September 24, 2026

To the Press

GMO Internet, Inc.

GMO Commerce, Inc.

GMO Internet and GMO Commerce to Reorganize and Integrate Marketing Businesses

～Accelerating the Build-Out of an AI-Era Marketing Platform Centered on GMO Commerce～

GMO Internet, Inc. (Tokyo Stock Exchange Prime Market, Securities Code: 4784; Representative Director, President and CEO: Tadashi Ito; hereinafter "GMO Internet"), a member of the GMO Internet Group, and GMO Commerce, Inc. (Tokyo Stock Exchange Growth Market, Securities Code: 410A; Representative Director and President: Masato Yamana; hereinafter "GMO Commerce") announced that their respective Boards of Directors, at meetings held on Thursday, September 24, 2026, resolved to reorganize and integrate their marketing businesses.

Under this reorganization and integration, GMO Internet will acquire shares of GMO Commerce (representing 65.96% of total issued shares[*1]) held by GMO Internet Group, Inc. (Tokyo Stock Exchange Prime Market, Securities Code: 9449; hereinafter "GMO Internet Group").

In addition, GMO Commerce will acquire all shares of GMO NIKKO, Inc. (hereinafter "GMO NIKKO") and GMO Insight, Inc. (hereinafter "GMO Insight") held by GMO Internet, transitioning to a marketing business structure centered on GMO Commerce. The new structure is scheduled to commence on October 1, 2026.

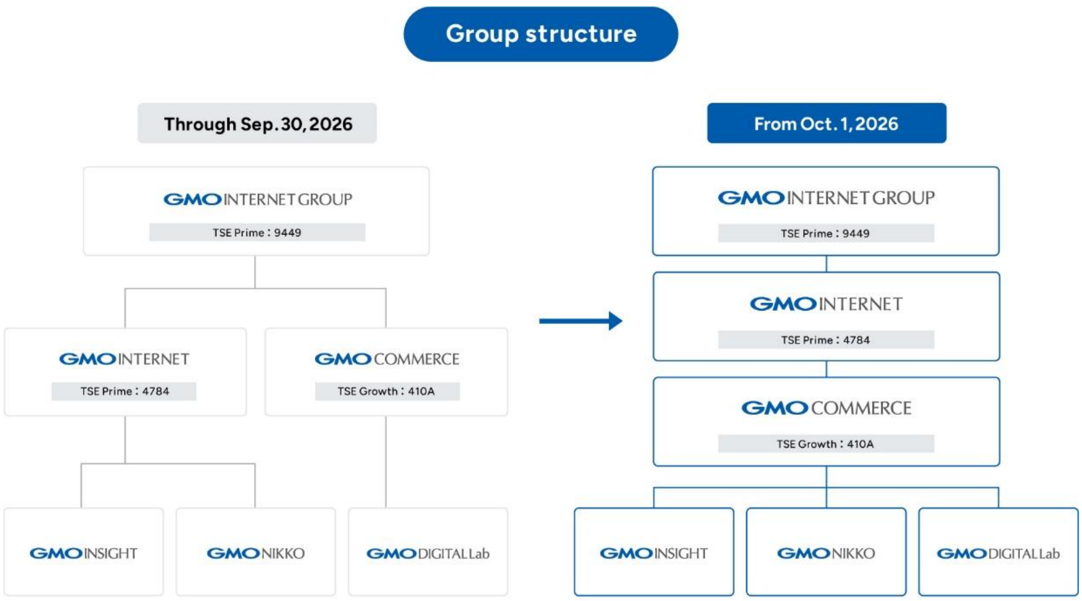
GMO Internet will advance mutual customer referrals and cross-selling between GMO Commerce's store-based customer base and the customer base of GMO Internet's internet infrastructure business, further accelerating the pursuit of synergies between the two areas while promoting the rollout of recurring-revenue products in its advertising business.

