



May 13, 2010

## Consolidated Financial Results for the Fiscal Year 2009

Company name: DISCO Corporation  
 Stock code number: 6146 (Tokyo Stock Exchange 1st Section)  
 URL: <http://www.disco.co.jp>  
 Telephone number: 81-3-4590-1099

(Amounts are rounded down to the nearest million yen)

### 1. Consolidated Results of FY2009 (April 1, 2009 though March 31, 2010)

#### 1) Operating results (Accumulated)

	Fiscal year ended		
	March 31, 2010	March 31, 2009	YoY(%)
Net sales	61,730	53,108	16.2%
Operating income	4,667	76	—
Ordinary income	4,560	1,460	212.2%
Net income	2,470	251	883.6%
Net income per share (yen)	73.51	7.41	—
Fully diluted net income per share (yen)	72.19	7.40	—

#### 2) Financial position

	As of March 31, 2010	As of March 31, 2009
Total assets	124,313	123,925
Net assets	88,091	86,328
Equity ratio (%)	70.3%	69.2%
Net assets per share (yen)	2,599.69	2,552.54

(Reference) Equity (defined as shareholders' equity plus valuation and translation adjustments) :

87,367 million yen (as of March 31, 2010)  
 85,777 million yen (as of March 31, 2009)

### 2. Dividends

	Fiscal Year 2009	Fiscal Year 2008	Fiscal Year 2010 Forecast
1Q-end dividend per share (yen)			—
2Q-end dividend per share (yen)	10.00	10.00	25.00
3Q-end dividend per share (yen)			—
Year-end dividend per share (yen)	10.00	10.00	25.00
Annual dividend per share (yen)	20.00	20.00	50.00

Note: Revision of dividends forecast for during this period: No

### 3. Earnings Forecasts of FY2010

	Six month ending September 30, 2010	YoY (%)	Year ending March 31, 2010	YoY (%)
Net sales	45,300	96.5	86,500	40.1
Operating income	7,100	—	12,100	159.2
Ordinary income	7,200	—	13,200	189.4
Net income	4,600	—	8,400	240.0
Net income per share (yen)	136.88		249.95	

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**4. Others**

- 1) Important changes in subsidiaries: None
- 2) Changes in principles, procedures and display of accounting method concerning consolidated statement policies.
  1. Changes in accounting policies: Yes
  2. Other changes: None
- 3) Number of shares outstanding (common stock)
  - Number of shares issued (include treasury stocks)
    - As of March 31, 2010: 34,004,418 shares
    - As of March 31, 2009: 34,004,418 shares
  - Number of shares of treasury stock
    - As of March 31, 2010: 397,346 shares
    - As of March 31, 2009: 399,666 shares

**Explanations on the appropriate use of earnings forecasts:**

The performance forecasts and estimates stated in this Financial Review are based on certain assumptions judged to be reasonable at the present time in light of information currently available. Consequently, actual operating results may differ substantially from the projections in the Financial Review.

**(Reference) Non-consolidated Earnings Forecasts of FY2010**

	(Millions of yen)			
	Six month ending September 30, 2010	YoY (%)	Year ending March 31, 2010	YoY (%)
Net sales	38,000	111.9	72,000	44.4
Operating income	5,200	—	8,500	298.0
Ordinary income	5,700	—	10,000	231.4
Net income	3,500	—	5,900	251.7
Net income per share (yen)	104.14		175.56	

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## Qualitative Information, Financial Statements, etc.

### 1. Qualitative information on consolidated operating results

#### 1) Overview of business performance

In the early months of the year under review, semiconductor markets remained extremely depressed under the impact of the global recession. However, increased demand for end products brought a rapid recovery in the second half of the year. Quarterly statistics show that operating rates were starting to move in Asia as early as the first quarter. Unfortunately, there was little capital investment at that stage. In the second quarter, manufacturers began to invest to raise production capacity for high intensity LEDs. The third quarter brought signs of a robust recovery trend, led by Asia. Those signs included a resumption of investment, especially by subcontractors.

The DISCO Group adjusted to this challenging business environment by implementing extensive cost-cutting initiatives, including furloughs and recession countermeasures. As soon as market conditions started to improve, we responded with dynamic marketing and production activities. This strategy resulted in a dramatic year-on-year increase in operating income.

