

DATA FILE 2018年3月期 第2四半期 速報

株式会社 三城ホールディングス
(東証第1部)

PARIS MIKI HOLDINGS Inc.

The First Section of the TSE, Code No. 7455

<http://www.paris-miki.com>

Consolidated, For The Fiscal Year Ended March 31, 2018
From April 1, 2017 to September 30, 2017

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本資料に記載されている見通し・業績見込みは、作成時現在における将来の予測であり、潜在的リスクや不確定要素を含んだものです。
よって将来の見通し・業績見込みについてその内容を確約するものではありません。
実際の業績はさまざまな要素により、これらの業績見込みと大きく異なる結果となりうることをご承知おきください。

Notice: Regarding Forward-Looking Statements: Statements in this report include forward-looking statements about future performance of the Company, which are based on assumptions and uncertainties. Please be reminded that actual results may differ significantly from those discussed in the forward-looking statements.

1. 決算概要 /Financial Summary

●連結 /Consolidated

(百万円 / Millions of Yen, %)

| | 2017年3月期 第2四半期 | | | 2018年3月期 第2四半期 | | | 2018年3月期(予想) | | |
|---|--------------------|-------|-------|--------------------|--------------|--------------|------------------------------|-------|-------|
| | 2016/4/1~2016/9/30 | | | 2017/4/1~2017/9/30 | | | 2017/4/1~2018/3/31(forecast) | | |
| | 金額 | 売上比 | 前年比 | 金額 | 売上比 | 前年比 | 金額 | 売上比 | 前年比 |
| | vs. sales | YoY | | vs. sales | YoY | | vs. sales | YoY | |
| | mIn. Yen | % | % | mIn. Yen | % | % | mIn. Yen | % | % |
| 売上高 | 25,994 | 100.0 | 92.2 | 26,398 | 100.0 | 101.6 | 51,822 | 100.0 | 103.9 |
| Sales | | | | | | | | | |
| 売上原価 | 8,400 | 32.3 | 92.8 | 8,698 | 32.9 | 103.6 | 17,405 | 33.6 | 107.5 |
| Cost of Sales | | | | | | | | | |
| 売上総利益 | 17,594 | 67.7 | 92.0 | 17,700 | 67.1 | 100.6 | 34,417 | 66.4 | 102.2 |
| Gross Profit | | | | | | | | | |
| 販管費 | 17,293 | 66.5 | 96.6 | 16,903 | 64.0 | 97.7 | 34,321 | 66.2 | 100.7 |
| SG&A Expenses | | | | | | | | | |
| 営業利益 | 301 | 1.2 | 24.5 | 796 | 3.0 | 264.6 | 95 | 0.2 | — |
| Operating Income | | | | | | | | | |
| 営業外収益 | 249 | 1.0 | 260.0 | 164 | 0.6 | 66.0 | | | |
| Non-operating Income | | | | | | | | | |
| 営業外費用 | 383 | 1.5 | 231.8 | 55 | 0.2 | 14.5 | | | |
| Non-operating Expenses | | | | | | | | | |
| 経常利益 | 167 | 0.7 | 14.4 | 905 | 3.4 | 541.4 | 128 | 0.2 | — |
| Recurring Income | | | | | | | | | |
| 特別利益 | 2 | 0.0 | 7.6 | 0 | 0.0 | 14.6 | | | |
| Extraordinary Income | | | | | | | | | |
| 特別損失 | 50 | 0.2 | 96.0 | 91 | 0.3 | 182.2 | | | |
| Extraordinary Loss | | | | | | | | | |
| 親会社株主に帰属する四半期純利益 | △ 157 | △ 0.6 | — | 558 | 2.1 | — | △ 438 | △ 0.8 | — |
| Profit attributable to owners of parent | | | | | | | | | |
| 1株当たり四半期純利益 | △ 3.05 | — | — | 10.90 | — | — | △ 8.52 | | |
| Earnings per Share | | | | | | | | | |

