

第 1 四半期 決算補足資料

2015年3月期

(2014年4月1日～2015年3月31日)

Financial and Operational Highlights Three months ended June 30,2014

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株式会社 丸井グループ
MARUI GROUP CO., LTD.

<http://www.0101maruigroup.co.jp>

1. 業績の概要

Financial summary

(百万円 Millions of yen)

	2013/6/30		2014/6/30	
	3ヵ月 Three months ended June 30, 2013	前年比 YOY (%)	3ヵ月 Three months ended June 30, 2014	前年比 YOY (%)
売上高 Total operating revenues	96,933	101.3	95,180	98.2
営業利益 Operating income	5,696	118.9	4,770	83.8
経常利益 Ordinary income	5,929	121.0	4,887	82.4
当期純利益 Net income	3,428	247.9	2,674	78.0
売上総利益率 Gross margin on total operating revenues	37.8%	+0.9%	39.5%	+1.7%
小売・店舗事業利益率 Gross margin of retailing and store operation	27.8%	△0.3%	27.8%	±0.0%
営業利益率 Operating income on total operating revenues	5.9%	+0.9%	5.0%	△0.9%

2. 売上高の状況

Operating revenues

(百万円 Millions of yen)

	2013/6/30		2014/6/30	
	3ヵ月 Three months ended June 30, 2013	前年比 YOY (%)	3ヵ月 Three months ended June 30, 2014	前年比 YOY (%)
商品売上高 Product sales	74,561	98.9	70,715	94.8
賃貸収入等 Rent revenues and others	1,243	100.3	1,382	111.1
小売・店舗事業 Retailing and store operation	75,805	98.9	72,097	95.1
* (総売上高) (Gross sales of retailing and store operation)	(79,197)	(99.1)	(75,888)	(95.8)
消費者ローン利息収入 Interest income on consumer loans	5,255	97.0	5,411	103.0
割賦手数料 Financial charges earned on installment sales	4,767	123.5	5,810	121.9
加盟店手数料 Affiliated merchants	2,790	125.7	3,425	122.7
その他 Others	1,112	127.9	1,423	128.0
カード事業 Credit card services	13,926	112.6	16,072	115.4
小売関連サービス事業 Retailing-related services	7,200	107.6	7,010	97.4
合計 Total operating revenues	96,933	101.3	95,180	98.2

* 「小売・店舗事業」では、従来の仕入販売を中心としたビジネスモデルを転換し、定期借家契約によるテナント導入をすすめております。したがって、販売動向と売上規模を継続的に開示するため、商品売上高に定借テナントの売上高等を加えて「総売上高」を表示しております。

Retailing and store operations are transitioning from the conventional business model focused on product purchasing and sales to a model that includes revenues from tenants with fixed-term rental contracts. Accordingly, gross sales of retailing and store operation is displayed including both product sales and revenues from fixed-term rental tenant contracts in order to provide an ongoing view of sales trends and sales scale in these operations.

3. 販売費及び一般管理費の状況

Selling, general and administrative expenses

(百万円 Millions of yen)

	2013/6/30		2014/6/30	
	3ヵ月 Three months ended June 30, 2013	前年比 YOY (%)	3ヵ月 Three months ended June 30, 2014	前年比 YOY (%)
販売促進費 Sales promotion expenses	3,678	111.6	4,641	126.2
販売事務費 Sales administration costs	5,151	105.1	5,176	100.5
人件費 Personnel cost	11,199	100.4	11,283	100.8
設備費 Equipment costs	7,050	98.9	6,833	96.9
減価償却費 Depreciation and amortization	2,075	89.8	2,133	102.8
貸倒費用 Provision for bad debts	1,563	106.2	1,813	116.0
利息返還費用 Expenses for interest repayment	—	—	700	—
その他 Others	214	85.8	222	103.6
合計 Total	30,933	101.4	32,804	106.1

4. セグメント情報

Segment information

(百万円 Millions of yen)

