



3rd Quarter Performance Briefing

Fiscal Year March 2026

TDK Corporation
February 2, 2026



Agenda



**1. First Nine Months,
FY March 2026
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1. First Nine Months, FY March 2026 Results Highlights

Tetsuji Yamanishi,

Senior Executive Vice President & CFO



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Hello, I am Tetsuji Yamanishi. Thank you for taking the time to attend TDK's performance briefing for the third quarter on a YTD (year-to-date) basis of FY March 2026. I would like to explain the highlights of our consolidated results.

9M, FY March 2026 key points

- ▶ Net sales and operating profit increased year on year due to continuous robust demand in the ICT and HDD markets.
- ▶ Net sales and operating profit reached new record highs for the first nine months of the fiscal year.

Net sales	Operating profit
¥1,858.6 bn [YoY +11.3%]	¥230.7 bn [YoY +10.4%]

- Sales of small capacity batteries and sensors to the ICT market increased considerably.
- Sales of HDD suspension assemblies grew considerably as demand in the HDD market significantly exceeded the previous year's level.
- Sales of passive components to the automotive market decreased due to sluggish sales of battery electric vehicles (BEVs).
- Sales of small capacity batteries, passive components and sensors to the industrial equipment market increased.

I would like to start with the key points of the first nine months of FY March 2026. In the electronic components market, which has a significant impact on TDK's consolidated business results, the production of ICT-related products remained strong on a year-on-year basis. The demand for nearline HDDs for data centers also remained robust. On the other hand, in the automotive market, demand for battery electric vehicles (BEVs) continued to be sluggish, resulting in lower parts demand than forecasted at the beginning of the fiscal year.

In this business environment, during the first nine months of FY March 2026, all segments experienced an increase in sales year on year, driven by robust demand for components in the ICT market and the industrial equipment market. Overall, net sales and operating profit increased by 11.3% and 10.4%, respectively, reaching new record highs for the first nine months of the fiscal year.

9M, FY March 2026 results

- Net sales and operating profit increased year on year.
- TDK set record highs in net sales and all profit items.

	FY3/25	FY3/26	Change	
	(¥bn)	9M	9M	¥bn
Net sales	1,670.5	1,858.6	+188.0	+11.3%
Operating profit	209.1	230.7	+21.6	+10.4%
Operating profit margin	12.5%	12.4%	-0.1pts	-
Profit before tax	218.1	235.1	+17.0	+7.8%
Net profit attributable to owners of parent	160.9	181.2	+20.3	+12.6%
Earnings per share (¥)*	84.79	95.48	-	-
USD/JPY	152.61	148.74	2.5% JPY appreciation	
EUR/JPY	164.90	171.83	4.2% JPY depreciation	

*TDK split one share of its common share into five shares with the effective date of October 1, 2024. Earnings per share is calculated on the assumption that the share split had been implemented at the beginning of the previous fiscal year.



Exchange rate impact on net sales and operating profit (OP)

Net sales	Decreased by approx. ¥29.4 bn
OP	Decreased by approx. ¥9.3 bn

Forex sensitivity (impact by one JPY change)

USD

Net Sales	¥11.0 bn
OP	¥2.0 bn

EUR

Net Sales	¥2.0 bn
OP	¥0.3 bn

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I would like to present an overview of our results for the first nine months of FY March 2026.

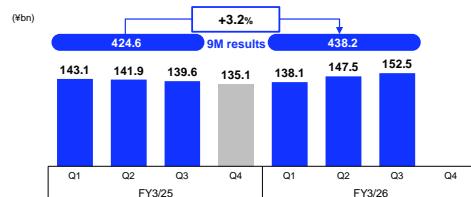
There was a decrease of about ¥29.4 billion in net sales and a decrease of about ¥9.3 billion in operating profit due to exchange rate fluctuations against the U.S. dollar and other currencies. Including this impact, net sales were ¥1,858.6 billion, an increase of ¥188.0 billion, or 11.3%, year on year, and operating profit was ¥230.7 billion, an increase of ¥21.6 billion, or 10.4%, year on year. Profit before tax was ¥235.1 billion, an increase of ¥17.0 billion, or 7.8%, year on year. Net profit attributable to owners of parent was ¥181.2 billion, an increase of ¥20.3 billion, or 12.6%, year on year, setting record highs in net sales and all profit items for the first nine months of the fiscal year.

