

# sequoia

Divulgação de Resultados

4T21

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# Disclaimer



As afirmações contidas neste documento relacionadas a perspectivas sobre os negócios, projeções sobre resultados operacionais e financeiros e aquelas relacionadas a perspectivas de crescimento da Sequoia são meramente projeções e, como tais, são baseadas exclusivamente nas expectativas da Diretoria sobre o futuro dos negócios. Essas expectativas dependem, substancialmente, das condições de mercado, do desempenho da economia brasileira, do setor e dos mercados internacionais e, portanto, sujeitas à mudança sem aviso prévio. Todas as variações aqui apresentadas são calculadas com base nos números em milhares de reais, assim como os arredondamentos. O presente relatório de desempenho inclui dados contábeis e não contábeis tais como operacionais, financeiros pro forma e projeções com base na expectativa da Administração da Companhia. Os dados não contábeis não foram objeto de revisão por parte dos auditores independentes da Companhia.



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## Destiques 4T21 & 2021

**Armando Marchesan Neto**  
Fundador e CEO

# Destques Financeiros e Operacionais 4T21 e 2021

- **RECEITA BRUTA** atinge **R\$ 1,8 BILHÃO** com **CRESCIMENTO DE 53,3%** em **2021**
  - Destaque para o **CRESCIMENTO ROBUSTO DO B2C** que alcançou **R\$ 1,1 BILHÃO** com **AUMENTO DE 80,7%** em **2021**, **SUPERANDO EM 3X** o **MERCADO DE ECOMMERCE<sup>1</sup>**
- **GMV TRANSACIONADO** atinge **R\$ 13,3 BILHÕES** no **4T21** e **R\$ 46,4 BILHÕES** em **2021**
- Número de **PEDIDOS ALCANÇA 53 MILHÕES** com **AUMENTO DE 28,6%** em **2021**.
  - **B2C ATINGE MARCA HISTÓRICA** de **17 MILHÕES** de **PEDIDOS** no **4T21**, com **INCREMENTO** de **54,8%**, **SUPERANDO EM MAIS DE 3X** o **MERCADO DE ECOMMERCE<sup>1</sup>** (+17,3%)
- **FORTE CRESCIMENTO** na **BLACK FRIDAY** (+57,4% **RECEITA BRUTA** e +81,5% **PEDIDOS**) e **NATAL** (+108,0% **RECEITA BRUTA** / +135,0% **PEDIDOS**)
- **MARGEM BRUTA AJUST. EX IFRS ATINGIU 20,4%** no **4T21** com **MELHORA CONSISTENTE VERSUS 3T21/2T21**
- **MARGEM EBITDA AJUST. EX IFRS ALCANÇA 11,8%** no **4T21** (**MELHORA** de **0,8 P.P.**) e **9,3%** em **2021** (**INCREMENTO** de **0,3 P.P.**)
- **ÍNDICE DE ALAVANCAGEM ATINGE 1,6X** no **4T21**, **PATAMAR SAUDÁVEL** e reflete o **BENEFÍCIO** da **OPERAÇÃO ASSET LIGHT**, com **ROIC AJUSTADO DE 33,6%** no mesmo período
- Agenda ESG, **DEFINIÇÃO DA MATRIZ DE MATERIALIDADE**: Emissões e Resíduos, Mobilidade, Comunidade e Motoristas. **AMBIÇÃO 2030 DE BUSCAR A NEUTRALIDADE NAS EMISSÕES DE CO2**
- Renovação do CA em linha com a melhores práticas de governança : **7 CONSELHEIROS SENDO 6 INDEPENDENTES E 2 MULHERES**

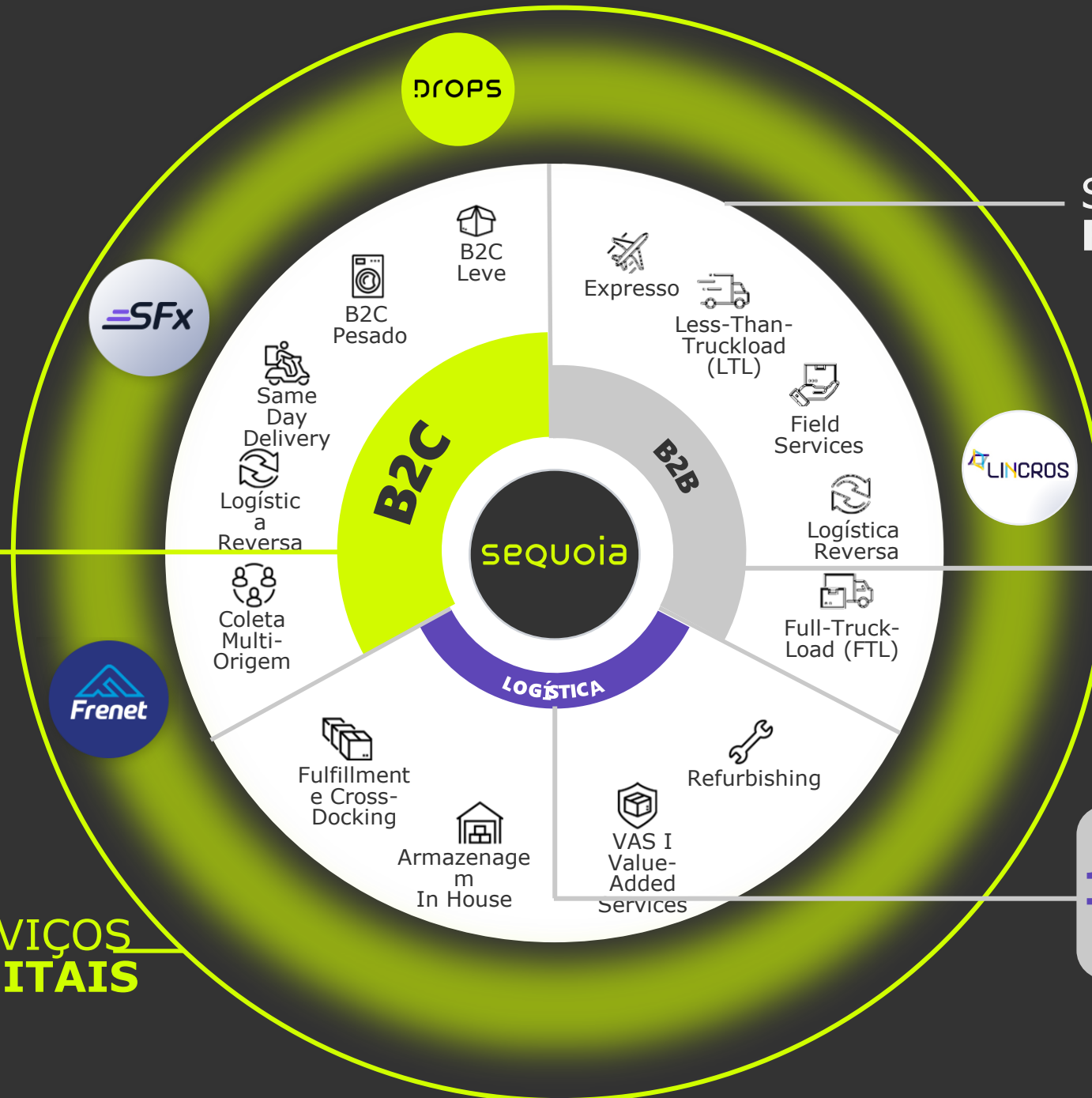
(1) Pesquisa realizada pela Neotrust e divulgada no portal E-commerce Brasil