		2013/6/30		2014/6/30	
		3ヵ月 Three months ended June 30, 2013	前年比 YOY (%)	3ヵ月 Three months ended June 30, 2014	前年比 YOY (%)
小売・店舗 事業 Retailing and store operation	売上高 Operating revenues	77,183	99.0	73,334	95.0
	営業利益 Operating income	1,913	115.6	1,148	60.0
	営業利益率 Operating income on total operating revenues	2.5%	+0.4%	1.6%	△0.9%
カード 事業 Credit card services	売上高 Operating revenues	14,451	112.2	16,595	114.8
	営業利益 Operating income	3,727	115.4	3,911	104.9
	営業利益率 Operating income on total operating revenues	25.8%	+0.7%	23.6%	△2.2%
小売関連 サービス 事業 Retailing-related services	売上高 Operating revenues	11,719	106.3	13,036	111.2
	営業利益 Operating income	687	108.5	700	101.9
	営業利益率 Operating income on total operating revenues	5.9%	+0.2%	5.4%	△0.5%

5. 店別総売上高

Gross sales of retailing and store operation by store

(百万円 Millions of yen)

		2013/6/30		2014/6/30		
		3カ月 Three months ended June 30, 2013	前年比 YOY (%)	3カ月 Three months ended June 30, 2014	前年比 YOY (%)	
(1)	マルイ	Marui				
	北千住マルイ	Kitasenju Marui	8,407	101.5	8,144	96.9
*1	新宿	Shinjuku	6,932	104.6	6,602	101.5
	有楽町マルイ	Yurakucho Marui	5,378	101.8	5,452	101.4
	ファミリー溝口	Family Mizonokuchi	5,388	100.8	5,099	94.6
	[通信販売]	[Online shopping and Mail-order]	4,607	101.3	4,665	101.3
	国分寺マルイ	Kokubunji Marui	3,550	102.0	3,377	95.1
	シティ横浜	City Yokohama	3,548	95.6	3,274	92.3
	上野マルイ	Ueno Marui	3,196	100.0	3,258	101.9
	ファミリー志木	Family Shiki	3,027	103.3	3,088	102.0
	錦糸町	Kinshicho	3,047	100.6	3,030	99.4
	ファミリー海老名	Family Ebina	3,106	98.4	3,018	97.2
	なんばマルイ	Namba Marui	2,862	96.1	2,708	94.6
	大宮	Omiya	2,828	99.8	2,626	92.9
	渋谷	Shibuya	2,430	99.8	2,269	93.4
	柏	Kashiwa	1,850	97.2	1,766	95.4
	池袋マルイ	Ikebukuro Marui	1,953	94.7	1,679	86.0
	静岡	Shizuoka	1,473	88.8	1,347	91.5
*2	吉祥寺	Kichijoji	1,704	91.6	1,334	95.9
	神戸マルイ	Kobe Marui	1,311	92.2	1,228	93.7
*3	町田マルイ	Machida Marui	1,470	94.7	1,159	78.8
	京都マルイ	Kyoto Marui	1,112	112.7	1,128	101.4
	川崎	Kawasaki	1,166	96.0	1,120	96.1
	草加マルイ	Soka Marui	1,120	102.9	1,069	95.4
	水戸	Mito	1,028	91.4	939	91.3
	中野マルイ	Nakano Marui	915	112.0	909	99.4
*4	[専門店]	[Specialty stores]	570	100.8	464	92.5
(2)	モディ	Modi				
	戸塚モディ	Totsuka Modi	2,231	99.9	2,292	102.7
	町田モディ	Machida Modi	2,165	104.6	2,086	96.4
	川越モディ	Kawagoe Modi	429	97.4	362	84.4

* 「店別総売上高」は、従来の商品売上高に定期借家テナントの売上高等を加えて算出しております。

Gross sales of retailing and store operation by store includes revenues from fixed-term rental tenant contracts in addition to conventional product sales.

*1, 2, 4 前年比は、閉鎖店を除いております。 YOY (%) is calculated from retailing and store operation sales without closed stores.

*3 町田マルイは一部フロア閉鎖を経て、5月21日にリニューアルオープンしております。(第1四半期の売場閉鎖率26%)

Machida Marui closed a portion of its sales floors, which was then reopened on May 21, 2014

(26% of sales floors closed during the three months ended June 30, 2014).

