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Cultivate & Evolve

2Q26
Earnings Conference Call

Speakers:
Aurélio Pavinato - CEO
Ivo Brum – Chief Financial and IR Officer
André Vasconcellos – Financial Planning and IR Manager

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Escolha do idioma + Q&A

Faça sua pergunta

Tradução Simultânea

Simultaneous Translation

Ask your question

Essa videoconferência será em português, com tradução simultânea para o inglês.

Alteração de Idioma: para acessar a tradução simultânea, clique no botão Interpretation, na parte inferior direita da tela, e escolha o idioma “Inglês”.

Para fazer perguntas: clique no ícone Q&A e escreva sua pergunta para entrar na fila. Ao ser anunciado, uma solicitação para ativar seu microfone aparecerá na tela e, então, você deve ativar o seu microfone para fazer perguntas. Orientamos que as perguntas sejam feitas todas de uma única vez.

The following presentation will be held in Portuguese, with simultaneous translation to English.

Language settings: to enable the English simultaneous translation, click on the Interpretation button, at the bottom right of the screen, and choose the “English” option.

To ask questions: please click on the Q&A icon and write your question. If announced, a request to activate up on your screen; then, you should enable your audio to ask your question. We kindly ask you to make all questions at once.

1

Market Overview

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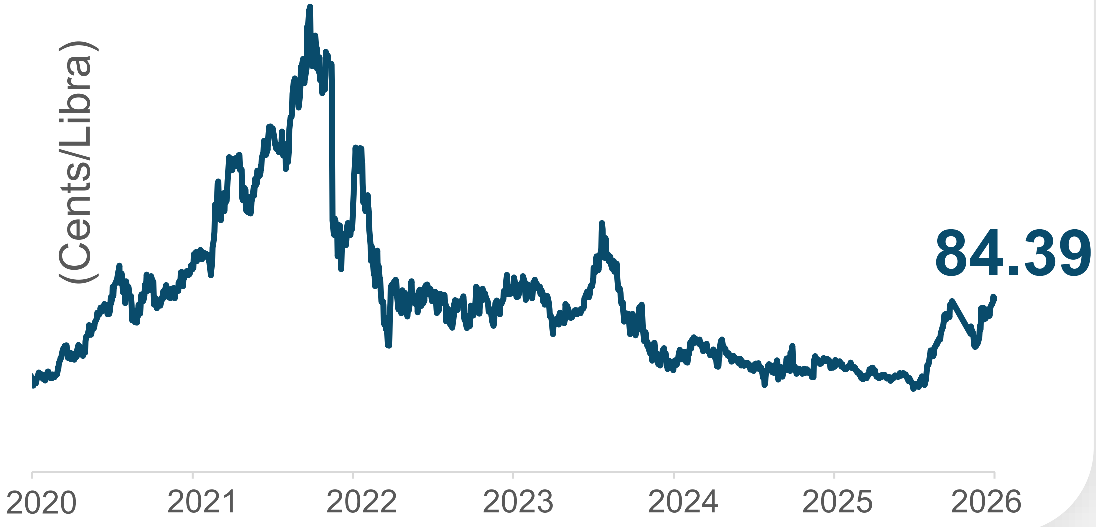
Cotton