# Ecosistema integrado de serviços FIGITAL<sup>2</sup> para apoiar a penetração no mercado

Portfolio de soluções integradas de alta escalabilidade atendendo +4.000 clientes de todos os portes e segmentos

**60%<sup>1</sup>**

## SERVIÇOS DIGITAIS



## SERVIÇOS FÍSICOS

**30%<sup>1</sup>**

**10%<sup>1</sup>**

Notas: (1) Receita Bruta 4T21 LTM  
(2) Figital = Físico + Digital

# Sequoia vem reforçando sua posição como consolidadora do mercado

## Modelo disciplinado para aquisições:

Estratégia é prioridade quando uma oportunidade é identificada





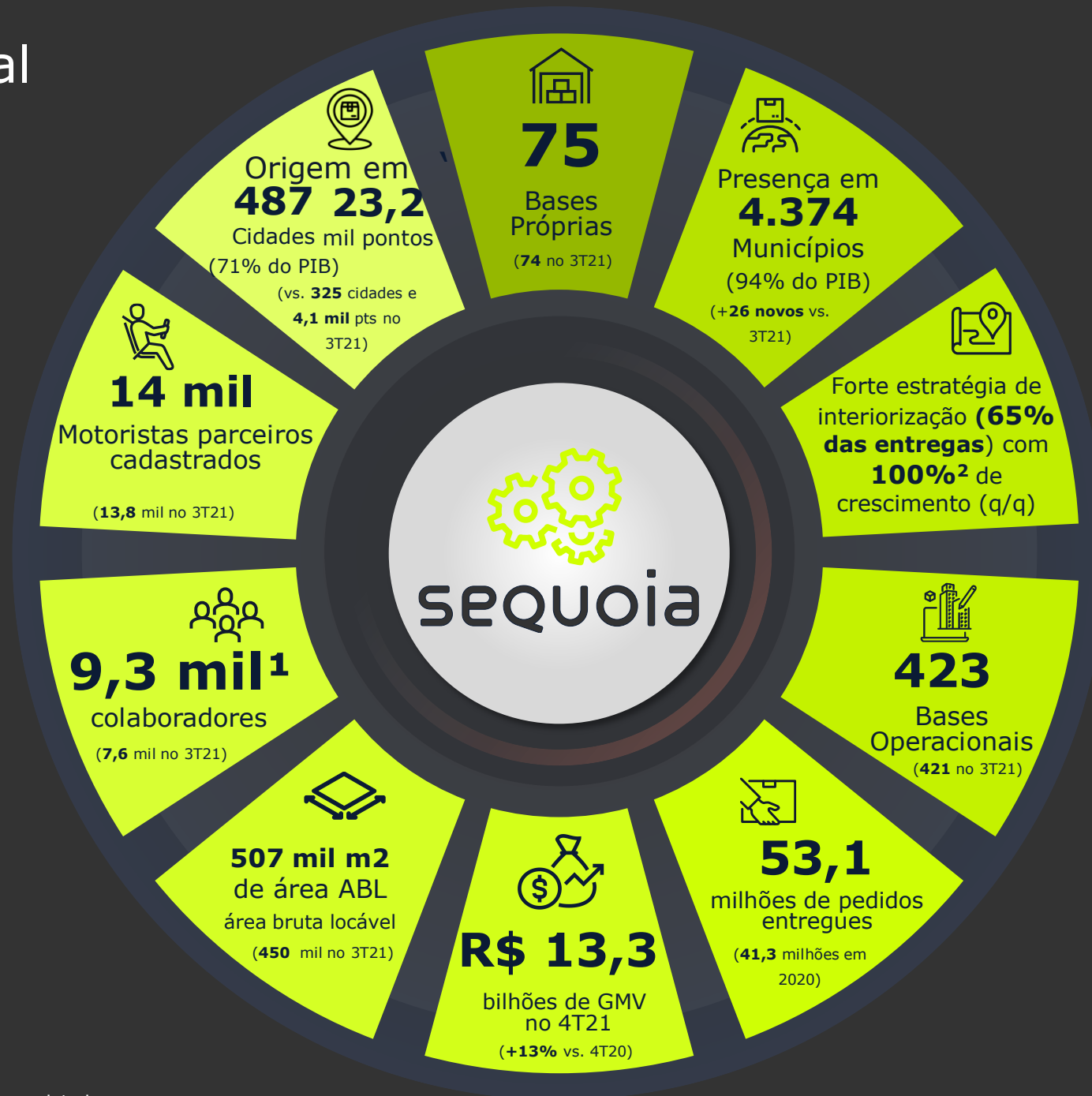
# 2

## DESTAQUES OPERACIONAIS

Bruno Henrique Souza  
COO

# Ecossistema operacional em evolução

Seguimos focados na expansão nacional, abrangência operacional e na entrada em novos segmentos



(1) (Considera funcionários CLTs e Terceiros.)

(2) Considera o crescimento 4T21 vs. 3T21 nas entregas no B2C leve no interior.

