1st Quarter Financial Results
Year Ending March 2013

Mitsui & Co., Ltd.
August 2, 2012

A Cautionary Note on Forward-Looking Statements:
This material contains statements (including figures) regarding Mitsui & Co., Ltd. (“Mitsui”)’s corporate strategies, objectives, and views of future developments that are forward-looking in nature and are not simply reiterations of historical facts. These statements are presented to inform stakeholders of the views of Mitsui’s management but should not be relied on solely in making investment and other decisions. You should be aware that a number of important risk factors could lead to outcomes that differ materially from those presented in such forward-looking statements. These include, but are not limited to, (i) change in economic conditions that may lead to unforeseen developments in markets for products handled by Mitsui, (ii) fluctuations in currency exchange rates that may cause unexpected deterioration in the value of transactions, (iii) adverse political developments that may create unavoidable delays or postponement of transactions and projects, (iv) changes in laws, regulations, or policies in any of the countries where Mitsui conducts its operations that may affect Mitsui’s ability to fulfill its commitments, and (v) significant changes in the competitive environment. In the course of its operations, Mitsui adopts measures to control these and other types of risks, but this does not constitute a guarantee that such measures will be effective.
Overall the global economy demonstrated a slower rate of recovery due to weakness in advanced economies and moderated growth momentum in emerging economies.

- Net Income attributable to Mitsui was ¥104.4 billion, supported by increases in volumes of Metals and Energy and high oil prices.
- This represents a decline from the corresponding period of the previous year due to lower metal resource prices, but an increase from the 4Q of the previous year.

Net Income Attributable to Mitsui for 3-month period Ended June 2012

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<tr>
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<tbody>
<tr>
<td>¥billion</td>
<td>102.5</td>
<td>132.7</td>
<td>104.4</td>
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Forex rate (¥/US$)
- Jun/2010: 91
- Jun/2011: 81
- Jun/2012: 80

Oil price (US$/bbl)
- Jun/2010: 78
- Jun/2011: 97
- Jun/2012: 117

Plan (Mar/2013) (Announced in May 2012): 400.0

* In this presentation material, “net income” means “net income attributable to Mitsui & Co., Ltd. for the three-month period ended June 30”
Summary of Operating Results

**Gross Profit** ¥201.9 bn -¥15.1 bn (-7%)
- MIOD -7.9 : Decline in iron ore prices, partially offset by increase in sales volume
- MII -4.8 : Decline in iron ore prices
- Chemicals Segment -5.4 : Decline in sales volume and prices of KPA, underperforming trading activities of petrochemicals
- MCH -3.3 : Decline in coal prices, partially offset by increase in sales volume and lower cost
- MOECO +7.8, MEPME+4.8, MEPAU+4.2 : Increase in oil prices and sales volume

**Operating Income** ¥72.0 bn -¥16.6 bn (-19%)
- Decline in gross profit

**Equity in Earnings of Associated Companies** ¥60.1 bn -¥14.1 bn (-19%)
- Valepar -13.1 : Reversal effect of the gain on aluminium assets divestiture and decline in iron ore prices
- Overseas IPP business -7.0 : Decline of 6.6 in mark-to-market valuation gains/losses
- Reversal effect of impairment loss on securities +6.7 : Moshi Moshi Hotline

**Net Income** ¥104.4 bn -¥28.3 bn (-21%)
- Impairment loss on securities -7.8 (pre-tax) :
  - Jun/2012 : Nippon Steel -4.9
- Loss on sales of securities -7.5 (pre-tax) :
  - Jun/2011 : Remeasurement gain on Multigrain +3.6
- Exploration expenses -2.4 (pre-tax) :
  - Jun/2012 : -7.3
  - Jun/2011 : -4.9
- Dividend income +13.9 (pre-tax) : Increase of +15.8 in dividends from LNG projects mainly driven by Sakhalin II
Net Income by Operating Segment

Major Factors in Q-on-Q Changes (after tax basis)

- **Mineral & Metal Resources** ¥30.3 bn - ¥29.6 bn (-49%)
  - Valepar -7.2*: Reversal effect of the gain on aluminium assets divestiture and decline in iron ore prices
  - MIOD -6.3**: Decline in iron ore prices, partially offset by increase in sales volume
  - MII -1.8**: Decline in iron ore prices

