

To Whom It May Concern,

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Insource Co., Ltd.

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(Code number: 6200, Prime Market of the
Tokyo Stock Exchange)

KPI (Key Performance Indicators) Progress Report for January 2026

- No. of On-Site Training conducted (94.2% YoY), No. of Open Seminars attendees (111.2% YoY)

No. of DX-related Open Seminars attendees (126.1% YoY), No. of “Leaf” active users (119.4% YoY)

Insource Co., Ltd. today announced KPI (Key Performance Indicators) Progress Report for January 2026.

1. On-Site Training Business

The number of On-Site Training conducted was 1,501 times (94.2% YoY). Of this, the number of trainings conducted for private sectors increased to 1,002 (98.2% YoY), and those for DX-related was 173 times (126.3% YoY). In January, level-specific training for managers and business skills training such as document creation and planning skills performed well. Training to learn business automation utilizing generative AI and prompt engineering methods has continued to grow.

■Monthly no. of On-Site Training conducted

(Unit: time)

	FY24		FY25			
	August	September	October	November	December	January
No. of conducted trainings	1,775	2,437	2,721	2,588	1,906	1,501
(YoY)	(113.2%)	(126.6%)	(112.9%)	(103.4%)	(105.2%)	(94.2%)
Private sector*	1,016	1,540	1,621	1,635	1,299	1,002
(YoY)	(105.6%)	(127.7%)	(106.7%)	(103.9%)	(108.4%)	(98.2%)
Public sector and government agencies*	759	897	1,100	953	607	449
(YoY)	(125.2%)	(124.8%)	(123.5%)	(102.6%)	(98.9%)	(87.7%)
DX-related trainings*	169	204	227	248	204	173
(YoY)	(113.4%)	(125.9%)	(106.1%)	(101.6%)	(142.7%)	(126.3%)
Conducted online	339	427	432	472	411	313
(Composition ratio)	(19.1%)	(17.5%)	(15.9%)	(18.2%)	(21.6%)	(20.9%)

* Consolidated subsidiaries are included.

2. Open Seminars Business

The number of attendees at Open Seminars was 10,701 (111.2% YoY) and the number of attendees for DX-related training was 1,849 (126.1% YoY). Since last December, there has been an increase in applications for the new service, “Guaranteed Seminar*,” which we began pre-operating. This service focuses on face-to-face training for HR, general affairs, finance, and train-the-trainer programs. We will continue to expand new training and promote sales while working to increase the number of attendees by broadening learning opportunities. (*For some courses designated by our company, this service promises to hold the training as long as there is at least one attendee, in exchange for a higher price than regular training.)

■Monthly no. of attendees at Open Seminars

(Unit: attendee)

	FY24		FY25			
	August	September	October	November	December	January
No. of attendees	13,196	14,922	14,016	13,495	13,066	10,701
(YoY)	(105.0%)	(115.3%)	(103.0%)	(95.5%)	(104.2%)	(111.2%)
DX-related trainings*	1,918	2,031	1,904	2,013	2,301	1,849
(YoY)	(124.5%)	(141.8%)	(134.2%)	(130.8%)	(132.9%)	(126.1%)
Conducted online	8,349	9,162	7,718	7,946	8,425	6,723
(Composition ratio)	(63.3%)	(61.4%)	(55.1%)	(58.9%)	(64.5%)	(62.8%)

*Consolidated subsidiaries are included.

3. Client Base

The number of WEBinsource acquisitions in January was 224, having achieved a monthly target of 200. The number of new WEBinsource registrations directly contributes to sales growth in Open Seminars. The acquisition of one WEBinsource registration in FY24 had the effect of increasing revenue by 192 thousand yen in the Open Seminars Business.

■WEBinsource: Total no. of subscribers (organizations)

(Unit: organization)

	FY24		FY25			
	August	September	October	November	December	January
No. of new subscribers*	188	199	201	175	258	224
No. of accumulated subscribers	26,794	26,993	27,194	27,369	27,627	27,851
(YoY * No. of new subscribers)	(91.3%)	(103.1%)	(99.0%)	(89.3%)	(140.2%)	(107.2%)
(Progress rate: %)	(98.3%)	(106.6%)	(8.4%)	(15.7%)	(26.4%)	(35.8%)

*Calculation takes place at the end of every month.