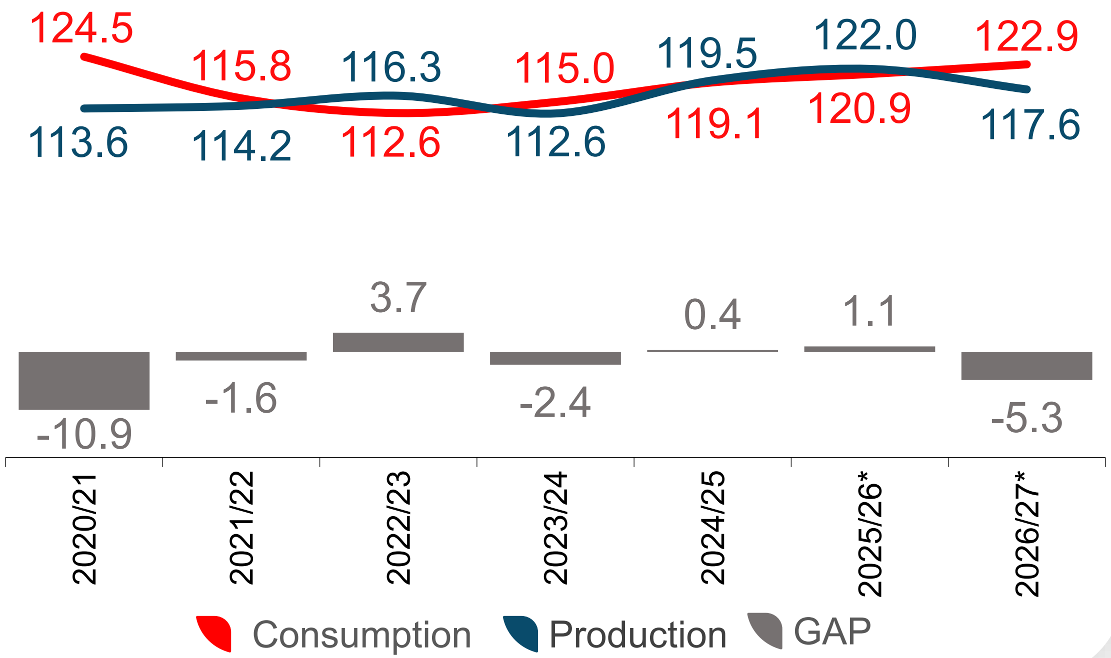
Price

(ICE) SPOT Dec 26 – U$ cents/pd	84.39
(ICE) Mar 27 – U$ cents/pd	86.24
(ICE) May 27 – U$ cents/pd	87.37
(ICE) Dec 27 – U$ cents/pd	78.51



World supply & demand (million bales)

+12.8% US Planted Area | -6.3% US Yield
2026/27 vs 2025/26



Price: Bloomberg ICE (August 11th, 2026). | WSD: USDA (Aug/2026).

*Forecast

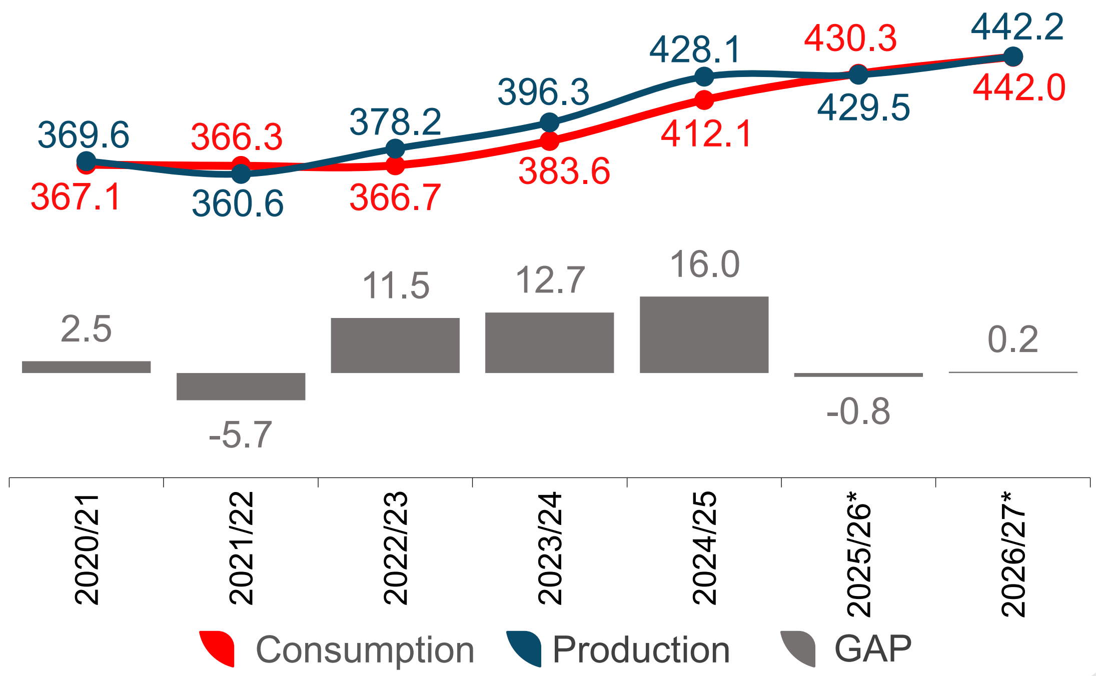
Soybean

Price

(CBOT) SPOT Aug 26 - USD\bu	11.48
(CBOT) Sep 26 - USD\bu	11.52
(CBOT) Mar 27 – USD\bu	11.93
(CBOT) May 27 – USD\bu	12.01

