

Supplemental Financial Information

for the 3rd Quarter Ended November 30, 2015

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January 8, 2016

UNY Group Holdings Co., Ltd.

1. Consolidated Financial Results

(1) Summary and outlook

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
		Y-o-y		Y-o-y		Y-o-y		Y-o-y
Operating revenue	746,122	-1.2%	1,018,959	-1.3%	760,969	2.0%	1,034,300	1.5%
General merchandise stores operations ^{*1}	562,802	-3.3%	777,327	-2.8%	581,557	3.3%	796,960	2.5%
Convenience stores operations	113,308	-0.5%	148,110	-0.3%	114,651	1.2%	150,700	1.7%
Specialty stores operations	43,206	-9.5%	58,304	-9.5%	39,154	-9.4%	53,060	-9.0%
Financial services operations	13,713	6.9%	18,428	6.5%	14,561	6.2%	19,650	6.6%
Others ^{*2}	41,072	174.3%	54,422	112.2%	41,136	0.2%	54,200	-0.4%
Eliminations	-27,981	-	-37,634	-	-30,092	-	-40,270	-
SG & A expenses	276,264	-0.4%	369,550	-0.3%	277,680	0.5%	372,140	0.7%
Operating income	14,118	-18.4%	20,237	-20.1%	14,797	4.8%	21,000	3.8%
General merchandise stores operations ^{*1}	4,592	-19.1%	9,013	-26.3%	4,061	-11.6%	8,810	-2.3%
Convenience stores operations	7,663	-15.2%	7,613	-19.5%	7,024	-8.3%	6,500	-14.6%
Specialty stores operations	-1,551	-	-1,164	-	-687	-	50	-
Financial services operations	2,705	-4.4%	3,899	4.0%	2,969	9.8%	4,110	5.4%
Others ^{*2}	657	-1.0%	831	8.5%	1,455	121.4%	1,710	105.8%
Eliminations	50	-	45	-	-26	-	-180	-
Non-operating income	2,466	6.0%	3,887	-2.8%	2,619	6.2%	3,530	-9.2%
Non-operating expenses	2,696	-12.3%	3,636	-14.6%	3,257	20.8%	4,030	10.8%
Ordinary income	13,888	-16.1%	20,488	-18.3%	14,158	1.9%	20,500	0.1%
Extraordinary gains	1,324	-11.5%	1,436	-5.5%	3,340	152.2%	3,500	143.7%
Extraordinary losses	7,110	-8.1%	19,440	83.3%	10,469	47.2%	15,300	-21.3%
Net income	4,364	-20.7%	-2,408	-	1,067	-75.5%	1,500	-
Net income per share (yen)	18.97	-20.2%	-10.47	-	4.64	-75.5%	6.52	-
Average number of shares outstanding during period ^{*3}	230,083,305 shares		230,083,074 shares		230,080,948 shares		-	
Total assets	975,278	8.8%	952,584	0.3%	969,065	-0.6%		
Total net assets	306,994	0.8%	301,249	-1.5%	294,103	-4.2%		
Interest-bearing liabilities ^{*4}	363,683	23.1%	364,174	1.7%	369,074	1.5%		

Notes 1. In the General merchandise stores segment, UNY (SHANGHAI) TRADING Co., Ltd. became a consolidated subsidiary on October 1, 2014.

2. In the Other segment, UNICOM Inc. became a consolidated subsidiary on March 1, 2014.

3. Average number of shares outstanding during period excludes treasury stocks.

4. Interest-bearing liabilities include lease liabilities.

(2) Stores of major subsidiaries at term-end

(stores)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
		Net increase (Net decrease)		Net increase (Net decrease)		Net increase (Net decrease)		Net increase (Net decrease)
General merchandise stores operations								
UNY CO., LTD.	225	-4	226	-3	230	+4	228	+2
Openings	3	-	6	-	6	-	8	-
Closures	7	-	9	-	2	-	6	-
UNY (HK) CO., LIMITED	3	±0	3	±0	3	±0	3	±0
Openings	0	-	0	-	0	-	0	-
Closures	0	-	0	-	0	-	0	-
UNY (SHANGHAI) TRADING Co., Ltd.	-	-	1	+1	1	±0	1	±0
Openings	-	-	1	-	0	-	0	-
Closures	-	-	0	-	0	-	0	-
99 ICHIBA Co., Ltd.	88	+12	90	+14	87	-3	98	+8
Openings	12	-	15	-	5	-	14	-
Closures	0	-	1	-	8	-	6	-
Convenience stores operations								
Circle K Sunkus Co., Ltd. (Group total)	6,319	-40	6,353	-6	6,291	-62	6,385	+32
Openings	254	-	360	-	209	-	357	-
Closures	294	-	366	-	271	-	325	-
The Company	5,951	+69	5,990	+108	5,933	-57	6,022	+32
Openings	243	-	347	-	198	-	340	-
Relocations	52	-	92	-	103	-	-	-
Closures	174	-	239	-	255	-	308	-
Area franchisers	368	-109	363	-114	358	-5	363	±0
Openings	11	-	13	-	11	-	17	-
Closures	120	-	127	-	16	-	17	-
Circle K Sunkus Co., Ltd. (Consolidated basis)	6,031	+65	6,069	+103	6,007	-62	6,095	+26
Openings	245	-	349	-	198	-	340	-
Closures	180	-	246	-	260	-	314	-
Specialty stores operations								
SAGAMI Co., Ltd.	266	-3	253	-16	247	-6	243	-10
Openings	7	-	7	-	12	-	14	-
Closures	10	-	23	-	18	-	24	-
PALEMO CO., LTD.	722	-58	700	-80	614	-86	609	-91
Openings	12	-	14	-	5	-	9	-
Closures	70	-	94	-	91	-	100	-
MOLIE Co., Ltd.	134	+1	131	-2	131	±0	127	-4
Openings	5	-	5	-	2	-	3	-
Closures	4	-	7	-	2	-	7	-

2. Financial results of major subsidiaries by operating segment

General merchandise stores operations: UNY CO., LTD.