Earnings per share amounted to ¥95.48. In terms of exchange rate sensitivity, we estimate that a change of ¥1 against the U.S. dollar will affect operating profit by about ¥2 billion a year, the same as our previous estimate, while a ¥1 change against the euro will have an impact of about ¥0.3 billion a year.

Passive Components segment

- On a recovery trend, driven by an increase in sales to the industrial equipment market despite a decline in sales to the automotive market.

Net sales



Operating profit, OP margin



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Ceramic capacitors

- Sales increased while profit decreased year on year.
- Sales increased to the automotive and industrial equipment market while decreased to the ICT market.

Aluminum electrolytic capacitors and film capacitors

- Sales increased while profit decreased year on year.
- Sales increased to the industrial equipment market while decreased to the automotive market. Restructuring costs were recorded.

Inductive devices

- Sales increased while profit decreased year on year.
- Sales increased to the ICT and automotive markets.

High-frequency components

- Sales and profit decreased year on year.
- Sales decreased to the industrial equipment and ICT markets.

Piezoelectric material products and circuit protection components

- Sales increased while profit decreased year on year.
- Sales increased to the industrial equipment market while decreased to the automotive market.

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I will now move on to segment results for the first nine months.

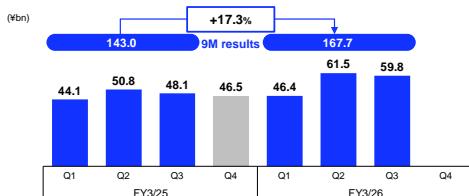
In the Passive Components segment, sales to the industrial equipment market increased, whereas sales to the automotive market declined. As a result, net sales amounted to ¥438.2 billion, an increase of 3.2% year on year, while operating profit stood at ¥30.4 billion, a drop of 25.6% year on year.

In ceramic capacitors, sales to the automotive and industrial equipment markets increased, resulting in an increase in sales year on year; however, profit decreased due to lower average selling prices among other factors. In aluminum electrolytic capacitors and film capacitors, sales increased year on year on the back of a rise of sales to the industrial equipment market for renewable energy, AI servers and other applications, despite a drop in sales to the automotive market. Profit increased year on year in real terms when excluding the restructuring costs of ¥2.7 billion recorded in Q2 as part of business portfolio management. Inductive devices saw an increase in sales, reflecting a rise in sales to the ICT and automotive markets, while profit decreased slightly partly due to an unfavorable product mix. Sales and profit decreased year on year for high-frequency components as sales to the industrial equipment and ICT markets declined. Piezoelectric material products and circuit protection components saw an increase in sales on a year-on-year basis, reflecting a rise in sales to the industrial equipment market, while profit decreased due to the stronger yen.

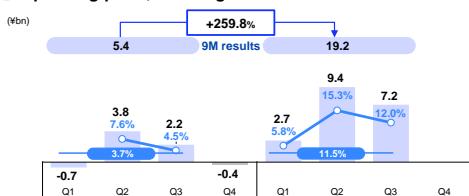
Sensor Application Products segment

- Profit increased considerably due to increase in sales to the ICT and automotive markets.

Net sales



Operating profit, OP margin



TDK In Everything, Better

Temperature and pressure sensors

- Sales increased while profit decreased year on year.
- Sales increased to the automotive market.

Magnetic sensors

- Sales and profit increased year on year.
- Sales increased to the ICT and automotive markets.