World supply & demand (million tons)

+6.9% US Planted Area | -0.6% US Yield
2026/27 vs 2025/26



Price: Bloomberg CBOT (August 11th, 2026). | WSD: USDA (Aug/2026).

*Forecast

Corn

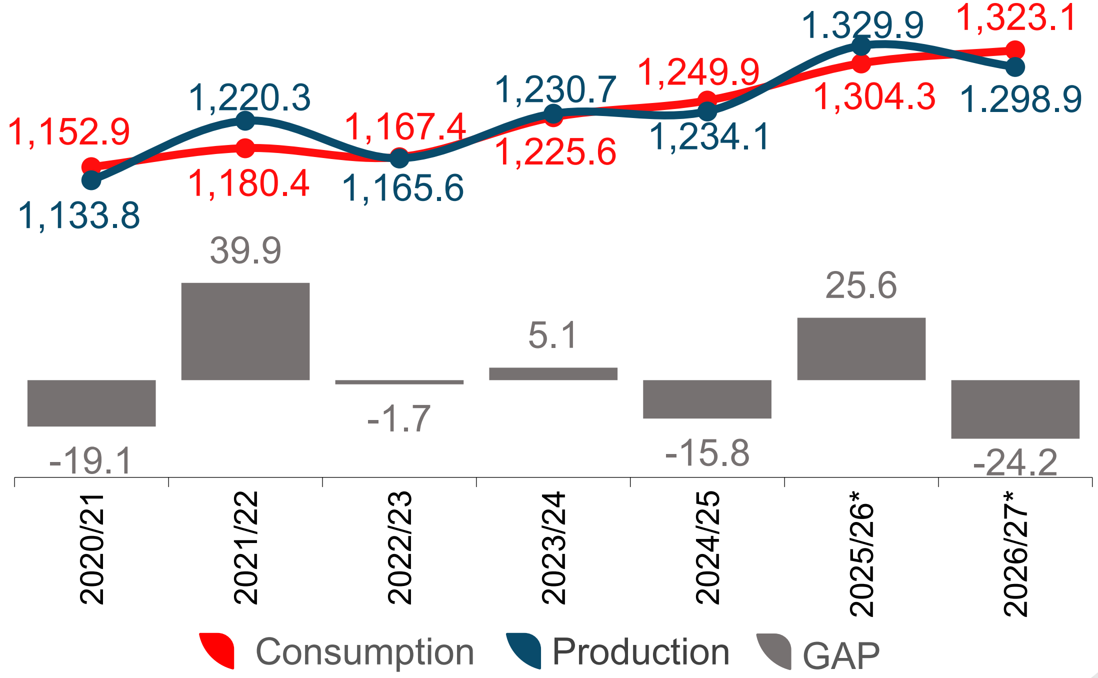
Price

(CBOT) SPOT Sep 26 - USD\bu	4.37
(CBOT) Dec 26 - USD\bu	4.61
(CBOT) Mar 27 – USD\bu	4.76
(CBOT) May 27 – USD\bu	4.85

World supply & demand (million tons)

-2.1% US Planted Area | -3.1% US Yield

2026/27 vs 2025/26



Price: Bloomberg CBOT (August 11th, 2026). | WSD: USDA (Aug/2026).

