

## **Summary of Q&A Session at Financial Results Briefing for the First Quarter of the Fiscal Year Ending December 31, 2025**

The following is a summary of questions received from participants at the financial results briefing held on May 15, 2025, and answered by GMO Internet President and CEO, Mr. Ito. Some questions and answers have been added or supplemented by the IR department.

### **About GMO GPU Cloud**

Q1 Please tell us how the situation at GMO GPU Cloud compares to the company's current assumptions.

A1 So far, we are progressing as expected against our initial goals. One proof of this  
(ITO) is that we are making good progress in acquiring customers to the point where we can make additional investments.

Since the service has only been in operation for about six months, we will continue to listen to our customers' opinions and strive to build an even better service.

Q2 Regarding GMO GPU Cloud, do you see any change in customer needs due to the economic downturn?

A2 At this point, we do not believe that we are being affected by the economic  
(ITO) downturn or tariffs. The use of generative AI is advancing in the same way that the Internet did when it became widespread, and we have heard that companies are continuing to consider the use of GPU clouds, so we believe that there will be high demand.

Therefore, at this point, we do not expect any change in needs due to the economic downturn or other factors.

Q3 Please tell us specifically about GMO GPU Cloud, what industries and for what purposes you are being approached.

A3 We have received many inquiries mainly from customers in the manufacturing  
(ITO) industry. Some of these customers include companies such as AI Robot Association, Turing, and NEC, which were mentioned in the earnings presentation. For example, robots and GPUs are very compatible, and we believe that their use in the robotics field will further advance in the future. In addition, the automotive industry has been investing in GPUs, and we believe that companies such as Turing, which are developing automatic driving systems, will also make further use of GPUs in the future.

In addition, we have developed this service with the aim of providing high-performance services that are acceptable to customers in the manufacturing industry, especially those who require high computing power, and we recognize that we are meeting such needs. We would like to further focus our efforts on these fields in the future.

## About GMO Internet Group

Q4            GMO Internet Group has been strengthening its security services and recently released ". Your Company's Name Domain" release. Please tell us about these details and the synergy between GMO Internet, Inc. and your company.

**\*Reference: Press release regarding ". Your Company's Name Domain". (Japanese)**

**<https://group.gmo/news/article/9499/>**

A4  
(ITO)            As mentioned on page 12 of the financial results presentation, we provide a vulnerability assessment service called "Net de Diagnosis" to our domain and rental server customers.

Our customers come from a wide variety of fields, but we also have many small and midsize businesses, or SMBs. We often hear from these customers that they do not know where to start when they see security issues in the news.

If such customers sign up for our domain name and server rental services, we provide them with a service that allows them to diagnose their security status at the touch of a button. We believe that we have created an opportunity for many people to take security measures.

We are a company that supports the Internet infrastructure of domains and rental servers, so I think there is great value in being able to provide safe and secure Internet access to many people. We believe that this is a service that is unique to our group and will be a differentiating factor.

Also, regarding ". Your Company's Name Domain", we mainly offer domain services through onamae.com, so we are familiar with customers who need domains. We will provide appropriate guidance to customers who would benefit from obtaining ". Your Company's Name Domain" and encourage them to do so.

This is the first time in 10 years that the service has been available for registration, and since it is uncertain when the next opportunity for registration will be available, we would like to deliver the service to our customers after properly informing them about it.

## **About M&A**

- Q5 What is your policy regarding future fellowship (M&A)?
- A5 In our existing business, we are looking to expand our market share by working with companies that have solid recurring revenue, such as Domain, and other businesses that are in close proximity to us.

In strengthening recurring revenue products, we believe that companies that have high product quality but are having difficulty selling them, or companies that have products that can be effectively sold when bundled with our products, would be good candidates.

With regard to reorganization within the group, we have just acquired shares in 11 Z.com overseas infrastructure companies. GMO Internet Group, Inc. is currently in the process of becoming a holding company and exploring a new organizational structure, and we have just started this January with a new organizational structure. We would like to continue to work together with companies that can lead to growth and efficiency for both parties through organizational restructuring within the group and by working together.

## **About Shareholder Returns**

- Q6 You mentioned that the dividend payout ratio for the 2025-2026 is 100%, what are your thoughts on the dividend payout ratio after that?
- A6 Currently, the basic dividend payout ratio is 65%, and at this point, we are considering maintaining a dividend payout ratio of 65% for 2027 and beyond.
- (ITO)