(1) Business results (Non-consolidated basis)

1) Business results

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
		Y-o-y		Y-o-y		Y-o-y		Y-o-y
Operating revenue	540,374	-3.7%	745,647	-3.3%	553,363	2.4%	759,000	1.8%
Net sales	510,941	-4.0%	705,770	-3.6%	523,089	2.4%	717,824	1.7%
Y-o-y change in existing store sales (Adjustment for the day of the week)	-3.4%	-	-2.9%	-	1.6%	-	0.4%	-
Gross profit	123,238	-4.5%	168,772	-4.4%	124,474	1.0%	170,224	0.9%
Gross profit ratio	24.1%	-0.1%	23.9%	-0.2%	23.8%	-0.3%	23.7%	-0.2%
Other revenues	29,432	2.2%	39,876	2.1%	30,273	2.9%	41,176	3.3%
Operating gross profit	152,670	-3.3%	208,649	-3.3%	154,748	1.4%	211,400	1.3%
SG & A expenses	147,995	-2.8%	198,240	-2.6%	149,909	1.3%	201,330	1.6%
Personnel costs	66,994	-4.0%	89,566	-3.8%	67,265	0.4%	-	-
Advertising costs	8,491	-20.3%	11,522	-16.9%	8,839	4.1%	-	-
Decoration expense	838	-30.8%	1,112	-37.1%	992	18.4%	-	-
Rental costs	18,331	-0.8%	24,549	-1.1%	18,084	-1.3%	-	-
Depreciation and amortization	11,963	6.3%	16,454	6.1%	11,981	0.2%	-	-
Water, electricity and heating expenses	11,407	5.9%	14,349	6.3%	10,618	-6.9%	-	-
Others	29,969	-0.2%	40,686	-0.7%	32,126	7.2%	-	-
Operating income	4,675	-16.7%	10,408	-14.3%	4,839	3.5%	10,070	-3.2%
Non-operating income	1,083	-8.8%	1,536	-6.6%	901	-16.8%	-	-
Non-operating expenses	1,827	-15.2%	2,426	-14.3%	1,730	-5.3%	-	-
Ordinary income	3,931	-15.3%	9,518	-13.1%	4,010	2.0%	9,000	-5.4%
Extraordinary gains	-	-	0	-100.0%	3,050	-	-	-
Extraordinary losses	1,790	11.5%	11,228	167.0%	2,512	40.3%	-	-
Net income	886	-50.9%	-3,244	-	1,937	118.5%	1,800	-

2) Non-operating income or expenses

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015	
		Y-o-y		Y-o-y		Y-o-y
Non-operating income	1,083	-8.8%	1,536	-6.6%	901	-16.8%
Interest income	215	-8.1%	283	-9.5%	188	-12.5%
Others	868	62.8%	1,253	41.9%	712	-17.9%
Non-operating expenses	1,827	-15.2%	2,426	-14.3%	1,730	-5.3%
Interest expenses	1,697	-14.6%	2,230	-14.3%	1,380	-18.7%
Others	129	-20.6%	196	-12.8%	350	169.7%

3) Extraordinary gains or losses

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015	
		Y-o-y		Y-o-y		Y-o-y
Extraordinary gains	-	-	0	-100.0%	3,050	-
Gain on sales of fixed assets	-	-	0	-100.0%	3,049	-
Extraordinary losses	1,790	11.5%	11,228	167.0%	2,512	40.3%
Loss on disposal of property and equipment	1,140	34.0%	1,348	0.9%	832	-27.0%
Impairment loss on fixed assets	335	-55.6%	9,557	233.1%	1,360	305.9%
Lease contract cancellation expenses	268	-	-	-	-	-
Others	46	-	322	-	319	580.5%

(2) Sales breakdown

1) Sales growth

	3rd Q ended Nov. 2014	3rd Q ended Nov. 2015								FY ending Feb. 2016 (Forecast)
		1st Quarter (Mar. to May)	2nd Quarter (Jun.-Aug.)	1st Half	September	October	November	3rd Quarter (Sep.-Nov.)	Nine Months to November	
Y-o-y change in existing store sales (Adjustment for the day of the week)	-3.4%	1.5%	2.3%	1.9%	2.6%	1.8%	-1.1%	1.1%	1.6%	0.4%
Clothing	-7.1%	-0.7%	-1.6%	-1.1%	3.0%	5.8%	-5.5%	0.6%	-0.6%	
Household goods	-5.5%	-6.1%	-0.1%	-2.9%	-0.8%	-0.9%	-4.0%	-2.0%	-2.6%	
Foods	-2.1%	3.6%	3.6%	3.6%	3.3%	1.6%	0.6%	1.8%	3.0%	
Y-o-y change in existing store sales (Non-adjustment for the day of the week)	-3.4%	1.1%	2.7%	1.9%	1.7%	2.7%	-1.2%	1.0%	1.6%	
Number of customers counted	-3.8%	-0.6%	-0.6%	-0.6%	-3.1%	-0.8%	-3.4%	-2.5%	-1.2%	
Average spending per customer	0.3%	1.8%	3.4%	2.6%	5.1%	3.7%	2.4%	3.7%	3.0%	
Y-o-y change in all store sales	-4.0%	0.3%	3.9%	2.1%	3.5%	4.8%	0.3%	2.8%	2.4%	
Clothing	-7.8%	-3.1%	-1.4%	-2.2%	1.7%	7.3%	-4.7%	1.0%	-1.2%	
Household goods	-6.0%	-7.6%	0.7%	-3.3%	-2.2%	0.9%	-2.0%	-1.2%	-2.6%	
Foods	-2.8%	2.9%	5.9%	4.4%	5.1%	5.2%	2.0%	4.1%	4.3%	