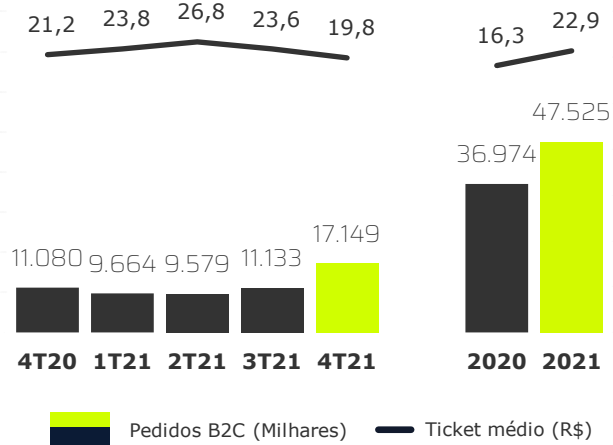


# Dados operacionais

Mais um trimestre de recorde no número de Pedidos – Com forte performance do SFx

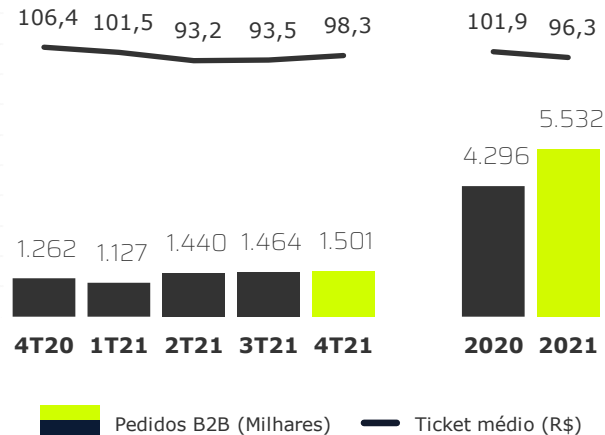
**+55%**  
4T21

## PEDIDOS B2C



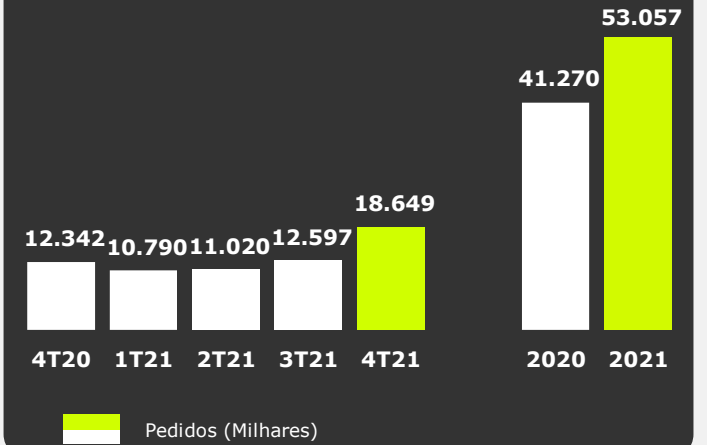
**+19%**  
4T21

## PEDIDOS B2B



**+51%**  
4T21

## PEDIDOS TOTAL



**Recorde** e novo patamar do número de Pedidos, impulsionado por **6,9 milhões de pedidos realizados pela SFx** no 4T21.

No B2C destaque para as **fortes marcas alcançadas** na **Black Friday** e **Natal**.

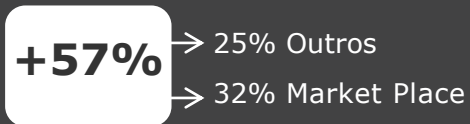


# Datas especiais 4T21

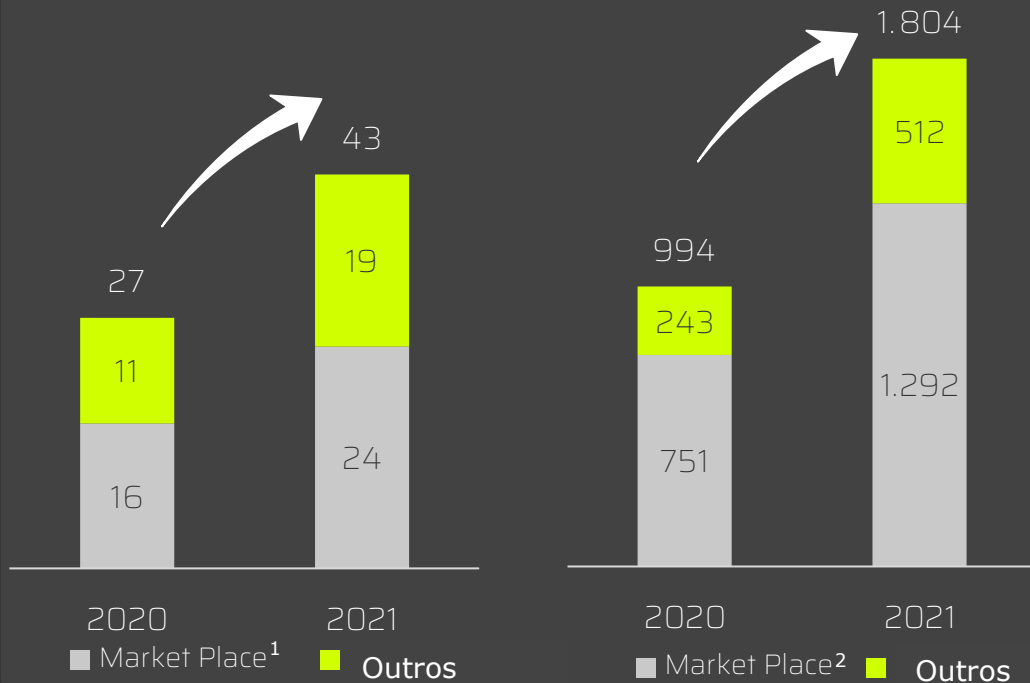
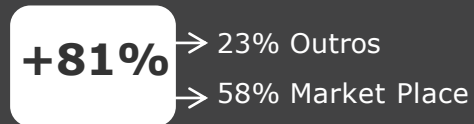
## Black Friday<sup>1</sup>

semana de 26 de novembro/21 a 2 de dezembro/21

### Receita (R\$ mm)



### Pedidos ('000)



## Black Friday

semana de 26 de novembro/21 a 2 de dezembro/21

- Entregas de mais de **9.000 vendedores com origem em 430 cidades**
- **65%** das entregas para **regiões fora de capitais**
- **70%** dos pacotes entregues **pesando menos de 3 kg**
- GMV transportado de **~R\$700 milhões**

## Natal<sup>1</sup>

semana de 20 a 26 de dezembro/21

### Receita

2021 vs 2020

**+108%**

### Pedidos

2021 vs 2020

**+135%**

# Grande potencial para nossas soluções digitais



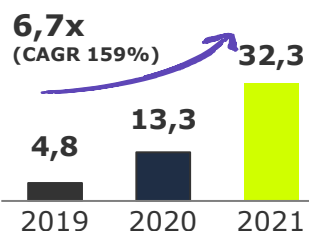
Adquirida no 4T21

Marketplace de Frete para SMBs

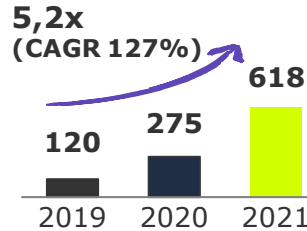
Fundada em 2015

**R\$8 M em Receita em 2021**

Sellers ativos (mil)



GFV (milhões)



**Ser o líder de mercado através de parcerias de e-commerce.**



**Benchmark**



**Valor de Mercado: US\$1 B**

**Fundada em 2013**

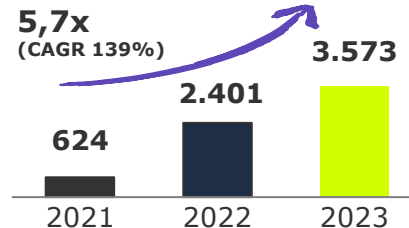
Marketplace de frete nos EUA  
Receita estimada: ~US\$50 M

**DROPS**

Fundada no 3T21

Pontos de pick-up e drop-off ("PUDO"), logística reversa e desenvolvimento de atividades relacionadas

Número de PUDOs

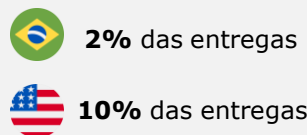


**Ser o líder no mercado de PUDOs**

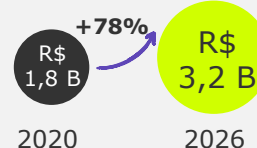


**Mercado SMB com forte crescimento e baixa penetração de PUDOs**

Penetração de PUDOs



Mercado SMB



**LINCROS**

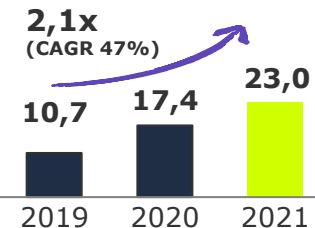
Adquirida no 4T21

SaaS para Roteirização, Torre Controle e Tracking

Fundada em 2015

**R\$23 M em Receita em 2021**

Receita (R\$ M)



**73 mil** Veículos monitorados<sup>1</sup>

**Ser a solução líder em tecnologia em logística**



**Benchmark**



**Valor de Mercado: US\$1 B**

**Fundada em 2013**

Solução baseada em dados para *last mile* no e-commerce com operação em 55 países  
Receita estimada: ~US\$33 M

# Ecosistema integrado de soluções digitais

Soluções digitais atinge **R\$ 215 milhões** em receita em 2021 crescimento de **9x vs. 2020**

## Pick up, Drop off e Logística Reversa

624 PUDOs no 4T21 com expectativa de atingir 3,5 mil em 2023  
Potenciais: *Nobody home*, *Kirana Model* e *Dark Stores*.