MEMS sensors

- Sales increased year on year, returning to profitability.
- Sales of microphones to the ICT market increased.
- Sales of motion sensors to the industrial equipment market increased.

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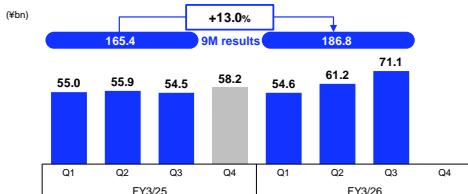
In the Sensor Application Products segment, net sales increased 17.3% year on year to ¥167.7 billion, and operating profit stood at ¥19.2 billion, representing an increase of approximately 3.5 times year on year.

In temperature and pressure sensors, sales increased year on year, reflecting a rise in sale to the automotive market, while profit decreased year on year mainly due to an unfavorable product mix. In magnetic sensors, sales of TMR sensors for smartphone applications rose, resulting in a year-on-year increase in sales and profit of magnetic sensors on the whole. In MEMS sensors, sales of motion sensors to the industrial equipment market increased, on top of a rise in sales of microphones to the ICT market. Consequently, sales of MEMS sensors on the whole increased year on year, returning to profitability. This contributed significantly to the segment's improved profit.

Magnetic Application Products segment

- Sales of HDD heads and suspension assemblies increased due to continuous robust demand in the HDD market, resulting in a significant improvement in profitability.

Net sales



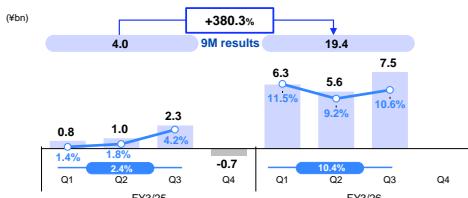
HDD heads and HDD suspension assemblies

- Sales increased and profit rose significantly year on year.

Magnets

- Sales decreased year on year while profitability improved.

Operating profit, OP margin



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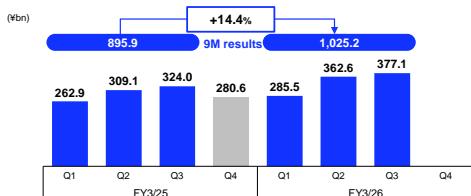
In the Magnetic Application Products segment, net sales increased 13.0% year on year to ¥186.8 billion, and operating profit rose significantly year on year to ¥19.4 billion, representing an increase of nearly 5 times.

In HDD heads and HDD suspension assemblies, sales volumes of heads and suspension assemblies for nearline HDDs increased by approximately 15% and slightly over 30%, respectively. As a result, sales and profit increased considerably. While sales of magnets decreased year on year, profitability improved on the back of cost reduction effects such as quality enhancement, despite posting a loss.

Energy Application Products segment

- Small capacity batteries posted an increase in sales volume and profit reflecting robust demand in the ICT market.

Net sales



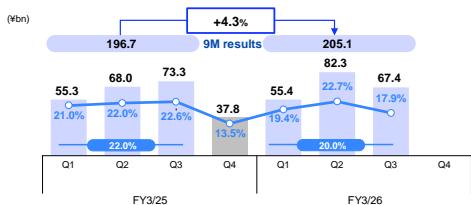
Energy devices (Rechargeable batteries)

- Sales and profit increased year on year.
- Sales of small capacity batteries increased due to an increase in the sales volume and the effect of new model sales.
- Sales of small capacity batteries increased to the industrial equipment market.

Power supplies

- Sales of power supplies for industrial equipment decreased while profitability improved year on year.

Operating profit, OP margin



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In the Energy Application Products segment, net sales amounted to ¥1,025.2 billion, up 14.4% year on year, and operating profit rose 4.3% year on year to ¥205.1 billion. In rechargeable batteries, sales increased year on year on the back of a rise in sales volume of small capacity batteries for smartphone applications and the effect of new model sales. Sales of medium capacity batteries to the industrial equipment market also increased, resulting in an increase in both sales and profit of rechargeable batteries on the whole. Power supplies for industrial equipment saw a year-on-year decline in sales as demand for industrial equipment applications failed to recover significantly; however, profit increased, mainly reflecting a more favorable product mix.