2) Sales by product category

(millions of yen)

	3rd Q ended Nov. 2014			FY ended Feb. 2015			3rd Q ended Nov. 2015		
	Y-o-y	Share		Y-o-y	Share		Y-o-y	Share	
Clothing	74,076	-7.8%	14.5%	99,975	-8.0%	14.2%	73,205	-1.2%	14.0%
Women's clothing	20,543	-8.6%	4.0%	27,103	-8.6%	3.8%	20,368	-0.9%	3.9%
Children's clothing	9,669	-9.5%	1.9%	12,948	-9.6%	1.8%	9,375	-3.0%	1.8%
Men's clothing	13,596	-3.6%	2.7%	18,898	-5.2%	2.7%	13,748	1.1%	2.6%
Shoes, bags and accessories	11,757	-10.5%	2.3%	15,758	-9.3%	2.2%	12,007	2.1%	2.3%
Underwear	18,510	-7.3%	3.6%	25,266	-7.7%	3.6%	17,705	-4.3%	3.4%
Household goods	77,104	-6.0%	15.1%	109,246	-5.6%	15.5%	75,064	-2.6%	14.4%
Household goods	12,328	-19.3%	2.4%	16,689	-20.6%	2.4%	11,720	-4.9%	2.2%
General merchandises	64,775	-3.0%	12.7%	92,556	-2.3%	13.1%	63,343	-2.2%	12.1%
Foods	351,095	-2.8%	68.7%	484,962	-2.3%	68.7%	366,213	4.3%	70.0%
Fresh foods	206,534	-2.0%	40.4%	286,898	-1.7%	40.7%	217,784	5.4%	41.6%
Processed foods	144,561	-3.9%	28.3%	198,064	-3.2%	28.1%	148,429	2.7%	28.4%
Commodity supply	479	73.8%	0.1%	679	107.2%	0.1%	636	32.8%	0.1%
Others	8,185	-3.5%	1.6%	10,905	-3.8%	1.5%	7,970	-2.6%	1.5%
Total	510,941	-4.0%	100.0%	705,770	-3.6%	100.0%	523,089	2.4%	100.0%

3) Sales by store type

(millions of yen)

	3rd Q ended Nov. 2014			FY ended Feb. 2015			3rd Q ended Nov. 2015		
	Y-o-y	Share		Y-o-y	Share		Y-o-y	Share	
Apita type	333,079	-3.5%	65.4%	462,024	-3.1%	65.6%	341,580	2.6%	65.5%
Piago type	168,785	-4.9%	33.1%	231,601	-4.4%	32.9%	172,614	2.3%	33.1%
U Home type	7,650	-5.0%	1.5%	10,195	-5.9%	1.4%	7,400	-3.3%	1.4%
Total	509,516	-4.0%	100.0%	703,821	-3.6%	100.0%	521,594	2.4%	100.0%

Note. Y-o-y change in existing store sales for the 3rd Quarter ended November 2015 by store type are below:

Apita type: +1.6%, Piago type: +1.7%, U Home type: +0.3%

(3) Gross profit ratio

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
		Change		Change		Change		Change
Clothing	37.7%	-1.2%	36.7%	-0.8%	37.4%	-0.3%		
Household goods	28.0%	+0.2%	27.8%	+0.1%	27.7%	-0.3%		
Foods	20.5%	+0.2%	20.5%	±0.0%	20.3%	-0.2%		
Total	24.1%	-0.1%	23.9%	-0.2%	23.8%	-0.3%	23.7%	-0.2%

(4) Openings and closures of stores

	Store name	Location	Retail space (Directly operated)	Date of open or close
Openings	Raspa Ootagawa (Piago Ootagawa): new store	Aichi prefecture	13,900 m ² (5,000 m ²)	March 20, 2015
	Raspa Hakusan (Piago Hakusan): new store	Ishikawa prefecture	7,260 m ² (2,200 m ²)	April 24, 2015
	U Home Shinshiro: new store	Aichi prefecture	2,900 m ² (2,900 m ²)	April 25, 2015
	Piago Isezaki: rebuilding store	Kanagawa prefecture	3,100 m ² (3,100 m ²)	July 3, 2015
	Piago Moriyama: renovation store	Aichi prefecture	4,900 m ² (3,400 m ²)	July 17, 2015
	Piago Hekinan: rebuilding store	Aichi prefecture	5,000 m ² (4,100 m ²)	July 31, 2015
	Apita Iwata: rebuilding store	Shizuoka prefecture	22,300 m ² (10,300 m ²)	November 21, 2015
	Apita Iwakura: rebuilding store	Aichi prefecture	17,000 m ² (9,300 m ²)	December 4, 2015
Closures	U Home Mattou	Ishikawa prefecture	6,000 m ² (6,000 m ²)	May 10, 2015
	Piago Matsubara	Shiga prefecture	3,100 m ² (3,000 m ²)	October 18, 2015
	Apita Hiyoshi	Kanagawa prefecture	12,800 m ² (8,200 m ²)	November 29, 2015
	Apita Ishige	Ibaraki prefecture	14,100 m ² (9,600 m ²)	December 6, 2015
	Apita Moriya	Ibaraki prefecture	11,000 m ² (8,600 m ²)	Mid-February, 2016
	Piago Shimizutakahashi	Shizuoka prefecture	9,500 m ² (5,400 m ²)	Mid-February, 2016

