

| 項目 | 18年6月度 | 19年6月度 | 20年6月度 | 21年6月度 | →収益認識基準適用 | | | | 24年6月度 FY 実績 | 25年6月度 FY 予想 | | | |
|-------|--------|--------|--------|--------|-----------|--------|-------|-------|-----------------|-----------------|-------|-------|-----|
| | | | | | 22年6月度 | 23年6月度 | | | | | | | |
| | | | | | | | 1Q 実績 | 2Q 実績 | | | 3Q 実績 | 4Q 実績 | |
| 出店 | 30 | 36 | 49 | 46 | 43 | 30 | 2 | 5 | 3 | 21 | 31 | 6 | 49 |
| 福井 | 8 | 7 | 4 | 9 | 5 | 3 | 1 | | 1 | 3 | 5 | 2 | 10 |
| 石川 | 2 | 3 | 19 | 8 | 7 | 5 | 1 | | 1 | 4 | 6 | 1 | 4 |
| 岐阜 | 10 | 17 | 7 | 7 | 4 | 4 | | 1 | | 5 | 6 | 1 | 7 |
| 愛知 | 10 | 9 | 19 | 22 | 19 | 10 | | 2 | | 8 | 10 | | 19 |
| 滋賀 | | | | | 8 | 8 | | 2 | 1 | 1 | 4 | 2 | 9 |
| 退店 | 4 | 2 | 3 | 1 | 0 | 7 | 3 | 2 | 1 | 1 | 7 | 3 | 7 |
| 改装 | | | 1 | 1 | 21 | 3 | | 3 | | | 3 | | 0 |
| 期末店舗数 | 218 | 252 | 298 | 343 | 386 | 409 | | | | | 433 | | 475 |

(単位:百万円)

