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Custom Fit.

ORIX Corporation

Third Quarter Consolidated Financial Results

For the Nine-Month Period Ended December 31, 2017

Kazuo Kojima

Deputy President & CFO

Hitomaro Yano

Executive Officer,

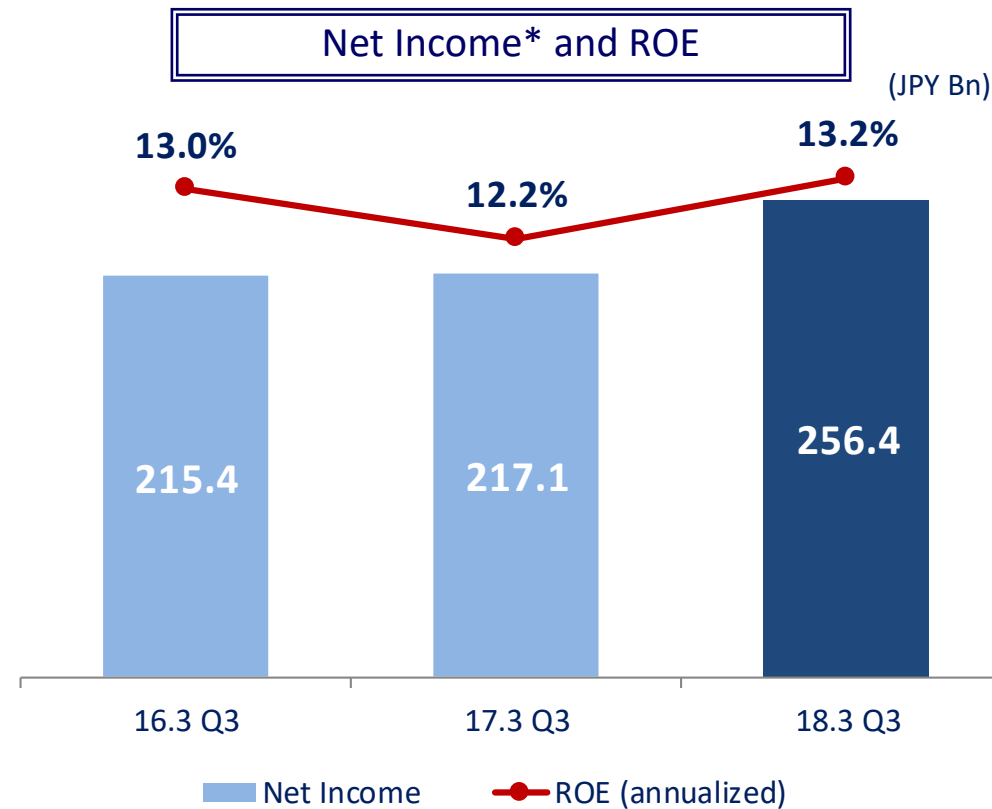
Head of Treasury and Accounting Headquarters

January 30, 2018

(TSE: 8591; NYSE: IX)

Overview (1)

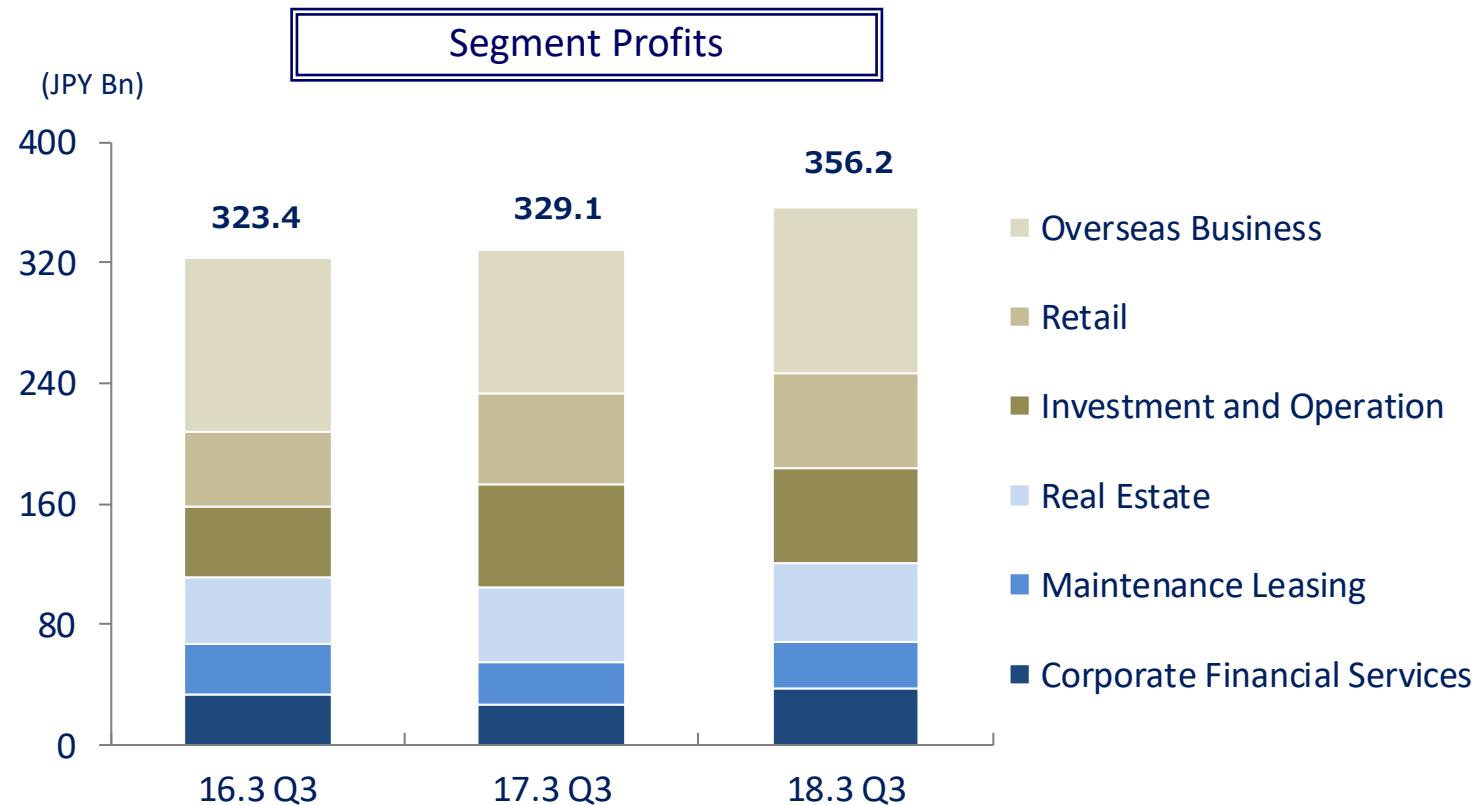
- ✓ 256.4bn yen in net income, up by 18% YoY, including the impact of US tax reform
- ✓ Annualized ROE at 13.2%
- ✓ No revision at the FY18.3 target of net income and dividend payout ratio (27%)



*Net Income refers to Net Income Attributable to ORIX Corporation Shareholders

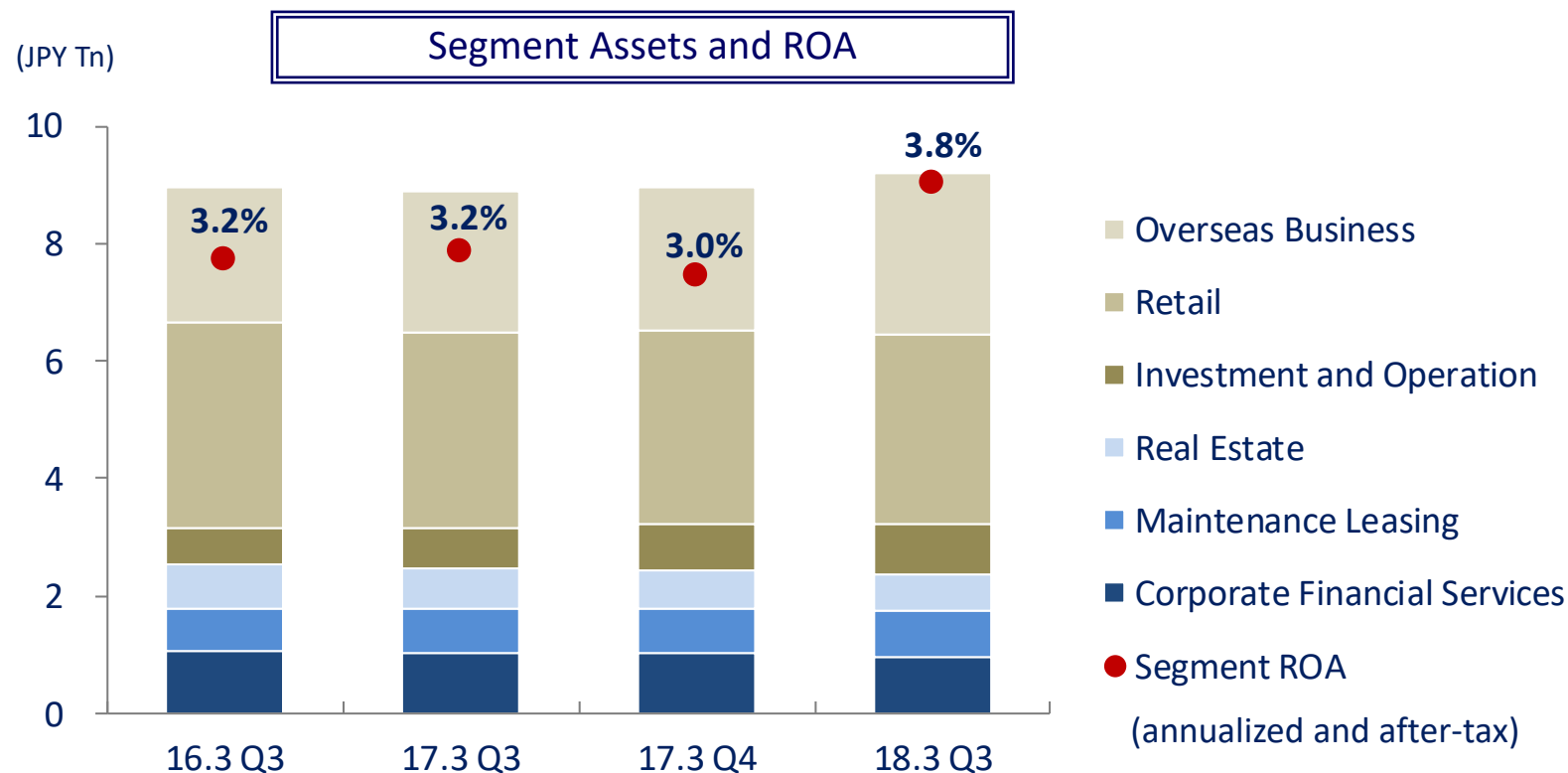
Overview (2)