General merchandise stores operation: UNY (HK) CO., LIMITED

Business results (Non-consolidated basis)

(millions of yen)

	3rd Q ended Aug. 2014		FY ended Nov. 2014		3rd Q ended Aug. 2015		FY ending Nov. 2015 (Forecast)		FY ending Nov. 2015 (Previous forecast)
		Y-o-y		Y-o-y		Y-o-y		Y-o-y	
Operating revenue	13,315	2.5%	19,090	8.2%	16,243	22.0%	21,710	13.7%	21,429
Net sales	13,260	2.5%	19,010	8.2%	16,168	21.9%	21,611	13.7%	21,334
Y-o-y change in existing store sales	-10.3%	-	-9.4%	-	5.0%	-	4.1%	-	4.0%
Operating income	187	-44.5%	102	-70.9%	436	132.9%	452	343.1%	297
Ordinary income	230	-43.7%	237	-52.5%	514	122.7%	531	124.1%	419
Net income	131	-61.5%	200	-52.8%	428	224.8%	444	122.0%	350

Note. Y-o-y change in existing store sales of UNY (HK) is based on the local currency.

General merchandise stores operation: 99 ICHIBA Co., Ltd.

Business results (Non-consolidated basis)

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
		Change		Change		Change		Change
Operating revenue	9,599	16.5%	12,873	16.0%	10,890	13.5%	15,005	16.6%
Y-o-y change in existing store sales	0.2%	-	-0.9%	-	2.1%	-	2.7%	-
Operating income	-188	-	-304	-	-121	-	-166	-
Ordinary income	-190	-	-305	-	-120	-	-166	-
Net income	254	-	40	-	-477	-	-410	-

Convenience stores operatings: Circle K Sunkus Co., Ltd.

(1) Business results (Consolidated basis)

1) Business results

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
		Y-o-y		Y-o-y		Y-o-y		Y-o-y
Total store sales	715,798	-1.1%	943,649	-0.7%	717,077	0.2%	951,030	0.8%
Non-consolidated	703,229	3.3%	928,201	3.7%	708,778	0.8%	939,970	1.3%
Consolidated subsidiaries	12,569	-70.7%	15,447	-72.1%	8,298	-34.0%	11,060	-28.4%
Operating revenue	113,308	-0.5%	148,110	-0.3%	114,651	1.2%	150,700	1.7%
Franchise commission from franchised stores	79,790	-1.6%	103,776	-1.5%	78,912	-1.1%	-	-
Real estate rental income	3,349	-6.8%	4,418	-7.1%	3,071	-8.3%	-	-
Net sales of Company-owned stores	24,950	3.7%	33,021	4.7%	27,422	9.9%	-	-
Other revenues	5,219	1.2%	6,893	0.9%	5,245	0.5%	-	-
Operating gross profit	94,160	-1.4%	122,656	-1.3%	93,525	-0.7%	123,440	0.6%
SG & A expenses	85,375	0.1%	113,547	0.2%	85,378	0.0%	115,440	1.7%
Personnel expenses	14,569	1.1%	19,183	0.6%	14,534	-0.2%	-	-
Advertising and sales promotion expenses	5,085	-13.1%	6,191	-11.9%	4,697	-7.6%	-	-
Rental Costs	35,836	3.8%	47,891	3.6%	36,474	1.8%	-	-
Equipment leasing expenses	1,793	-44.3%	2,208	-43.9%	956	-46.7%	-	-
Depreciation and amortization	11,743	-1.4%	16,006	-0.4%	11,972	2.0%	-	-
Others	16,347	6.1%	22,065	5.0%	16,743	2.4%	-	-
Operating income	8,785	-13.6%	9,109	-16.8%	8,146	-7.3%	8,000	-12.2%
Non-operating income	769	10.0%	1,187	-22.6%	981	27.7%	-	-
Non-operating expenses	1,016	5.4%	1,479	11.2%	1,097	8.0%	-	-
Ordinary income	8,538	-13.7%	8,817	-21.0%	8,031	-5.9%	7,870	-10.7%
Extraordinary gains	1,320	-4.8%	1,368	-2.5%	289	-78.1%	-	-
Extraordinary losses	4,939	-16.5%	5,425	-5.1%	6,828	38.2%	-	-
Net income	3,968	21.1%	3,492	-17.5%	30	-99.2%	60	-98.3%