6. 小売・店舗事業月次総売上高

Year-on-year % change in monthly gross sales of retailing and store operation (%)

	4月 APR.	5月 MAY	6月 JUN.	7月 JUL.	8月 AUG.	9月 SEP.	10月 OCT.	11月 NOV.	12月 DEC.	1月 JAN.	2月 FEB.	3月 MAR.	年度 TOTAL
2015/3/31	95.9	98.4	93.1	/	/	/	/	/	/	/	/	/	95.8
既存店 Existing stores	98.0	99.7	94.3	/	/	/	/	/	/	/	/	/	97.3

* 「総売上高」は、従来の商品売上高に定期借家テナントの売上高等を加えて算出しております。

Gross sales of retailing and store operation includes revenues from fixed-term rental tenant contracts in addition to conventional product sales.

7. 入店・買上客数及び客単価の伸長率

Trend in number of visiting customer (%)

	2013/6/30		2014/6/30	
	3か月 Three months ended June 30, 2013	既存店 Existing stores	3か月 Three months ended June 30, 2014	既存店 Existing stores
入店客数 Number of customer coming to store	101.7	101.7	100.0	101.3
買上客数 Number of purchase	105.8	105.8	102.1	102.2
客単価 Sales per purchase	94.8	94.8	93.8	95.3

8. カード会員数

Number of credit card members (万人 10 thousand)

	2013/6/30		2014/6/30	
	3か月 Three months ended June 30, 2013	増減 change	3か月 Three months ended June 30, 2014	増減 change
エポスカード Epos Card	500	+ 40	550	+ 50
プラチナ/ゴールド Platinum/Gold Card	65	+ 22	88	+ 24
赤いカード Akai Card	7	△ 13	5	△ 2
会員数 合計 Total	508	+ 26	555	+ 47
新規会員数 New cardholders	18	+ 0	17	△ 1
利用客数 Active cardholders	232	+ 21	255	+ 23

9. カード取扱高

Card transactions (億円 100 millions of yen)

	2013/6/30		2014/6/30	
	3か月 Three months ended June 30, 2013	前年比 YOY (%)	3か月 Three months ended June 30, 2014	前年比 YOY (%)
ショッピング取扱高 Card shopping transactions	1,904	121.4	2,246	117.9
丸井内取扱高 Total transactions at Marui stores	300	101.0	290	96.6
外部加盟店取扱高 Total transactions outside Marui stores	1,605	126.2	1,956	121.9
リボ分割取扱高 Total transactions for revolving and installment payments	259	121.3	294	113.6
キャッシング取扱高 Cash advance transactions	314	112.3	344	109.5

10. 営業債権の状況

Operating receivables

(1) 割賦売掛金残高 Installment sales accounts receivable (百万円 Millions of yen)

	2013/6/30		2014/6/30		2014/3/31	
	Three months ended June 30, 2013	前年比 YOY (%)	Three months ended June 30, 2014	前年比 YOY (%)	Fiscal year ended March 31, 2014	前年比 YOY (%)
リボ・分割払い Revolving repayment, Payment by installments (流動化債権を含む) (Including factoring accounts receivable)	139,814	125.9	166,020	118.7	160,562	120.4
	(139,814)	(120.4)	(166,020)	(118.7)	(160,562)	(119.6)
1・2回、ボーナス1回払い等 Payment by installments within two times, lump-sum payment in bonus months, Others (流動化債権を含む) (Including factoring accounts receivable)	40,993	103.9	47,859	116.7	52,903	140.0
	(80,993)	(121.9)	(97,859)	(120.8)	(98,903)	(132.2)
合 計 Total (流動化債権を含む) (Including factoring accounts receivable)	180,807	120.1	213,879	118.3	213,466	124.7
	(220,807)	(121.0)	(263,879)	(119.5)	(259,466)	(124.1)

(2) 営業貸付金残高 Consumer loans outstanding (百万円 Millions of yen)

	2013/6/30		2014/6/30		2014/3/31	
	Three months ended June 30, 2013	前年比 YOY (%)	Three months ended June 30, 2014	前年比 YOY (%)	Fiscal year ended March 31, 2014	前年比 YOY (%)
エポスカード Epos Card Co., Ltd.	113,510	98.4	118,556	104.4	116,544	103.2
ゼロファースト Zero First Co., Ltd.	10,169	75.1	8,264	81.3	8,671	80.4
合 計 Total	123,680	96.0	126,821	102.5	125,215	101.2