*Forecast

2

2025/26 Crop Year

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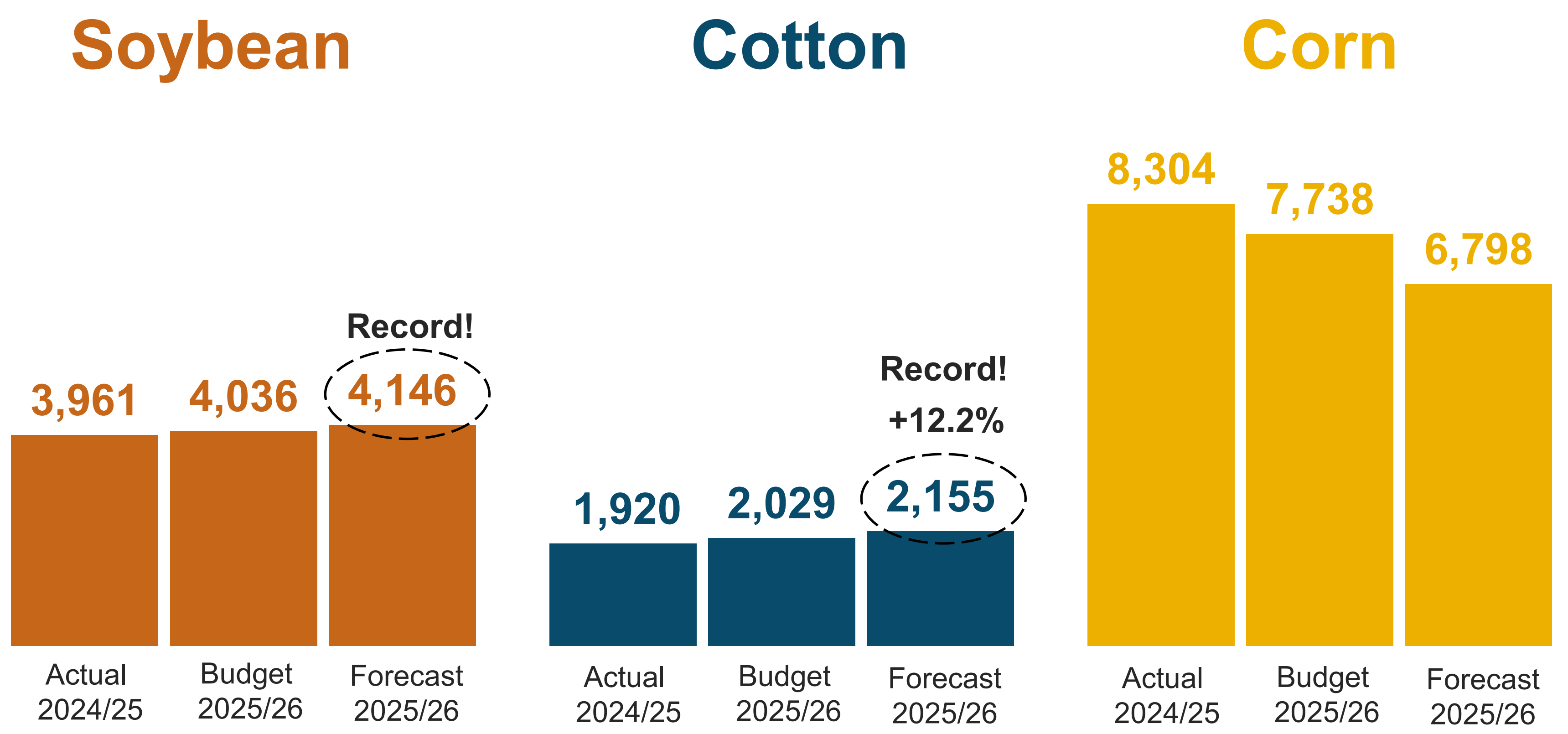
2025/26 Crop Year

2025/26 Crop Year Status - Yields



Fonte: Release 2T26

2025/26 Hedge Position

FX Hedge – Soybean	
Total	**85.2%**
%	85.1
R$/USD	5.6079
Commitments %	0.1

Commercial Hedge – Soybean	
Total	**90.2%**
%	90.1
USD/bu[2]	11.42
Commitments %[1]	0.1

FX Hedge – Cotton	
Total	**83.5%**
%	83.5
R$/USD	5.9178
Commitments %	-

Commercial Hedge – Cotton	
Total	**94.7%**
%	94.7
US¢/lb[2]	75.61
Commitments %[1]	-