2) Non-operating income or expenses

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015	
		Y-o-y		Y-o-y		Y-o-y
Non-operating income	769	10.0%	1,187	-22.6%	981	27.7%
Interest income	480	17.3%	636	14.6%	468	-2.5%
Dividend income	57	305.2%	175	-71.6%	149	158.1%
Compensation income	186	-15.6%	283	3.4%	295	58.8%
Others	44	-19.0%	92	6.0%	68	53.3%
Non-operating expenses	1,016	5.4%	1,479	11.2%	1,097	8.0%
Interest expenses	298	4.3%	394	1.0%	346	16.2%
Lease contract cancellation expenses	469	-5.6%	649	1.8%	536	14.1%
Allowance for doubtful debts	196	50.1%	364	88.2%	156	-20.2%
Others	51	4.4%	69	-34.6%	57	12.3%

3) Extraordinary gains or losses

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015	
		Y-o-y		Y-o-y		Y-o-y
Extraordinary gains	1,320	-4.8%	1,368	-2.5%	289	-78.1%
Gain on sales of property and equipment	21	-83.1%	44	-67.0%	32	50.2%
Gain on sales of investment in securities	123	-71.5%	123	-71.5%	238	92.6%
Others	1,175	42.2%	1,200	44.0%	18	-98.4%
Extraordinary losses	4,939	-16.5%	5,425	-5.1%	6,828	38.2%
Loss on disposal of property and equipment	136	202.6%	155	26.9%	94	-31.2%
Impairment loss on fixed assets	4,777	8.9%	5,220	12.7%	6,726	40.8%
Others	25	-32.4%	50	-66.1%	8	-67.6%

4) Consolidated subsidiaries

(millions of yen)

	3rd Q ended Nov. 2015				FY ending Feb. 2016(Forecast)			
	Area franchiser	ZERO NETWORKS	Retail Staff	Elimination	Area franchiser	ZERO NETWORKS	Retail Staff	Elimination
Total store sales	8,298	-	-	-	11,056	-	-	-
Operating revenue	2,180	2,715	563	-691	2,870	3,590	763	-914
Operating income	-44	516	43	-21	-85	602	64	-11

Note. Consolidated subsidiaries of Circle K Sunkus Co., Ltd. at each fiscal year-end are listed below:

3rd Q ended Nov. 2014 and FY ended Feb. 2015: 4 companies:

Sunkus Nishi-Shikokuk Co., Ltd., Sunkus Hokuria Co., Ltd., ZERO NETWORKS Co., Ltd. and Retail Staff Co., Ltd.

3rd Q ended Nov. 2015 and FY ending Feb. 2016: 3 companies:

Sunkus Nishi-Shikokuk Co., Ltd., ZERO NETWORKS Co., Ltd. and Retail Staff Co., Ltd.

(2) Business results (Non-consolidated basis)

1) Business results

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
		Y-o-y		Y-o-y		Y-o-y		Y-o-y
Total store sales	703,229	3.3%	928,201	3.7%	708,778	0.8%	939,970	1.3%
Y-o-y change in existing store sales	-4.1%	-	-3.6%	-	-1.1%	-	-0.6%	-
Average Product markup	27.12%	+0.14%	26.95%	+0.06%	26.83%	-0.29%	26.85%	-0.10%
Operating revenue	107,768	4.4%	141,030	4.7%	109,883	2.0%	144,390	2.4%
Franchise commission from franchised stores	78,739	2.2%	102,506	2.3%	78,267	-0.6%	-	-
Real estate rental income	3,334	-5.8%	4,403	-6.0%	3,068	-8.0%	-	-
Net sales of Company-owned stores	20,536	16.6%	27,307	18.0%	23,351	13.7%	-	-
Other revenues	5,158	1.8%	6,813	1.5%	5,195	0.7%	-	-
Operating gross profit	92,206	2.6%	120,254	2.6%	92,052	-0.2%	121,550	1.1%
SG & A expenses	83,798	4.7%	111,624	4.9%	84,399	0.7%	114,120	2.2%
Personnel expenses	13,953	6.2%	18,413	5.8%	14,081	0.9%	-	-
Advertising and sales promotion expenses	4,818	-7.7%	5,851	-5.5%	4,501	-6.6%	-	-
Rental Costs	35,364	8.2%	47,312	8.0%	36,152	2.2%	-	-
Equipment leasing expenses	1,761	-41.5%	2,169	-41.0%	947	-46.2%	-	-
Depreciation and amortization	11,543	2.8%	15,758	3.9%	11,838	2.6%	-	-
Others	16,356	10.6%	22,119	9.8%	16,877	3.2%	-	-
Operating income	8,408	-14.4%	8,629	-19.8%	7,653	-9.0%	7,430	-13.9%
Non-operating income	765	12.6%	1,179	-21.7%	979	27.9%	-	-
Non-operating expenses	1,402	-17.3%	1,876	-21.9%	1,161	-17.2%	-	-
Ordinary income	7,771	-11.7%	7,932	-19.5%	7,471	-3.9%	7,230	-8.9%
Extraordinary gains	1,316	-3.0%	1,362	-0.7%	286	-78.2%	-	-
Extraordinary losses	4,618	-14.7%	5,096	-1.0%	6,791	47.0%	-	-
Net income	3,612	50.4%	3,073	-5.7%	-294	-	-310	-