## FRENET/DROPS

Integração de novas demandas logística reversa, clientes, mercados e canais para o PUDOs

## Marketplace de frete

32 mil vendedores ativos  
R\$ 618 milhões em GFV



## sequoia

- 53 milhões de Pedidos
- R\$ 46 bilhões em GMV



## DROPS/FRENET/SFX

Integração para coleta, logística reversa e *last mile*

## Solução de *first mile* e *ominichannel* para múltiplas origens

6,9 milhões de Pedidos no 4T21  
487 cidades com coleta  
4.374 municípios cobertos

## SFX/FRENET

Integra as demandas do mercado SMB, canais digitais e clientes

## SaaS para Roteirização, Torre Controle e *Tracking*

73 mil veículos monitorados  
R\$ 4,6 bilhões em frete transacionado  
2,5 milhões de rotas operadas

## LINCROS

Integração da roteirização, torre de controle e *tracking* das plataformas **SFX/FRENET/DROPS**



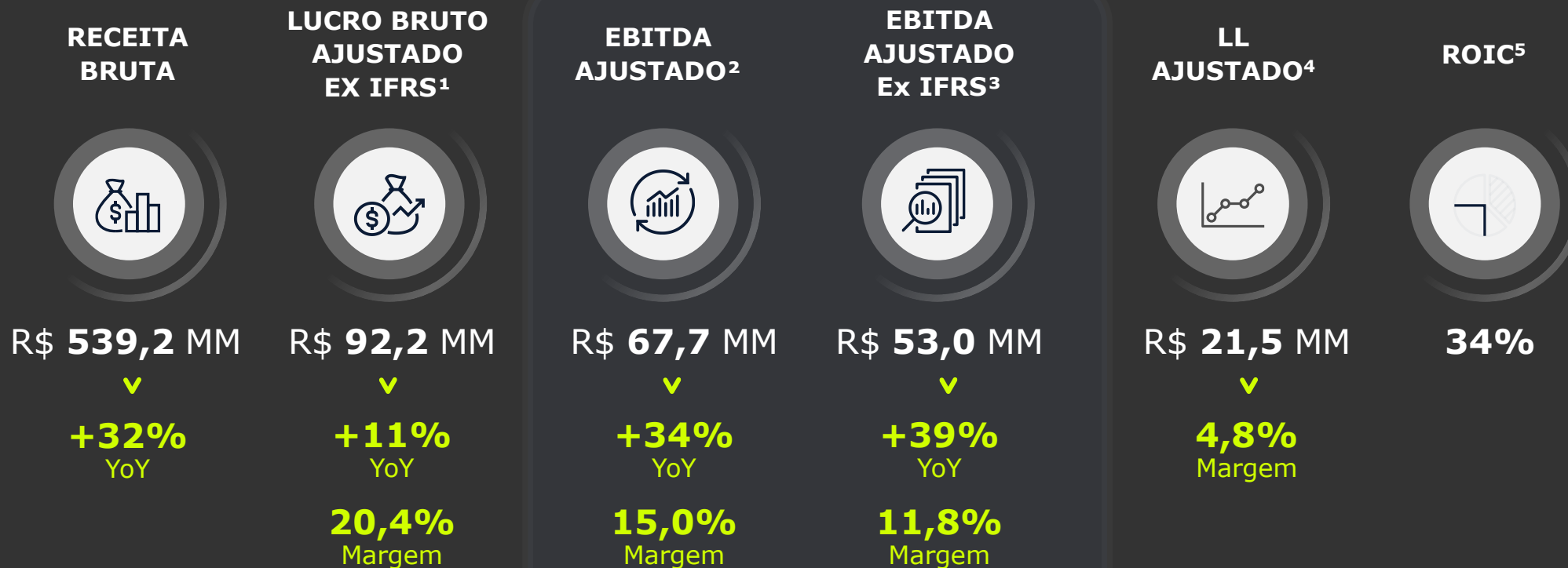
3

# RESULTADOS 4T21

**Fernando Stucchi**  
CFO & IRO

# Destques 4T21

## EBITDA



(1) Exclui efeitos com IFRS 16 adicionando os custos de alugueis e exclui custos com depreciação e amortização.

(2) Exclui despesas não recorrentes com: (i) fusões e aquisições; e (ii) outras receitas/despesas.

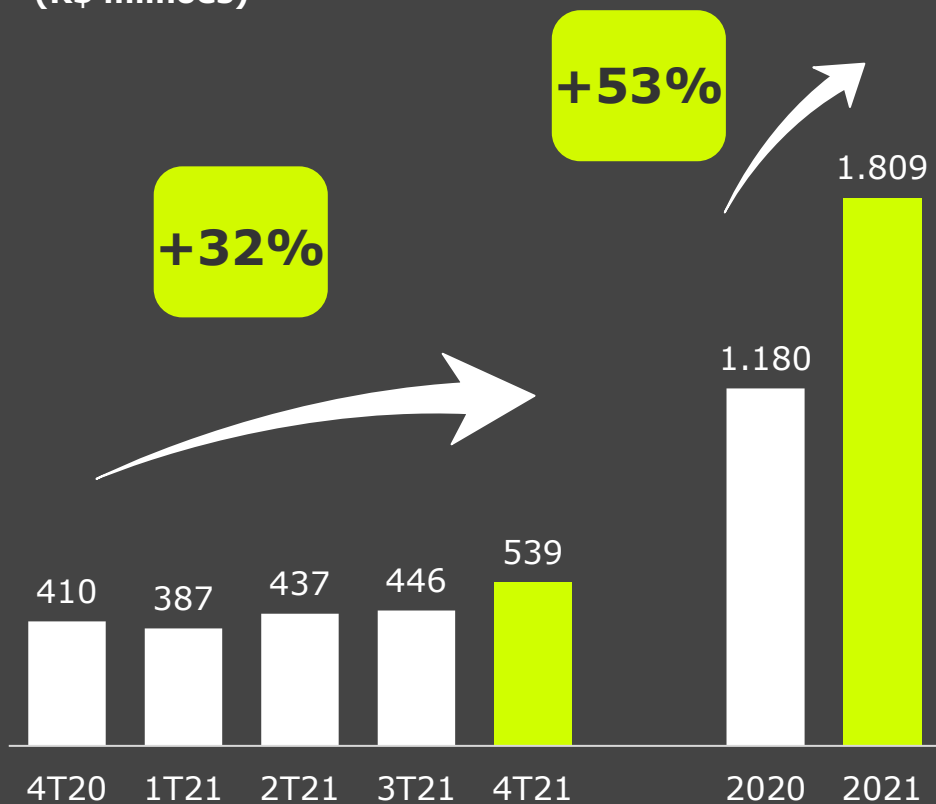
(3) Exclui efeitos com IFRS 16 adicionando os custos e despesas de alugueis e exclui despesas não recorrentes com: (i) fusões e aquisições; e (ii) outras receitas/despesas.

