

第3四半期 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 Nine months ended December 31, 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)

	2013/12/31		2014/12/31		2014/3/31	
	9ヵ月 Nine months ended December 31, 2013	前年比 YOY (%)	9ヵ月 Nine months ended December 31, 2014	前年比 YOY (%)	12ヵ月 Fiscal year ended March 31, 2014	前年比 YOY (%)
売上高 Total operating revenues	305,723	101.2	301,437	98.6	416,460	102.2
売上総利益 Gross profit	115,060	104.1	118,793	103.2	155,726	105.1
販売費及び一般管理費 Selling, general and administrative expenses	95,542	103.3	97,224	101.8	128,579	103.8
営業利益 Operating income	19,518	108.4	21,568	110.5	27,146	111.8
経常利益 Ordinary income	20,047	111.8	21,530	107.4	27,698	113.3
当期純利益 Net income	11,602	120.6	9,129	78.7	15,409	116.3
売上総利益率 Gross margin on total operating revenues	37.6%	+1.0%	39.4%	+1.8%	37.4%	+1.0%
小売・店舗事業荒利益率 Gross margin of retailing and store operation	27.8%	△0.1%	27.7%	△0.1%	27.7%	±0.0%
営業利益率 Operating income on total operating revenues	6.4%	+0.4%	7.2%	+0.8%	6.5%	+0.5%

(百万円 Millions of yen)

総資産 Total assets	663,189	103.4	685,626	103.4	664,019	106.4
純資産 Net assets	314,482	105.8	318,566	101.3	315,889	103.9
営業債権 Operating receivables	327,194	111.7	356,677	109.0	338,681	114.8
有利子負債 Interest-bearing debt	260,467	99.7	268,833	103.2	264,824	108.6

2. セグメント情報

Segment information

(百万円 Millions of yen)

		2013/12/31		2014/12/31		2014/3/31	
		9ヵ月 Nine months ended December 31, 2013	前年比 YOY (%)	9ヵ月 Nine months ended December 31, 2014	前年比 YOY (%)	12ヵ月 Fiscal year ended March 31, 2014	前年比 YOY (%)
小売・店舗 事業 Retailing and store operation	売上高 Operating revenues	241,317	97.7	229,535	95.1	327,832	98.9
	営業利益 Operating income	7,093	95.2	5,516	77.8	10,562	103.3
	営業利益率 Operating income on total operating revenues	2.9%	△0.1%	2.4%	△0.5%	3.2%	+0.1%
カード 事業 Credit card services	売上高 Operating revenues	45,434	113.9	53,127	116.9	61,795	115.0
	営業利益 Operating income	11,842	117.8	16,288	137.5	15,634	118.6
	営業利益率 Operating income on total operating revenues	26.1%	+0.9%	30.7%	+4.6%	25.3%	+0.8%
小売関連 サービス 事業 Retailing-related services	売上高 Operating revenues	41,209	117.5	41,569	100.9	59,509	118.7
	営業利益 Operating income	3,144	127.9	2,465	78.4	4,523	130.9
	営業利益率 Operating income on total operating revenues	7.6%	+0.6%	5.9%	△1.7%	7.6%	+0.7%

3. 売上高の状況

Operating revenues

(百万円 Millions of yen)

	2013/12/31		2014/12/31		2014/3/31	
	9ヵ月 Nine months ended December 31, 2013	前年比 YOY (%)	9ヵ月 Nine months ended December 31, 2014	前年比 YOY (%)	12ヵ月 Fiscal year ended March 31, 2014	前年比 YOY (%)
商品売上高 Product sales	233,476	97.6	221,409	94.8	317,334	98.8
賃貸収入等 Rent revenues and others	3,746	103.2	4,468	119.3	5,008	103.4
小売・店舗事業 Retailing and store operation	237,223	97.7	225,878	95.2	322,342	98.9
* (総売上高) (Gross sales of retailing and store operation)	(249,382)	(98.0)	(240,786)	(96.6)	(338,586)	(99.2)
割賦手数料 Financial charges earned on installment sales	15,228	124.4	19,664	129.1	20,700	123.8
消費者ローン利息収入 Interest income on consumer loans	15,879	98.9	16,398	103.3	21,084	99.5
加盟店手数料 Affiliated merchants	9,195	127.5	11,065	120.3	12,738	130.1
その他 Others	3,501	126.8	4,337	123.9	4,896	127.7
カード事業 Credit card services	43,805	114.5	51,466	117.5	59,421	115.3
小売関連サービス事業 Retailing-related services	24,694	117.8	24,093	97.6	34,695	116.3
合計 Total operating revenues	305,723	101.2	301,437	98.6	416,460	102.2

* 「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.