Net sales for the year ended March 31, 2010 amounted to ¥61,730 million, an increase of 16.2% over the previous year's result. Operating income reached ¥4,667 million, compared with ¥76 million in the previous year, while ordinary income was 212.2% higher at ¥4,560 million. Net income increased by 883.6% year on year to ¥2,470 million.

### 2. Financial Results by Business Segment

#### a. Electronic Industry Products

Sales of precision cutting systems were substantially higher year on year. Contributing factors included a surge in demand for laser saws used to cut high intensity LEDs and a recovery in demand for blade dicers and package singulation dicers for semiconductor ICs. Sales of precision grinding systems matched the previous year's level, in part because of a second-half recovery driven by a return to capital investment by subcontractors and other manufacturers. The firm trend in sales of precision blades and wheels (consumables) was attributable in part to the exchange rate, but we also benefited from an early improvement in customers' operating levels, and from buoyant demand for semiconductors.

Net sales for this segment were 18.0% higher year on year at ¥60,137 million. Operating income increased by 166.2% to ¥7,308 million.

#### b. Industrial grinding products

In this segment, the DISCO Group manufactures and sells industrial diamond tools for use in the civil engineering, construction and manufacturing industries, as well as general purpose grindstones used in the production of motor vehicles and electronic parts. Business conditions remained difficult, despite the gradually emerging recovery in the second half of the year.

Net sales for this segment amounted to ¥1,462 million, a year-on-year decline of 25.0%. Operating income was 78.2% lower at ¥26 million.

#### c. Other Business

Activities in this segment consist of the development and sale of software and hardware for computer systems, especially those used by manufacturers of semiconductor fabrication equipment.

Net sales for this segment in the year ended March 31, 2010 were 25.2% lower year on year at ¥130 million. There was an operating loss of ¥81 million, compared with a ¥74 million loss in the previous year.

### 3. Geographical Segment Information

#### a. Domestic

In addition to sales in Japan, this segment also encompasses sales through local distributors in other markets, especially Taiwan and South Korea. A recovery in demand for precision blades and wheels and precision processing equipments brought substantial year-on-year growth in both net sales and operating income.

Net sales increased by 28.0% year on year to ¥41,044 million, while operating income was 330.8% higher at ¥4,932 million.

#### b. Overseas

Net sales in North America were 5.8% below the previous year's level at ¥3,561 million. Operating income was ¥138 million, compared with a ¥138 million loss in the previous year. Net sales in Asia were 13.8% higher year on year at ¥11,081 million. Operating income increased by 252.3% to ¥1,192 million. Net sales in Europe were 19.5% down year on year at ¥6,043 million, but operating income increased by 0.4% to ¥896 million.

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#### 4. Overseas Sales

A regional breakdown of overseas sales shows that net sales in North America increased by 3.6% year on year to ¥3,641 million, and that net sales in Asia were 52.6% higher at ¥34,403 million. Net sales in Europe were 26.8% lower year on year at ¥5,457 million.

On this basis, the contribution of overseas sales to total consolidated net sales reached 70.5%, an increase of 7.4 percentage points over the previous year's figure of 63.1%.

#### Forecasts for the Year Ending March 31, 2011

With semiconductor market trends likely to remain firm, manufacturers are expected to increase in their capital investment.

Our consolidated financial forecast for the year ending March 31, 2011 includes net sales of ¥86,500 million and operating income of ¥12,100 million. These figures are 40.1% and 159.2% higher, respectively, than the results for current year. We also expect ordinary income to increase by 189.4% year on year to ¥13,200 million, and net income by 241.8% to ¥8,400 million.

### Analysis of Financial Position

#### 1. Assets, Liabilities and Net Assets

Total assets amounted to ¥124,313 million at March 31, 2010, an increase of ¥388 million over the position at the end of the previous fiscal year.

Total current assets amounted to ¥62,926 million, a reduction of ¥3,379 million from the previous year's level. There was a ¥12,124 million increase in notes and accounts receivable, reflecting a recovery in product demand, but cash and deposits were reduced by ¥15,170 million, in part because of the repayment of borrowings ahead of schedule.