2. 販売費及び一般管理費の増減内訳 /Selling, General and Administrative Expenses

●連結 /Consolidated

(百万円 / Millions of Yen, %)

| | 2017年3月期 第2四半期 | 2018年3月期 第2四半期 | | |
|--------------------------|--------------------|--------------------|------------------|--------------|
| | 2016/4/1~2016/9/30 | 2017/4/1~2017/9/30 | | 前年比 YoY |
| | 金額 (A) | 金額 (B) | 増減額 (B) - (A) | |
| 販売促進費 | mln. Yen | mln. Yen | mln. Yen | % |
| Sales Promotion Expenses | 1,247 | 1,182 | △ 65 | 94.8 |
| 広告宣伝費 | 368 | 278 | △ 90 | 75.5 |
| Advertising Expenses | | | | |
| 人件費 | 8,449 | 8,419 | △ 29 | 99.6 |
| Wages | | | | |
| 賃借料 | 4,503 | 4,508 | 5 | 100.1 |
| Rent | | | | |
| 他 管理費 | 2,723 | 2,514 | △ 209 | 92.3 |
| Other SG&A Expenses | | | | |
| うち 減価償却費 | 561 | 526 | △ 34 | 93.8 |
| Thereof Depreciation | | | | |
| 合計 | | | | |
| Total | 17,293 | 16,903 | △ 389 | 97.7 |

3. 貸借対照表主要増減 /Major Changes in Balance Sheet

● 連結 /Consolidated

(百万円 / Millions of Yen)

| | | 2016年9月30日現在 As of 2016/9/30 | 2017年9月30日現在 As of 2017/9/30 | 増減額 Variance | 2017年3月31日現在 As of 2017/3/31 | 増減額 Variance |
|----------------|--|---------------------------------|---------------------------------|-----------------|---------------------------------|-----------------|
| | | (A) | (B) | (B) - (A) | (C) | (B) - (C) |
| | | mln. Yen | mln. Yen | mln. Yen | mln. Yen | mln. Yen |
| 資産の部 | Assets | | | | | |
| 流動資産 | Total Current Assets | 33,516 | 33,203 | △ 313 | 33,269 | △ 66 |
| 現金及び預金 | Cash and Deposits | 18,185 | 17,137 | △ 1,047 | 17,408 | △ 270 |
| 売掛金 | Account Receivables | 2,813 | 3,313 | 500 | 2,926 | 386 |
| たな卸資産 | Inventories | 10,988 | 11,617 | 629 | 11,689 | △ 71 |
| その他流動資産 | Other Current Assets | 1,529 | 1,134 | △ 395 | 1,244 | △ 110 |
| 固定資産 | Total Fixed Assets | 15,797 | 14,449 | △ 1,348 | 14,657 | △ 207 |
| 有形固定資産 | Tangible Fixed Assets | 5,334 | 5,259 | △ 74 | 5,308 | △ 48 |
| 無形固定資産 | Intangible Fixed Assets | 1,085 | 868 | △ 217 | 1,028 | △ 159 |
| 投資その他の資産 | Investments and Others | 9,378 | 8,321 | △ 1,056 | 8,320 | 0 |
| 資産 合計 | Total Assets | 49,314 | 47,652 | △ 1,661 | 47,926 | △ 273 |
| 負債の部 | Liabilities | | | | | |
| 流動負債 | Total Current Liabilities | 11,286 | 11,373 | 87 | 11,580 | △ 207 |
| 支払手形及び買掛金 | Notes and Accounts Payable | 1,620 | 1,681 | 60 | 1,820 | △ 139 |
| 未払法人税等 | Accrued Taxes | 283 | 266 | △ 16 | 184 | 82 |
| その他流動負債 | Other Current Liabilities | 9,382 | 9,425 | 42 | 9,575 | △ 150 |
| 固定負債 | Total Long-term Liabilities | 1,224 | 1,284 | 60 | 1,284 | 0 |
| 負債 合計 | Total Liabilities | 12,510 | 12,658 | 147 | 12,865 | △ 207 |
| 純資産の部 | Net Assets | | | | | |
| 株主資本 | Shareholders' Equity | 36,502 | 34,326 | △ 2,176 | 34,423 | △ 96 |
| 資本金 | Common Stock | 5,901 | 5,901 | 0 | 5,901 | 0 |
| 資本剰余金 | Additional Paid-in Capital | 6,829 | 6,829 | 0 | 6,829 | 0 |
| 利益剰余金 | Retained Earnings | 32,174 | 30,240 | △ 1,934 | 30,144 | 96 |
| 自己株式 | Treasury Stock | △ 8,402 | △ 8,644 | △ 241 | △ 8,451 | △ 193 |
| その他の包括利益累計額 | Accumulated Other Comprehensive Income | 20 | 335 | 314 | 312 | 22 |
| その他有価証券評価差額金 | Revaluation Gains of Other Marketable Securities | △ 122 | 182 | 304 | 109 | 72 |
| 為替換算調整勘定 | Foreign Currency Translation Adjustments | 142 | 152 | 10 | 202 | △ 49 |
| 新株予約権 | Subscription Rights To Shares | 44 | 44 | 0 | 44 | 0 |
| 非支配株主持分 | Non-controlling interests | 236 | 288 | 51 | 280 | 7 |
| 純資産 合計 | Total Net Assets | 36,804 | 34,994 | △ 1,809 | 35,060 | △ 66 |
| 負債純資産合計 | Total Liabilities and Net Assets | 49,314 | 47,652 | △ 1,661 | 47,926 | △ 273 |