Q3, FY March 2026 results

- Net sales and operating profit increased year on year.

	FY3/25		FY3/26		Change	
	(¥bn)	Q3	Q3	¥bn	%	
Net sales	581.0	675.2		+94.2	+16.2%	
Operating profit	75.8	83.1		+7.3	+9.7%	
Operating profit margin	13.0%	12.3%		-0.7pts	-	
Profit before tax	80.8	87.6		+6.8	+8.4%	
Net profit attributable to owners of parent	55.2	69.8		+14.6	+26.5%	
Earnings per share (¥)*	29.07	36.77		-	-	
USD/JPY	152.29	154.04		1.1% JPY depreciation		
EUR/JPY	162.64	179.32		10.3% JPY depreciation		

Exchange rate impact on net sales and operating profit (OP)

Net sales Increased by approx. ¥12.3 bn

OP Decreased by approx. ¥0.1 bn



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I would like to present an overview of our results for Q3.

There was an increase of about ¥12.3 billion in net sales and a decrease of about ¥0.1 billion in operating profit due to exchange rate fluctuations against the U.S. dollar and other currencies. Including this impact, net sales were ¥675.2 billion, an increase of ¥94.2 billion, or 16.2%, year on year, and operating profit was ¥83.1 billion, an increase of ¥7.3 billion, or 9.7%, year on year. Profit before tax was ¥87.6 billion, an increase of ¥6.8 billion, or 8.4%, year on year. Net profit attributable to owners of parent was ¥69.8 billion, a significant increase of ¥14.6 billion, or 26.5%, year on year.

Earnings per share turned out to be ¥36.77.

Quarterly results by segment

	FY3/25 (¥bn)	FY3/26 Q3 [A]	FY3/26 Q2 [B]	FY3/26 Q3 [C]	YoY [C] – [A]		QoQ [C] – [B]	
		¥bn	%	¥bn	%	¥bn	%	
Net Sales	Capacitors	57.5	62.1	66.3	+8.8	+15.3%	+4.3	+6.9%
	Inductive Devices	51.8	55.0	55.8	+4.0	+7.8%	+0.8	+1.5%
	Other Passive Components	30.3	30.4	30.4	+0.1	+0.4%	(0.04)	(0.1)%
	Passive Components	139.6	147.5	152.5	+12.9	+9.3%	+5.0	+3.4%
	Sensor Application Products	48.1	61.5	59.8	+11.7	+24.4%	(1.7)	(2.7)%
	Magnetic Application Products	54.5	61.2	71.1	+16.6	+30.5%	+9.9	+16.1%
	Energy Application Products	324.0	362.6	377.1	+53.1	+16.4%	+14.5	+4.0%
	Other	14.9	14.8	14.7	(0.2)	(1.6)%	(0.1)	(0.7)%
Operating Profit	Total	581.0	647.6	675.2	+94.2	+16.2%	+27.6	+4.3%
	Passive Components	12.0	8.4	15.6	+3.6	+30.3%	+7.2	+86.0%
	Sensor Application Products	2.2	9.4	7.2	+5.0	+231.2%	(2.2)	(23.7)%
	Magnetic Application Products	2.3	5.6	7.5	+5.3	+232.2%	+1.9	+34.0%
	Energy Application Products	73.3	82.3	67.4	(5.9)	(8.1)%	(14.9)	(18.1)%
	Other	(0.9)	(1.5)	(1.5)	(0.7)	-	(0.03)	-
	Subtotal	88.9	104.2	96.2	+7.3	+8.3%	(8.0)	(7.7)%
	Adjustment	(13.1)	(13.0)	(13.1)	(0.02)	-	(0.1)	-
	Total	75.8	91.2	83.1	+7.3	+9.7%	(8.1)	(8.9)%
	Operating profit margin	13.0%	14.1%	12.3%	(0.7)pts	-	(1.8)pts	-
	USD/JPY	152.29	147.54	154.04				
	EUR/JPY	162.64	172.31	179.32				



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I will now explain some of the factors behind the changes in segment sales and operating profit from Q2 to Q3 of FY March 2026.