(3) 1顧客当たり貸付残高 Loans outstanding by customer (万円 10 thousands of yen)

	2013/6/30		2014/6/30		2014/3/31	
	Three months ended June 30, 2013	前年比 YOY (%)	Three months ended June 30, 2014	前年比 YOY (%)	Fiscal year ended March 31, 2014	前年比 YOY (%)
エポスカード Epos Card Co., Ltd.	20.1	103.2	21.7	108.0	21.3	106.9
ゼロファースト Zero First Co., Ltd.	24.5	98.3	25.8	105.1	25.4	104.7
合 計 Total	20.4	102.3	22.0	107.5	21.6	106.5

(4) 貸倒率 Ratio of bad debt write-offs (%)

	2013/6/30		2014/6/30		2014/3/31	
	Three months ended June 30, 2013	増 減 change	Three months ended June 30, 2014	増 減 change	Fiscal year ended March 31, 2014	増 減 change
エポスカード Epos Card Co., Ltd.	0.51	△ 0.15	0.45	△ 0.06	1.82	△ 0.45
ゼロファースト Zero First Co., Ltd.	0.69	△ 0.24	0.58	△ 0.11	2.73	△ 1.04
合 計 Total	0.52	△ 0.15	0.46	△ 0.06	1.84	△ 0.48

* 貸倒率 = 貸倒償却額 / 営業債権 (期末)

Ratio of bad debt write-offs = Bad debt write-offs / Operating receivables (at June 30, 2014)

11. 2015年3月期予想

Forecast for the year ending March 31, 2015

連結 MARUI GROUP CO., LTD. and its consolidated subsidiaries (百万円 Millions of yen)

	2014/3/31		2014/9/30		2015/3/31	
	Fiscal year ended March 31, 2014	前年比 YOY (%)	予 想 Forecast	前年比 YOY (%)	予 想 Forecast	前年比 YOY (%)
売上高 Total operating revenues	416,460	102.2	191,000	97.5	409,000	98.2
小売・店舗事業 Retailing and store operation	322,342	98.9	143,000	94.6	307,500	95.4
カード事業 Credit card services	59,421	115.3	32,000	112.3	67,000	112.8
小売関連サービス事業 Retailing-related services	34,695	116.3	16,000	98.5	34,500	99.4
売上総利益 Gross profit	155,726	105.1	75,500	102.0	159,500	102.4
販売費及び一般管理費 Selling, general and administrative expenses	128,579	103.8	65,500	103.4	131,500	102.3
営業利益 Operating income	27,146	111.8	10,000	93.3	28,000	103.1
小売・店舗事業 Retailing and store operation	10,562	103.3	1,500	51.3	8,000	75.7
カード事業 Credit card services	15,634	118.6	8,500	112.3	19,000	121.5
小売関連サービス事業 Retailing-related services	4,523	130.9	1,500	73.7	4,000	88.4
消去又は全社 Eliminations/Corporate	△ 3,574	—	△ 1,500	—	△ 3,000	—
経常利益 Ordinary income	27,698	113.3	10,000	90.3	28,000	101.1
当期純利益 Net income	15,409	116.3	5,000	81.4	16,000	103.8

(%)

売上総利益率 Gross margin of total operating revenues	37.4	+ 1.0	39.5	+ 1.7	39.0	+ 1.6
小売・店舗事業荒利益率 Gross margin of retailing and store operation	27.7	± 0.0	28.0	+ 0.2	27.8	+ 0.1
営業利益率 Operating income on total operating revenues	6.5	+ 0.5	5.2	△ 0.3	6.8	+ 0.3

(円 Yen)

1株当たり当期純利益 Net income per share	56.29	116.2	18.26	81.4	58.44	103.8
自己資本当期純利益率 (ROE) Return on equity	5.0%	+ 0.5%	—	—	5.0%	± 0.0%
1株当たり配当金 Cash dividends per share	18.00	120.0	9.00	100.0	19.00	105.6
配当性向 Payout ratio	32.0%	+ 1.0%	—	—	32.5%	+ 0.5%