- **Energy** ¥56.3 bn + ¥17.8 bn (+46%)
  - Increase in dividend income from LNG projects +16.5
  - MOECO +5.0, MEPME+2.3, MEPAU+2.1: Higher oil prices and increases in volume
  - MCH -1.8**: Decline in coal prices, partially offset by increase in sales volume and lower cost

- **Iron & Steel Products** - ¥1.9 bn - ¥4.3 bn
  - Foreign exchange gains/losses on trading -1.5
  - Impairment loss on securities -1.0: Nippon Steel

- **Machinery & Infrastructure** ¥4.3 - ¥4.2 bn (-49%)
  - Overseas IPP business -3.4*/**: Decline in mark-to-market valuation gains/losses

(¥billion)

* After tax effect on undistributed retained earnings recognized at parent company.
** This segment’s holding portion
Breakdown on Q-on-Q Change in Net Income (Jun/2011 vs Jun/2012)

(¥billion)

After tax basis

132.7

One-Time Reversal Effect

-2.0

Details

- Divestitures of securities: -10.0
  - T-GAIA -3.9
  - Multigrain -1.8 (Remeasurement gain) etc.
- Impairment loss of securities: +9.0
  - Moshi Moshi Hot Line +6.7 etc.
- Others: -1.0
  - Overseas IPP businesses MtM -1.0 etc.

Divestiture & Evaluation Profit/Loss

-6.0

Details

- Divestiture of Securities: +3.0
  - T-GAIA +1.1
  - IHH +1.2 (equity dilution) etc.
- Impairment loss of securities: -6.0
  - Nippon Steel -1.7
  - Preferred shares of Valepar -1.6 etc.
- Others: -3.0
  - Overseas IPP businesses MtM -3.0 etc.

Market & Commodity Prices

-14.0

Details

- Iron Ore: -15.0
- Oil & Gas: +10.0
- Coal: -5.0
- Nickel: -1.0
- Forex*: -3.0
  - i) Yen vs functional currency: -2.0
  - ii) Functional currency vs. revenue currencies: +4.0

Costs in Metals & Energy

-4.0

Details

- Energy: -4.0
  - Sales volume increase: +11.0
  - Mineral & Metal Resources: +2.5
  - Energy: +8.5
- Reversal of DTL for undistributed R/E in relation to dividend income: +2.0
- Weak macro environment

Miscellaneous

approx. -2.0

104.4

Details

- Overseas IPP businesses MtM -3.0 etc.

Jun/2011

Jun/2012

*Forex
- Energy: -3.0 (i) -2.0, (ii) -1.0
- Mineral & Metal Resources: ±0 (i) -5.0, (ii) +5.0
Balance Sheets & Cash Flows

**Balance Sheets**

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<thead>
<tr>
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**(¥trillion)**

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**(¥billion)**

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**Cash Flows**

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*(*) Figures in brackets in interest-bearing debt are “net interest-bearing debt”, which is interest-bearing debt minus cash and cash equivalents and time deposits.
# Investments and Loans

<table>
<thead>
<tr>
<th>Business Area</th>
<th>Plan Mar/2013</th>
<th>Result Mar/2013 1Q (Ybillion)</th>
<th>Major Projects</th>
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<tr>
<td>Metals</td>
<td>200</td>
<td>35</td>
<td>Australian iron ore expansion, Caserones copper development</td>
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<td>Machinery &amp; Infrastructure</td>
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<td>Rolling stock lease, FPSO lease, IPP business</td>
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<td>Chemicals</td>
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<td>Energy</td>
<td>250</td>
<td>65</td>
<td>Shale gas/oil, Expansion of oil &amp; gas and coal, Capital increase in JAL-MIMI</td>
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<td>Lifestyle</td>
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<td>Innovation &amp; Cross Function</td>
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<td>5</td>
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<td>Gross Investments &amp; Loans</td>
<td>800</td>
<td>150</td>
<td>Loan collection of commercial vessel business, Redemption of preferred shares of Valepar, Divestiture of T-GAIA shares</td>
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<tr>
<td>Divestiture</td>
<td>▲160</td>
<td>▲40</td>
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<td>Net Cash Outflow</td>
<td>640</td>
<td>110</td>
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Appendix
Net Income by Business Area -Global Basis- (Reference*)

Jun/2011

- Metals: 72.6
- Machinery & Infrastructure: 9.6
- Chemicals: 8.4
- Metals: 40.0
- Energy: 5.3
- Lifestyle: 1.3
- Innovation & Cross Function: -4.5