Fixed assets increased by ¥3,765 million to ¥61,364 million. The completion of a new building at the Kuwabata Plant and other factors added ¥5,136 million to tangible fixed assets, but there was a ¥1,344 million reduction in investments and other assets

Total liabilities amounted to ¥36,221 million as of March 31, 2010, a reduction of ¥1,374 million from the level a year earlier. Current liabilities rose by ¥10,913 million to ¥22,784 million. This was attributable to an ¥8,955 million rise in notes and accounts payable because of increased procurement of materials and other items to keep pace with a recovery in demand for products. Other factors included a ¥3,411 million increase in other accounts payable and other items.

Total long-term liabilities were reduced by ¥12,288 million to ¥13,437 million. Funds totaling ¥10,000 million were procured through convertible bond issue for use in capital investment, while interest payments and other costs were reduced through the repurchase and cancellation of bank-guaranteed variable-interest bonds worth ¥2,700 million, and the early repayment of long-term borrowings totaling ¥19,747 million.

Net assets increased by ¥1,763 million from the position a year earlier to ¥88,091 million as of March 31, 2010. The shareholders' equity ratio rose by 1.1 points to 70.3%.

#### 2. Cash Flows

Cash and cash equivalents amounted to ¥15,247 million as of March 31, 2010. This is ¥18,170 million lower than the position as of March 31, 2009. Free cash flows were negative ¥2,932 million, reflecting the high level of capital investment in anticipation of future changes in the business environment. The factors affecting cash flow categories in the year ended March 31, 2010 were as follows.

##### Cash Flows from Operating Activities

Net cash provided by operating activities amounted to ¥11,017 million. This total includes net income before income taxes and minority interests of ¥4,046 million, and depreciation of ¥5,364 million.

##### Cash Flows from Investing Activities

Net cash used for investing activities amounted to ¥13,950 million. This reflects expenditure of ¥10,644 million on the acquisition of tangible fixed assets relating to the Kuwabata and Chino Plants.

##### Cash Flows from Financing Activities

Net cash used for financing activities totaled ¥15,411 million. This includes expenditure of ¥21,651 million on the repayment of long-term loans, and ¥3,000 million on the purchase and cancellation of bonds. There was also an inflow of ¥9,976 million resulting from a convertible bond issue.

#### Basic Policy on Income Distribution; Dividends for the Years Ending March 31, 2010 and March 31, 2011

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Disco maintains an income-linked dividend policy, under which dividends are set at 20% of consolidated net income. Regardless of our income position, however, we have maintained a stable annual dividend of at least ¥20. Except where there is a loss, dividends are further increased by an amount equivalent to approximately one-third of any surplus of cash and deposits after payment of dividends and income taxes, etc. This sum is relative to the amount required for technology purchases, such as the acquisition of technology patents and investment in ventures, funds required for the expansion of facilities, and funds that need to be allocated for the repayment of interest-bearing liabilities. The stable dividend level of ¥20 may be reviewed if consolidated losses are recorded in three successive years.

One of our target management indicators is the maintenance of a ratio of ordinary income to net sales of 20% or higher on a four-year cumulative basis. We are on track to achieve this target at the non-consolidated level, and if we can also reach it at the consolidated level we will set our payout ratio at 24%.

Based on a consolidated payout ratio of 20%, our annual dividend for the year ended March 31, 2010 would be ¥15 per share. In line with our stable dividend policy, however, the annual dividend will be set at ¥20 per share. We have already paid an interim dividend of ¥10, which means that the final dividend will also be ¥10.

Our performance forecasts for the year ending March 31, 2011 indicate that the annual dividend will be ¥49 per share.

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## Consolidated Balance sheets (Unaudited)

(Millions of yen)