2) Non-operating income or expenses

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015	
		Y-o-y		Y-o-y		Y-o-y
Non-operating income	765	12.6%	1,179	-21.7%	979	27.9%
Interest income	478	17.8%	632	14.9%	465	-2.6%
Dividend income	67	180.1%	184	-70.5%	159	134.9%
Compensation income	178	-13.5%	275	6.9%	287	61.0%
Others	40	-5.1%	85	21.6%	66	63.7%
Non-operating expenses	1,402	-17.3%	1,876	-21.9%	1,161	-17.2%
Interest expenses	256	16.6%	341	12.6%	319	24.8%
Lease contract cancellation expenses	486	2.3%	670	9.4%	550	13.2%
Allowance for doubtful debts	610	-36.3%	798	-41.6%	235	-61.5%
Others	49	16.1%	65	-45.1%	56	13.2%

3) Extraordinary gains or losses

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015	
		Y-o-y		Y-o-y		Y-o-y
Extraordinary gains	1,316	-3.0%	1,362	-0.7%	286	-78.2%
Gain on sales of property and equipment	18	-85.7%	38	-71.0%	30	66.4%
Gain on sales of investment in securities	123	-71.5%	123	-71.5%	238	92.6%
Others	1,175	47.6%	1,200	49.2%	18	-98.4%
Extraordinary losses	4,618	-14.7%	5,096	-1.0%	6,791	47.0%
Loss on disposal of property and equipment	116	179.0%	134	57.0%	82	-29.2%
Impairment loss on fixed assets	4,493	17.7%	4,928	21.4%	6,668	48.4%
Others	8	-92.4%	33	-82.3%	40	374.0%

(3) Sales breakdown (Non-consolidated basis)

1) Average daily sales per store, average customers per day and average purchases per customer

		3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
			Change		Change		Change		Change
Existing stores	Average daily sales per store (thousands of yen)	440	-19	436	-16	434	-5		
	Average customers per day	737	-34	720	-33	711	-22		
	Average purchase per customer (yen)	596	+2	604	+5	610	+12		
Y-o-y change in existing store sales		-4.1%	-	-3.6%	-	-1.1%	-	-0.6%	-
Average daily sales at total chain stores (thousands of yen)		436	-22	432	-19	433	-3		
Average daily sales at newly opened stores (thousands of yen)		402	+12	401	+18	464	+62		

Note: "Existing stores" refers to those stores that had been opened more than a year and had a full month's operation during the current year as well as in the corresponding month of the previous year.

2) Sales growth by geographic region

	3rd Q ended Nov. 2014	FY ended Feb. 2015	3rd Q ended Nov. 2015
Hokkaido	-3.9%	-3.3%	-0.2%
Tohoku	-5.0%	-4.6%	-0.7%
Kanto	-4.6%	-4.0%	-2.2%
Koshinetsu	-5.5%	-4.9%	-0.4%
Hokuriku	-4.3%	-3.9%	-1.1%
Tokai	-3.9%	-3.3%	-0.9%
Kansai	-3.3%	-3.3%	-0.9%
Chugoku	-2.4%	-2.0%	0.6%
Shikoku	-7.5%	-7.4%	-1.3%
Kyushu	-2.8%	-1.1%	3.6%
Total	-4.1%	-3.6%	-1.1%

(4) Product breakdown (Non-consolidated basis)

Y-o-y sales, share of sales and average markup by product category

	3rd Q ended Nov. 2014				FY ended Feb. 2015				3rd Q ended Nov. 2015				FY ending Feb. 2016 (Forecast)			
	Y-o-y sales		Average markup		Y-o-y sales		Average markup		Y-o-y sales		Average markup		Y-o-y sales		Average markup	
		Share		Change		Share		Change		Share		Change		Share		Change
Fast foods	8.5%	18.4%	37.6%	+0.1%	8.0%	18.3%	37.7%	+0.2%	0.7%	18.3%	36.5%	-1.0%				
Perishable foods	3.1%	11.6%	34.3%	-0.2%	2.9%	11.4%	34.2%	-0.2%	-0.6%	11.4%	34.1%	-0.3%				
Processed foods	3.0%	26.3%	38.6%	-0.2%	3.2%	26.1%	38.3%	-0.3%	1.2%	26.4%	38.8%	+0.3%				
Alcoholic beverages	5.9%	5.0%			6.0%	5.0%			2.1%	5.1%						
Non-food items	0.9%	35.3%	14.8%	-0.1%	0.9%	35.2%	14.8%	+0.0%	-2.7%	34.1%	14.9%	+0.1%				
Tobacco	1.8%	29.2%			1.8%	29.1%			-2.0%	28.4%						
Services	6.5%	8.5%	5.6%	+0.5%	10.9%	9.0%	5.6%	+0.5%	15.3%	9.7%	5.4%	-0.2%				
Total	3.3%	100.0%	27.12%	+0.14%	3.7%	100.0%	26.95%	+0.06%	0.8%	100.0%	26.83%	-0.29%	1.3%	26.85%	-0.10%	

Note: Product categories are as follows:

Fast foods: rice dishes, sandwiches, noodles, delicatessen snacks, countertop fast foods
 Perishable foods: chilled beverages, pastries, bread, desserts, fresh packaged foods
 Processed foods: soft drinks, alcoholic beverages, snacks, instant noodles, ice-cream, dried foods

Non-food items: tobacco, magazines, newspapers, general merchandise, cosmetics
 Services: tickets, *Gift Card* used for prepaid cards, stamps, parcel delivery

(5) Profile of stores

1) Stores by prefecture (Group total including Area franchisees)

(stores)