Jun/2012

- Metals: 36.9
- Machinery & Infrastructure: 5.0
- Chemicals: 5.5
- Metals: 56.6
- Energy: 3.0
- Lifestyle: -2.8
- Innovation & Cross Function: 1.1
- All Others/Adjustments & Eliminations: -3.8

Notes:

(*) Global results by business area, including all overseas operations (Reference).
Reorganization to 6 Business Areas

- Reorganization to 6 business areas from previous 4 business areas.
- Newly created “Innovation & Cross Function” business area
  - Develop new businesses for the future, carry out investments for corporate development purposes
  - Contribute to the entire earnings base by providing various functional capabilities

<table>
<thead>
<tr>
<th>Previous 4 Business Areas</th>
<th>New 6 Business Areas</th>
<th>Operating Segments</th>
<th>Business Units</th>
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<td>Mineral Resources &amp; Energy</td>
<td>Metals</td>
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<td>-Energy BU 2</td>
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<td>-Foods &amp; Retail</td>
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<td>-Motor Vehicles &amp; Construction Machinery</td>
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<td>-Consumer Service</td>
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<td>-Marine &amp; Aerospace</td>
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<td>-IT</td>
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<td>Global Marketing Networks</td>
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<td>-Basic Chemicals</td>
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<td>-Iron &amp; Steel Products</td>
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<td>-Performance Chemicals</td>
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<td>-Motor Vehicles &amp; Construction Machinery</td>
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<td>-Basic Chemicals</td>
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<td>-Performance Chemicals</td>
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### Assumptions and Sensitivities for FY Mar/2013 Forecast

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<td>Crude Oil ((^1))</td>
<td>¥1.2 bn (US$1/bbl)</td>
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<tr>
<td>154(^{*}(2))</td>
<td>Iron Ore</td>
<td>¥1.9 bn (US$1/ton)</td>
<td>(^{(3)})</td>
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<tr>
<td>8,821(^{*}(4))</td>
<td>Copper</td>
<td>(^{(5)})</td>
<td>7,625</td>
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<tr>
<td>10.4(^{*}(4))</td>
<td>Nickel</td>
<td>¥1.8 bn (US$1/lb)</td>
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<td>78.82</td>
<td>USD</td>
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<tr>
<td>46.65</td>
<td>BRL</td>
<td>¥0.8 bn (¥ 1/BRL)</td>
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\(^{(1)}\) Oil price trend is reflected in net income with a 0-6 month time lag. For FY Mar/2013:
- 6 month time lag: 12%, 3 month time lag: 62%, Without lag: 26%

The annual average price applicable to FY Mar/2013 is US$113/bbl, based on the premise that the crude oil price (JCC) will be maintained at US$110/bbl throughout FY Mar/2013.


\(^{(3)}\) We refrain from disclosing iron ore price assumption for FY Mar/2013 forecast.

\(^{(4)}\) FY Mar/2012 Result: Average of LME cash settlement price during Jan’11-Dec’11.


\(^{(5)}\) We refrain from disclosing the copper price sensitivity to net income.

\(^{(6)}\) Impact of currency fluctuation on net income of overseas subsidiaries and associated companies (denominated in functional currency) against JPY. Impact of currency fluctuation between thier functional currencies against revenue currencies and exchange hedging are not included.

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Net Income by Quarterly Results

(¥billion)

177.6     149.7     306.7     434.5     400.0
39.2      56.7      30.9      94.3      104.4
137.4     92.6      112.9
103.1      80.7      94.6
-102.1     102.5      132.7

Exchange rate (¥/US$)  Oil price (US$/bbl)
101         101       93         62
93          85        80         108
85          79        117

* average of 3-month period ended June 30, 2012
Iron Ore Spot Price*
(Reference)

CFR North China (Fine, Fe 62%)

*Average of representative reference prices
Crude Oil Prices

US$/BBL

WTI
Dubai
JCC
## Equity Share of Delivery (Results)

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<td><strong>Iron Ore (Mt)</strong></td>
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<td>11.7</td>
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<td>11.2</td>
<td>45.8</td>
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<td><strong>MIOD</strong></td>
<td>6.2</td>
<td>7.0</td>
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<td>1.0</td>
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<td><strong>Vale</strong></td>
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<td><strong>Coking Coal</strong></td>
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<td>60.7</td>
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* Preliminary figures for coal
** 1Q: Result of Jan-Mar, 2Q: Result of Apr-Jun, 3Q: Result of Jul-Sep, 4Q: Result of Oct-Dec
*** Including 5% equity share of Vale
Equity Share of Production