In the Passive Components segment, net sales increased by ¥5.0 billion, or 3.4%, from Q2, and operating profit increased by ¥4.5 billion from Q2, when excluding one-time expenses of ¥2.7 billion. Sales and profit of ceramic capacitors increased reflecting a rise in sales to the automotive market. Sales and profit of aluminum electrolytic capacitors and film capacitors virtually remained unchanged when excluding the restructuring costs of ¥2.7 billion recorded in Q2. Sales of inductive devices increased on the back of a rise in sales to the automotive market, while profit remained at the same level as Q2, reflecting an unfavorable product mix among other factors. While sales of high-frequency components decreased as sales to the automotive market declined, profit increased reflecting a more favorable product mix and other factors. Sales and profit of piezoelectric material products and circuit protection components increased driven by higher sales to the industrial equipment market.

In the Sensor Application Products segment, net sales decreased by ¥1.7 billion, or 2.7%, from Q2, and operating profit decreased by ¥2.2 billion from Q2. Sales and profit of temperature and pressure sensors decreased reflecting a drop in sales to the automotive market. Magnetic sensors saw a slight decrease in sales and profit on the whole reflecting a seasonal decrease in demand for TMR sensors from the ICT market. In MEMS sensors, sales of microphones to the ICT market decreased reflecting a seasonal decrease in demand. Sales of motion sensors also decreased mainly for industrial equipment applications. As a result, sales and profit of MEMS sensors decreased on the whole; however, profitability was maintained.

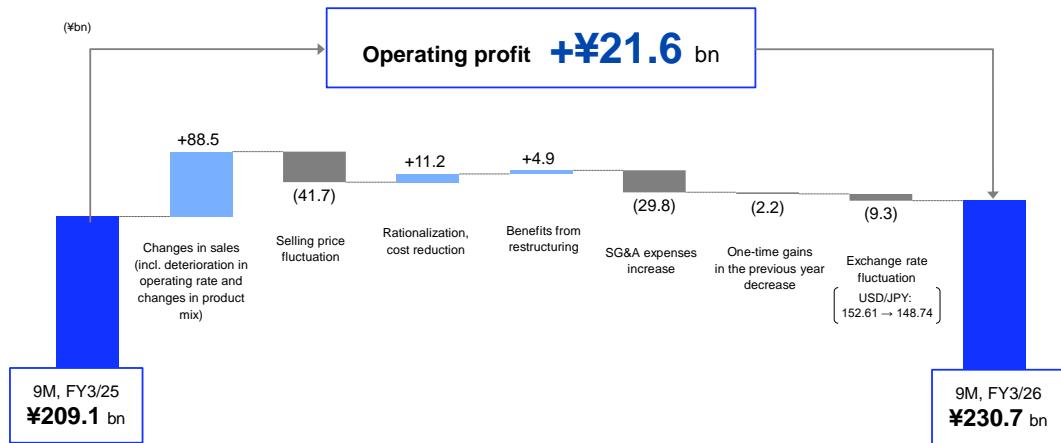
In the Magnetic Application Products segment, net sales increased by ¥9.9 billion, or 16.1%, from Q2, and operating profit increased by ¥1.9 billion, or 34%, from Q2.