- ✓ Segment profits at 356.2bn yen, up by 8% YoY
- ✓ Profit increased in every segment except Investment and Operation
- ✓ Decreased in Investment and Operation due to the absence of the capital gain from PE investment



Overview (3)

- ✓ Segment assets at 9,192.7bn yen, up by 3% YTD
- ✓ Increased in Overseas Business, Investment and Operation and Maintenance Leasing
- ✓ Decreased in Retail due to the sale of investment securities by ORIX Life Insurance (OLI) and run-off in Hartford Life Insurance K.K. (HLIKK) portfolio



Overview (4)

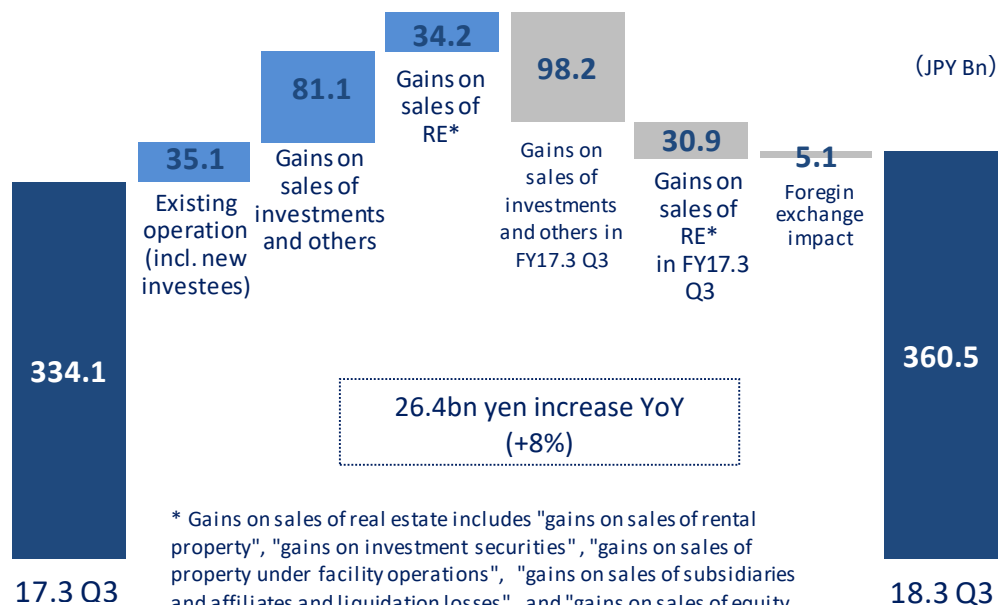
■ Pretax profits: 26.4bn yen increase YoY (+8%)

- ✓ Positive contribution from the existing operation such as aircraft and ship-related operations, the Americas, asset management, concession, life insurance, and banking business.
- ✓ Gain on sales decreased YoY

■ Segment assets: 235.9bn yen increase YTD (+3%)

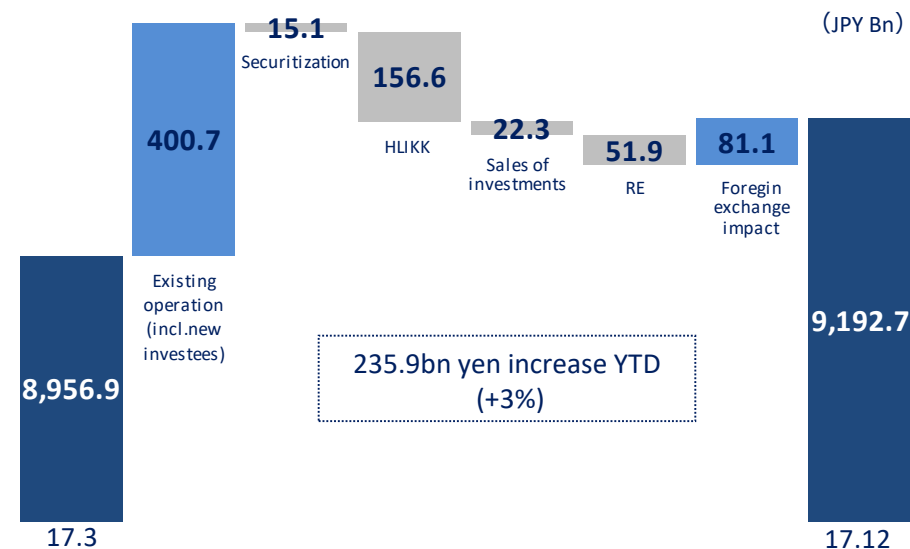
- ✓ Increased in aircraft and ship-related operations, the Americas, banking business, environment and energy, and PE investment in existing operation

YoY Changes in Pretax Profits



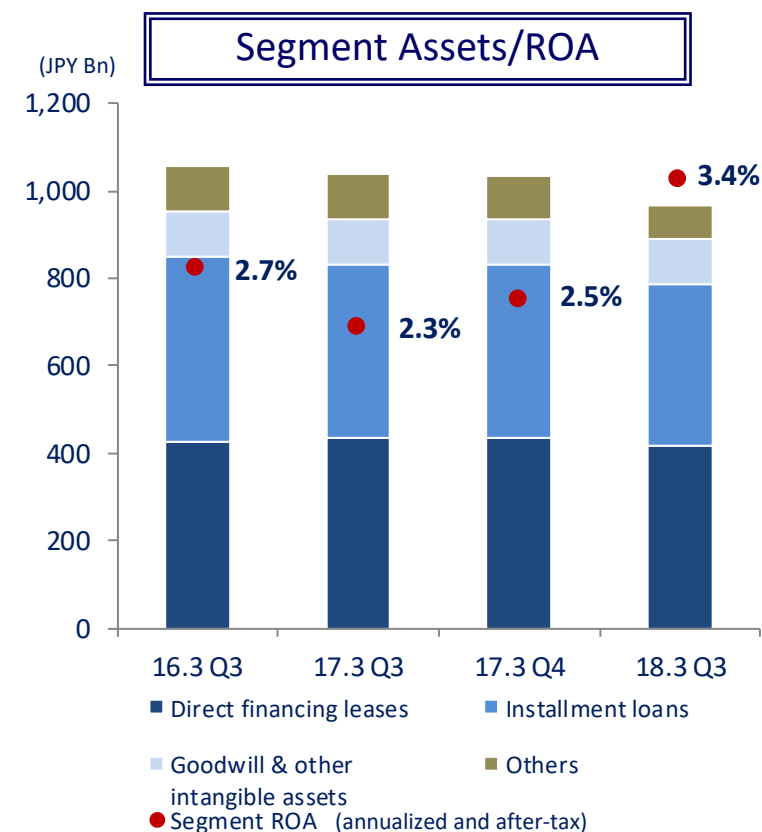
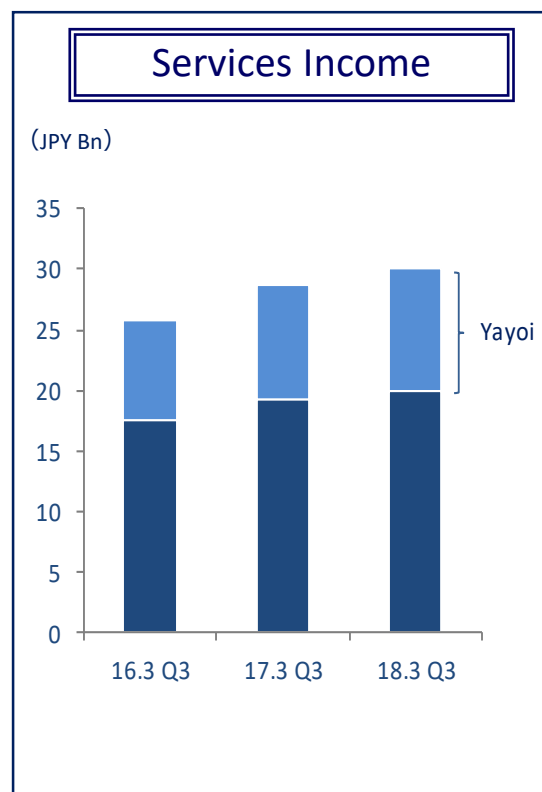
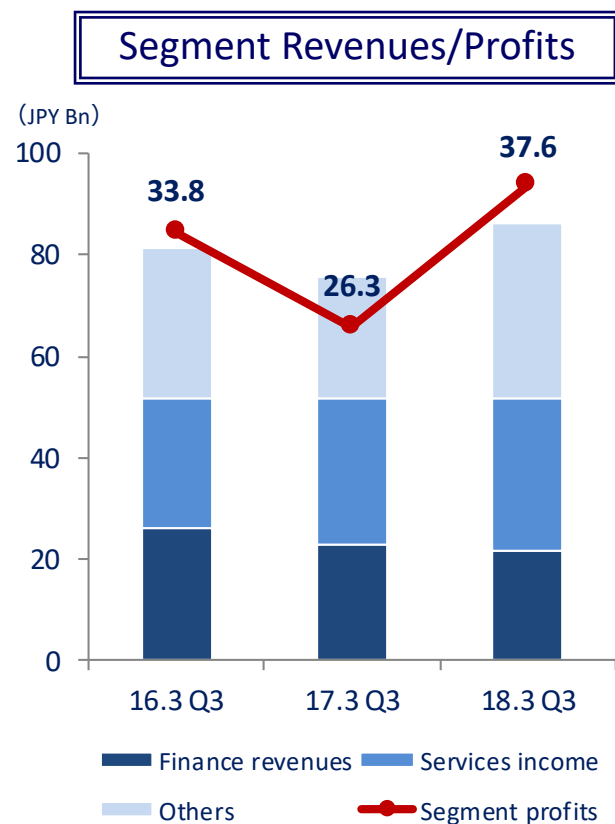
* Gains on sales of real estate includes "gains on sales of rental property", "gains on investment securities", "gains on sales of property under facility operations", "gains on sales of subsidiaries and affiliates and liquidation losses", and "gains on sales of equity method affiliates"(excl. condominium related gains) under Real Estate segment