(Announced in May 2012)

Iron ore*

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Oil/Gas

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Gas

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</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>131.1</td>
<td>140.3</td>
<td>163.0</td>
<td>176.8</td>
<td>182.6</td>
</tr>
</tbody>
</table>

Oil

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>81.2</td>
<td>74.2</td>
<td>81.9</td>
<td>80.7</td>
<td>75.1</td>
</tr>
</tbody>
</table>

Copper*

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>58.0</td>
<td>59.8</td>
<td>67</td>
<td>92</td>
<td>126</td>
</tr>
</tbody>
</table>

Coal

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>8.5</td>
<td>9.4</td>
<td>11</td>
<td>12</td>
<td>12</td>
</tr>
</tbody>
</table>

*Including 5% equity share of vale
As of June 30, 2012

Major Projects in Mineral & Metal Resources Business
Upstream Assets in Energy Business

As of June 30, 2012
### Upstream Assets (Natural Gas/LNG/Oil)

**Natural gas/LNG Project**

<table>
<thead>
<tr>
<th>Australia</th>
<th>New Zealand</th>
<th>Papua New Guinea</th>
<th>Thailand</th>
<th>Vietnam</th>
<th>Cambodia</th>
<th>Indonesia</th>
<th>Poland</th>
<th>Oman</th>
<th>Egypt</th>
<th>Yemen</th>
<th>Libya</th>
<th>Mozambique</th>
<th>Ghana</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laverda*1 and 21 other permits (MEPAU)</td>
<td>PEP50119 and 3 other permits (MEPAU)</td>
<td>PPL285 (MEPAU)</td>
<td>Blocks L10/43*1 and 3 other permits (MOECO)</td>
<td>Song Hong (MOECO)</td>
<td>Block A (MOECO)</td>
<td>Merangin I, Tuna, West Papuwa I・III (MOECO)</td>
<td>Poland Shale (MEPPOL)</td>
<td>Block 3&amp;4*1 (MEPOL)</td>
<td>Meleiha Deep (MEPME)</td>
<td>Block 7 (MEPME)</td>
<td>Block 113, Block 201 (MOECO)</td>
<td>Area1 (MEPMOZ)</td>
<td>Keta (MEPKQ)</td>
</tr>
</tbody>
</table>

**Oil Project**

<table>
<thead>
<tr>
<th>USA</th>
<th>Australia</th>
<th>Russia</th>
<th>New Zealand</th>
<th>Indonesia</th>
<th>Qatar</th>
<th>Oman</th>
<th>Egypt</th>
<th>USA</th>
<th>Russia</th>
<th>Australia</th>
<th>New Zealand</th>
<th>Qatar</th>
<th>Oman</th>
<th>Egypt</th>
</tr>
</thead>
</table>

*1 Proved undeveloped  *2 Partly in production

---

*As of June 30, 2012*
As of June 30, 2012

**Major Investments in Iron & Steel Products Business**

- **Mi-King Limited**
- **Euro-Mit Steel**
- **Mi-King S.R.O.**
- **BAMI**
- **Indian Steel**
- **Wuhan Yorozu Bao Mit Automotive**
- **Guangzhou Ribao Steel Coil Center**
- **Guangzhou Pacific Tinplate**
- **Yorozu Bao Mit Automotive**
- **J/V with Bao Steel Group (14)**
- **Yantai Fuji Mitsui Automotive**
- **Changchun Fam Steel**
- **Stami**
- **GEG(Holdings)***

**Steel Technologies**

(Service Center Location: USA 15, Canada 2, Mexico 8)

- **Seymour Tubing**
- **PK-USA**
- **Champions Pipe & Supply**

**Major Domestic Group Companies**

- Mitsui & Co. Steel
- Mitsui Bussan Kozai Hanbai
- MBK Steel Products West

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**Key:***

- ● Major domestic subsidiaries
- ▲ Processor
- ■ Manufacturer
- ◆ Distributor

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Portfolio of IPP (Independent Power Producer) Business

As of June 30, 2012

Net Capacity (Mitsui’s Share): 5.5GW
(Gross Capacity: 25GW)
Major Infrastructure Projects (except IPP)

As of June 30, 2012

- MRCE/Railway Locomotive Lease
  - Izumit/Water Supply
  - Ras Laffan IWPP (Desalination)
- Galaxy/Water Supply, Waste Water Treatment
- Thai Tap/Water Supply
- Umm Al Nar IWPP (Desalination)
- Taiwan High Speed Rail
- KPA/Ammonia Producing
- Haneda Air Cargo Terminal