4. IT Services Business

The number of paid subscribers for Leaf (HR support system) reached 877 organizations (111.3% YoY) and the number of its active users increased to 5,239,292 (119.4% YoY). The total number of orders delivered for Stress Check Support Service was 90. In January, we conducted customization development for organizations aiming to start using “Leaf” from the new fiscal year in April.

(1) “Leaf (HR support system)”: No. of paid subscribers (organizations), no. of active users, no. of customization

(Unit: organization)

	FY24		FY25			
	End of Aug.	End of Sep.	End of Oct.	End of Nov.	End of Dec.	End of Jan.
No. of paid subscribers (organizations)	845	860	865	869	873	877
(YoY)	(115.8%)	(116.1%)	(114.6%)	(113.4%)	(112.2%)	(111.3%)
No. of active users	4,991,973	5,018,374	5,137,677	5,150,908	5,206,421	5,239,292
(YoY)	(124.1%)	(123.3%)	(122.2%)	(120.3%)	(119.9%)	(119.4%)
No. of customizations* (since the beginning of FY)	106	133	2	8	17	23
(YoY)	(98.1%)	(100.0%)	(40.0%)	(72.7%)	(100.0%)	(115.0%)

*The number of customizations shows the number of organizations that add their own functions when implementing Leaf.

(2) Stress Check Support Service: No. of orders delivered (organizations)

(Unit: organization)

	FY24		FY25			
	August	September	October	November	December	
No. of orders delivered* (by month)	4	69	20	37	132	90
No. of orders delivered* (since the beginning of FY)	566	708	20	57	189	279
(YoY)	(112.5%)	(122.1%)	(83.3%)	(91.9%)	(116.0%)	(105.7%)

*Note that the actual sales will be recorded after clients' inspection.

*This service has the highest number of deliveries in March every year.

5. e-Learning/video Business

The number of contents sold (outright purchases) was 211 (142.6% YoY), and the number of video production and customization projects was 45 (121.6% YoY). The number of viewers in the video rental plan was 1,635 (174.7% YoY). In January, outright purchase and rental plans were strong. The themes included harassment prevention standards such as compliance and risk management, as well as those reflecting current trends like personnel evaluation, DX, generative AI, and Microsoft 365 utilization, which received applications from a wide range of attendees.

■e-Learning/videos: No. of video contents sold, no. of video productions, no. of rental viewers, no. of STUDIO subscription users (IDs) (Unit: ID) (Unit: Content)

	FY24		FY25			
	August	September	October	November	December	January
No. of video contents sold (Outright purchase)* by month (YoY)	129 (127.7%)	273 (140.0%)	166 (105.7%)	154 (83.7%)	188 (98.9%)	211 (142.6%)
No. of video production and customization projects* by month (YoY)	44 (118.9%)	39 (169.6%)	45 (642.9%)	55 (239.1%)	87 (669.2%)	45 (121.6%)
No. of rental viewers* by month (YoY)	1,905 (104.6%)	2,075 (143.3%)	1,970 (147.3%)	1,776 (139.2%)	2,753 (181.8%)	1,635 (174.7%)
STUDIO (e-Learning) users* by month (MoM)	105,093 (-5,500)	111,133 (+6,040)	111,347 (+214)	111,682 (+335)	111,633 (-49)	105,435 (-6,198)

*Calculation takes place at the end of every month.

6. Proposed Amount

The proposed amount is 3,078 million yen. With an annual target of 50 billion yen, we will continue our sales activities.

■Proposed Amount (unit: million yen)

	FY25	
	1Q	January
Proposed amount	8,019	3,078
(Target progress rate)	(16.0%)	(22.2%)
Since the beginning of FY	8,019	11,097

*Currently disclosed proposed amounts do not include some products, such as “Leaf.”

7. Inquiries

In January, we received 539 inquiries, having achieved a monthly target of 500. In FY24, each acquisition of one inquiry had the effect of increasing revenue by 364 thousand yen. We are continuing to make improvements to the website and implement direct marketing measures.