		3rd Q ended Nov. 2014			FY ended Feb. 2015			3rd Q ended Nov. 2015			
			Circle K	Sunkus		Circle K	Sunkus		Circle K	Sunkus	Change
Hokkaido		188	-	188	192	-	192	186	-	186	-6
Tohoku	Aomori	192	96	96	192	95	97	188	97	91	-4
	Iwate	87	8	79	88	7	81	89	7	82	+1
	Akita	98	12	86	98	12	86	95	11	84	-3
	Miyagi	119	-	119	118	-	118	119	-	119	+1
	Yamagata	51	-	51	51	-	51	50	-	50	-1
	Fukushima	19	-	19	18	-	18	18	-	18	±0
	Total	566	116	450	565	114	451	559	115	444	-6
Kanto	Gunma	18	-	18	18	-	18	18	-	18	±0
	Tochigi	53	-	53	54	-	54	53	-	53	-1
	Ibaraki	53	-	53	51	-	51	50	-	50	-1
	Chiba	141	-	141	142	-	142	141	-	141	-1
	Saitama	198	-	198	201	-	201	194	-	194	-7
	Tokyo	634	64	570	638	64	574	626	63	563	-12
	Kanagawa	353	119	234	352	120	232	349	122	227	-3
	Total	1,450	183	1,267	1,456	184	1,272	1,431	185	1,246	-25
Koshinetsu	Nigata	111	111	-	111	111	-	110	110	-	-1
	Nagano	145	145	-	146	146	-	143	143	-	-3
	Total	256	256	-	257	257	-	253	253	-	-4
Hokuriku	Fukui	66	46	20	68	48	20	67	47	20	-1
	Toyama	84	83	1	84	83	1	84	83	1	±0
	Ishikawa	216	135	81	217	137	80	216	140	76	-1
	Total	366	264	102	369	268	101	367	270	97	-2
Tokai	Shizuoka	374	335	39	373	335	38	374	340	34	+1
	Gifu	299	292	7	303	297	6	296	293	3	-7
	Aichi	1,188	1,052	136	1,204	1,082	122	1,196	1,093	103	-8
	Mie	274	251	23	275	258	17	279	271	8	+4
	Total	2,135	1,930	205	2,155	1,972	183	2,145	1,997	148	-10
Kansai	Shiga	52	52	-	52	52	-	51	51	-	-1
	Kyoto	114	114	-	115	115	-	112	112	-	-3
	Hyogo	172	62	110	171	62	109	168	66	102	-3
	Osaka	405	184	221	402	184	218	400	190	210	-2
	Nara	51	51	-	51	51	-	51	51	-	±0
	Wakayama	30	30	-	31	31	-	31	31	-	±0
	Total	824	493	331	822	495	327	813	501	312	-9
Chugoku	Okayama	138	97	41	140	100	40	136	99	37	-4
	Hiroshima	49	5	44	51	5	46	56	5	51	+5
	Total	187	102	85	191	105	86	192	104	88	+1
Shikokuk	Kagawa	33	17	16	31	16	15	30	30	-	-1
	Tokushima	29	15	14	29	15	14	28	28	-	-1
	Ehime	156	102	54	155	102	53	155	155	-	±0
	Kochi	58	32	26	58	32	26	59	59	-	+1
	Total	276	166	110	273	165	108	272	272	-	-1
Kyushu	Fukuoka	71	-	71	73	-	73	73	-	73	±0
	Total	71	-	71	73	-	73	73	-	73	±0
Total		6,319	3,510	2,809	6,353	3,560	2,793	6,291	3,697	2,594	-62
Number of prefectures		36	26	30	36	26	30	36	26	26	-

2) Opened and closed stores by agreement type (Non-consolidated basis)

(stores)

		3rd Q ended Nov. 2014	FY ended Feb. 2015	3rd Q ended Nov. 2015
Type A	Openings	18	25	12
	Closures	47	66	61
Type E	Openings	0	0	0
	Closures	14	17	16
Type C	Openings	222	319	186
	Closures	79	113	127
Company-owned store	Openings	3	3	0
	Closures	34	43	51
Total	Openings	243	347	198
	Closures	174	239	255

Note: Type E agreement specific to Sunkus were abolished in September 2004 with some exceptions such as relocations.

3) Number of stores by agreement type (Non-consolidated basis)

(stores)

		3rd Q ended Nov. 2014			FY ended Feb. 2015			3rd Q ended Nov. 2015		
		Circle K	Sunkus		Circle K	Sunkus		Circle K	Sunkus	
Type A		940	668	272	914	648	266	817	588	229
	Change	-29	-45	+16	-55	-65	+10	-97	-60	-37
Type E		280	4	276	276	5	271	246	7	239
	Change	-19	+2	-21	-23	+3	-26	-30	+2	-32
Type C		4,529	2,558	1,971	4,592	2,621	1,971	4,650	2,719	1,931
	Change	+345	+131	+214	+408	+194	+214	+58	+98	-40
Company-owned store	Company-operated stores	199	106	93	205	114	91	217	131	86
	Consigned stores	3	3	0	3	3	0	3	3	0
		202	109	93	208	117	91	220	134	86
	Change	+42	+8	+34	+48	+16	+32	+12	+17	-5
Total		5,951	3,339	2,612	5,990	3,391	2,599	5,933	3,448	2,485
	Change	+339	+96	+243	+378	+148	+230	-57	+57	-114

4) Number of stores by store condition (Non-consolidated basis)

(stores)