	As of March 31, 2009	As of March 31, 2010
<b>Assets</b>		
Current assets		
Cash and deposits	33,418	18,247
Notes and accounts receivable-trade	10,963	23,087
Merchandise and finished goods	5,533	5,007
Work in process	5,138	5,920
Raw materials and supplies	8,106	7,612
Deferred tax assets	980	1,258
Other	2,237	1,854
Allowance for doubtful accounts	(71)	(63)
<b>Total current assets</b>	<b>66,306</b>	<b>62,926</b>
Noncurrent assets		
Property, plant and equipment		
Buildings and structures, net	20,324	28,933
Machinery, equipment and vehicles, net	7,636	7,751
Tools, furniture and fixtures, net	935	714
Land	12,787	12,794
Construction in progress	6,858	3,484
Total property, plant and equipment	48,542	53,678
Intangible assets		
Other	782	756
<b>Total intangible assets</b>	<b>782</b>	<b>756</b>
Investments and other assets		
Investment securities	900	581
Deferred tax assets	1,521	464
Long-term time deposits	5,200	5,200
Other	689	722
Allowance for doubtful accounts	(37)	(38)
Total investments and other assets	8,274	6,929
Total noncurrent assets	57,598	61,364
Deferred assets		
Bond issuance cost	20	22
Total deferred assets	20	22
<b>Total assets</b>	<b>123,925</b>	<b>124,313</b>

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(Millions of yen)

	As of March 31, 2009	As of March 31, 2010
<b>Liabilities</b>		
Current liabilities		
Current portion of long-term loans payable	1,903	-
Current portion of bonds	300	-
Income taxes payable	214	403
Provision for bonuses	1,358	1,851
Provision for directors' bonuses	-	61
Provision for product warranties	117	197
Other	3,301	6,713
<b>Total current liabilities</b>	<b>11,871</b>	<b>22,784</b>
Noncurrent liabilities		
Bonds payable	2,700	-
Convertible bond-type bonds with subscription rights to shares	-	10,000
Long-term loans payable	21,747	2,000
Provision for retirement benefits	507	777
Provision for directors' retirement benefits	28	37
Negative goodwill	209	119
Other	531	501
<b>Total noncurrent liabilities</b>	<b>25,725</b>	<b>13,437</b>
<b>Total liabilities</b>	<b>37,596</b>	<b>36,221</b>
<b>Net assets</b>		
Shareholders' equity		
Capital stock	14,517	14,517
Capital surplus	15,599	15,604
Retained earnings	57,342	59,141
Treasury stock	(1,071)	(1,065)
<b>Total shareholders' equity</b>	<b>86,388</b>	<b>88,197</b>
Valuation and translation adjustments		
Valuation difference on available-for-sale securities	0	11
Foreign currency translation adjustment	(610)	(841)
<b>Total valuation and translation adjustments</b>	<b>(610)</b>	<b>(829)</b>
Subscription rights to shares	421	589
Minority interests	130	134
<b>Total net assets</b>	<b>86,328</b>	<b>88,091</b>
<b>Total liabilities and net assets</b>	<b>123,925</b>	<b>124,313</b>

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## Consolidated Statements of income

	(Millions of yen)	
	FY 2008	FY 2009
	Accumulated	Accumulated
<b>Net sales</b>	<b>53,108</b>	<b>61,730</b>
<b>Cost of sales</b>	<b>28,034</b>	<b>33,038</b>
Gross profit	25,073	28,691
Selling, general and administrative expenses	24,997	24,023
<b>Operating income</b>	<b>76</b>	<b>4,667</b>
Non-operating income		
Interest income	134	60
Amortization of negative goodwill	123	89
Equity in earnings of affiliates	29	27
Subsidy income	600	37
Foreign exchange gains	359	-
Other	247	201
Total non-operating income	1,495	416
Non-operating expenses		
Interest expenses	52	346
Sales discounts	24	15
Foreign exchange losses	-	103
Other	34	58
Total non-operating expenses	111	523
<b>Ordinary income</b>	<b>1,460</b>	<b>4,560</b>
Extraordinary income		
Gain on prior period adjustment	53	-
Gain on sales of noncurrent assets	7	2
Subsidy income for furlough	-	248
Other	11	39
Total extraordinary income	72	290
Extraordinary loss		
Loss on sales and retirement of noncurrent assets	468	71
Loss on valuation of investment securities	-	347
Special retirement expenses	45	112
Furlough expenses	158	176
Other	90	97
Total extraordinary losses	762	805
<b>Income before income taxes</b>	<b>770</b>	<b>4,046</b>
Income taxes-current	639	814
Income taxes-deferred	(98)	758
Total income taxes	540	1,573

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	(Millions of yen)	
	FY 2008	FY 2009
	Accumulated	Accumulated
Minority interests in income (loss)	(21)	2
<b>Net income</b>	<b>251</b>	<b>2,470</b>

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## Consolidated Statements of cash flows