■No. of Inquiries

	FY24		FY25			
	August	September	October	November	December	January
No. of inquiries	466	519	545	438	526	539
YoY	(90.1%)	(114.1%)	(100.2%)	(87.1%)	(122.0%)	(96.3%)
Since the beginning of FY	5,667	6,186	545	983	1,509	2,048

*Inquiries refer to those that lead to increased sales, such as business negotiations, visits, proposals, quotations, sending materials, and system demonstrations, which are received via Web inquiry forms, e-mails, and telephone calls. The calculation method has been changed since 1Q FY23.

8. Contents Development

The number of contents developed totaled 30 for training (On-Site Training). 19 videos and e-Learnings were also released. In January, we focused on developing communication training aimed at organizational revitalization and preventing employee turnover. Due to increasingly severe labor shortages and the diversification of the workforce, it has become a challenge to enhance employees' sense of belonging, which is essential for keeping them engaged in the organization. From this, we developed five training programs mainly aimed at managers to learn respectful communication and cultivating a healthy workplace culture.

■No. of new contents developed

(Unit: titles)

	FY24		FY25			
	August	September	October	November	December	January
No. of new contents for On-Site Training	30	30	30	30	30	30
since the beginning of FY	331	361	30	60	90	120
(Progress rate: %)	(91.9%)	(100.3%)	(8.3%)	(16.7%)	(25.0%)	(33.3%)
Of which, no. of Digital skills	7	6	8	8	8	2
since the beginning of FY	116	122	8	16	24	26
No. of new contents for e-Learning	21	19	20	20	19	19
since the beginning of FY	257	276	20	40	59	78
(Progress rate: %)	(102.8%)	(110.4%)	(8.0%)	(16.0%)	(23.6%)	(31.2%)

*Figures above are calculated at the end of each month.

(For reference) KPI (Key Performance Indicators) and Performance Correspondence Chart

Performance	Related KPIs
Monthly performance	<ul style="list-style-type: none"> Number of On-Site Training conducted (Composition ratio of sales in FY24: 47.7%) Number of Attendees at Open Seminars (Same as above: 24.7%) Number of Organizations and Users of Leaf (Same as above: 13.3%)
1 month to 3months	<ul style="list-style-type: none"> Number of inquiries <p>Negotiations, visits, proposals, quotes, sending materials, confirming prices, purchasing or adding Smart Packs, and requests for system demonstrations are all factors in the client's decision to use our services. This is a leading performance indicator for three months from the current month.</p>

In several months to 6 months	<ul style="list-style-type: none"> ▪ Proposed amount <p>The proposed amount serves as an indicator of sales activity to generate future revenue and a leading performance indicator for three to six months or more ahead.</p> <ul style="list-style-type: none"> ▪ Number of registered WEBinsource clients <p>WEBinsource is our entry level product for new customers, who have the potential to purchase a variety of our services. The number of new registrations is an indicator of sales activity and a leading performance indicator for SMBs for the next few months to six months.</p>
In 6 months to 2 or 3 years	<ul style="list-style-type: none"> ▪ Number of new contents developed <p>An increase in the number of content developments, such as training, e-Learning, and videos, will contribute to long-term growth of the company. It does not realize significant sales immediately, but rather contributes to business performance six months to two or three years afterwards.</p>

Based on our classification of private-sector client segments by the size of their employees, we conduct sales activities.

- Large Enterprise (LE): Large and Second-tier companies (2,000 or more employees)
- Medium Market Business (MM): Medium-sized companies (300-1,999 employees)
- Small Medium Business (SMB): Medium-sized companies and Small and growing companies (Less than 299 employees)

We will keep expanding our businesses in order to adapt to changes in the social environment by offering a wide variety of services such as online training, IT and e-Learning and videos.

◇For Excel data of latest KPI, download from <https://www.insource.co.jp/en/ir/insmthdata.html>

※Available from February 2, 2026 at 20:00 JST

*Microsoft, Excel, Word, Windows, Teams is a trademark or registered trademark of Microsoft Corporation in the United States and other countries.

The preliminary figures above may differ from the upcoming financial statements. This information is created with the utmost caution, but we do not fully guarantee its accuracy.

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