		3rd Q ended Nov. 2014			FY ended Feb. 2015			3rd Q ended Nov. 2015		
		Circle K	Sunkus		Circle K	Sunkus		Circle K	Sunkus	
24-hour stores		5,846	3,284	2,562	5,881	3,335	2,546	5,817	3,384	2,433
	Share	98.2%	98.4%	98.1%	98.2%	98.3%	98.0%	98.0%	98.1%	97.9%
Stores handling alcoholic beverages		5,876	3,294	2,582	5,898	3,334	2,564	5,858	3,399	2,459
	Share	98.7%	98.7%	98.9%	98.5%	98.3%	98.7%	98.7%	98.6%	99.0%
Stores handling tobacco		5,772	3,299	2,473	5,791	3,339	2,452	5,762	3,407	2,355
	Share	97.0%	98.8%	94.7%	96.7%	98.5%	94.3%	97.1%	98.8%	94.8%
Stores with parking lot		4,832	3,116	1,716	4,864	3,160	1,704	4,822	3,189	1,633
	Share	81.2%	93.3%	65.7%	81.2%	93.2%	65.6%	81.3%	92.5%	65.7%
Total		5,951	3,339	2,612	5,990	3,391	2,599	5,933	3,448	2,485

(6) Profile of Circle K Sunkus Group

1) Total store sales

(millions of yen)

		3rd Q ended Nov. 2014	FY ended Feb. 2015	3rd Q ended Nov. 2015
The company	Total store sales	703,229	928,201	708,778
	Y-o-y	3.3%	3.7%	0.8%
	Y-o-y change in existing store sales	-4.1%	-3.6%	-1.1%
Area FC	Total store sales	47,092	60,724	41,157
	Y-o-y	-51.2%	-50.9%	-12.6%
	Y-o-y change in existing store sales	-3.5%	-2.8%	-2.1%
Group total	Total store sales	750,321	988,926	749,936
	Y-o-y	-3.5%	-2.9%	-0.1%
	Y-o-y change in existing store sales	-4.1%	-3.6%	-1.1%

2) Area franchisers

		Equity interest	The number of sores				Total store sales (millions of yen)	
			Opened	Closed	Net increase (decrease)	Stores at term-end		Y-o-y
1	Sunkus Nishi-Shikoku Co., Ltd.	100% Consolidated	0	5	-5	74	8,298	-6.2%
2	Circle K Shikoku Co., Ltd.	100% Non-consolidated	6	0	+6	175	20,273	-3.1%
3	Sunkus Tokai Co., Ltd.	19.0%	5	11	-6	109	12,585	-2.6%
Total			11	16	-5	358	41,157	-12.6%

Specialty stores operations: SAGAMI Co., Ltd.

Business results (Consolidated basis)

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
		Y-o-y		Y-o-y		Y-o-y		Y-o-y
Operating revenue	15,600	-5.2%	21,620	-5.3%	15,094	-3.2%	21,150	-2.2%
Operating income	-901	-	-470	-	-621	-	30	-
Ordinary income	-883	-	-457	-	-586	-	82	-
Net income	-1,196	-	-897	-	-840	-	-308	-
Y-o-y change in existing store sales	-4.8%	-	-4.3%	-	0.6%	-	2.2%	-

Specialty stores operations: PALEMO CO., LTD.

Business results (Non-consolidated basis)

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
		Y-o-y		Y-o-y		Y-o-y		Y-o-y
Operating revenue	24,057	-12.2%	31,875	-12.2%	20,821	-13.5%	27,300	-14.4%
Operating income	-619	-	-679	-	97	-	140	-
Ordinary income	-564	-	-619	-	132	-	170	-
Net income	-898	-	-2,146	-	-148	-	-300	-
Y-o-y change in existing store sales	-10.3%	-	-9.1%	-	-4.4%	-	-4.8%	-

Specialty stores operations: MOLIE Co., Ltd.

Business results (Non-consolidated basis)

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
		Y-o-y		Y-o-y		Y-o-y		Y-o-y
Operating revenue	3,548	-8.6%	4,809	-9.8%	3,238	-8.7%	4,583	-4.7%
Operating income	-12	-	10	-94.6%	-87	-	-44	-
Ordinary income	-10	-	13	-92.6%	-88	-	-45	-
Net income	-32	-	-17	-	-113	-	-106	-
Y-o-y change in existing store sales	-6.9%	-	-8.8%	-	-6.8%	-	-3.2%	-

Financial services operations: UCS CO., LTD.

Business results (Non-consolidated basis)

(millions of yen)

	3rd Q ended Nov. 2014		FY ended Feb. 2015		3rd Q ended Nov. 2015		FY ending Feb. 2016 (Forecast)	
		Y-o-y		Y-o-y		Y-o-y		Y-o-y
Operating revenue	13,713	7.0%	18,428	6.6%	14,561	6.2%	19,650	6.6%
Operating income	2,523	1.2%	3,663	10.1%	2,830	12.2%	3,900	6.5%
Ordinary income	2,524	1.2%	3,664	10.1%	2,832	12.2%	3,900	6.4%
Net income	1,452	-4.5%	2,150	5.7%	1,715	18.1%	2,350	9.3%
Number of members of UCS card (ten thousand)	305.1	-2.4%	303.0	-2.6%	302.7	-0.8%	302.0	-0.3%
Number of members of UNICO card (ten thousands)	93.8	-	113.3	189.0%	149.5	59.4%	159.0	40.3%

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