YTD Changes in Segment Assets



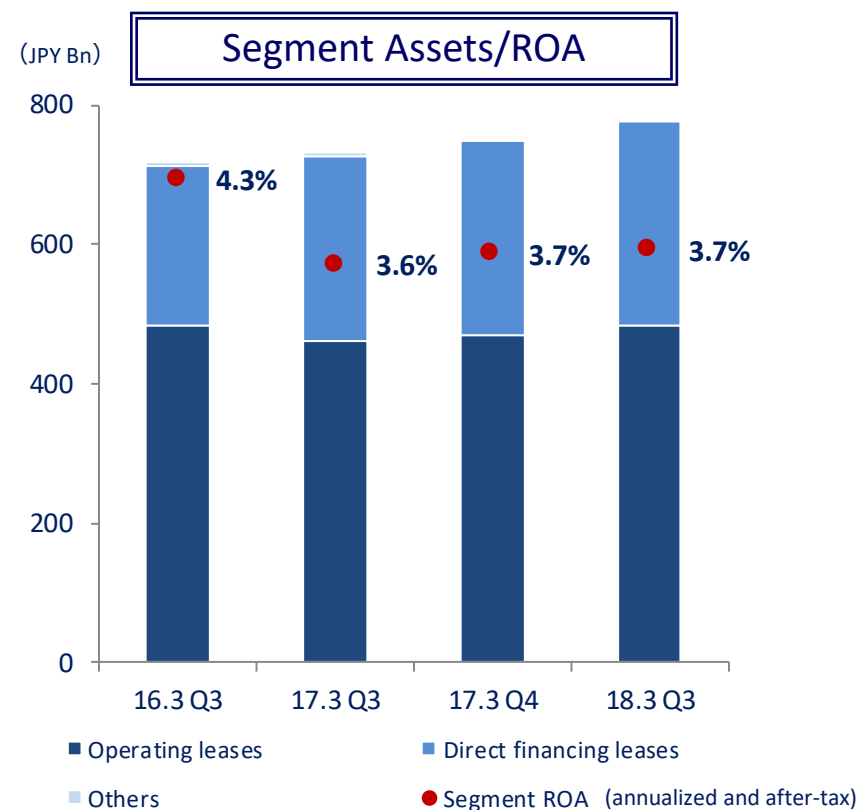
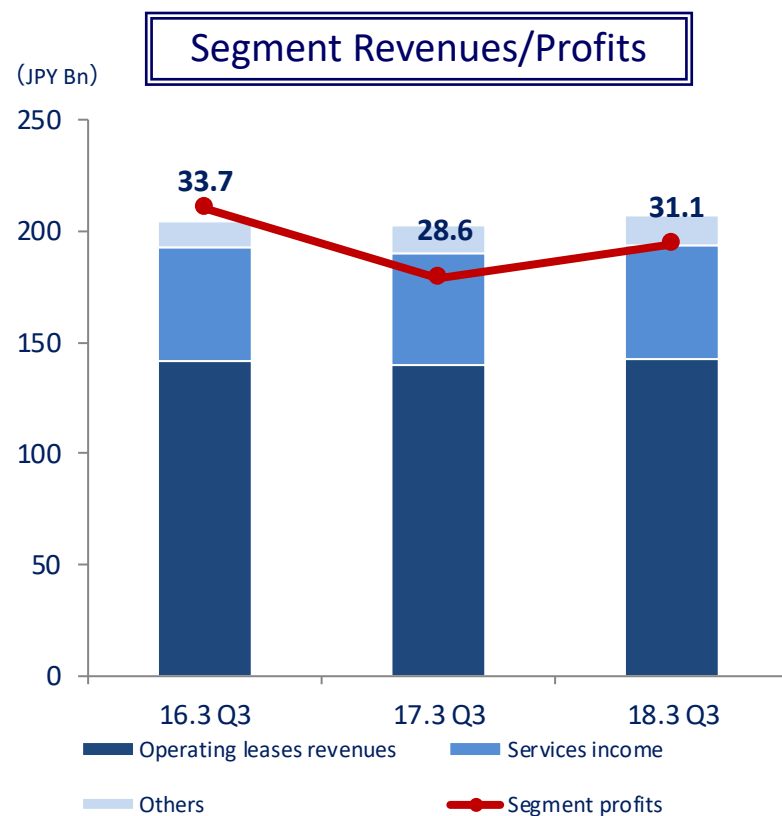
Segment Performance (1) Corporate Financial Services

- Segment profits: 37.6bn yen, up by 11.2bn yen YoY (+43%)
 - ✓ Increase in services income YoY
 - ✓ Gains on sales of investment securities and shares of affiliates were recognized
- Segment assets: 966.9bn yen, down by 65.2bn yen YTD (▲6%)
 - ✓ Installment loan balance decreased



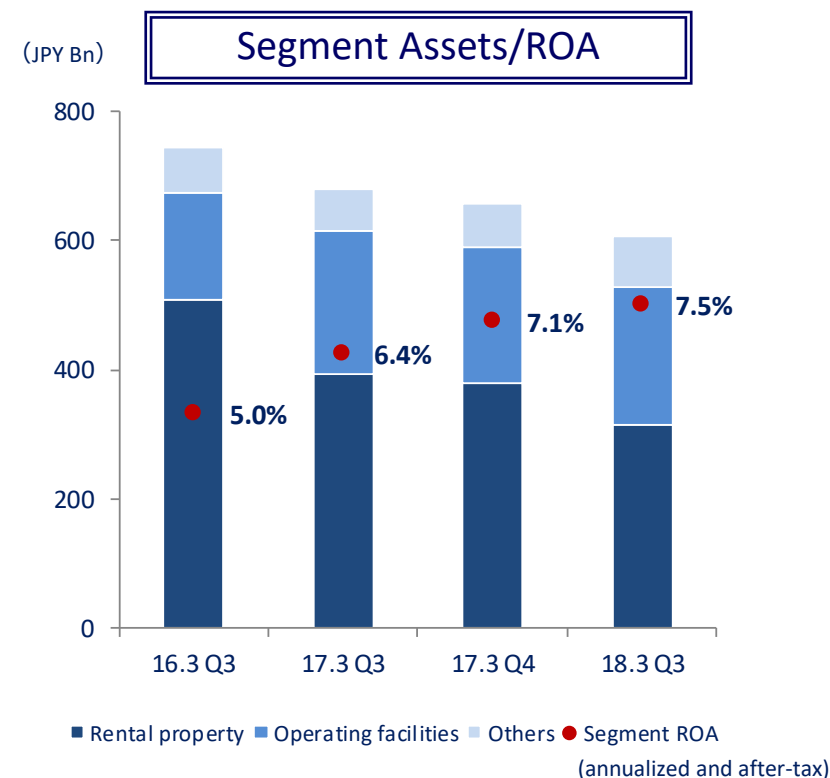
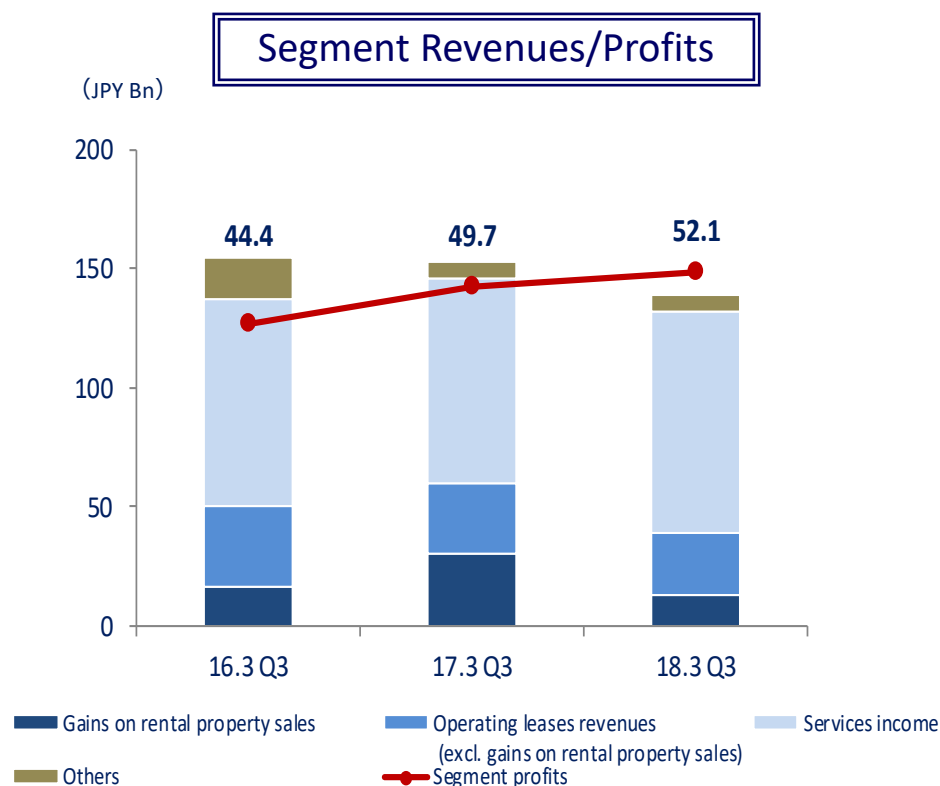
Segment Performance (2) Maintenance Leasing

- Segment profits: 31.1bn yen, up by 2.4bn yen YoY (+9%)
 - ✓ Increase in revenue in line with asset growth while the lower gain on sales of used cars
- Segment assets: 780.5bn yen, up by 28.0bn yen YTD (+4%)
 - ✓ Increase in new auto leases