While sales volume of HDD heads remained almost unchanged, sales increased on

the back of a rise in average selling prices reflecting a favorable change in new product mix. Sales volume of HDD suspension assemblies rose about 23% reflecting an increase in demand for nearline HDDs. As a result, sales and profit of HDD heads and suspension assemblies increased on the whole. As for magnets, sales increased due to progress in price pass-through of higher material costs, resulting in a reduced loss.

In the Energy Application Products segment, net sales increased by ¥14.5 billion, or 4.0%, from Q2, while operating profit decreased by ¥14.9 billion, or 18.1%, from Q2. While sales volume of small capacity batteries to the ICT market decreased due to seasonality, sales of rechargeable batteries increased on the whole reflecting a rise in sales of small capacity battery packs. On the other hand, operating profit decreased reflecting the impact of a significant rise in material prices. Sales and profit of power supplies for industrial equipment remained virtually unchanged. While sales of power supplies for EVs decreased due to lower demand for BEVs, loss was reduced.

Analysis of change in operating profit – 9M



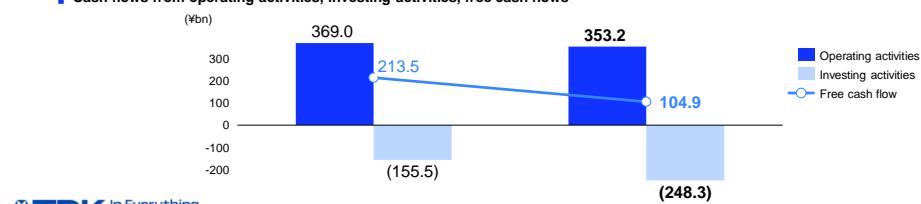
Next is an analysis of the ¥21.6 billion year-on-year increase in operating profit for the first nine months of FY March 2026.

Changes in sales increased by ¥88.5 billion due to an increase in the sales volume of rechargeable batteries, HDD heads and HDD suspension assemblies, and sensors. While there were positive effects on operating profit including rationalization and cost reduction of ¥11.2 billion and benefits from restructuring carried out in the previous fiscal year of ¥4.9 billion, operating profit declined by ¥41.7 billion due to selling price fluctuation reflecting the impact of discounts on selling prices. SG&A expenses increased by ¥29.8 billion reflecting an increase in R&D expenses mainly related to rechargeable batteries, for which TDK has been accelerating the development of new technologies and products. There was also a ¥2.2 billion decrease in one-time gains recorded in the previous fiscal year. These factors, along with the positive effect of an increase in sales volume, contributed to the ¥21.6 billion increase in operating profit on the whole, despite the negative effect of the stronger yen amounting to ¥9.3 billion.

Cash flows – 9M

(¥bn)	FY3/25	FY3/26	Change
	9M	9M	
Cash flows from operating activities	369.0	353.2	(15.8)
Cash flows from investing activities	(155.5)	(248.3)	(92.8)
Free cash flow	213.5	104.9	(108.6)
Cash flows from financing activities	(73.3)	18.3	+91.6
Effects of exchange rate changes on cash and cash equivalents	28.1	57.7	+29.5
Cash and cash equivalents	818.4	878.2	+59.8

Cash flows from operating activities, investing activities, free cash flows



I would like to present an overview of cash flows.

In the first nine months of FY March 2026, operating cash flow amounted to ¥353.2 billion. Investing cash flow increased overall by ¥92.8 billion year on year, reflecting higher capital expenditures mainly related to rechargeable batteries, including investments related to new products and technologies. Free cash flow decreased by ¥108.6 billion year on year to ¥104.9 billion, but exceeded the level forecasted for the nine-month period.

2. FY March 2026 Projections

Tetsuji Yamanishi,

Senior Executive Vice President & CFO



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I would like to explain our FY March 2026 projections.