(4) Exclui a amortização do ágio e despesas não recorrentes.

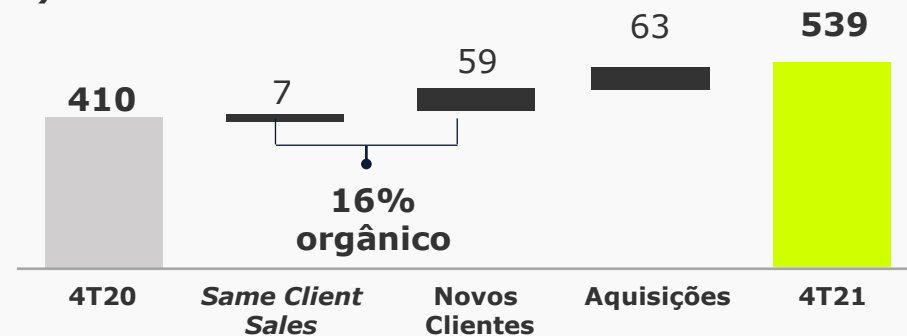
(5) Soma do EBITDA Ajustado LTM (Anualizando as adquiridas) mais Depreciação LTM, multiplicado por (1 - Alíquota IR) dividido pelo Valor residual + Capital de Giro (A Alíquota de Imposto de Renda e Contribuição Social utilizada para o cálculo do ROIC foi de 34%).

# Receita Operacional

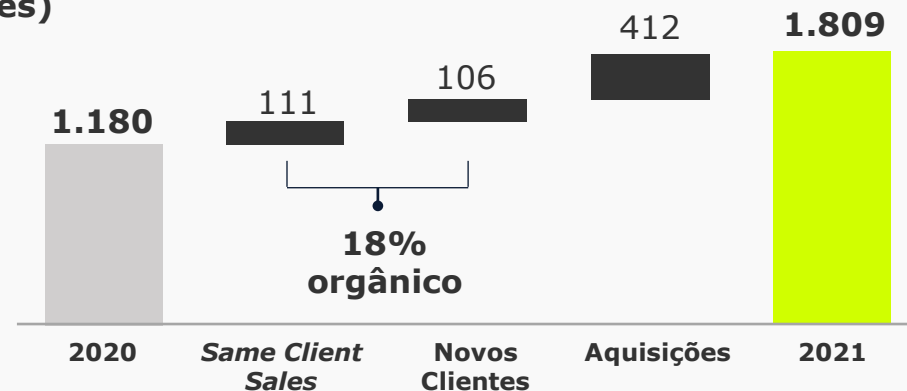
## ■ Histórico Receita Bruta (R\$ milhões)