4. キャッシュ・フローの状況 /Cash Flows

●連結 /Consolidated

(百万円 / Millions of Yen)

| | 2017年3月期第2四半期累計 2016/4/1~2016/9/30 | 2017年3月期 2016/4/1~2017/3/31 | 2018年3月期第2四半期累計 2017/4/1~2017/9/30 |
|--|---------------------------------------|--------------------------------|---------------------------------------|
| | 金額 mln. Yen | 金額 mln. Yen | 金額 mln. Yen |
| 営業活動によるキャッシュ・フロー Cash Flows from Operating Activities | 536 | △ 42 | 1,156 |
| 投資活動によるキャッシュ・フロー Cash Flows from Investing Activities | △ 360 | △ 290 | △ 270 |
| 財務活動によるキャッシュ・フロー Cash Flows from Financing Activities | △ 437 | △ 896 | △ 1,177 |
| 現金及び現金同等物 期末残高 Cash and Cash Equivalents at End of Year | 12,475 | 11,617 | 11,334 |

5. 設備投資額の推移 /Capital Expenditures

●連結 /Consolidated

(百万円 / Millions of Yen)

| Fiscal Years Ended | 2016.3 | 2017.3 | 2017.9 | 2018.3 (予想) (Forecast) |
|-------------------------------|--------|--------|---------------|---------------------------|
| 設備投資額 Capital Expenditures | 1,028 | 1,576 | 593 | 1,736 |

6. 売上高伸長率(国内全店小売ベース)/Sales Growth (Retail Sales of All Domestic Stores Basis)

| | | (%) | | | | | | | |
|-----------|-----------------------|----------|----------|----------|----------|----------|----------|---------|--|
| | | 第1 | 第2 | 上半期 | 第3 | 第4 | 下半期 | 通期 | |
| | | 1st Qtr. | 2nd Qtr. | 1st Half | 3rd Qtr. | 4th Qtr. | 2nd Half | Total | |
| 2015-2016 | 全店 All Stores | -1.4 | -0.8 | -1.1 | 0.6 | -5.1 | -2.2 | -1.6 | |
| | 既存店 Comparable Stores | (-0.5) | (0.2) | (-0.1) | (1.9) | (-4.2) | (-1.1) | (-0.6) | |
| 2016-2017 | 全店 All Stores | -7.9 | -5.6 | -6.7 | -5.7 | -4.0 | -4.9 | -5.9 | |
| | 既存店 Comparable Stores | (-7.6) | (-5.7) | (-6.6) | (-5.2) | (-4.2) | (-4.7) | (-5.7) | |
| 2017-2018 | 全店 All Stores | 3.6 | 1.3 | 2.4 | | | | 4.2 * | |
| | 既存店 Comparable Stores | (3.0) | (1.8) | (2.4) | | | | (4.9) * | |

* 予想 (forecast)

(注)

1. 既存店()内は稼動24ヶ月超店舗で算出した数値
退店分は調整済み
 2. のれん自立店舗の売上高を含めて算出
(Notes)
1. Comparable Stores for more than 24 months.
2. Including franchised stores' sales.