Projections by segment for Q4 of FY March 2026

Q3 of FY3/26 Actual	Q4 of FY3/26 projection (QoQ)		Factor
	Assumed exchange rates: Q4 basis	Assumed exchange rates: Q3 basis	
Passive Components	152.5	(1) ~ +2%	• Sales of inductive devices to the automotive market and aluminum electrolytic capacitors for server applications are expected to increase.
Sensor Application Products	59.8	(9) ~ (6)%	• Sales of magnetic sensors to the ICT market are expected to decrease. • Sales of MEMS sensors are expected to decrease.
Magnetic Application Products	71.1	+6 ~ +9%	• Sales of HDD heads are expected to increase.
Energy Application Products	377.1	(19) ~ (16)%	• Sales of small capacity batteries to the ICT market are expected to decrease.
Other	14.7	-	-
Total	675.2	(11) ~ (8)%	(10) ~ (7)%
USD/JPY	154.04	153.00	154.00
EUR/JPY	179.32	178.00	179.00



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I would like to discuss our projections regarding changes in segment net sales for Q4.

We have revised our exchange rate assumption for Q4 from ¥145 to the U.S. dollar to ¥153 to the U.S. dollar. However, for the sake of easier comparison, I will provide explanations by adjusting this to the exchange rate for Q3.

In the Passive Components segment, we expect overall sales growth between ±0% and +3% on a quarter-on-quarter basis. This is attributable mainly to an increase in sales of inductive devices to the automotive market and an increase in sales of aluminum electrolytic capacitors for AI server applications.

In the Sensor Application Products segment, we expect overall sales growth between -8% and -5% on a quarter-on-quarter basis. This is attributable mainly to a decrease in sales of magnetic sensors and MEMS sensors for smartphone applications due to seasonality.

In the Magnetic Application Products segment, we expect overall sales growth between +7% and +10% on a quarter-on-quarter basis. This is attributable mainly to the fact that the sales volume of HDD heads is expected to increase by approximately 8% and that of HDD suspension assemblies is expected to decrease by approximately 6% due to some advance orders received in Q3, among other factors.

In the Energy Application Products segment, we expect overall sales growth between -18% and -15% on a quarter-on-quarter basis. This is attributable mainly to a decline in sales of small capacity batteries for smartphone applications due to seasonality.

FY March 2026 projections

- FY March 2026 projection and dividend projection have been revised upward reflecting brisk results in the ICT and HDD markets.

(¥bn)	FY3/25 Actual	FY3/26 projections		Change	
		As of October 2025	As of February 2026	¥bn	%
Net sales	2,204.8	2,370.0	2,470.0	+265.2	+12.0%
Operating profit	224.2	245.0	265.0	+40.8	+18.2%
Operating profit margin	10.2%	10.3%	10.7%	+0.5pts	-
Profit before tax	237.8	250.0	270.0	+32.2	+13.5%
Net profit attributable to owners of parent	167.2	180.0	190.0	+22.8	+13.7%
ROIC	6.7%	7.2%	7.4%	+0.7pts	-
Free cash flow	201.0	80.0	115.0	(86.0)	(42.8)%
Earnings per share (¥)	88.10	94.84	100.11	-	-
Annual dividends (¥)	30.00	32.00	34.00	-	-
USD/JPY	152.66	146.00	150.00	-	-
EUR/JPY	163.86	168.00	173.00	-	-



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I would now like to go over our full-year projections for FY March 2026.

As explained earlier, in the electronics market during the first nine months of FY March 2026, sales of rechargeable batteries and sensors increased, supported by the launch of new smartphone models, among other factors. In addition, sales of HDD suspension assemblies remained robust as demand for HDDs related to data centers continued to show strength. Under such circumstances, TDK's performance for the first nine months of FY March 2026 exceeded the projections announced on October 31, 2025, reflecting the impact of the yen trending weaker than anticipated. As a result of a review of full-year projections in light of the above conditions, TDK has revised upward its consolidated projections for FY March 2026 from the previously announced projections as follows: net sales of ¥2,470.0 billion, operating profit of ¥265.0 billion, and net profit attributable to owners of parent of ¥190.0 billion.