| | | | | | | | | | | | | | |
|--------|--------|---------|---------|---------|---------|---------|--------|--------|--------|--------|---------|--------|---------|
| 売上高 | 94,869 | 103,897 | 123,603 | 142,376 | 154,639 | 169,059 | 46,872 | 45,096 | 44,620 | 48,273 | 184,860 | 50,050 | 202,000 |
| YoY | +13.8% | +9.5% | +19.0% | +15.2% | +8.6% | +9.3% | +10.0% | +9.2% | +10.6% | +7.6% | +9.3% | +6.8% | +9.3% |
| SSS | +3.5% | +3.0% | +8.4% | +6.1% | +1.1% | +2.5% | +7.6% | +6.6% | +7.9% | +4.7% | +6.7% | +3.5% | +3.3% |
| 荒利益高 | 21,897 | 24,419 | 26,712 | 30,289 | 30,954 | 34,554 | 9,347 | 9,435 | 8,856 | 9,982 | 37,621 | 10,103 | 41,200 |
| YoY | +12.7% | +11.5% | +9.4% | +13.4% | +2.2% | +11.6% | +8.9% | +10.4% | +7.8% | +8.4% | +8.9% | +8.1% | +9.5% |
| 荒利益率 | 23.08% | 23.50% | 21.61% | 21.27% | 20.02% | 20.44% | 19.94% | 20.92% | 19.85% | 20.68% | 20.35% | 20.19% | 20.40% |
| 販管費※ | 17,768 | 20,409 | 22,370 | 23,995 | 25,279 | 28,230 | 7,332 | 7,064 | 6,748 | 7,462 | 28,606 | 7,834 | 31,200 |
| YoY | +14.1% | +14.9% | +9.6% | +7.3% | +5.4% | +11.7% | +4.8% | +4.4% | △1.0% | +2.8% | +1.3% | +6.8% | +9.1% |
| /sales | 18.73% | 19.64% | 18.10% | 16.85% | 16.35% | 16.70% | 15.64% | 15.66% | 15.12% | 15.46% | 15.47% | 15.65% | 15.45% |
| 人件費計 | 6,305 | 7,693 | 8,699 | 9,791 | 11,154 | 11,815 | 3,192 | 3,015 | 2,802 | 3,206 | 12,215 | 3,305 | 13,300 |
| /sales | 6.6% | 7.4% | 7.0% | 6.9% | 7.2% | 7.0% | 6.8% | 6.7% | 6.3% | 6.6% | 6.6% | 6.6% | 6.6% |
| 販売促進費計 | 2,562 | 2,794 | 3,034 | 2,928 | 1,124 | 1,329 | 349 | 367 | 365 | 379 | 1,460 | 411 | 1,650 |
| /sales | 2.7% | 2.7% | 2.5% | 2.1% | 0.7% | 0.8% | 0.7% | 0.8% | 0.8% | 0.8% | 0.8% | 0.8% | 0.8% |
| 設備費計 | 7,496 | 8,452 | 9,002 | 9,550 | 11,206 | 13,217 | 3,317 | 3,181 | 3,168 | 3,320 | 12,986 | 3,650 | 14,150 |
| /sales | 7.9% | 8.1% | 7.3% | 6.7% | 7.2% | 7.8% | 7.1% | 7.1% | 7.1% | 6.9% | 7.0% | 7.3% | 7.0% |
| 一般費計 | 1,405 | 1,470 | 1,636 | 1,726 | 1,795 | 1,869 | 474 | 501 | 413 | 557 | 1,945 | 468 | 2,100 |
| /sales | 1.5% | 1.4% | 1.3% | 1.2% | 1.2% | 1.1% | 1.0% | 1.1% | 0.9% | 1.2% | 1.1% | 0.9% | 1.0% |
| 営業利益 | 4,129 | 4,010 | 4,342 | 6,295 | 5,675 | 6,324 | 2,015 | 2,372 | 2,108 | 2,520 | 9,015 | 2,270 | 10,000 |
| YoY | +7.3% | △2.9% | +8.3% | +45.0% | △9.8% | +11.4% | +27.2% | +33.3% | +51.2% | +29.1% | +42.6% | +12.6% | +10.9% |
| /sales | 4.4% | 3.9% | 3.5% | 4.4% | 3.7% | 3.7% | 4.3% | 5.3% | 4.7% | 5.2% | 4.9% | 4.5% | 5.0% |
| 経常利益 | 4,378 | 4,305 | 4,566 | 6,601 | 6,087 | 7,079 | 2,089 | 2,406 | 2,194 | 2,579 | 9,268 | 2,297 | 10,220 |
| YoY | +7.0% | △1.7% | +6.1% | +44.6% | △7.8% | +16.3% | +23.7% | +28.4% | +47.5% | +27.0% | +30.9% | +9.9% | +10.3% |
| /sales | 4.6% | 4.1% | 3.7% | 4.6% | 3.9% | 4.2% | 4.5% | 5.3% | 4.9% | 5.3% | 5.0% | 4.6% | 5.1% |
| 当期純利益 | 3,118 | 2,697 | 2,755 | 4,832 | 4,421 | 4,765 | 1,445 | 1,643 | 1,368 | 1,869 | 6,325 | 1,592 | 7,000 |
| YoY | +9.6% | △13.5% | +2.2% | +75.4% | △8.5% | +7.8% | +31.1% | +40.6% | +31.3% | +28.7% | +32.7% | +10.2% | +10.7% |
| /sales | 3.3% | 2.6% | 2.2% | 3.4% | 2.9% | 2.8% | 3.1% | 3.6% | 3.1% | 3.9% | 3.4% | 3.2% | 3.5% |