FX Hedge – Corn	
Total	**2025/26**
-	-
-	-
%	78.7
R$/USD	5.6817
Commitments %	-
-	-
-	-

Commercial Hedge – Corn	
Total	**54.1%**
%	17.9
R$/bag	58.52
%	36.2
USD/bag	8.84
Commitments %	-
% Total	**54.1**
R$/bag Total	**52.97**

Source: 2Q26 Release

3

Financial Performance

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Quarter and First Half Highlights

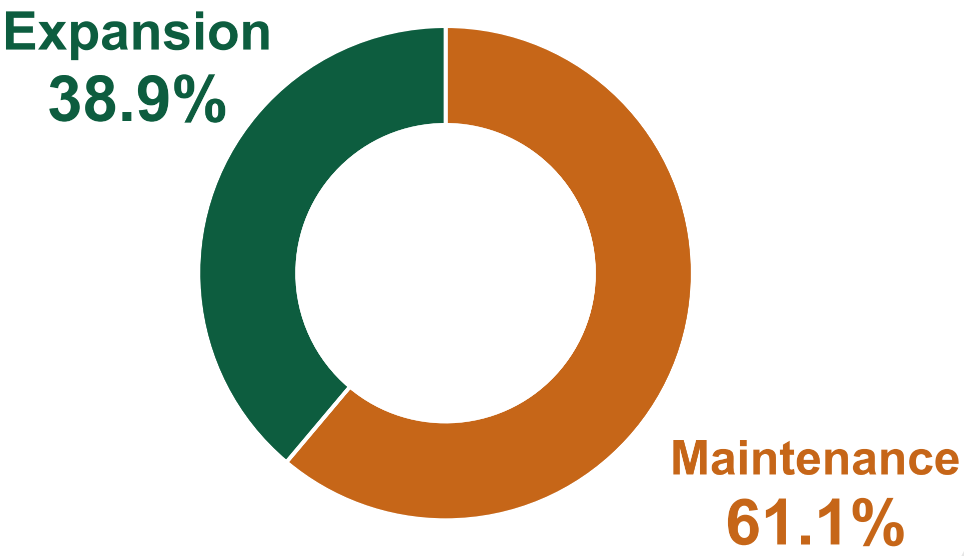
(R$ thd)	1H25	1H26	HA	2Q25	2Q26	HA
Net revenue	**4,193,177**	**4,443,113**	**6.0%**	**1,862,135**	**2,175,612**	**16.8%**
Gross income	**1,732,082**	**1,884,366**	**8.8%**	**656,027**	**941,202**	**43.5%**
Gross margin	41.3%	42.4%	1.1p.p.	35.2%	43.3%	8.1p.p.
Operational result	**1,319,334**	**1,301,835**	**-1.3%**	**453,286**	**677,429**	**49.4%**
Operational margin	31.5%	29.3%	-2.2p.p.	24.3%	31.1%	6.8p.p.
Net income	**650,537**	**481,151**	**-26.0%**	**139,837**	**245,069**	**75.3%**
Net margin	15.5%	10.8%	-4.7p.p.	7.5%	11.3%	3.8p.p.
Adjusted EBITDA	**1,500,225**	**1,275,818**	**-15.0%**	**556,569**	**580,576**	**4.3%**
Adjusted EBITDA margin	35.8%	28.7%	-7.1p.p.	29.9%	26.7%	-3.2p.p.
Free cash flow	**(2,045,422)**	**(2,159,539)**	**5.6%**	**(626,121)**	**(805,273)**	**28.6%**