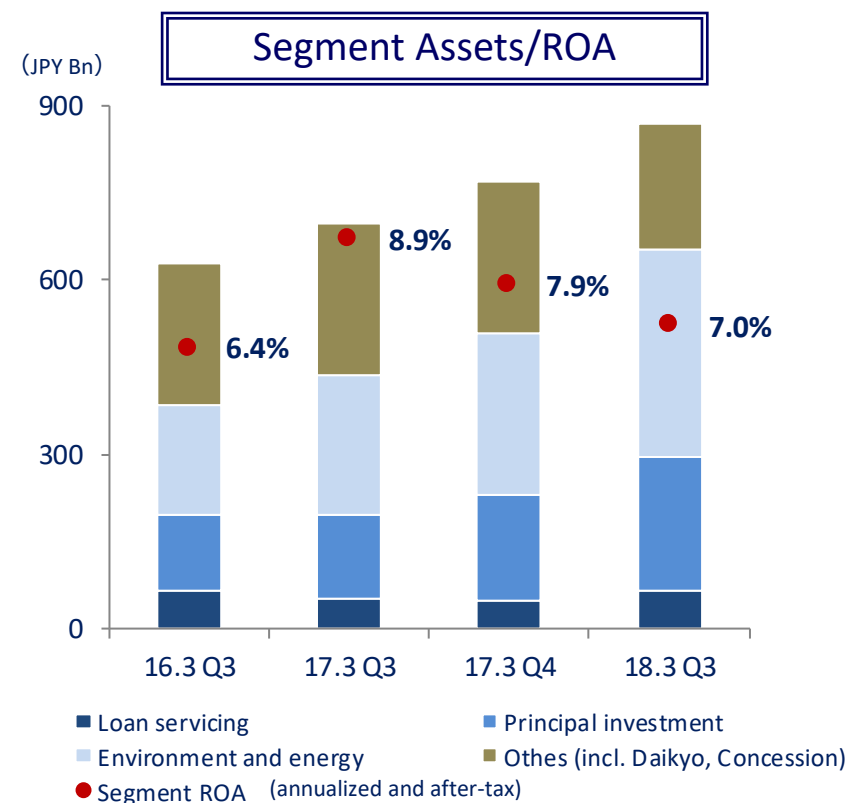
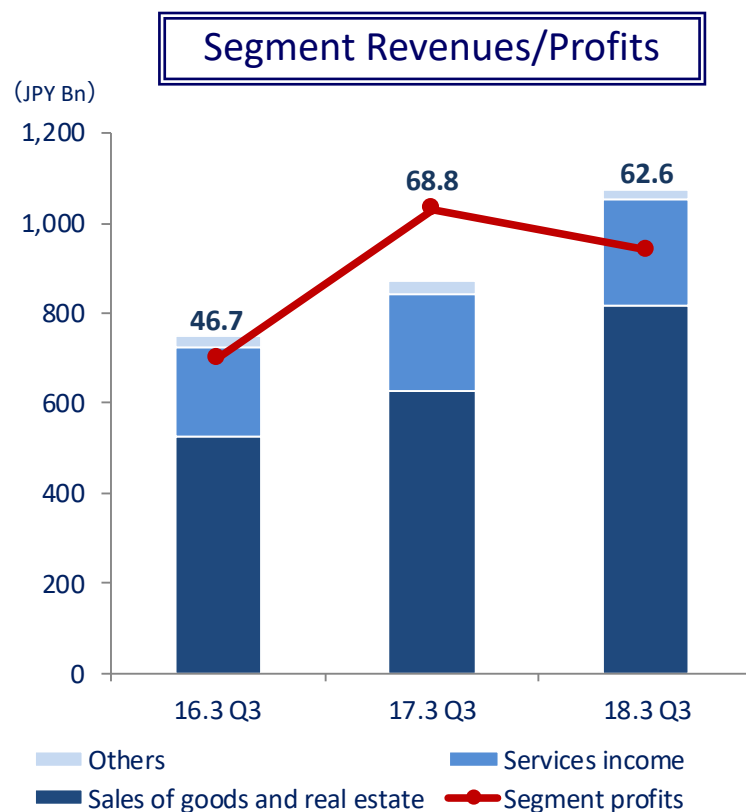
Segment Performance (3) Real Estate

- Segment profits: 52.1bn yen, up by 2.4bn yen YoY (+5%)
 - ✓ Realized gains from well-timed sales of real estate assets, solid contribution from facility operation business
- Segment assets: 605.8bn yen, down by 51.9bn yen YTD (▲8%)
 - ✓ Assets decreased due to the sales of rental properties



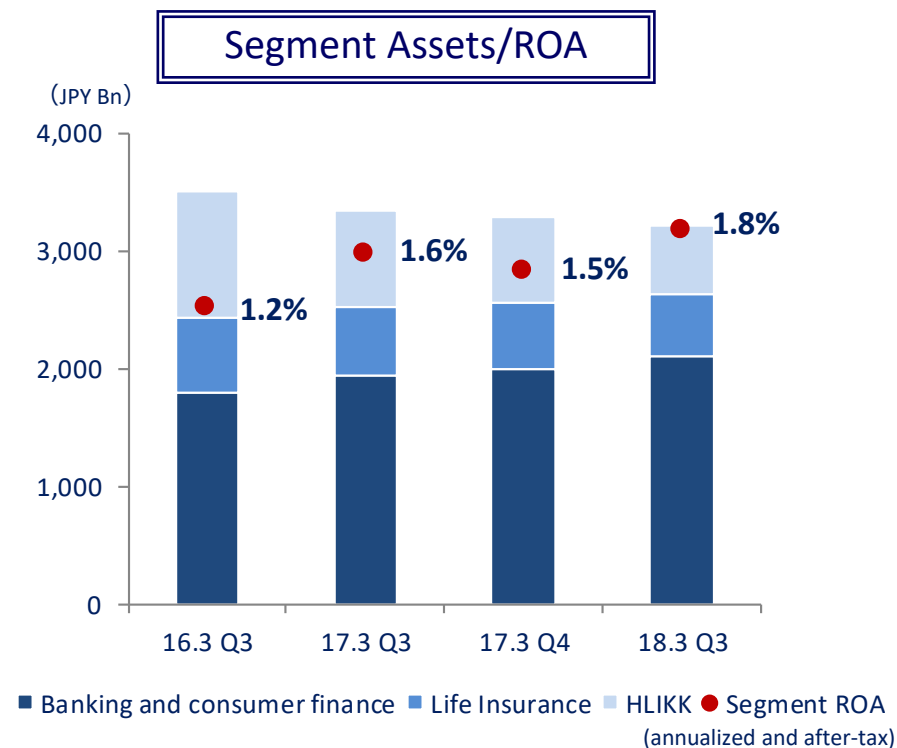
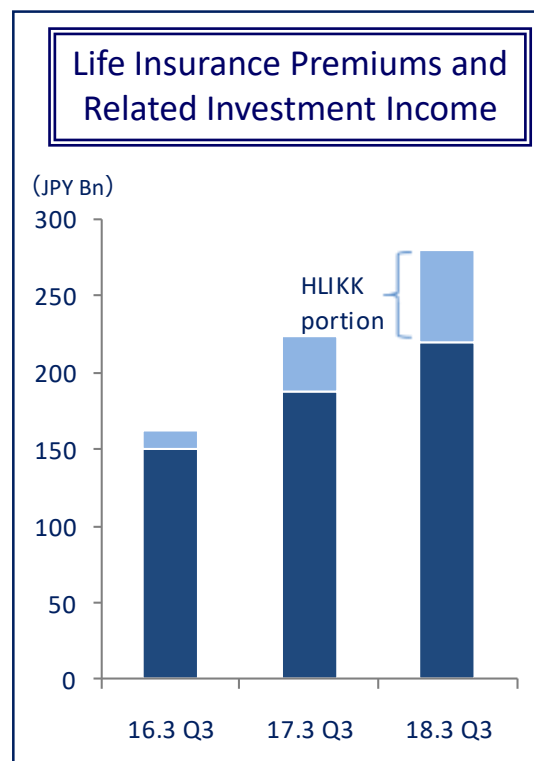
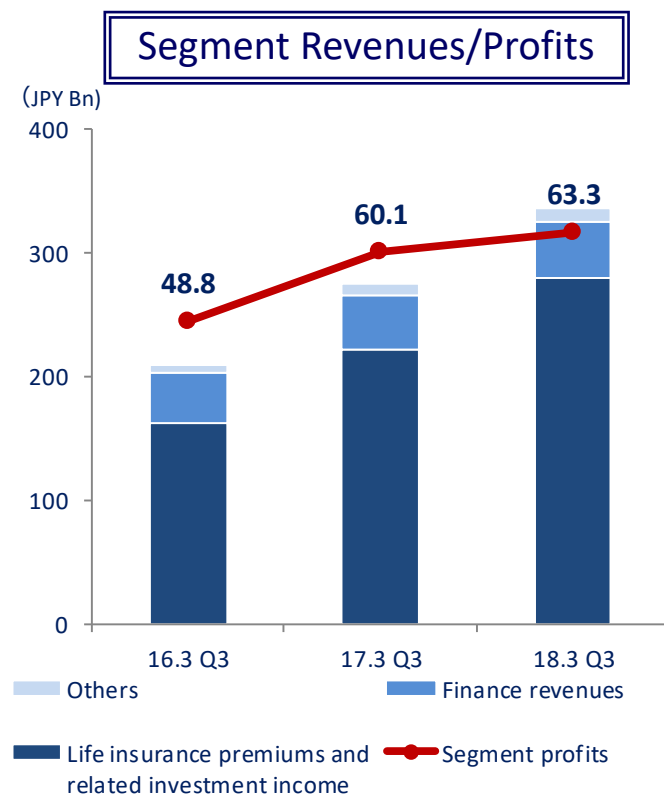
Segment Performance (4) Investment and Operation

- Segment profits: 62.6bn yen, down by 6.1bn yen YoY (▲9%)
 - ✓ Profit from environment and energy business and concession business increased steadily, while the profit in PE investment decreased due to the absence of the large capital gain
- Segment assets: 870.3bn yen, up by 101.6bn yen YTD (+13%)
 - ✓ New investments in environment and energy business and domestic PE business