- MRCH/Railway Wagon Lease
  - Atlatec/Water Supply, Waste Water Treatment
  - Refinery Waste Water Treatment for PEMEX
- Manzanillo LNG Terminal
- Advanced Loan for PDVSA

- MRCLA/Railway Wagon Lease
  - Subway PPP at Sao Paulo
  - MGE和Gas Distribution
  - FPSO Lease for Petrobras
  - Drill Ship Lease for Petrobras
Major Overseas Investments
in Food Resources and Food Products & Services

As of June 30, 2012

- BUSSAN BEIJING LOGISTICS ENTERPRISE
- NEW MIT ENTERPRISE (Feedstuff)
- Allied Pacific (Shrimp farming)
- MCC LOGISTICS KOREA
- The Kumphawapi Sugar (Cane sugar)
- KASET PHOL SUGAR (Cane sugar)
- United Grain (Grain merchandising)
- WILSEY FOODS Ventura Foods (Edible oil products)
- LDM Foods (Canola oil processing)
- WILSEY FOODS (Processed food)
- MITSUI BUSSAN LOGISTICS
- Multigrain (Production: Soybean, Cotton, etc.) (Distribution: Soybean, Corn, etc.)
- Mitsui Alimentos (Coffee products)
- Synlait (Dairy farming)
- Ventura Foods (Processed food)

Resources
Materials
Distribution
Retail
Major Investments in Consumer Service Business

As of June 30, 2012

- **Medical & healthcare**
- **Services**
- **Real estate**
- **Housing & industrial materials**
- **Fashion**

**Medical & healthcare**
- IHH Healthcare (Hospitals, healthcare)[Malaysia]
- PTS (Industrial materials)[Peru]
- MBK Real Estate Europe [U.K.]
- T.M. BAikal (Housing materials)[Russia]
- Alcantara [Italy]
- Shenzhen Main Luck Pharmaceuticals (Pharmaceutical Business)[China]
- DUSKIN HONG KONG (Franchise)[China]
- MBK Real Estate [U.S.]
- The OSI Companies (Staffing)[U.S.]

**Services**
- The CSI Companies (Staffing)[U.S.]
- UM Managed Solutions (Facility management services)[Singapore]
- MBK Real Estate Europe [U.K.]
- MBK Real Estate [U.S.]
- Altal Moda (China) [China]
- Shenzhen Main Luck Pharmaceuticals (Pharmaceutical Business)[China]
- Gleneagles CRC (Pharmaceutical: CRO *1)[Singapore]
- Gleneagles CRC (Pharmaceutical: CRO *1)[Singapore]
- TAINAN ENTERPRISES [Taiwan]

**Real estate**
- IHH Healthcare (Hospitals, healthcare)[Malaysia]
- PTS (Industrial materials)[Peru]
- MBK Real Estate Europe [U.K.]
- MBK Real Estate [U.S.]
- MBK Real Estate Europe [U.K.]
- The OSI Companies (Staffing)[U.S.]

**Housing & industrial materials**
- Shenzhen Main Luck Pharmaceuticals (Pharmaceutical Business)[China]
- PTS (Industrial materials)[Peru]
- MBK Real Estate Europe [U.K.]
- MBK Real Estate [U.S.]
- Altal Moda (China) [China]
- Shenzhen Main Luck Pharmaceuticals (Pharmaceutical Business)[China]
- Gleneagles CRC (Pharmaceutical: CRO *1)[Singapore]
- Gleneagles CRC (Pharmaceutical: CRO *1)[Singapore]
- TAINAN ENTERPRISES [Taiwan]

**Fashion**
- IHH Healthcare (Hospitals, healthcare)[Malaysia]
- MBK Real Estate Europe [U.K.]
- Shenzhen Main Luck Pharmaceuticals (Pharmaceutical Business)[China]
- PTS (Industrial materials)[Peru]
- MBK Real Estate Europe [U.K.]
- The OSI Companies (Staffing)[U.S.]

*1 Contract Research Organization
*2 Contract Manufacturing Organization
Major Investments in Trading Business in Chemical Business
Major Investments in Manufacturing Business in Chemical Business

As of June 30, 2012

Methanol
Chlor-alkali
Petrochemicals
Green and Specialty chemicals
Agricultural chemicals
Performance materials and advanced materials