## ■ Evolução da Receita Bruta 4T20 x 4T21 (R\$ milhões)



## ■ Evolução da Receita Bruta 2020 x 2021 (R\$ milhões)

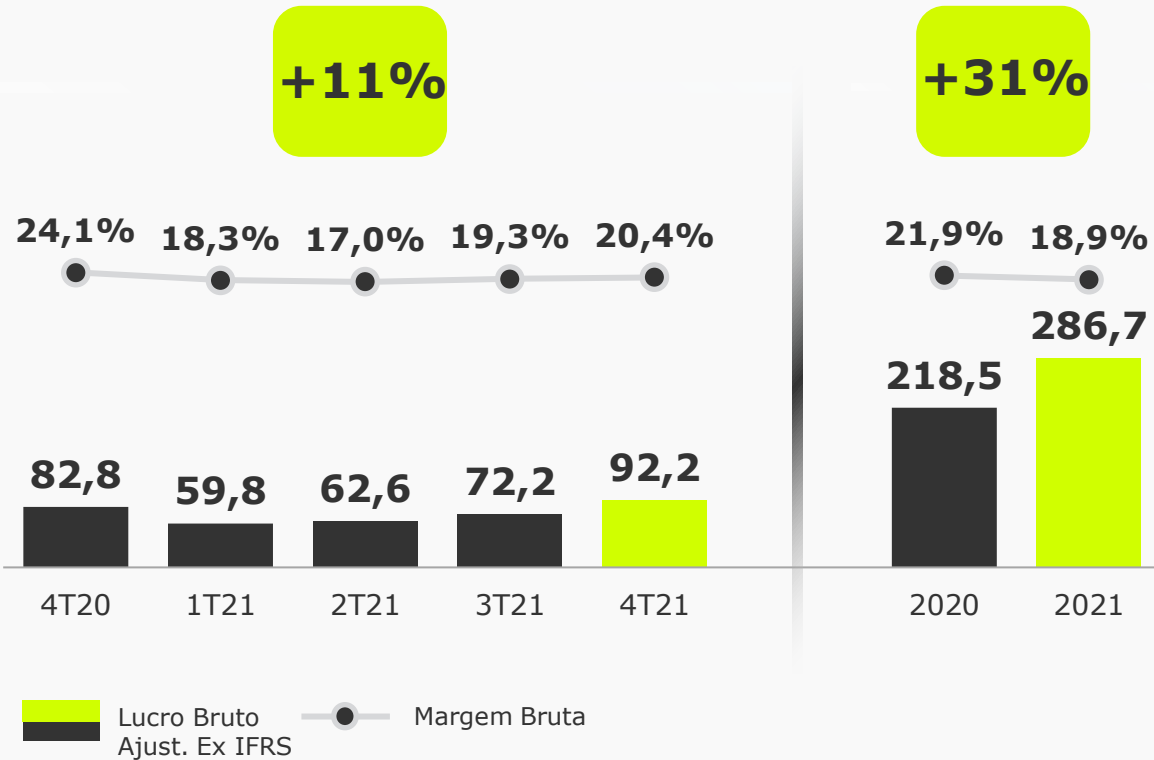




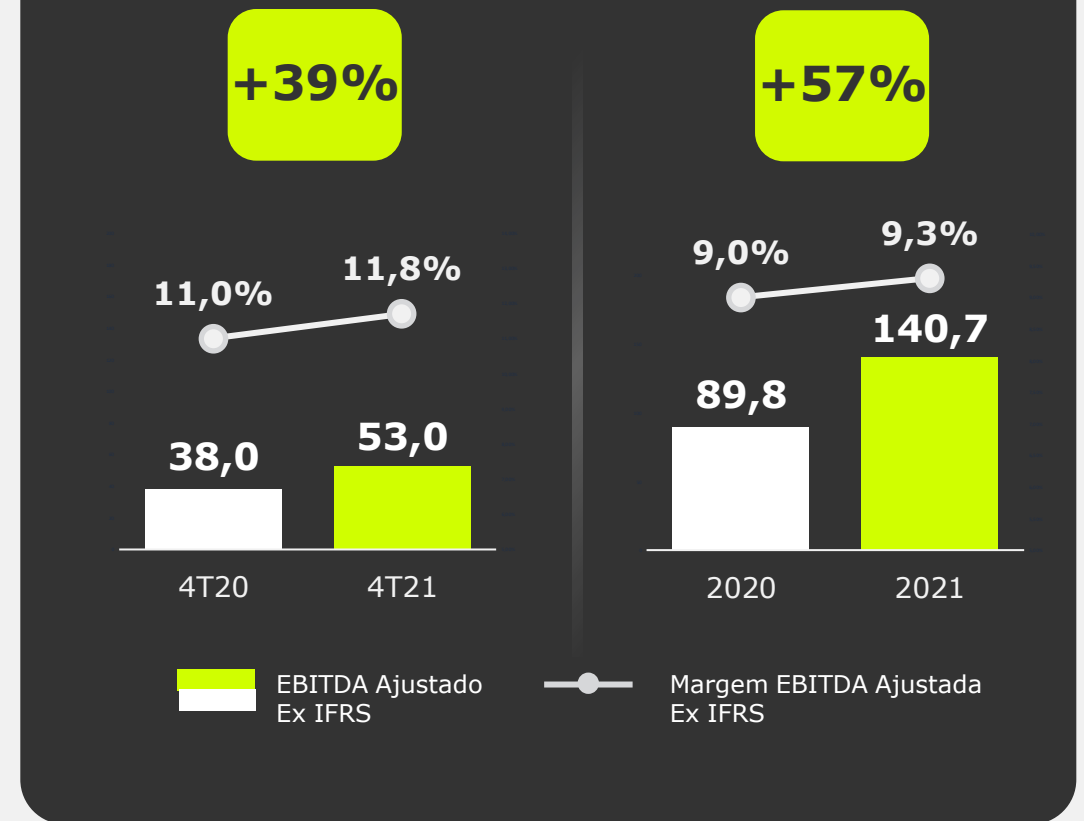
# Rentabilidade

## Recuperação da Margem Bruta e Expansão da Margem EBITDA

### ■ Lucro Bruto Ajustado Ex IFRS<sup>1</sup> (R\$ milhões)



### ■ EBITDA Ajustado Ex IFRS<sup>2</sup> (R\$ milhões)



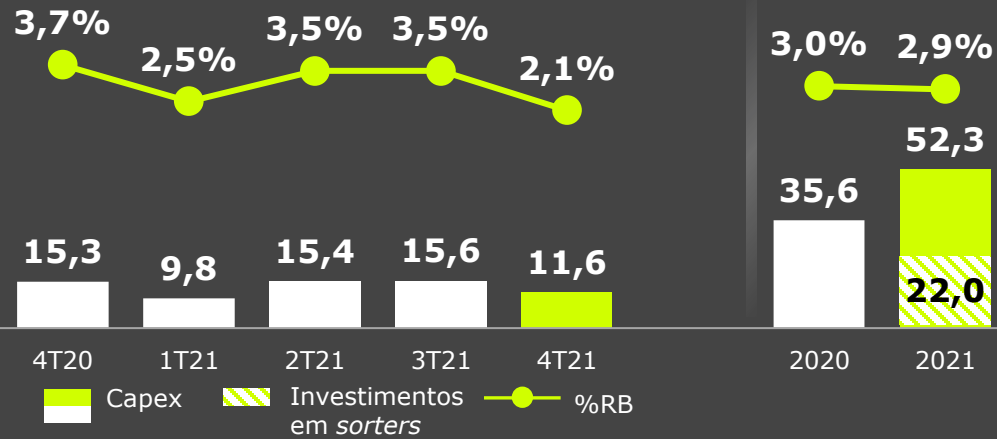
(1) Exclui efeitos com IFRS 16 adicionando os custos de aluguéis e exclui custos com depreciação e amortização.

(2) Exclui efeitos com IFRS 16 adicionando os custos e despesas de aluguéis e exclui despesas não recorrentes com: (i) fusões e aquisições; e (ii) outras receitas/despesas.