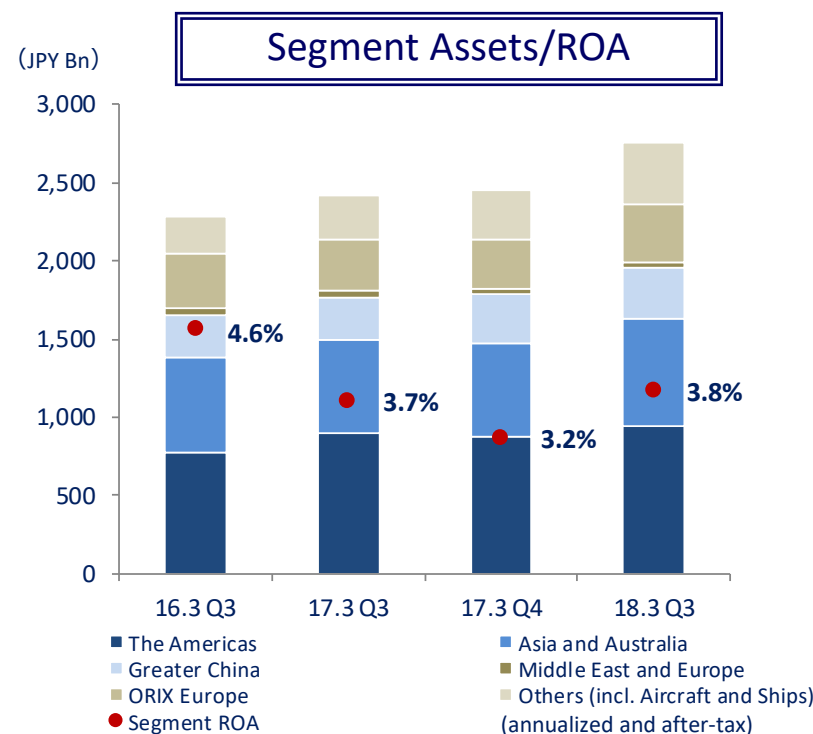
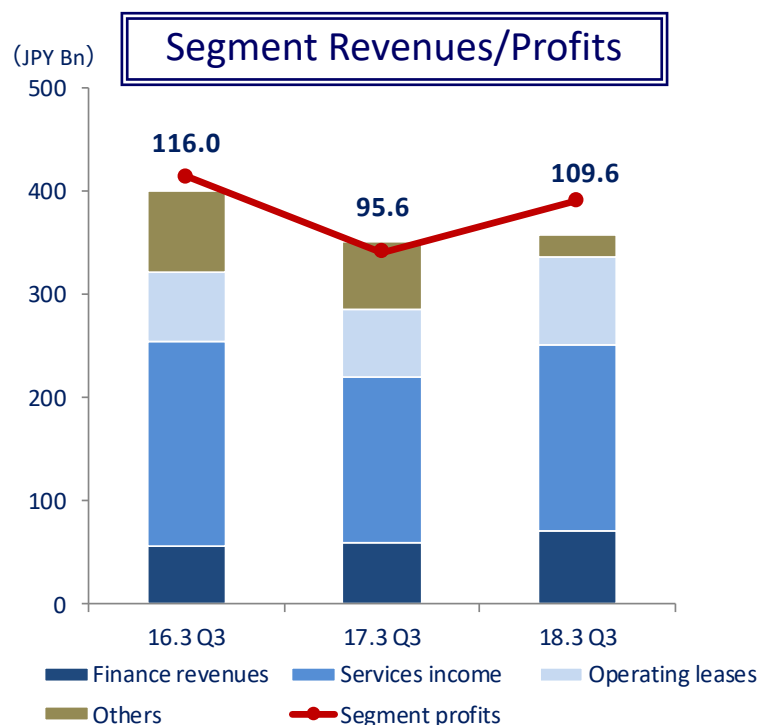
Segment Performance (5) Retail

- Segment profits: 63.3bn yen, up by 3.2bn yen YoY (+5%)
 - ✓ Finance revenue in banking business and life insurance premiums increased
- Segment assets: 3,212.7bn yen, down by 78.9bn yen YTD (▲2%)
 - ✓ Assets decreased due to sales of investment securities in OLI and run-off in HLIKK portfolio
 - ✓ Increased in installment loans in banking business



Segment Performance (6) Overseas Business

- Segment profits: 109.6bn yen, up by 14.0bn yen YoY (+15%)
 - ✓ 6.2bn yen increased due to FX rate fluctuation
 - ✓ Capital gain from PE investment in Asia, partial sales of Houlihan Lokey stocks
 - ✓ Profit growth in aircraft and ship-related operations as well as asset management business
- Segment assets: 2,756.5bn yen, up by 302.3bn yen YTD (+12%)
 - ✓ 81.1bn yen increased due to FX rate fluctuation
 - ✓ Assets of aircraft and ship-related operations increased, new investments in the Americas



*Robeco Groep N.V. changed its name into ORIX Corporation Europe N.V. (ORIX Europe) on January 1, 2018

Performance in Three Categories

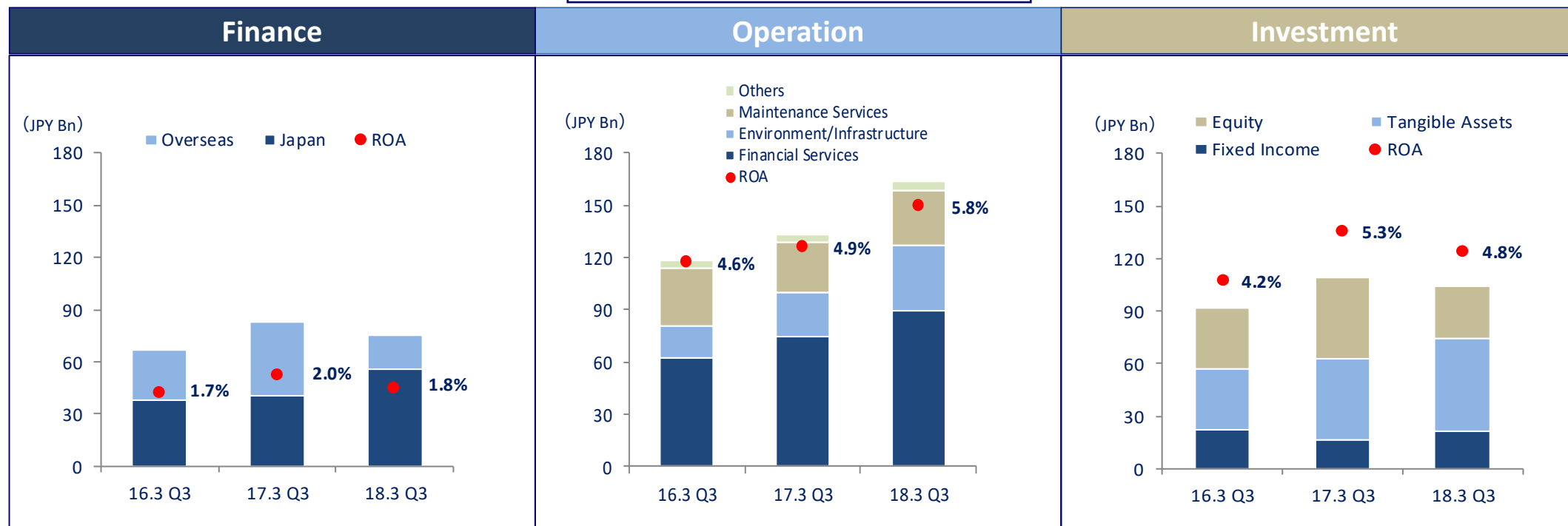
See P.33 for details on the three categories



- ✓ Operations: Financial Services, mainly asset management business, had steady profit growth
Positive contribution by US subsidiaries such as BFIM and LP*
Steady progress in Environment/Infrastructure (environment and energy, and concession)
- ✓ Investment: Equity investment decreased YoY due to the absence of the large capital gain
Profit growth in aircraft and ship-related operations and bond investment

*BFIM: Boston Financial Investment Management
LP: Lancaster Pollard

Segment Profits (3 Categories)



(*1) FY16.3 Q3 Segment Profits in Operation excludes capital gains/valuation gains (c. 39.6bn yen) associated with the IPO of Houlihan Lokey and ordinary profit/loss contribution from HLIKK
 (*2) FY17.3 Q3 Segment Profits in Operation excludes ordinary profit/loss contribution from HLIKK
 (*3) FY18.3 Q3 Segment Profits in Operation excludes capital gain from the sale of Houlihan Lokey shares and ordinary profit/loss contribution from HLIKK

FY18.3 Q3 YTD New Investments

- ✓ New investments of approximately 600bn yen in the “Operation” and “Investment” (approx. 600bn yen in the last full fiscal year)
- ✓ Approximately 140bn yen new investments during this Q3 (Oct. - Dec., 2017)

Operation	Environment/ Infrastructure 110bn yen	<ul style="list-style-type: none"> Expansion of environment and energy business in Overseas and Japan Overseas: New investment in geothermal energy business (Ormat) Japan: Additional investment in mega solar, etc. Building power plants.
	Financial Services 90bn yen	<ul style="list-style-type: none"> New investments in the Americas (incl. acquiring a mortgage servicing company)
Investment	Fixed Income 110bn yen	<ul style="list-style-type: none"> Municipal bond and CMBS mainly in the Americas
	Tangible Assets 265bn yen	<ul style="list-style-type: none"> Purchase 60 aircraft (incl. JV investment) and invest in shipping loan New investments in logistics centers, etc.
	Equity 20bn yen	<ul style="list-style-type: none"> Focus on business with growth potentials considering economic demand change Japan: Information processing service The Americas: Traffic control services and products Asia: Vehicle dispatch service

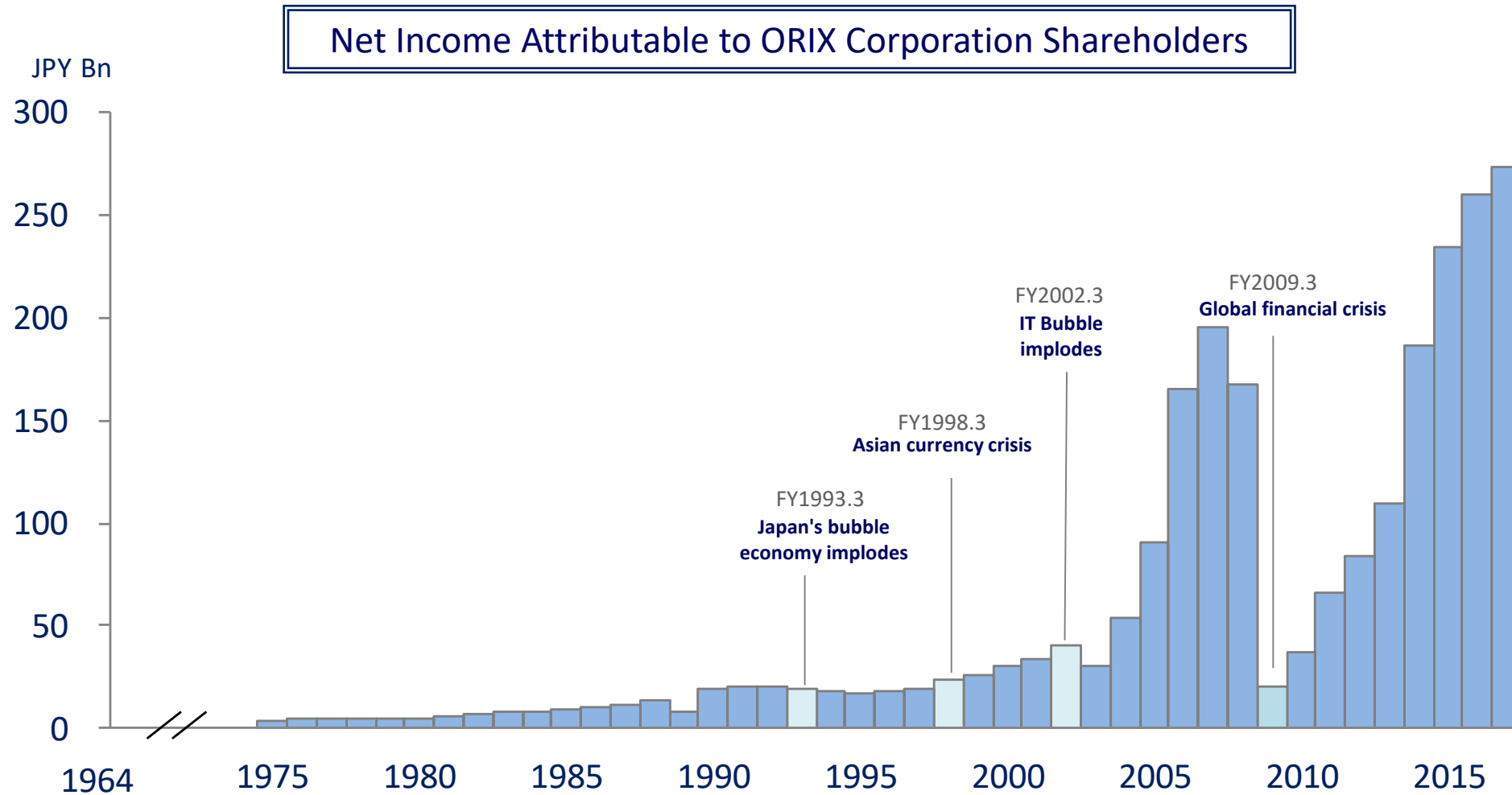
**Achieved 256.4bn yen in net income, up 18% YoY,
annualized ROE at 13.2%**