7. 品目別売上高(国内全店小売ベース)/Sales Breakdown by Product (Retail Sales of All Domestic Stores Basis)

(百万円 / Millions of Yen, %)

| | 2017年3月期 第2四半期 2016/4/1~2016/9/30 | | | 2018年3月期 第2四半期 2017/4/1~2017/9/30 | | |
|--|--------------------------------------|------------------|------------|--------------------------------------|------------------|------------|
| | 金額 | 構成比 vs. total | 前年比 YoY | 金額 | 構成比 vs. total | 前年比 YoY |
| フレーム Frames | mIn. Yen 7,007 | % 30.1 | % 93.2 | mIn. Yen 7,130 | % 29.9 | % 101.8 |
| レンズ Lenses | 10,036 | 43.0 | 90.3 | 10,152 | 42.5 | 101.2 |
| サングラス Sunglasses | 1,616 | 6.9 | 103.2 | 1,766 | 7.4 | 109.3 |
| コンタクトレンズ及び備品 Contact Lenses & Care Solution | 480 | 2.1 | 90.1 | 436 | 1.8 | 90.7 |
| 補聴器 Hearing Aids | 2,829 | 12.1 | 96.2 | 3,054 | 12.8 | 107.9 |
| その他 Other | 1,352 | 5.8 | 101.7 | 1,339 | 5.6 | 99.1 |
| 合計 Total | 23,322 | 100.0 | 93.3 | 23,879 | 100.0 | 102.4 |

8. 単価、数量伸長率の推移(国内)/Domestic Unit Price and Unit Growth

期別推移 Fiscal Year

第2四半期推移 2Q

(円 / Yen, %)

| Fiscal Years Ended | | 2016.3 | 2017.3 | 2016.3 2Q | 2017.3 2Q | 2018.3 2Q |
|--|-----------------|--------|--------|-----------|-----------|---------------|
| 組単価 | 全店 | | | | | |
| Average Eyeglass Unit Price | All Stores | 32,304 | 30,307 | 32,589 | 30,616 | 30,758 |
| | 三城 | | | | | |
| | PARIS MIKI Inc. | 30,031 | 28,027 | 30,357 | 28,378 | 28,421 |
| | 金鳳堂 | | | | | |
| | KIMPO-DO Co.Ltd | 93,932 | 95,226 | 92,587 | 94,416 | 98,709 |
| 組数(前年比) | 全店 | | | | | |
| Number of Eyeglasses Unit Sales (YoY) | All Stores | 96.4 | 99.7 | 96.8 | 97.7 | 101.2 |
| | 三城 | | | | | |
| | PARIS MIKI Inc. | 96.2 | 99.8 | 96.4 | 97.9 | 101.3 |
| | 金鳳堂 | | | | | |
| | KIMPO-DO Co.Ltd | 103.2 | 95.0 | 107.3 | 92.3 | 99.3 |
| 総客数(前年比) | 全店 | | | | | |
| Number of Customers Counted (YoY) | All Stores | 98.9 | 98.5 | 99.5 | 98.5 | 99.7 |
| | 三城 | | | | | |
| | PARIS MIKI Inc. | 98.3 | 98.8 | 98.5 | 98.9 | 99.2 |
| | 金鳳堂 | | | | | |
| | KIMPO-DO Co.Ltd | 100.9 | 94.8 | 103.8 | 93.3 | 97.7 |

(注) 1. 組単価、組数は眼鏡1組の数量基準

2. 客数は総客数で算出

(Notes) 1. 'Spending per Eyeglass Unit' and 'Number of Eyeglasses Unit Sales':Eyeglass unit (frame and lenses) basis.