GMO Commerce regards this reorganization and integration as a turning point for growth. As the evolution of AI reshapes the structure of the marketing market, GMO Commerce will bring together the customer touchpoints, data, and AI expertise held by GMO NIKKO, GMO Insight, and GMO Digital Lab (*2) across sales promotion, advertising, and media, thereby strengthening its overall capabilities in the marketing field. As a listed company, GMO Commerce will expand its business domain across the entire marketing field and work to maximize corporate value.

(*1) Percentage excluding treasury shares.

(*2) GMO Digital Lab joined GMO Commerce's group of consolidated companies effective July 1, 2026, and is not subject to any capital transfer under this reorganization.

[Overview of the Reorganization and Integration]

<table>
<tr><td>Scheme</td><td>① GMO Internet will acquire shares of GMO Commerce (65.96% of total issued shares) held by GMO Internet Group
② GMO Commerce will acquire all shares of GMO NIKKO and GMO Insight held by GMO Internet</td></tr>
<tr><td>Effective Date</td><td>October 1, 2026 (planned)</td></tr>
<tr><td colspan="2">

*GMO Commerce will maintain its listing on the Growth Market of the Tokyo Stock Exchange following this reorganization and integration.</td></tr>
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[Purpose and Background]

■ Strengthening Overall Capabilities in the Marketing Field

Since succeeding its business from GMO Internet Group in January 2025 under a new organizational structure, GMO Internet has pursued a basic strategy built around two core areas

— the “Internet Infrastructure Business” and the “Internet Advertising & Media Business” — comprising four pillars: (1) stable and continuous growth of existing businesses, (2) pursuit of synergies between the two business areas, (3) development of new businesses (GMO GPU Cloud), and (4) building partnerships through M&A. This reorganization and integration, which welcomes GMO Commerce as a new partner, advances both (2) and (4) simultaneously.

Within the “Internet Advertising & Media Business,” GMO NIKKO has handled integrated marketing while GMO Insight has handled media marketing, together developing marketing businesses on the internet. GMO Commerce, meanwhile, provides an optimal platform for solving stores’ marketing challenges, built on ongoing customer touchpoints with 18,191 stores (as of the end of June 2026) across retail, food service, and other service industries. In July 2026, GMO Commerce consolidated GMO Digital Lab, expanding its store marketing support capabilities from customer acquisition through post-purchase repeat-visit promotion.

This reorganization and integration combines the respective strengths of GMO NIKKO, GMO Insight, and GMO Digital Lab around GMO Commerce as its core, strengthening overall capabilities in the marketing field and aiming to maximize the value delivered to customers. This will establish a structure capable of providing seamless, end-to-end support — from awareness generation through advertising and customer acquisition, to store visits and purchases, and ongoing customer communication thereafter.