Aiming for steady achievement of FY18.3 full-year performance targets

Developing new business fields for future growth from FY19.3

Appendix

- ✓ ORIX has achieved 52 years of sustained, profitable growth

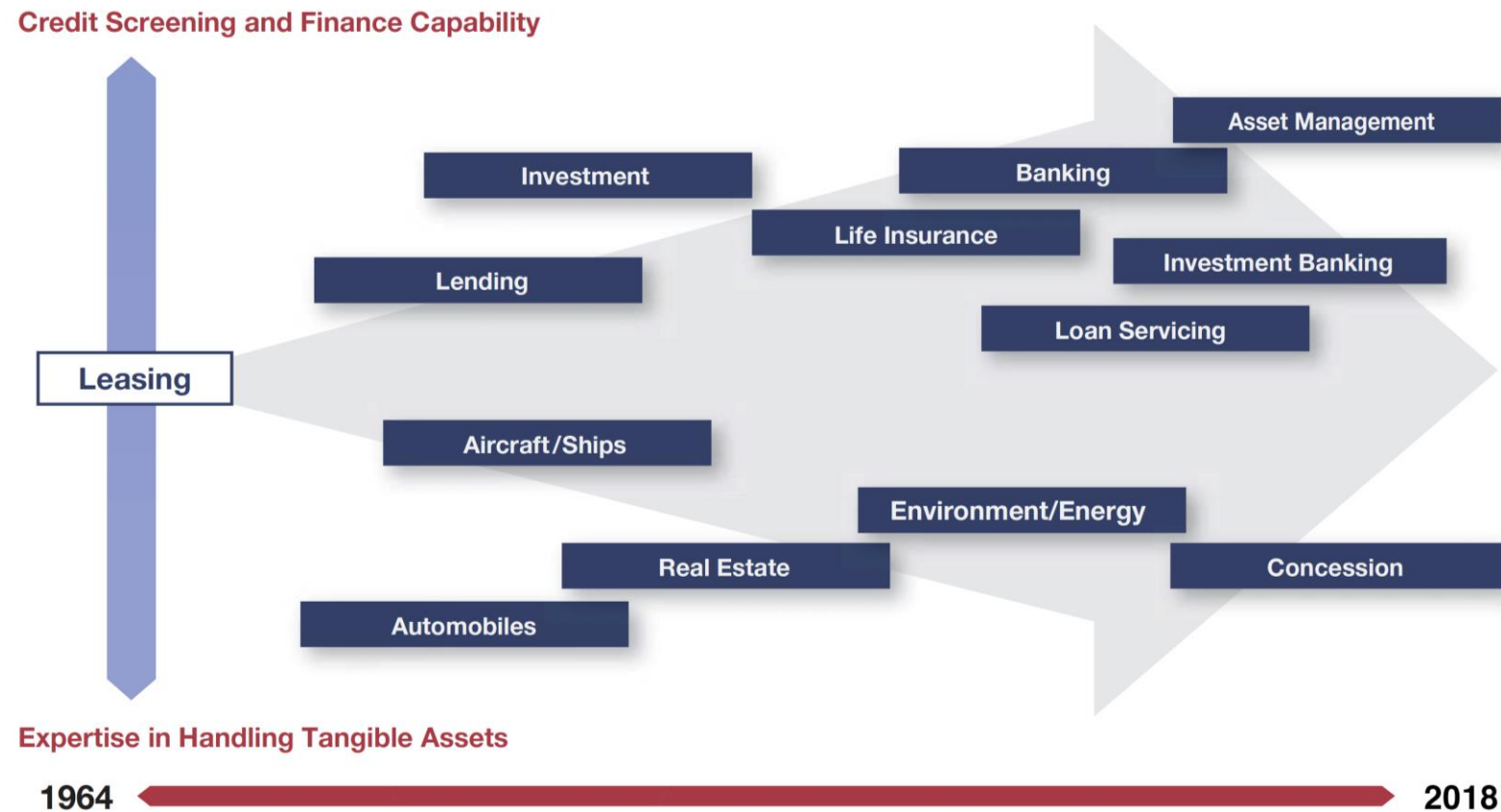


About ORIX

Evolving and Dynamic Portfolio

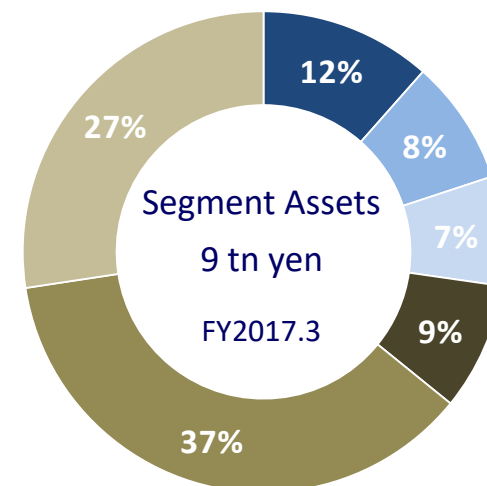
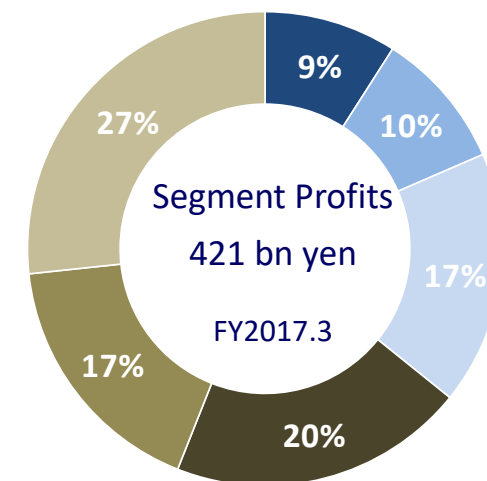


- ✓ ORIX will continue to enhance our experience in finance and tangible assets as we synergistically expand our businesses



- ✓ Our highly diversified company contains many complementary businesses, providing ample opportunity for synergies and knowledge sharing

Corporate Financial Services	Loan, Leasing, Fee businesses
Maintenance Leasing	Automobile leasing and rentals, Car sharing, Test and measurement instruments and IT-related equipment rentals and leasing
Real Estate	Real estate development and rental, facility operation, REIT asset management, and real estate investment advisory services
Investment and Operation	Environment and energy business, Principal investment and Loan servicing, Concession
Retail	Life insurance, Banking, Card loan
Overseas Business	Leasing, Loan, Bond investment, Asset management, Aircraft and Ship-related operations



✓ ORIX has spread its business globally by expanding operations in 40 countries and regions worldwide



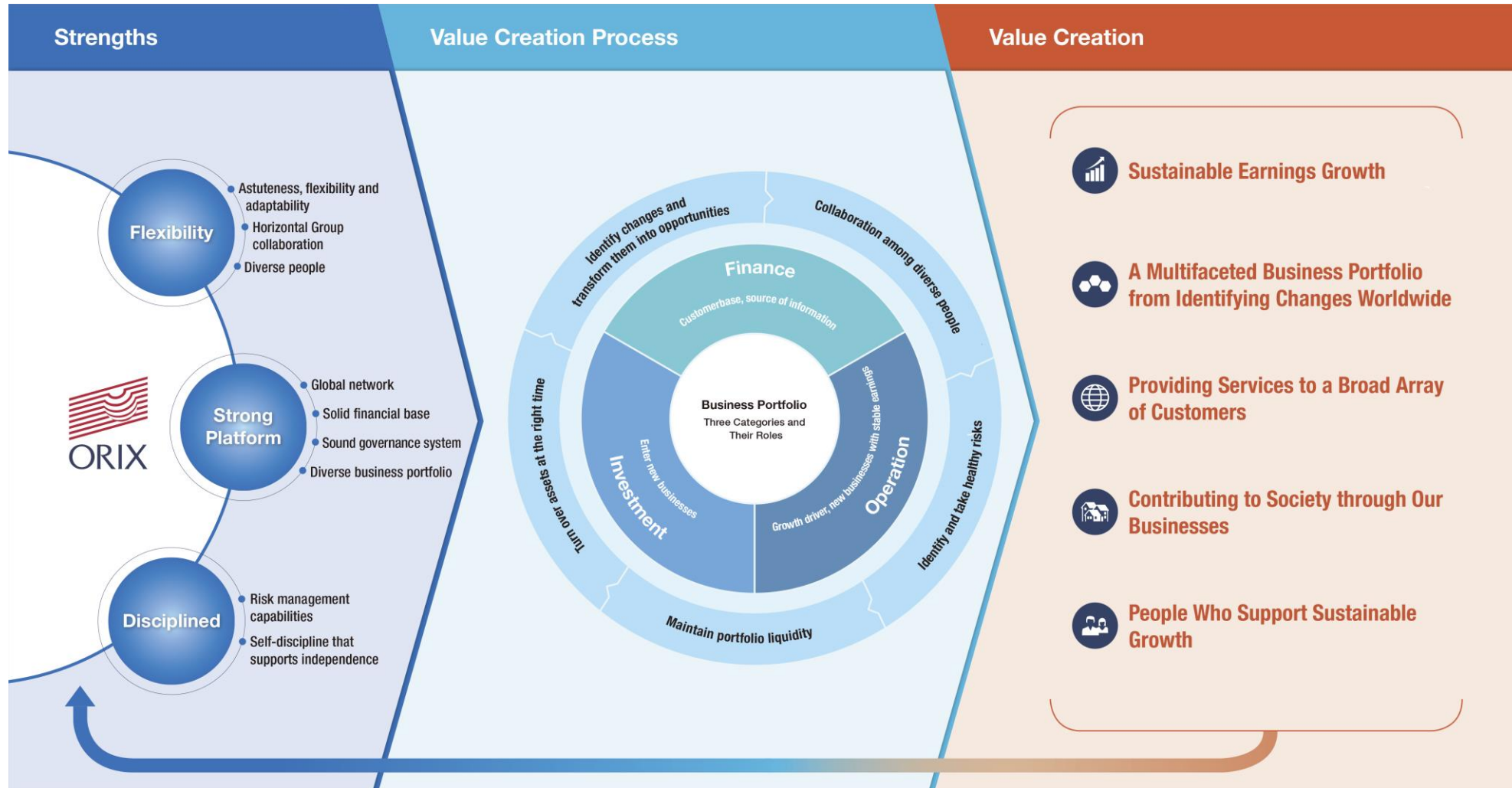
Business Locations



(As of September 30, 2017)