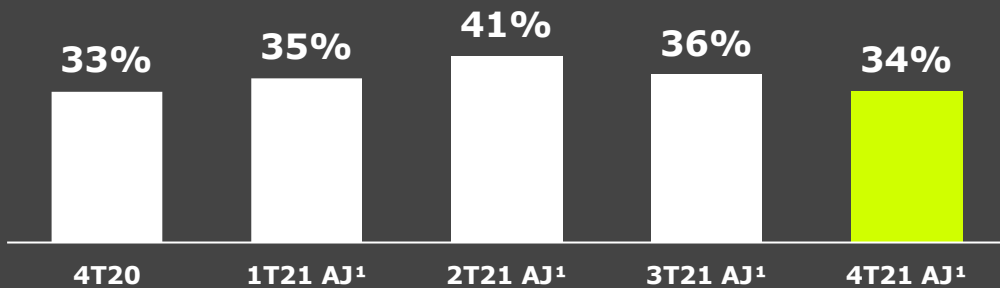
# Investimento e Endividamento

## Investimentos e ROIC

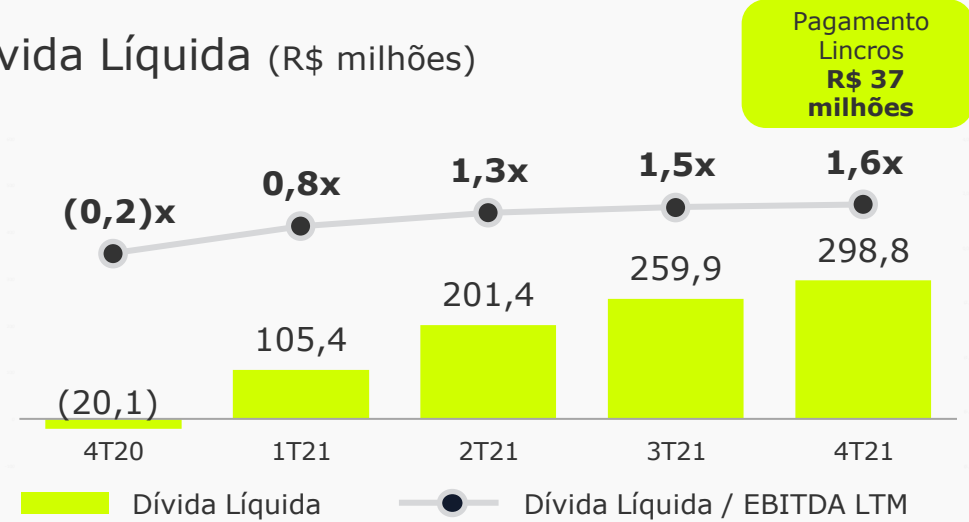
### Investimentos



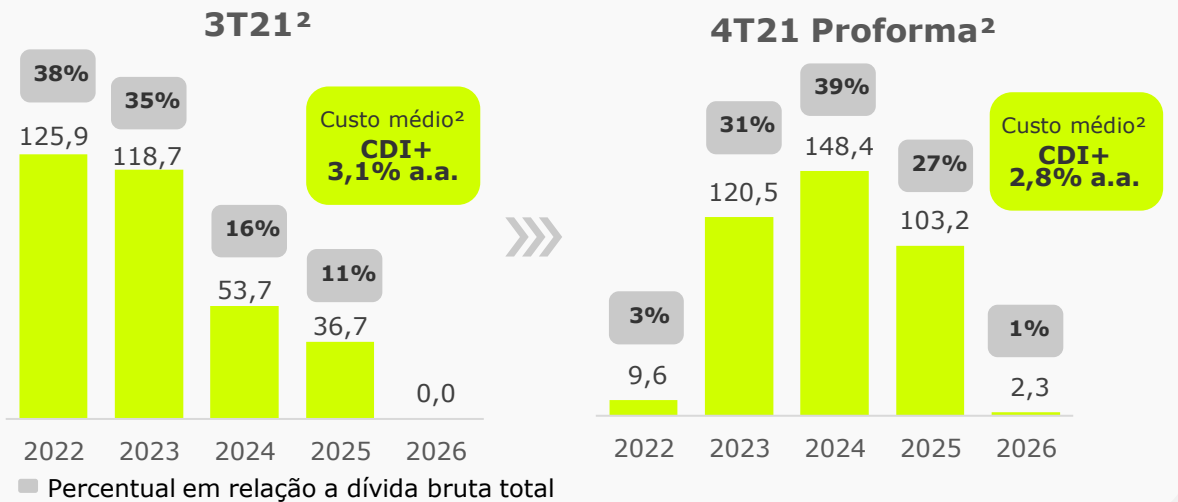
### ROIC



## Dívida Líquida (R\$ milhões)



## Alongamento do Endividamento (R\$ milhões)



(1) Considera a soma do EBITDA Ajustado LTM (anualizando o EBITDA das adquiridas)

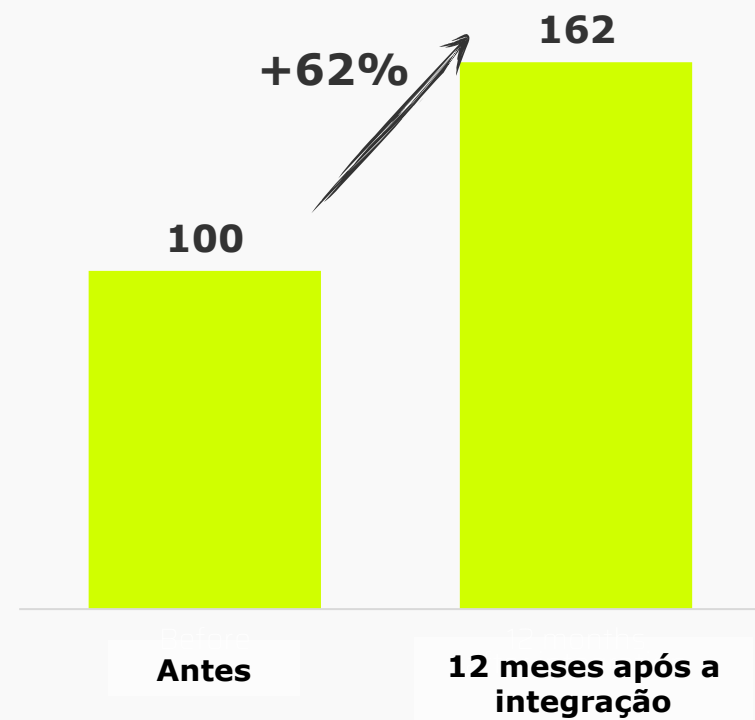
(2) Considera a dívida bruta em cada período e considera o CDI médio do 4T21 de 7,63% para o 3T21 e Proforma (Jan/21).

# Processo de Integração e Captura de Sinergias

## Processo de Integração entre 6-8 meses com captura de sinergias e 12 meses



## Evolução da Margem EBITDA após a Captura das Sinergias (base 100)<sup>1</sup>





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## GENTE & GESTÃO ESG

**Diná Ribeiro Carvalho**

Diretora Executiva Gente & Gestão e Sustentabilidade

# Agenda ESG | Prioridades

Sequoia na vanguarda do ESG no setor de logística



EMISSÕES +  
RESÍDUOS

**BUSCAR A  
NEUTRALIDADE  
DE CARBONO**



MOBILIDADE

**FAVORECER A  
MOBILIDADE  
SUSTENTÁVEL NAS  
CIDADES  
PRIORITÁRIAS**



COMUNIDADE

**ELEVAR O  
DESENVOLVIMENTO  
HUMANO NO NOSSO  
ECOSSISTEMA**



MOTORISTAS  
PARCEIROS

**GARANTIR  
SEGURANÇA,  
DESENVOLVIMENTO E  
TRABALHO JUSTO**

**AMBIÇÃO 2030**

# Agenda ESG | Principais Projetos e Impactos 4T21



- Lançamento da DROPS: redução das emissões e melhora da mobilidade urbana:
  - Trajetos mais curtos e utilização de modais alternativos
  - 624 PUDOs credenciados no 4T21. Expectativa de 3.500 PUDOs em 2023



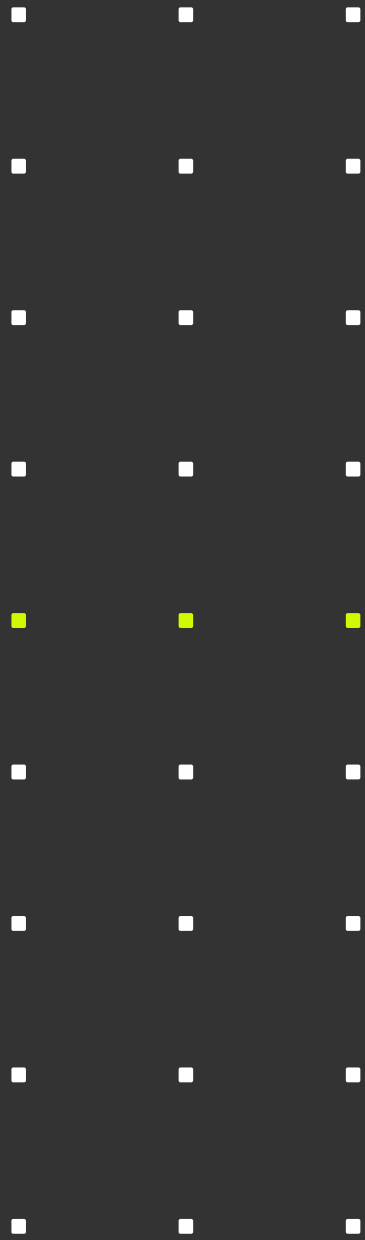
- Implantação da Plataforma com unificação do controle de resíduos de todas as unidades do Grupo Sequoia
- Expansão do Programa Despoluir, com aumento do número de veículos avaliados ambientalmente



- Ação de conscientização sobre saúde e segurança com 400 motoristas parceiros impactados



- Transporte de 50 toneladas de alimentos e itens de higiene pessoal para 3.000 famílias vitima das enchentes nos estados da Bahia e São Paulo
- Início da quinta turma do Programa Sementes (Jovens Aprendizes): 30 jovens selecionados e 41 educadores voluntários



sequoia

OBRIGADO

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**Fernando Stucchi**

CFO & IRO

**Rodrigo Manso**

Head de RI

**Larissa Almeida**

Especialista de RI

An aerial, long-exposure photograph of a complex highway interchange at night. The image is dominated by light trails from cars, creating a sense of motion and flow. The trails are primarily white and yellow, with some green highlights. The interchange features multiple levels of overpasses and ramps, curving and looping through the frame. The background shows some dark silhouettes of buildings and trees, suggesting an urban or industrial setting.