	(Millions of yen)	
	FY2008	FY2009
<b>Net cash provided by (used in) operating activities</b>		
Income before income taxes	770	4,046
Depreciation and amortization	4,656	5,364
Amortization of goodwill	0	-
Amortization of negative goodwill	(123)	(89)
Loss (gain) on valuation of investment securities	23	347
Equity in (earnings) losses of affiliates	(29)	(27)
Increase (decrease) in allowance for doubtful accounts	14	(1)
Increase (decrease) in provision for bonuses	(773)	495
Increase (decrease) in provision for directors' bonuses	(198)	61
Increase (decrease) in provision for product warranties	8	83
Increase (decrease) in provision for retirement benefits	(467)	270
Loss (gain) on sales of investment securities	(2)	24
Loss (gain) on sales and retirement of property, plant and equipment	416	31
Subsidy income for furlough	(600)	(37)
Interest and dividends income	(142)	(67)
Interest expenses	52	346
Decrease (increase) in notes and accounts receivable-trade	15,863	(12,276)
Decrease (increase) in inventories	1,023	547
Increase (decrease) in notes and accounts payable-trade	(9,454)	9,120
Increase (decrease) in accounts payable-other	(3,802)	2,485
Other, net	(397)	475
<b>Subtotal</b>	<b>6,837</b>	<b>11,199</b>
Interest and dividends income received	158	58
Interest expenses paid	(72)	(268)
Income taxes (paid) refund	(2,918)	(9)
Proceeds from subsidy	600	37
<b>Net cash provided by (used in) operating activities</b>	<b>4,605</b>	<b>11,017</b>
<b>Net cash provided by (used in) investing activities</b>		
Purchase of short-term investment securities	(500)	-
Proceeds from redemption of securities	500	-
Purchase of property, plant and equipment	(13,677)	(10,644)
Proceeds from sales of property, plant and equipment	40	37
Purchase of investment securities	(578)	0
Proceeds from sales of investment securities	3	-
Purchase of intangible assets	(74)	(122)
Payments into time deposits	(200)	(9,400)

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	FY2008	FY2009
Proceeds from withdrawal of time deposits	1,000	6,400
Other, net	(99)	(219)
<b>Net cash provided by (used in) investing activities</b>	<b>(13,586)</b>	<b>(13,950)</b>
<b>Net cash provided by (used in) financing activities</b>		
Net increase (decrease) in short-term loans payable	1,047	(73)
Proceeds from long-term loans payable	23,066	-
Repayment of long-term loans payable	(95)	(21,651)
Proceeds from issuance of bonds	2,979	9,976
Redemption of bonds	-	(3,000)
Proceeds from issuance of common stock	0	-
Purchase of treasury stock	(801)	0
Cash dividends paid	(1,833)	(673)
Other, net	-	12
<b>Net cash provided by (used in) financing activities</b>	<b>24,363</b>	<b>(15,411)</b>
<b>Effect of exchange rate change on cash and cash equivalents</b>	<b>(26)</b>	<b>173</b>
<b>Net increase (decrease) in cash and cash equivalents</b>	<b>15,355</b>	<b>(18,170)</b>
<b>Cash and cash equivalents at beginning of period</b>	<b>18,062</b>	<b>33,418</b>
<b>Cash and cash equivalents at end of period</b>	<b>33,418</b>	<b>15,247</b>

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**4) Going concern assumption**

None

**5) Segment Information****A) Information by business segment**

(Millions of yen)

	Year ending March 31, 2009					
	Electronic industry product segment	Industrial grinding product segment	Other business segment	Total	Eliminations (Corporate)	Consolidated
Net sales to external customers	50,982	1,950	174	53,108	-	53,108
Intersegment net sales	-	39	102	142	(142)	-
Total net sales	50,982	1,990	277	53,250	(142)	53,108
Operating income	2,745	123	74	2,795	(2,718)	76

(Millions of yen)

	Year ending March 31, 2010					
	Electronic industry product segment	Industrial grinding product segment	Other business segment	Total	Eliminations (Corporate)	Consolidated
Net sales to external customers	60,137	1,462	130	61,730	-	61,730
Intersegment net sales	-	37	167	205	(205)	-
Total net sales	60,137	1,500	298	61,936	(205)	61,730
Operating income	7,308	26	81	7,253	(2,585)	4,667