1970s	1980s	1990s	2000s	2010s
Global Network and Number of Countries				
7 countries	12 countries	18 countries	26 countries	40 countries
Overseas expansion mainly through Leasing business in Asia		Further overseas expansion via diversification into aircraft-related and equity investment businesses		Expansion of business operations through acquisition of Robeco and development of the environment and energy business

- ✓ Contribute to society by identifying changes in society and markets to create new value



Appendix (1) Performance Overview



(JPY Bn)

	FY16.3	FY17.3	17.3 Q3	18.3 Q3	Change (YoY)
Total Revenues	2,369.2	2,678.7	1,925.8	2,194.9	114%
Net Income *1	260.2	273.2	217.1	256.4	118%
Segment Assets	8,972.4	8,956.9	8,896.7	9,192.7	103%
Total Assets	10,992.9	11,231.9	11,142.5	11,551.9	104%
Shareholders' Equity	2,310.4	2,507.7	2,437.0	2,667.9	109%
Shareholders' Equity Ratio	21.0%	22.3%	21.9%	23.1%	+1.2%
ROE	11.7%	11.3%	12.2%	13.2%	1.0%
Return on Segment Assets (ROA)	2.87%	3.05%	3.24%	3.77%	0.53%
D/E Ratio					
(Short and Long-Term Debt+Deposits)/Shareholders' Equity	2.5x	2.3x	2.3x	2.2x	-0.1x
(Short and Long-Term Debt)/Shareholders' Equity	1.9x	1.7x	1.7x	1.6x	-0.1x

*1 Net Income Attributable to ORIX Corporation Shareholders

Appendix (2) Profits by Segment

(JPY Bn)

	FY16.3	FY17.3	17.3 Q3	18.3 Q3	Change (YoY)
Corporate Financial Services	42.4	38.0	26.3	37.6	143%
Maintenance Leasing	42.9	39.8	28.6	31.1	109%
Real Estate	42.9	72.8	49.7	52.1	105%
Investment and Operation	57.2	85.0	68.8	62.6	91%
Retail	51.8	72.9	60.1	63.3	105%
Overseas Business	142.9	112.3	95.6	109.6	115%
Total Segment Profits	380.1	420.8	329.1	356.2	108%

Appendix (3) Assets by Segment

(JPY Bn)

	16.3	17.3	16.12	17.12	Change (YTD)
Corporate Financial Services	1,049.9	1,032.2	1,038.9	966.9	94%
Maintenance Leasing	731.3	752.5	731.5	780.5	104%
Real Estate	739.6	657.7	680.2	605.8	92%
Investment and Operation	704.2	768.7	697.6	870.3	113%
Retail	3,462.8	3,291.6	3,331.6	3,212.7	98%
Overseas Business	2,284.7	2,454.2	2,416.9	2,756.5	112%
Total Segment Assets	8,972.4	8,956.9	8,896.7	9,192.7	103%

Appendix (4) Income Statement Data

(JPY Bn)

	FY16.3	FY17.3	17.3 Q3	18.3 Q3	Change (YoY)
Finance revenues	200.9	200.6	147.9	160.9	109%
Gains on investment securities and dividends	35.8	30.3	24.4	33.9	139%
Operating leases	128.8	155.1	108.4	101.2	93%
Life insurance premiums and related investment income	68.1	95.8	73.9	73.5	99%
Sales of goods and real estate	85.8	86.5	64.1	54.4	85%
Services income	289.8	286.6	214.4	236.1	110%
Gross Profits*1	809.2	854.9	633.0	660.1	104%
Interest expense	72.8	72.9	54.0	56.8	105%
Selling, general and administrative expenses	422.7	418.7	307.3	315.3	103%
Provisions/Impairments	29.7	38.4	23.5	15.8	67%
Other (income) and expense, net	-3.7	-4.4	0.7	-1.1	-
Operating Income	287.7	329.2	247.6	273.3	110%
Equity in Net Income of Affiliates	45.7	26.5	25.8	46.3	179%
Gains on Sales of Subsidiaries and Affiliates...etc	57.9	69.2	60.7	40.9	67%
Income before Income Taxes	391.3	425.0	334.1	360.5	108%
Net Income Attributable to ORIX Corporation Shareholders	260.2	273.2	217.1	256.4	118%

*1 Each revenue component deducted with corresponding costs and expenses

Appendix (5) Funding

(JPY Bn)

Funding	16.3	17.3	16.12	17.12	Change (YoY)
CP	102.4	50.1	42.0	49.5	7.5
Borrowings from Financial Institutions	2,970.6	2,958.2	2,938.7	3,092.5	153.8
Bonds / MTN	938.1	885.1	906.1	1,006.5	100.4
Deposits	1,398.5	1,614.6	1,526.3	1,745.1	218.8
ABS, CMBS	275.5	245.1	285.9	101.1	-184.8
Short-term Debt, Long-term Debt and Deposits	5,685.0	5,753.1	5,699.1	5,994.6	295.5
Share of Long-Term Debt	92%	93%	93%	92%	-1%

Liquidity (excl. ORIX Bank, ORIX Life Insurance)	16.3	17.3	16.12	17.12	Change (YoY)
Cash and Cash Equivalents (1)	588.7	586.6	539.1	578.2	39.1
Available Commitment Line (2)	389.9	394.0	341.4	271.0	-70.4
Liquidity (1+2)	978.6	980.6	880.5	849.2	-31.3
Marketable Short-term Debt (3) *1	362.3	290.9	365.7	133.2	-232.5
Liquidity Coverage Ratio (1+2)/(3)	270%	337%	241%	637%	396%

Funding Costs (including Deposits)	FY16.3	FY17.3	17.3 Q3	18.3 Q3	Change (YoY)
Domestic Currency	0.64%	0.50%	0.52%	0.42%	-0.10%
Foreign Currency	2.74%	2.80%	2.80%	2.71%	-0.09%

*1 Marketable Short-term Debt is the total of bonds and MTN expected to reach maturity within 1 year and the balance of CP.

Segment Performance (1) Corporate Financial Services



(JPY Bn)

	FY16.3	FY17.3	17.3 Q3	18.3 Q3	Change (YoY)
Finance revenues	34.2	30.2	22.9	21.6	94%
Operating leases	25.5	25.6	18.6	17.4	94%
Services income	35.7	40.6	28.8	30.1	105%
Gains on investment securities and dividends and others	11.7	6.6	5.3	17.0	320%
Segment Revenues	107.2	103.0	75.5	86.1	114%
Segment Expenses	65.5	68.0	51.3	50.8	99%
Segment Profits	42.4	38.0	26.3	37.6	143%
Investment in Direct Financing Leases	431.6	433.9	433.7	415.1	
Installment Loans	411.8	398.6	399.3	369.4	
Segment Assets	1,049.9	1,032.2	1,038.9	966.9	
ROA	2.59%	2.50%	2.29%	3.42%	

Segment Performance (2) Maintenance Leasing

(JPY Bn)

	FY16.3	FY17.3	17.3 Q3	18.3 Q3	Change (YoY)
Finance revenues	12.1	13.0	9.7	10.5	108%
Operating leases	188.8	187.2	140.0	142.1	102%
Services income	66.8	66.3	50.1	51.6	103%
Segment Revenues	271.7	270.6	202.7	207.1	102%
Segment Expenses	228.7	230.8	174.0	175.8	101%
Segment Profits	42.9	39.8	28.6	31.1	109%
Investment in Direct Financing Leases	245.3	277.5	265.0	293.7	
Investment in Operating Leases	481.0	469.8	461.3	482.3	
Segment Assets	731.3	752.5	731.5	780.5	
ROA	4.10%	3.66%	3.57%	3.69%	

Segment Performance (3) Real Estate



(JPY Bn)

	FY16.3	FY17.3	17.3 Q3	18.3 Q3	Change (YoY)
Finance revenues	6.7	2.3	1.8	1.5	84%
Operating leases	60.3	88.2	59.6	39.3	66%
Gains on Rental Property Sales	16.1	49.7	30.3	13.3	44%
Services income	110.6	112.6	86.0	92.9	108%
Sales of goods and real estate and others	13.9	9.0	5.8	4.9	85%
Segment Revenues	191.5	212.1	153.2	138.6	90%
Segment Expenses	154.6	143.1	105.5	107.9	102%
Segment Profits	42.9	72.8	49.7	52.1	105%
Investment in Operating Leases	375.1	298.2	320.9	246.4	
Property under Facility Operations	177.5	185.0	181.7	190.3	
Advances for Investment in Operating Leases	38.5	18.6	21.3	19.4	
Investment in Affiliates	91.0	99.3	94.1	81.5	
Segment Assets	739.6	657.7	680.2	605.8	
ROA	3.62%	7.12%	6.38%	7.51%	

Segment Performance (4) Investment and Operation

(JPY Bn)