Source: 2Q26 Release

Financial Performance

CAPEX 1H26

Expansion vs. Maintenance



IRRIGATION CAPEX

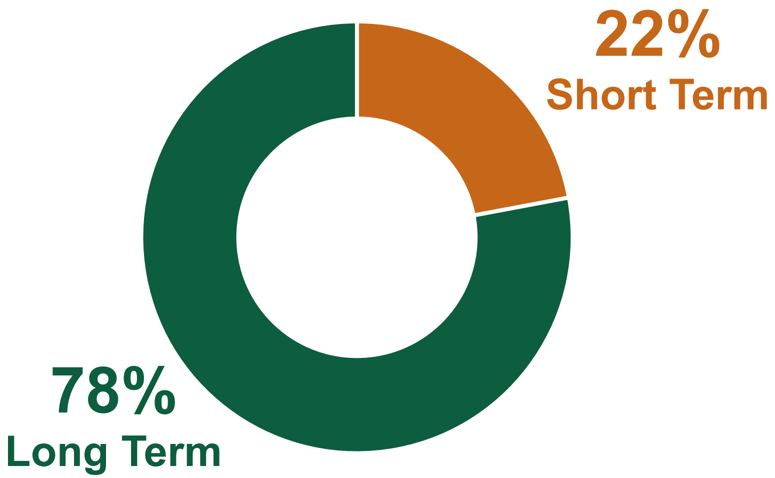
R$ 155 M on 1H26

Source: 2Q26 Release

Net Debt

Credit Line	Average annual Interest Rate		Consolidated	
(R$ thd)	4Q25	2Q26	4Q25	2Q26
Indebtedness BRL	15.3%	14.4%	7,572,731	8,177,138
Indebtedness USD	7.5%	7.2%	206,948	84,476
(=) Gross Debt			**7,779,679**	**8,261,614**
(+/-) Gains and losses with deriv. connected with applications and debt			113,701	203,630
(=) Adjusted Gross Debt			**7,893,380**	**8,465,244**
(-) Cash			(2,649,368)	(926,613)
(=) Adjusted Net Debt			**5,244,012**	**7,538,631**
Adjusted EBITDA (Last 12 months)			2,664,715	2,440,308
Adjusted Net Debt/Adjusted EBITDA			**1.97x**	**3.09x**

Debt Profile



Source: 2Q26 Release

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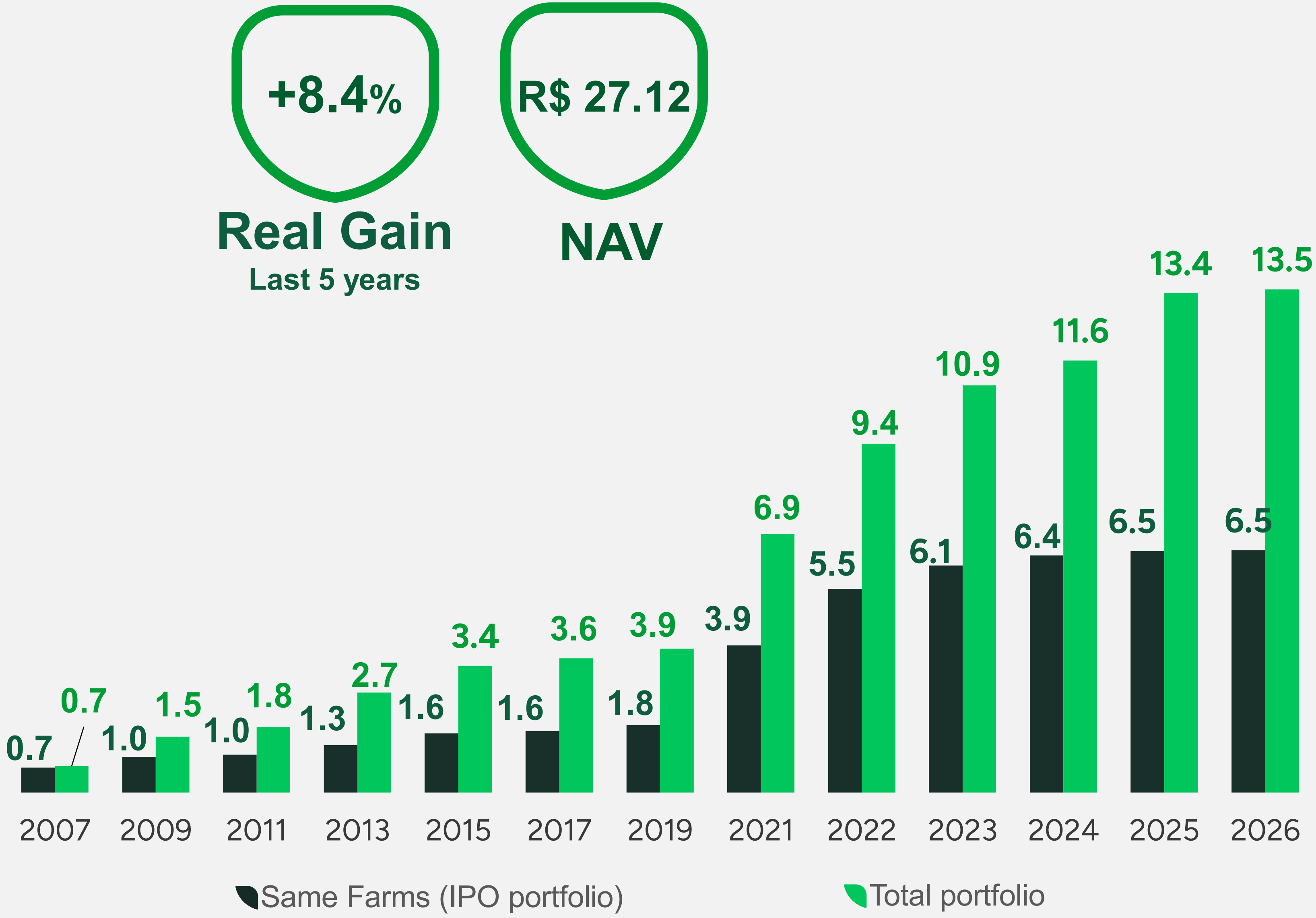
Evolution in the value of the land portfolio