4. 販売費及び一般管理費の状況

Selling, general and administrative expenses

(百万円 Millions of yen)

	2013/12/31		2014/12/31		2014/3/31	
	9ヵ月 Nine months ended December 31, 2013	前年比 YOY (%)	9ヵ月 Nine months ended December 31, 2014	前年比 YOY (%)	12ヵ月 Fiscal year ended March 31, 2014	前年比 YOY (%)
販売促進費 Sales promotion expenses	12,924	125.0	13,960	108.0	18,269	126.9
販売事務費 Sales administration costs	15,703	103.4	15,599	99.3	21,118	103.1
人件費 Personnel cost	33,323	100.6	33,480	100.5	44,115	100.5
設備費 Equipment costs	21,678	99.9	21,138	97.5	28,498	98.7
減価償却費 Depreciation and amortization	6,272	89.8	6,531	104.1	8,542	91.3
貸倒費用 Provision for bad debts	4,857	110.9	5,745	118.3	6,361	107.6
利息返還費用 Expenses for interest repayment	227	—	—	—	867	—
その他 Others	555	76.0	768	138.4	807	85.7
合計 Total	95,542	103.3	97,224	101.8	128,579	103.8

5. 店別総売上高

Gross sales of retailing and store operation by store

(百万円 Millions of yen)

		2013/12/31		2014/12/31		2014/3/31	
		9カ月 Nine months ended December 31, 2013	前年比 YOY (%)	9カ月 Nine months ended December 31, 2014	前年比 YOY (%)	12カ月 Fiscal year ended March 31, 2014	前年比 YOY (%)
(1)	マルイ Marui						
	北千住マルイ Kitasenju Marui	26,201	100.5	25,660	97.9	35,795	101.8
*1	新宿 Shinjuku	21,633	102.9	21,041	101.7	29,358	104.6
	有楽町マルイ Yurakucho Marui	17,073	100.0	17,168	100.6	23,252	101.6
	ファミリー溝口 Family Mizonokuchi	16,659	98.8	16,005	96.1	22,672	100.1
	[通信販売] [Online shopping and Mail-order]	14,688	101.6	14,519	98.8	20,487	104.1
	国分寺マルイ Kokubunji Marui	10,985	101.1	10,547	96.0	14,850	101.8
	シティ横浜 City Yokohama	11,293	91.7	10,398	92.1	15,421	93.7
	上野マルイ Ueno Marui	10,135	101.7	10,356	102.2	13,791	103.5
	ファミリー志木 Family Shiki	9,727	107.1	9,769	100.4	13,309	109.0
	錦糸町 Kinshicho	9,626	100.2	9,738	101.2	13,104	102.3
	ファミリー海老名 Family Ebina	9,665	96.0	9,450	97.8	13,164	97.6
	なんばマルイ Namba Marui	9,190	95.6	8,900	96.8	12,546	95.8
	大宮 Omiya	8,780	95.1	8,231	93.7	12,045	96.7
	渋谷 Shibuya	7,513	97.1	6,983	92.9	10,094	97.3
	柏 Kashiwa	5,710	94.1	5,613	98.3	7,609	94.6
*2	池袋マルイ Ikebukuro Marui	5,975	95.8	5,156	86.3	7,915	96.2
*3	吉祥寺 Kichijoji	5,213	105.0	4,314	90.7	6,698	103.5
	静岡 Shizuoka	4,730	87.9	4,247	89.8	6,520	89.2
*4	町田マルイ Machida Marui	4,614	92.8	4,232	91.7	6,057	91.0
	中野マルイ Nakano Marui	4,009	104.3	3,983	99.4	5,411	104.8
	神戸マルイ Kobe Marui	4,181	90.4	3,904	93.4	5,628	91.2
	川崎 Kawasaki	3,701	92.7	3,525	95.3	5,107	94.6
	草加マルイ Soka Marui	3,432	99.1	3,454	100.6	4,629	100.8
	京都マルイ Kyoto Marui	3,361	109.5	3,376	100.4	4,638	107.8
	水戸 Mito	3,164	89.2	2,935	92.8	4,347	91.6
*5	[専門店] [Specialty stores]	1,934	97.0	1,468	89.9	2,507	95.6
(2)	モディ Modi						
	戸塚モディ Totsuka Modi	7,126	104.7	7,060	99.1	9,470	105.5
	町田モディ Machida Modi	6,659	104.2	6,475	97.2	8,958	105.8
	川越モディ Kawagoe Modi	1,227	95.8	1,084	88.3	1,622	95.4