	FY16.3	FY17.3	17.3 Q3	18.3 Q3	Change (YoY)
Finance revenues	12.6	10.7	7.9	7.3	92%
Gains on investment securities and dividends	10.3	13.0	11.5	5.7	50%
Sales of goods and real estate	718.9	938.4	627.0	816.6	130%
Services income	277.2	299.7	217.1	236.2	109%
Segment Revenues	1,028.4	1,272.0	870.4	1,073.7	123%
Segment Expenses	983.2	1,224.3	837.4	1,038.4	124%
Equity in Net Income of Affiliates and others	12.1	37.3	35.8	27.4	77%
Segment Profits	57.2	85.0	68.8	62.6	91%
Installment Loans	76.0	56.4	60.2	51.4	
Investment in Securities	71.7	51.5	49.9	37.2	
Property under Facility Operations	130.6	187.7	162.3	185.7	
Inventories	98.0	112.8	114.3	128.4	
Investment in Affiliates	108.2	71.5	69.5	150.6	
Segment Assets	704.2	768.7	697.6	870.3	
ROA	5.58%	7.88%	8.94%	6.96%	

Segment Performance (5) Retail



(JPY Bn)

	FY16.3	FY17.3	17.3 Q3	18.3 Q3	Change (YoY)
Finance revenues	55.3	59.2	43.7	46.2	106%
Life insurance premiums and related investment income	190.8	297.9	222.5	279.6	126%
Services income and others	8.2	11.6	8.6	10.6	124%
Segment Revenues	254.3	368.7	274.7	336.4	122%
Segment Expenses	203.3	295.8	214.7	273.1	127%
Segment Profits	51.8	72.9	60.1	63.3	105%
Installment Loans	1,496.4	1,718.7	1,665.5	1,835.3	
Investment in Securities	1,893.6	1,509.2	1,596.0	1,315.2	
Segment Assets	3,462.8	3,291.6	3,331.6	3,212.7	
ROA	0.96%	1.47%	1.61%	1.77%	

Segment Performance (6) Overseas Business



(JPY Bn)

	FY16.3	FY17.3	17.3 Q3	18.3 Q3	Change (YoY)
Finance revenues	75.0	81.3	59.2	71.9	122%
Gain on investment securities and dividends	16.1	13.3	9.1	13.7	150%
Operating leases	92.0	88.5	65.9	84.8	129%
Services income	250.1	216.7	161.1	179.5	111%
Segment Revenues	526.0	458.9	351.7	358.3	102%
Segment Expenses	452.2	386.8	293.4	279.5	95%
Equity in Net Income of Affiliates and others	69.0	40.2	37.2	30.7	82%
Net Income Attributable to Redeemable Noncontrolling Interests	-7.8	-2.3	-3.6	-1.4	-
Segment Profits	142.9	112.3	95.6	109.6	115%
Investment in Direct Financing Leases	351.0	357.7	343.8	386.5	
Installment Loans	407.9	457.4	462.7	571.3	
Investment in Operating Leases	375.4	420.2	399.3	496.3	
Investment in Securities	383.2	465.9	462.8	457.2	
Investment in Affiliates	305.7	332.2	299.7	337.0	
Segment Assets	2,284.7	2,454.2	2,416.9	2,756.5	
ROA	4.26%	3.24%	3.70%	3.83%	

■ Overseas Business segment assets breakdown

(JPY Bn)

By Region	16.3	17.3	16.12	17.12	Change (YTD)
The Americas	787.2	879.3	894.0	944.0	107%
Asia and Australia	592.3	593.6	597.9	680.2	115%
Greater China	260.3	315.6	273.4	334.6	106%
Middle East and Europe	49.3	36.5	41.2	32.5	89%
ORIX Europe*	340.9	317.3	325.9	367.2	116%
Aircraft and Ships	242.9	296.8	274.8	388.0	131%
Others	11.8	15.0	9.5	9.9	66%
Total	2,284.7	2,454.2	2,416.9	2,756.5	112%

*Robeco Groep N.V. changed its name into ORIX Corporation Europe N.V. (ORIX Europe) on January 1, 2018

Business Portfolio in Three Categories

Categories		Finance		Operation				Investment		
	Main Risk	Credit risk		Operation/Business risk				Market risk		
	Capital Requirement	Low		Medium-High				High		
Segments		Japan	Overseas	Environment/ Infrastructure	Financial Services	Maintenance Services	Others	Fixed Income	Tangible Assets	Equity
	Corporate Financial Services	Leasing, Loan, Fee business					Yayoi			New business development
	Maintenance Leasing					ORIX Auto, ORIX Rentec				
	Real Estate			Facilities operation	REIT, RE investment advisory				RE investment	
	Investment and Operation			Environment and energy, Concession				Loan servicing		PE investment, Daikyo
	Retail	Banking, Consumer finance, Guarantee			Life insurance, HLIKK					
	Overseas Business		Leasing, Loan		Asset Management, Houlihan Lokey			Bond investment	Aircraft, Ships	PE investment

Management Targets from FY2019.3 to FY2021.3

Profit Growth

Annual net income growth at between 4-8%

Capital Efficiency

ROE above 11%

Financial Soundness

Maintain single A credit rating

ERM with global best practice

Shareholders returns policy

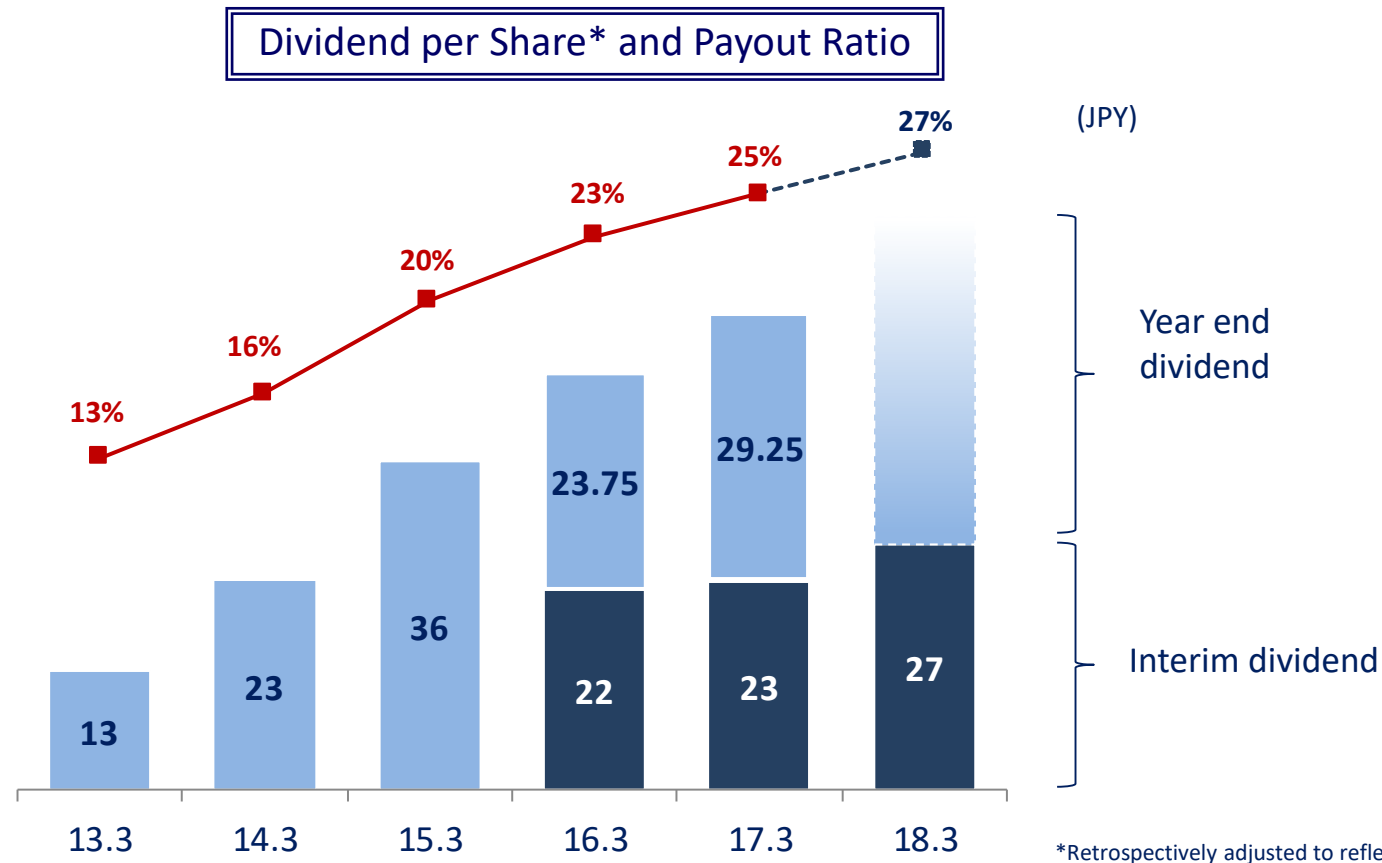
- **Dividend payout ratio target at 27%**
- **Share buyback as proactive capital management**

Dividends and Payout Ratio

Released on October 30, 2017



- ✓ Interim dividend at 27 yen per share, up by 17% YoY
- ✓ Dividend payout ratio at 27% for FY18.3
- ✓ Maintain the optimal balance between investment opportunities for sustainable future profit growth and stable dividend growth



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- Some of the financial information in these materials is unaudited.
- The Company believes that it will be considered a “passive foreign investment company” for United States Federal income tax purpose in the year to which these consolidated financial results relate and for the foreseeable future by reason of the composition of its assets and the nature of its income. A U.S. holder of the shares or ADSs of the Company is therefore subject to special rules generally intended to eliminate any benefits from the deferral of U.S. Federal income tax that a holder could derive from investing in a foreign corporation that does not distribute all of its earnings on a current basis. Investors should consult their tax advisors with respect to such rules, which are summarized in the Company’s annual report.
- ORIX Life Insurance has completed merger proceeding on its subsidiary Hartford Life Insurance K.K. on July 1, 2015 and is committed to continue serving its policy holders. ORIX Life insurance has no affiliation with The Hartford Financial Services Group, Inc. or its affiliates.
- Nothing in this document shall be considered as an offer to sell or solicitation of an offer to buy any security, commodity or other instrument, including securities issued by the Company or any affiliate thereof.

A large circular graphic on the left side of the slide, composed of a thick ring with a color gradient from red at the top to purple at the bottom. The text "Answers, Custom Fit." is centered within the white space of the ring.

Answers, Custom Fit.

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IR Section

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ORIX Corporation

Corporate Planning Department
World Trade Center Building., 2-4-1,
Hamamatsu-cho, Minato-ku,
Tokyo 105-6135, Japan

Tel: +81-3-3435-3121

Fax: +81-3-3435-3154

orix_corpcomm@orix.jp