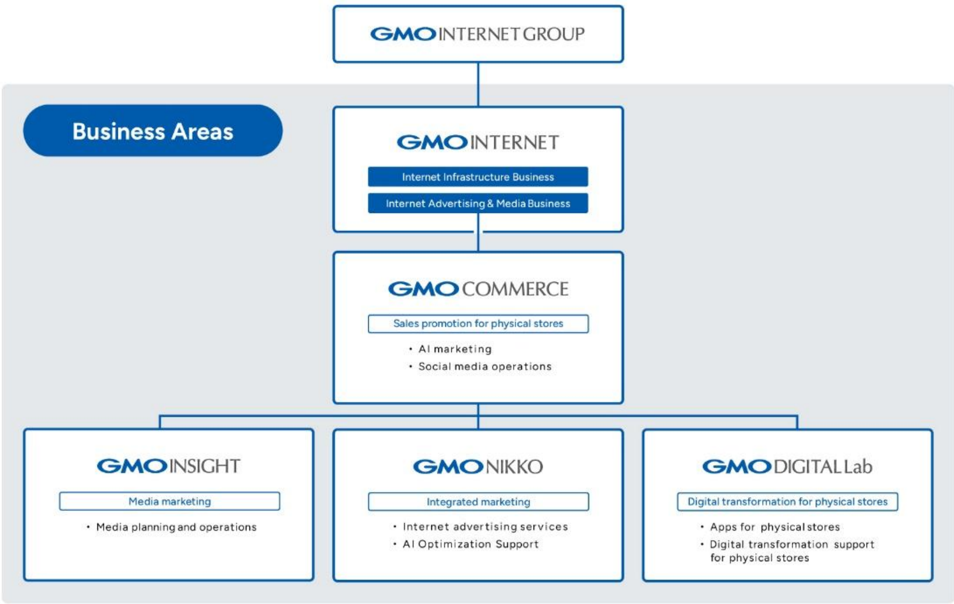
■ Market Changes Driven by AI

The changes brought about by AI extend across every facet of marketing, from the diversification of consumers’ information touchpoints to the practical work of ad operations. Consumers are increasingly obtaining information not only from search results but also from AI-generated answers, and a shift toward “agentic commerce” — in which AI agents carry out purchases on consumers’ behalf — is expected going forward.

Meanwhile, as AI increasingly enhances the delivery optimization of advertising platforms, the role required of ad operations is also changing. Support in more upstream areas — such as strategy formulation, designing data to feed AI, and using AI to streamline and accelerate creative production — is becoming increasingly important.

This reorganization and integration is also aimed at building a structure that responds to these market changes.

[Strengths and Business Areas of Each Company]



■ GMO Internet | A Solid Customer Base in the Internet Infrastructure Business

GMO Internet has a customer base of over 13 million accounts (as of the end of June 2026) in its internet infrastructure business, which spans domains, cloud/rental servers, and internet connectivity. Its strengths lie in ongoing touchpoints that support customers' business foundations and its initiatives in cutting-edge AI fields, including GMO GPU Cloud.

■ GMO Commerce | Customer Touchpoints with Stores

Starting from social media operation support, GMO Commerce's strength lies in marketing support that leverages AI and data. It maintains ongoing customer touchpoints with 18,191 stores across retail, food service, and other service industries through dedicated teams providing hands-on operational support. By turning 3 billion proprietary messages sent annually into knowledge assets, it has built an execution platform designed to be selected by AI systems, comprehensively providing everything from measure implementation to effect measurement and improvement.

■ GMO NIKKO | Advertising and Marketing Support

GMO NIKKO's strength is integrated marketing support that combines strategy formulation, creative production, and ad operations for expanding customer awareness and acquiring new customers. It also develops and offers proprietary services, including AI Optimization Support, aiming to stay a step ahead in marketing support for the AI era.

■ GMO Insight | Media Touchpoints with Consumers

GMO Insight has direct content touchpoints with consumers, centered on the women's lifestyle media "michill byGMO," which is used by 7.3 million people per month. Its strength lies in holding data on consumers' interests and browsing behavior on media — data that differs from advertising delivery data and customer touchpoints at stores.

■ GMO Digital Lab | Digital transformation for physical stores

GMO Digital Lab supports the resolution of management challenges and business growth for stores and local governments through digital transformation. It handles everything from building customer touchpoints and repeat-visit promotion mechanisms via store apps to digital marketing such as SEO (search engine optimization), supporting store customer acquisition in the AI era.

[Synergies Expected from the Reorganization and Integration]

① Shift to Cross-Selling and Recurring Revenue

We will pursue cross-selling to existing customers of GMO Commerce and GMO NIKKO, aiming to improve retention rates and expand revenue opportunities. We will also leverage GMO NIKKO's expertise in AI Optimization Support to accelerate initiatives in new proposal areas, such as AIO (AI-optimization) for stores, while combining flow-type revenue from the advertising agency business with monthly subscription services to shift toward recurring-type revenue.

② Synergies with the Internet Infrastructure Business

We will advance the provision of AI-driven marketing products to the customer base of over 13 million accounts held by GMO Internet's internet infrastructure business. We will also mutually leverage the customer bases across the GMO Internet Group of consolidated companies, aiming to expand revenue opportunities through cross-selling. Following this reorganization and integration, we will also expand the customer base of the GMO Internet Group of consolidated companies, building a solid business foundation for walking alongside our customers over the long term.

