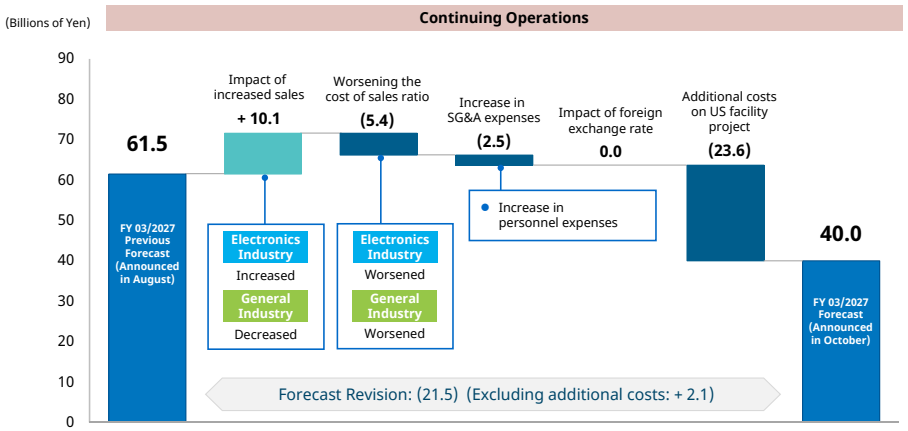




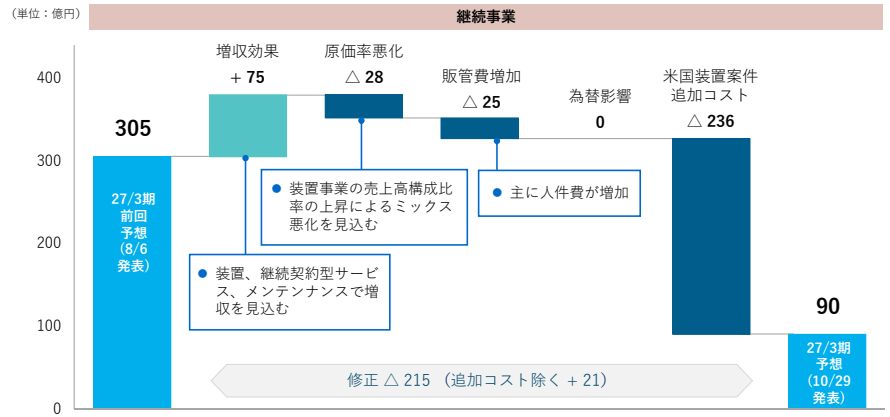
2027年3月期 通期の事業利益の増減要因（予想［10月29日発表］ vs. 予想［8月6日発表］） / Factors in Business Profit Change (October 29 Forecast vs. August 6 Forecast)

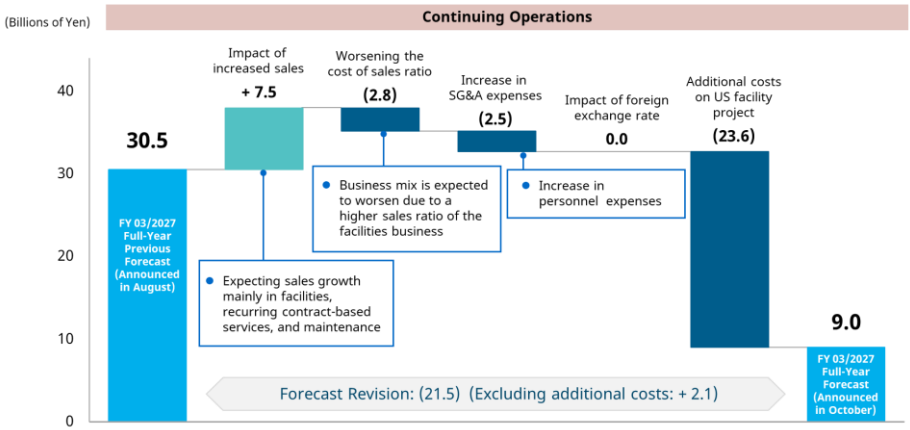
＜全社/Consolidated＞





＜電子/Electronics Industry＞





＜一般水処理/General Industry＞