Note:

1. Method of classifying business: Products are classified mainly on the basis of market similarity.
2. Major products in each business segment:
  - 1) Electronic industry product segment: dicing saws, laser saws, grinders, polishers, dry etchers, surface planer, dicing blades, grinding wheels, dry polishing wheels and electronic parts.
  - 2) Industrial grinding products segment: industrial diamond wheels and cut-off wheels
  - 3) Other business segment: software

**B) Information by geographic segment**

(Millions of yen)

	Year ending March 31, 2009						
	Japan	North America	Asia	Europe	Total	Elimination (Corporate)	Consolidated
Net sales to external customers	32,075	3,781	9,740	7,511	53,108	-	53,108
Intersegment net sales	14,188	49	957	7	15,204	(15,204)	-
Total net sales	46,264	3,830	10,697	7,518	68,312	(15,204)	53,108
Operating income	1,144	138	338	893	2,237	(2,161)	76

(Millions of yen)

	Year ending March 31, 2010						
	Japan	North America	Asia	Europe	Total	Elimination (Corporate)	Consolidated
Net sales to external customers	41,044	3,561	11,081	6,043	61,730	-	61,730
Intersegment net sales	13,732	66	836	90	14,726	(14,726)	-
Total net sales	54,777	3,627	11,917	6,133	76,456	(14,726)	61,730
Operating income	4,932	138	1,192	896	7,160	(2,492)	4,667

Note:

1. National and regional categories are determined on the basis of geographic proximity.
2. Main countries and territories except Japan are as follows;
  - 1) "North America" includes operations located primarily in the United States.
  - 2) "Asia" includes operations located primarily in Singapore, Malaysia, Thailand, China, Korea and Taiwan.
  - 3) "Europe" includes operations located primarily in Germany, France and the United Kingdom.

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**C) Overseas sales**

(Millions of yen)

	Year ending March 31, 2009			
	North America	Asia	Europe	Consolidated
Net sales to foreign customers	3,515	22,548	7,459	33,524
Consolidated Sales	-	-	-	53,108
Net sales to foreign customers as a percentage of total net sales	6.6%	42.5%	14.0%	63.1%

(Millions of yen)

	Year ending March 31, 2010			
	North America	Asia	Europe	Consolidated
Net sales to foreign customers	3,641	34,403	5,457	43,502
Consolidated Sales	-	-	-	61,730
Net sales to foreign customers as a percentage of total net sales	5.9%	55.7%	8.9%	70.5%

Note:

1. National and regional categories are determined on the basis of geographic proximity.
2. Main countries and territories except Japan are as follows;
  - 1) "North America" includes operations located primarily in the United States.
  - 2) "Asia" includes operations located primarily in Singapore, Malaysia, Thailand, China, Korea and Taiwan.
  - 3) "Europe" includes operations located primarily in Germany, France and the United Kingdom.
3. Foreign sales indicates net sales in countries and territories except Japan.

**5) Notes on significant changes in shareholders' equity**

Not applicable.

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**4. Other Information****1) Production results**

(Millions of yen)

	Year ending March 31, 2010	YoY(%)
Electronic industry product segment	52,093	123.5
Industrial grinding product segment	784	76.7
Other business segment	298	107.6
Total	53,176	122.3

Note:

1. The amounts are based on sales prices before internal transfer between segments.
2. The amounts shown above do not include consumption taxes.

**2) Orders and order backlog**

(Millions of yen)

	Orders		Order backlog	
	Year ending March 31, 2010	YoY(%)	Year ending March 31, 2010	YoY(%)
Electronic industry product segment	64,622	142.0	7,971	228.6
Industrial grinding product segment	1526	87.4	107	251.0
Other business segment	109	61.1	6	22.5
Total	66,258	139.7	8,084	227.3

Note:

1. Inter-segment transactions have been eliminated.
2. The amounts shown above do not include consumption taxes.

**3) Sales results**

(Millions of yen)

	Year ending March 31, 2010	YoY(%)
Electronic industry product segment	60,137	118.0
Industrial grinding product segment	1,462	75.0
Other business segment	130	74.8
Total	61,730	116.2

Note:

1. Inter-segment transactions have been eliminated.
2. The amounts shown above do not include consumption taxes.