③ Development of New Businesses

We will combine store behavioral data, ad operation data, and media viewing data held by each company to drive the creation of new marketing services and businesses.

[Future Outlook]

Once the new structure is launched, we will leverage the customer touchpoints held by each of GMO Commerce, GMO NIKKO, GMO Insight, and GMO Digital Lab to accurately provide the services each individual customer needs. As an AI-era marketing platform, we will be able to seamlessly provide everything from store customer-acquisition support to advertising and media, creating a cycle in which data accumulates with each measure implemented, advancing AI learning and improving the precision and results of the next measure.

Furthermore, through collaboration with the customer base held by GMO Internet's internet infrastructure business, we will maximize the overall strength of the GMO Internet Group of consolidated companies and walk alongside our customers' business growth.

[About GMO Internet, Inc.]

GMO Internet, Inc. is a comprehensive internet company that operates an internet infrastructure business — spanning domains, cloud/rental servers, and internet connectivity — as well as an internet advertising and media business. Under its corporate catchphrase "Internet for Everyone," GMO Internet contributes to realizing a safe and secure internet society and to creating value that builds a new future with AI, as a company supporting social infrastructure, and delivers "smiles" and "excitement" to everyone it touches.

[About GMO Commerce, Inc.]

GMO Commerce, Inc., under its mission to become “the marketing platform for every store,” provides marketing support that leverages AI and data to companies with physical stores in retail, food service, and other service industries. As a group of consolidated companies, it provides an integrated offering spanning LINE official account and Instagram operation support, customer data platforms, AI Optimization Support, and store apps/mobile gift certificates, walking alongside stores to improve customer experience and drive growth.

[Media Contact]

●GMO Internet, Inc.
President's Office, Public Relations: Fukui
TEL : +81-3-5728-7900
Contact Form:
https://internet.gmo/contact/press/

●GMO Commerce, Inc
Public Relations:Yoshida
TEL : +81-3-3770-7030
Contact Form:
https://www.gmo-c.jp/official-inquiry/

●GMO Internet Group, Inc.
Group Public Relations Department
PR Team
Kawaberi
TEL:+81-3-5456-2695
Contact Form:
https://group.gmo/contact/press-inquiries/

[GMO Internet, Inc.] (URL: https://internet.gmo/)

Company Name	GMO Internet, Inc. (Tokyo Stock Exchange Prime Market, Securities Code: 4784)
Location	Cerulean Tower, 26-1 Sakuragaoka-cho, Shibuya-ku, Tokyo
Representative	Representative Director, President and CEO: Tadashi Ito
Business Description	■Internet Infrastructure Business Domain Registration and Sales (Registrar) Business Cloud/Rental Server (Hosting) Business Internet Connection (Provider) Business ■Internet Advertising & Media Business
Capital	¥10,691,600,000

[GMO Commerce, Inc.] (URL: https://www.gmo-c.jp/)

Company Name	GMO Commerce, Inc. (Tokyo Stock Exchange Growth Market, Securities Code: 410A)
Location	Shibuya Fukuras 13F, 1-2-3 Dogenzaka, Shibuya-ku, Tokyo
Representative	Representative Director and President: Masato Yamana
Business	Development and provision of marketing platforms and other services that

Description	support the improvement of stores’ customer experience and digital transformation
Capital	¥1,103,280,000

[GMO Internet Group, Inc.] (URL: https://group.gmo/)

Company Name	GMO Internet Group, Inc. (Tokyo Stock Exchange Prime Market, Securities Code: 9449)
Location	Cerulean Tower, 26-1 Sakuragaoka-cho, Shibuya-ku, Tokyo
Representative	Representative Director and Group Representative: Masatoshi Kumagai
Business Description	Holding company (Group management functions) ■Group Business Areas Internet Infrastructure Business Internet Security Business Internet Advertising & Media Business Internet Finance Business Crypto Assets (Cryptocurrency) Business
Capital	¥5,000,000,000