(R$ / billion)

- **R$ 13.5 billion**



4

2026/27 Crop Year

Inputs/Hedge Position

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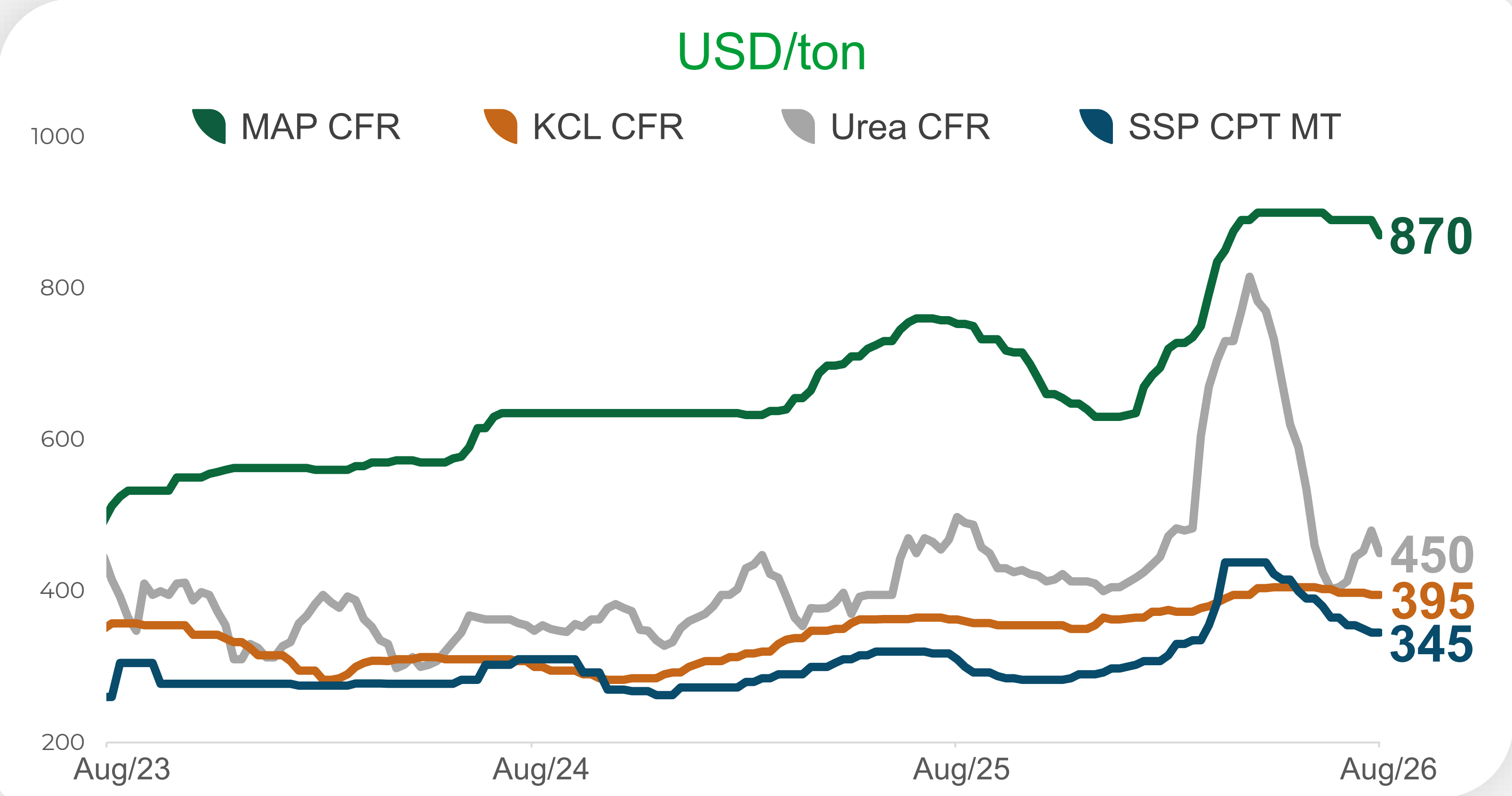
Inputs and fertilizers