* 「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あります。

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

*1, 3, 5 前年比は、閉鎖店を除いてあります。 YOY (%) is calculated from retailing and store operation sales without closed stores.

*2 池袋マルイは、フロアを一部閉鎖しております。(第3四半期累計の売場閉鎖率12%)

Ikebukuro Marui closed a portion of its sales floors. (12% of sales floors closed during the nine months ended December 31, 2014).

*4 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3四半期累計の売場閉鎖率8%)

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

(8% of sales floors closed during the nine months ended December 31, 2014).

6. 月次前年比推移

Year-on-year comparisons by month

(1) 小売・店舗事業 総売上高前年比推移

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
総売上高 Gross sales of retailing and store operation	95.9	98.5	93.3	93.8	97.5	98.9	96.1	98.7	96.3				96.6
既存店 Existing stores	98.0	99.7	94.4	95.2	99.0	99.7	96.4	99.1	96.6				97.5

* 「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.

(2) カード事業 取扱高前年比推移

Year-on-year % change in monthly card transactions of credit card services

(%)

	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
ショッピング Card shopping transactions	116.7	119.9	117.0	117.4	121.0	118.8	117.6	117.5	118.5				118.3
外部加盟店 Outside Marui stores	119.5	125.0	121.2	122.3	124.0	123.4	122.0	122.3	122.1				122.4
キャッシング Cash advance transactions	108.3	110.5	109.8	107.3	113.3	116.6	109.0	104.2	104.8				109.4

7. 入店・買上客数及び客単価の伸長率

Trend in number of visiting customer

(%)

	2013/12/31		2014/12/31		2014/3/31	
	9ヵ月 Nine months ended December 31, 2013	既存店 Existing stores	9ヵ月 Nine months ended December 31, 2014	既存店 Existing stores	12ヵ月 Fiscal year ended March 31, 2014	既存店 Existing stores
入店客数 Number of customer coming to store	101.2	101.8	99.9	100.5	100.8	101.5
買上客数 Number of purchase	104.8	105.2	101.7	102.1	104.4	105.0
客単価 Sales per purchase	93.9	94.0	94.4	95.3	95.2	95.4

8. カード会員数

Number of credit card members

(万人 10 thousand)

	2013/12/31		2014/12/31		2014/3/31	
	9ヵ月 Nine months ended December 31, 2013	前年差 change	9ヵ月 Nine months ended December 31, 2014	前年差 change	12ヵ月 Fiscal year ended March 31, 2014	前年差 change
エポスカード Epos Card	521	+ 41	577	+ 56	536	+ 46
プラチナ/ゴールド Platinum/Gold Card	77	+ 25	98	+ 22	83	+ 25
赤いカード Akai Card	6	△ 4	4	△ 2	6	△ 2
会員数 合計 Total	527	+ 37	581	+ 54	542	+ 44
新規会員数 New cardholders	52	+ 0	53	+ 1	71	△ 0
丸井店舗外発行 Cards issued outside of Marui stores	8	+ 2	13	+ 5	12	+ 2
利用客数 Active cardholders	323	+ 31	341	+ 19	354	+ 30

9. カード取扱高

Card transactions

(億円 100 millions of yen)