2. 'Number of Customers':The total number of customers.

9. 形態別店舗数の推移(国内)/Number of Stores by Type of Store (Domestic)

| Fiscal Years Ended | 2016.3 | | | | 2017.3 | | | | 2017.9 | | | | (店 / Number of stores) 2018.3予想 (forecast) | |
|--------------------------|--------|-------------|----------|------------|--------|-------------|----------|------------|--------|-------------|----------|------------|---|--|
| | テナント型 | ビルイン型 | 郊外型 | 合計 | テナント型 | ビルイン型 | 郊外型 | 合計 | テナント型 | ビルイン型 | 郊外型 | 合計 | 合計 | |
| | Tenant | In Building | Suburban | Total | Tenant | In Building | Suburban | Total | Tenant | In Building | Suburban | Total | Total | |
| 出店 Opened | 12 | 0 | 0 | 12 | 7 | 5 | 0 | 12 | 8 | 2 | 0 | 10 | 15 | |
| 退店 Closed | 23 | 2 | 11 | 36 | 11 | 4 | 13 | 28 | 16 | 2 | 10 | 28 | 45 | |
| 期末 Total | 317 | 96 | 409 | 822 | 313 | 97 | 396 | 806 | 305 | 97 | 386 | 788 | 776 | |
| 構成比 % to total | 38.6 | 11.7 | 49.7 | 100.0 | 38.8 | 12.1 | 49.1 | 100.0 | 38.7 | 11.8 | 49.5 | 100.0 | | |
| ・三城計 PARIS MIKI Inc. | 294 | 93 | 409 | 796 | 291 | 94 | 396 | 781 | 284 | 94 | 386 | 764 | | |
| 直営店 Original store | 224 | 91 | 409 | 724 | 280 | 78 | 311 | 669 | 274 | 78 | 301 | 653 | | |
| のれん自立店 franchised | 11 | 17 | 87 | 115 | 11 | 16 | 85 | 112 | 10 | 16 | 85 | 111 | | |
| ・金鳳堂計 KIMPO-DO Co.Ltd | 22 | 2 | | 24 | 21 | 2 | | 23 | 20 | 2 | | 22 | | |
| ・グレート計 GREAT Inc. | 1 | 1 | | 2 | 1 | 1 | | 2 | 1 | 1 | | 2 | | |

その他、移動型店舗が16店あります
Additionally, there are 16 shops movement type store.

* のれん自立店舗を含む
* Including franchised stores.

10. 地域別店舗数(国内)/Number of Stores by Region (Domestic)

| Fiscal Years Ended | (店 / Number of stores, %) | | | | 三城直営店 | 三城のれん自立店 | 金鳳堂 | グレート |
|---------------------------|---------------------------|--------|--------|-------|--------------------------------------|--|-----------------|------------|
| | 2016.3 | 2017.3 | 2017.9 | 構成比 | Original store by PARIS MIKI Inc. | Franchised store by PARIS MIKI Inc. | KIMPO-DO Co.Ltd | GREAT Inc. |
| | | | | | % | | | |
| 北海道・東北 Hokkaido・Tohoku | 55 | 55 | 53 | 6.7 | 44 | 8 | 1 | 0 |
| 関東 Kanto | 214 | 214 | 210 | 26.6 | 173 | 19 | 17 | 1 |
| 中部 Chubu | 121 | 119 | 114 | 14.5 | 106 | 5 | 3 | 0 |
| 近畿 Kinki | 225 | 220 | 219 | 27.8 | 188 | 29 | 1 | 1 |
| 中国 Chugoku | 97 | 95 | 93 | 11.8 | 63 | 30 | 0 | 0 |
| 四国 Shikoku | 48 | 45 | 43 | 5.5 | 32 | 11 | 0 | 0 |
| 九州・沖縄 Kyusyu・Okinawa | 62 | 58 | 56 | 7.1 | 47 | 9 | 0 | 0 |
| 合計 Total | * | * | * | 100.0 | 653 | 111 | 22 | 2 |

* のれん自立店舗を含む

* Including franchised stores.