Last price update: August 6th, 2026
% purchased inputs source: 2Q26 Release.

% purchased inputs 2026/27 crop year:

90% potassium chloride

100% phosphate

70% nitrogen

96% crop protection

2026/27 Hedge Position

FX Hedge – Soybean	
Total	**43.1%**
%	6.3
R$/USD	5.5035
Commitments %	36.8

Commercial Hedge – Soybean	
Total	**49.2%**
%	35.6
USD/bu	11.95
Commitments %	13.6

FX Hedge – Cotton	
Total	**44,0%**
%	11.2
R$/USD	5.7506
Commitments %	32.8

Commercial Hedge – Cotton	
Total	**55.0%**
%	55.0
US¢/lb	78.88
Commitments %	-

FX Hedge – Corn	
Total	**41.1%**
-	-
-	-
%	3.9
R$/USD	5.5200
Commitments %	37.2
-	-
-	-

Commercial Hedge – Corn	
Total	**-**
%	-
R$/bag	-
%	-
USD/bag	-
Commitments %	-
R$/bag Total	**-**
% Total	**-**

Source: 2Q26 Release

5

ESG

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Awards and Carbon Negative Farms

Farm	Agricultural Emissions (tCO2e)	Removals (tCO2e)	Balance (tCO2e)
Paineira	3,706	(15,496)	(11,790)
Parceiro	20,151	(31,432)	(11,281)
Paladino	23,898	(32,199)	(8,301)
Panorama	23,639	(26,965)	(3,326)
Palmares	36,054	(39,552)	(3,498)

Our Big Dream

To positively impact future generations, through global leadership in agribusiness and respect to the planet.

Our values

Integrity, guided by ethical, consistent, and unquestionable conduct, combined with **Passion for what we do** and a commitment to the highest quality, foster **Enduring Relationships** and mutual respect among all stakeholders, leading to **Sustainable Results**—economically viable, socially equitable, and environmentally responsible.

INTEGRITY

PASSION
FOR WHAT WE DO

LASTING
RELATIONSHIPS

SUSTAINABLE
RESULTS

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Disclaimer

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Forward-looking statements also include information concerning our possible or assumed future results of operations, as well as statements proceeded by, followed by, or that include the words “believes”, “may”, “will”, “continues”, “expects”, “anticipates”, “intends”, “plans”, “estimates” or similar expressions.

Forward-looking statements are not guarantees and assumptions because they relate to future events and therefore depend on circumstances that may or may not occur. Our future results and shareholder values may differ materially from those expressed in or suggested by these forward-looking statements. Many of the factors that will determine these results and values are beyond our ability to control or predict.

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