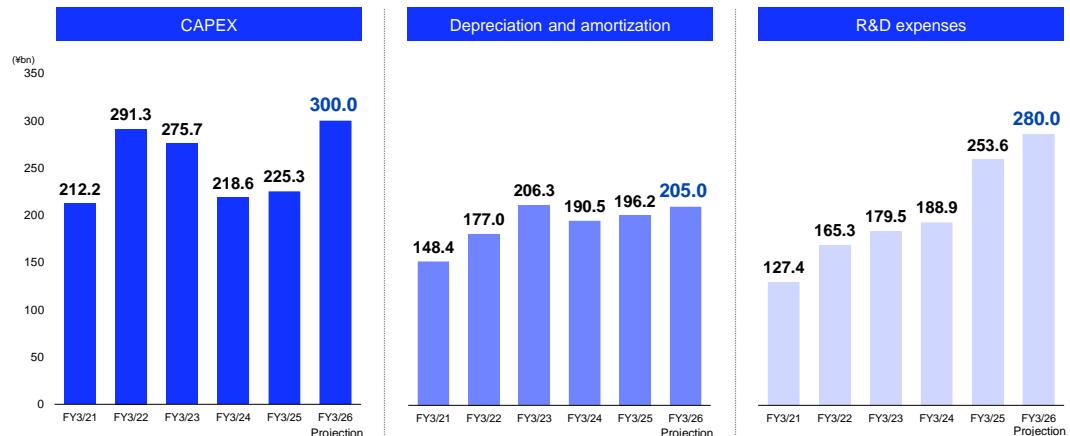
Our exchange rate assumption for Q4 of FY March 2026 is ¥153 against the U.S. dollar.

In addition, supported by higher profit contributions, TDK also revised upward its free cash flow projection by ¥35.0 billion from the previous announcement to ¥115.0 billion.

Furthermore, as part of its effort to drive business portfolio management, TDK will recognize operating expenses of approximately ¥13.0 billion in total for FY March 2026. This reflects an additional one-time expenses of approximately ¥3.0 billion, including restructuring costs, to be recorded in Q4 compared to the previous forecast.

As for our projections for dividend per share, in light of the upward revision to profit, we revised the year-end dividend projection upward by ¥2 per share to ¥18, from ¥16. As a result, the annual dividend projection has been revised from ¥32 per share to ¥34 per share.

CAPEX, Depreciation, and R&D expenses – Projections



Along with an upward revision to the full-year projections, we also reviewed various expenses.

Capital expenditures (CAPEX) are now projected at ¥ 300.0 billion, up ¥20.0 billion yen from the previous forecast of ¥280.0 billion, depreciation and amortization at ¥205.0 billion, up ¥5.0 billion, and R&D expenses at ¥280.0 billion, up 20.0 billion yen. These increases mainly reflect the upcoming launch of new products and the acceleration of development of new technologies in rechargeable batteries. We are preparing for further growth toward achieving our targets next fiscal year, which is the final year of our Medium-term Plan.

This concludes my presentation.
Thank you for your attention.

Cautionary statements with respect to forward-looking statements

This material contains forward-looking statements, including projections, plans, policies, management strategies, targets, schedules, understandings, and evaluations about TDK, or its group companies (TDK Group). These forward-looking statements are based on the current forecasts, estimates, assumptions, plans, beliefs, and evaluations of the TDK Group in light of the information currently available to it, and contain known and unknown risks, uncertainties, and other factors. The TDK Group therefore wishes to caution readers that, being subject to risks, uncertainties, and other factors, the TDK Group's actual results, performance, achievements, or financial position could be materially different from any future results, performance, achievements, or financial position expressed or implied by these forward-looking statements, and the TDK Group undertakes no obligation to publicly update or revise any forward-looking statements after the issue of this material except as provided for in laws and ordinances.

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