	2013/12/31		2014/12/31		2014/3/31	
	Nine months ended December 31, 2013	前年比 YOY (%)	Nine months ended December 31, 2014	前年比 YOY (%)	Fiscal year ended March 31, 2014	前年比 YOY (%)
ショッピング取扱高 Card shopping transactions	6,139	121.1	7,221	118.3	8,491	123.6
(リボ分割取扱高) (Total transactions for revolving and installment payments)	(828)	(119.9)	(927)	(112.0)	(1,129)	(118.6)
丸井内取扱高 Total transactions at Marui stores	941	99.3	898	95.5	1,291	101.2
外部加盟店取扱高 Total transactions outside Marui stores	5,199	126.2	6,323	122.4	7,199	128.8
キャッシング取扱高 Cash advance transactions	949	111.3	1,038	109.4	1,277	111.1
合 計 Total	7,088	119.7	8,259	117.1	9,768	121.9

10. 営業債権の状況

Operating receivables

(1) 営業債権残高 Balance of operating receivables

(百万円 Millions of yen)

	2013/12/31		2014/12/31		2014/3/31	
	Nine months ended December 31, 2013	前年比 YOY (%)	Nine months ended December 31, 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	153,229	122.1	165,426	108.0	160,562	120.4
(流動化債権を含む) (Including factoring accounts receivable)	(153,229)	(120.2)	(178,853)	(116.7)	(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	50,974	117.1	64,299	126.1	52,903	140.0
(流動化債権を含む) (Including factoring accounts receivable)	(94,974)	(120.9)	(114,299)	(120.3)	(98,903)	(132.2)
割賦売掛金残高 Installment sales accounts receivable	204,204	120.8	229,725	112.5	213,466	124.7
(流動化債権を含む) (Including factoring accounts receivable)	(248,204)	(120.4)	(293,152)	(118.1)	(259,466)	(124.1)
営業貸付金残高 Consumer loans outstanding	122,990	99.3	126,952	103.2	125,215	101.2
合 計 Total	327,194	111.7	356,677	109.0	338,681	114.8
(流動化債権を含む) (Including factoring accounts receivable)	(371,194)	(112.5)	(420,104)	(113.2)	(384,681)	(115.6)

(万円 10 thousands of yen)

1人当たり営業貸付金残高 Loans outstanding per customer	21.0	105.1	22.6	107.5	21.6	106.5
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(2) 貸倒率 Ratio of bad debt write-offs

(%)

	2013/12/31		2014/12/31		2014/3/31	
	Nine months ended December 31, 2013	前年差 change	Nine months ended December 31, 2014	前年差 change	Fiscal year ended March 31, 2014	前年差 change
貸倒率 Ratio of bad debt write-offs	1.44	△ 0.36	1.24	△ 0.20	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 December 31, 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		2015/3/31	
	Fiscal year ended March 31, 2014	前年比 YOY (%)	予 想 Forecast	前年比 YOY (%)
売上高 Total operating revenues	416,460	102.2	401,000	96.3
小売・店舗事業 Retailing and store operation	322,342	98.9	300,000	93.1
カード事業 Credit card services	59,421	115.3	68,500	115.3
小売関連サービス事業 Retailing-related services	34,695	116.3	32,500	93.7
売上総利益 Gross profit	155,726	105.1	157,500	101.1
販売費及び一般管理費 Selling, general and administrative expenses	128,579	103.8	129,500	100.7
営業利益 Operating income	27,146	111.8	28,000	103.1
小売・店舗事業 Retailing and store operation	10,562	103.3	7,000	66.3
カード事業 Credit card services	15,634	118.6	21,000	134.3
小売関連サービス事業 Retailing-related services	4,523	130.9	3,500	77.4
消去又は全社 Eliminations/Corporate	△ 3,574	—	△ 3,500	—
経常利益 Ordinary income	27,698	113.3	28,000	101.1
当期純利益 Net income	15,409	116.3	16,000	103.8

(%)

売上総利益率 Gross margin of total operating revenues	37.4	+ 1.0	39.3	+ 1.9
小売・店舗事業荒利益率 Gross margin of retailing and store operation	27.7	± 0.0	27.6	△ 0.1
営業利益率 Operating income on total operating revenues	6.5	+ 0.5	7.0	+ 0.5

(円 Yen)

1株当たり当期純利益 Net income per share	56.29	116.2	58.68	104.3
自己資本当期純利益率 (ROE) Return on equity	5.0%	+ 0.5%	5.1%	+ 0.1%
1株当たり配当金 Cash dividends per share	18.00	120.0	19.00	105.6
配当性向 Payout ratio	32.0%	+ 1.0%	32.4%	+ 0.4%