※販管費の主な科目

人件費 給料・賞与・採用費・教育費・法定福利費
 販売促進費 広告宣伝費・包装費・キャッシュレス手数料・販売雑費
 設備費 減価償却費・地代家賃・リース料・水道光熱費・修繕費
 一般費 租税公課・報酬・支払手数料・接待交際費

| 項目 | →収益認識基準適用 | | | | | | 24年6月度 FY 実績 | 25年6月度 FY 予想 |
|---------------------|-----------|----------|----------|----------|----------|----------|-----------------|-----------------|
| | 18年6月度 | 19年6月度 | 20年6月度 | 21年6月度 | 22年6月度 | 23年6月度 | | |
| [一株当たり指標] | | | | | | | | |
| EPS (円) | 206.6 | 174.7 | 181.5 | 318.0 | 290.9 | 313.6 | ※ 207.94 | |
| BPS (円) | 1,538.05 | 1,667.60 | 1,823.51 | 2,117.96 | 2,383.41 | 2,674.34 | ※ 1532.81 | |
| DPS (円) | 25.0 | 25.0 | 25.0 | 25.0 | 25.0 | 25.0 | 25.5 | |
| [単位面積当たり指標] | | | | | | | | |
| 期中平均売場面積 (坪) | 91,045 | 99,986 | 110,380 | 121,829 | 136,205 | 143,299 | 144,998 | 152,879 |
| 坪当たり売上高 (千円/坪) | 1,042 | 1,039 | 1,120 | 1,169 | 1,135 | 1,180 | 1,275 | 1,321 |
| 坪当たり荒利益高 (〃) | 241 | 244 | 242 | 249 | 227 | 241 | 259 | 269 |
| 坪当たり経費高 (〃) | 195 | 204 | 203 | 197 | 186 | 197 | 197 | 204 |
| 坪当たり営業利益高 (〃) | 45 | 40 | 39 | 52 | 42 | 44 | 62 | 65 |
| [C/Sほか] 百万円 | | | | | | | | |
| CFO | 5,365 | 4,300 | 7,411 | 12,075 | 6,076 | 8,773 | 13,256 | |
| CFI (≒CAPEX) | △ 5,443 | △ 10,947 | △ 11,223 | △ 8,829 | △ 10,589 | △ 9,736 | △ 10,631 | |
| CFF | 191 | 6,866 | 7,989 | △ 1,953 | 2,037 | 854 | △ 2,058 | |
| FCF | △ 78 | △ 6,646 | △ 3,812 | 3,246 | △ 4,513 | △ 963 | 2,625 | |
| 減価償却費(連結営業CFベース) | 2,614 | 2,910 | 3,443 | 4,059 | 4,592 | 4,955 | 5,566 | |
| EBITDA | 6,743 | 6,920 | 7,785 | 10,354 | 10,267 | 11,279 | 14,581 | |
| 純資産額 | 23,805 | 25,309 | 27,685 | 32,166 | 36,233 | 40,681 | 46,691 | |
| 総資産額 | 60,043 | 67,855 | 83,145 | 90,795 | 97,118 | 105,912 | 113,939 | |
| [バリュエーションほか] | | | | | | | | |
| PER (倍) | 21.9 | 14.8 | 18.5 | 11.7 | 10.9 | 13.5 | 13.2 | |
| PBR (倍) | 2.94 | 1.55 | 1.84 | 1.76 | 1.33 | 1.59 | 1.79 | |
| 配当性向 (%) | 12.1 | 14.3 | 13.8 | 7.9 | 8.6 | 8.0 | 6.1 | |
| ROA(経常利益ベース) (%) | 7.8 | 6.7 | 6.0 | 7.6 | 6.5 | 7.0 | 8.4 | |
| ROE (%) | 16.0 | 11.0 | 10.4 | 16.2 | 12.9 | 12.4 | 14.5 | |
| 総資産回転率 (回) | 1.7 | 1.6 | 1.6 | 1.6 | 1.6 | 1.7 | 1.7 | |
| 自己資本比率 (%) | 39.6 | 37.3 | 33.3 | 35.4 | 37.3 | 38.4 | 40.9 | |
| NET D/E Ratio (倍) | 0.47 | 0.73 | 0.85 | 0.64 | 0.70 | 0.66 | 0.53 | |

※ 2024年6月21日付で普通株式1株につき2株の割合で株式分割を行っております。

当連結会計年度の期首に当該株式分割が行われたと仮定し、EPS及びBPSを算定しております。