Nov 13, 2017

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11. 地域別店舗数(海外) /Number of Stores by Country Outside of Japan

(店 / Number of stores)

2018年3月期 第2四半期

| 地域 Region | 法人名 Legal Entity | 国(地域) Country (Area) | 増加 Increase | 減少 Decrease | 期末 Total |
|------------------|---------------------------------------|-------------------------------------|----------------|----------------|-------------|
| ヨーロッパ Europe | PARIS MIKI S.A.R.L. | フランス / France | 0 | 0 | 1 |
| | PARIS-MIKI INTERNATIONAL GmbH | ドイツ / Germany | 0 | 0 | 1 |
| | PARIS-MIKI LONDON LTD. | イギリス / U.K. | 0 | 0 | 1 |
| アジア Asia | 巴黎三城光学(中国)有限公司 | 中国 / China | | | |
| | 上海巴黎三城眼鏡有限公司 | 中国 / China | | | |
| | 上海巴黎三城商貿有限公司 | 中国 / China | 0 | 4 | 62 |
| | 上海巴黎三城實業有限公司 | 中国 / China | | | |
| | 上海巴黎三城食品銷售有限公司 | 中国 / China | | | |
| | OPTIQUE PARIS-MIKI (S) PTE. LTD. | シンガポール / Singapore | 0 | 0 | 9 |
| | KIMPO-DO (S) PTE.LTD. | シンガポール / Singapore | 0 | 0 | 1 |
| | OPTIQUE PARIS MIKI (M) SDN BHD | マレーシア / Malaysia | 0 | 0 | 8 |
| | KIMPO-DO (MALAYSIA) SDN BHD | マレーシア / Malaysia | 0 | 0 | 1 |
| | 巴黎三城眼鏡股份有限公司 | 台湾 / Taiwan | 0 | 0 | 1 |
| | PARIS MIKI OPTICAL(THAILAND)CO.,LTD. | タイ / Thailand | 0 | 0 | 6 |
| | DIANE OPTICAL INC. | 韓国 / Korea | 0 | 0 | 49* |
| | PARIS MIKI OPTICAL INTERNATIONAL LTD. | 香港 / Hong Kong | 0 | 0 | 1 |
| | PARIS MIKI VIETNAM CO, LTD. | ベトナム / Vietnam | 0 | 0 | 1 |
| | PARIS MIKI PHILIPPINES INC. | フィリピン / Philippines | 0 | 0 | 1 |
| オセアニア Oceania | PARIS MIKI AUSTRALIA PTY. LTD. | オーストラリア / Australia | 0 | 0 | 5 |
| アメリカ U.S. | MIKI, INC. (SEATTLE BRANCH) | ハワイ州 / Hawaii シアトル / Seattle, WA | 0 | 0 | 1 5 |
| 合計 | Total | | 0 | 4 | 154 |

*フランチャイズ店舗40店を含む

* Including 40 franchised stores.

※その他、ベトナムにおいて、眼科病院を運営しております。

※Additionally, we have operate the Eye Hospital in Vietnam.

12. 従業員数の推移 /Number of Employees

●連結 /Consolidated

(名 / Number of persons)

| Fiscal Years Ended | 2015.3 | 2016.3 | 2017.3 | 2016.9 | 2017.9 |
|-------------------------------|--------|--------|--------|--------|--------|
| 正社員 | | | | | |
| Number of Full-time Employees | 3,359 | 3,224 | 3,122 | 3,190 | 3,086 |
| 契約社員 | | | | | |
| Number of Part-time Employees | 1,422 | 1,391 | 1,415 | 1,389 | 1,397 |
| 合計 | | | | | |
| Total | 4,781 | 4,615 | 4,537 | 4,579 | 4,483 |

(注) 契約社員数は1日8時間換算で算出

(Notes) The total number of part-time employees is converted by a regular working hours (8 hours per day)

Nov 13, 2017

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