# sequoia

Earnings Presentation

# 4Q21

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# Disclaimer



The statements in this document related to business prospects, forecasts on operating and financial results and those related to Sequoia's growth outlook are merely forecasts and, as such, are based solely on the Executive Board's estimates on the future of the business. These estimates substantially depend on market conditions, the Brazilian economy, the segment and international markets and, therefore, are subject to changes without prior notice. All variations presented here are calculated based on balances in thousands of reais, as well as rounding. This performance report includes accounting and non-accounting data such as operating, pro forma financial and projections based on the Company's management expectations. Non-accounting data were not subject to review by the Company's independent auditors.



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# 4Q21 & 2021 Highlights

**Armando Marchesan Neto**  
Founder and CEO

# 4Q21 and 2021 Financial and Operating Highlights

- **GROSS REVENUE ACHIEVED R\$ 1.8 BILLION, GROWTH of 53.3%** in 2021
  - Highlight for the robust **B2C GROWTH WHICH REACHED R\$ 1.1 BILLION**, an **INCREASE OF 80.7%** in 2021, **SURPASSING THE E-COMMERCE MARKET<sup>1</sup>** (+26.9%)
- **TRADED GMV** reaches **R\$ 13.3 BILLION** in 4Q21 and **R\$ 46.4 BILLION** in 2021
- Number of **ORDERS** totaled **53 MILLION INCREASING 28.6%** in **2021**.
  - **B2C REACHES HISTORIC MARK of 17 MILLION ORDERS** with an **INCREASE OF 54.8%**, **SURPASSING THE E-COMMERCE MARKET<sup>1</sup> BY MORE THAN 3x** (+17.3%)
- **STRONG GROWTH on BLACK FRIDAY (+57.4% in GROSS REVENUE and +81.5% in ORDERS) and CHRISTMAS (+108.0% in GROSS REVENUE / +135.0% in ORDERS)**
- Adjusted **GROSS MARGIN Ex IFRS REACHED 20.4%** in 4Q21 with **CONSISTENT IMPROVEMENT VERSUS 3Q21/2Q21**
- Adjusted **EBITDA Margin Ex IFRS REACHES 11.8%** in 4Q21 (**IMPROVEMENT of 0.8 p.p.**) and **9.3%** in 2021 (**INCREASE of 0.3 p.p.**)
- **LEVERAGE RATIO** reaches **1.6x IN 4Q21, A HEALTHY LEVEL** and reflects the **ASSET LIGHT STRATEGY BENEFIT**, with an **ADJUSTED ROIC of 33.6%** in the period
- ESG Agenda, **DEFINITION OF THE MATERIALITY MATRIX**: Emissions and Waste, Mobility, Community and Drivers. **2030 AMBITION TO PURSUE THE CO2 NEUTRALITY**
- Renewal of the Board of Directors in line with the best governance practices: **7 MEMBERS BEING 6 INDEPENDENT MEMBERS AND 2 FEMALE BOARD MEMBERS**

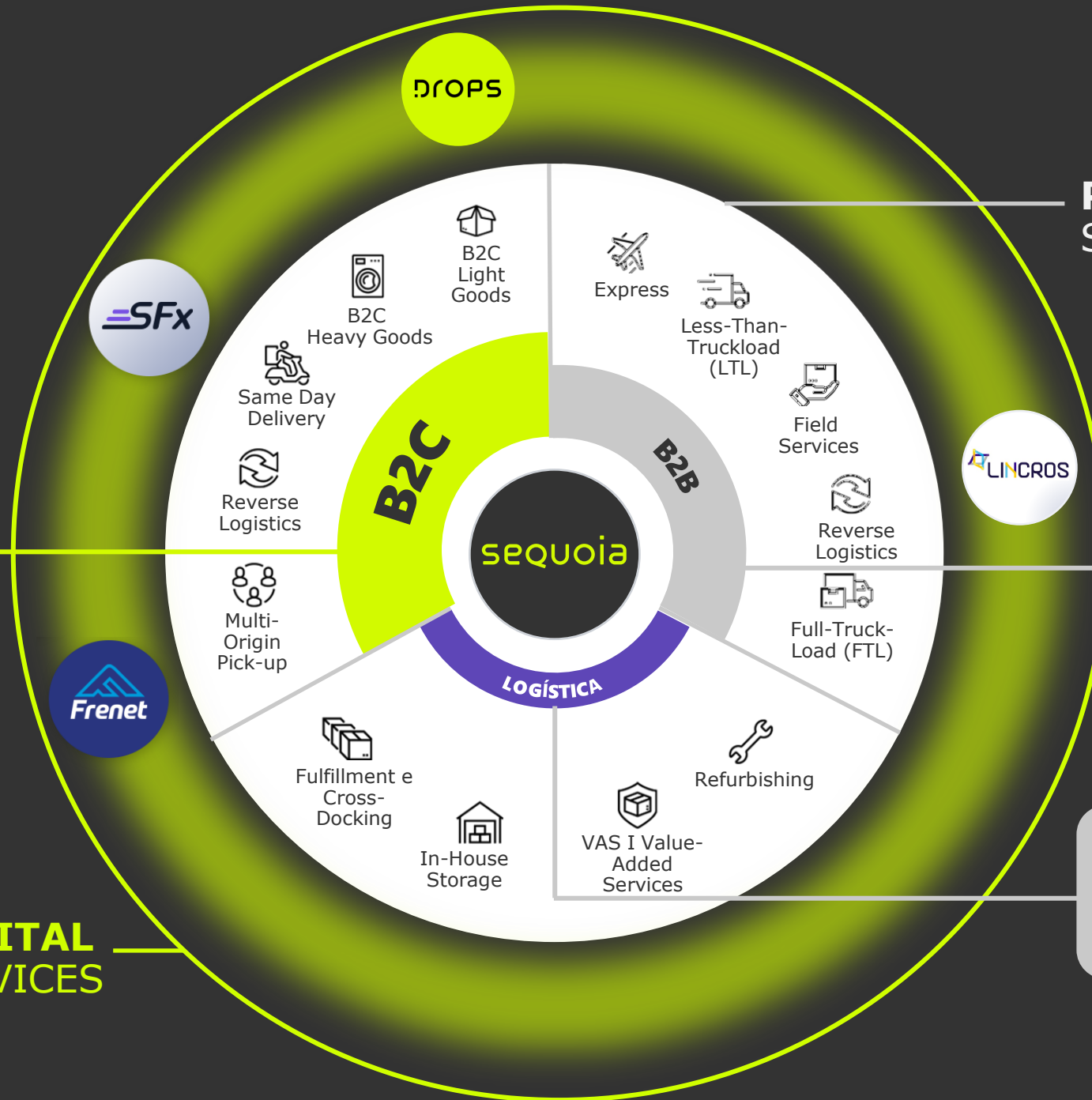
(1) Research carried out by Neotrust and published on the E-commerce Brazil portal

# Integrated PHYGITAL<sup>2</sup> services ecosystem to support market penetration

Portfolio with highly scalable one-stop-shop solutions for +4,000 customers of all sizes and segments

60%<sup>1</sup>

## DIGITAL SERVICES



## PHISICAL SERVICES

30%<sup>1</sup>

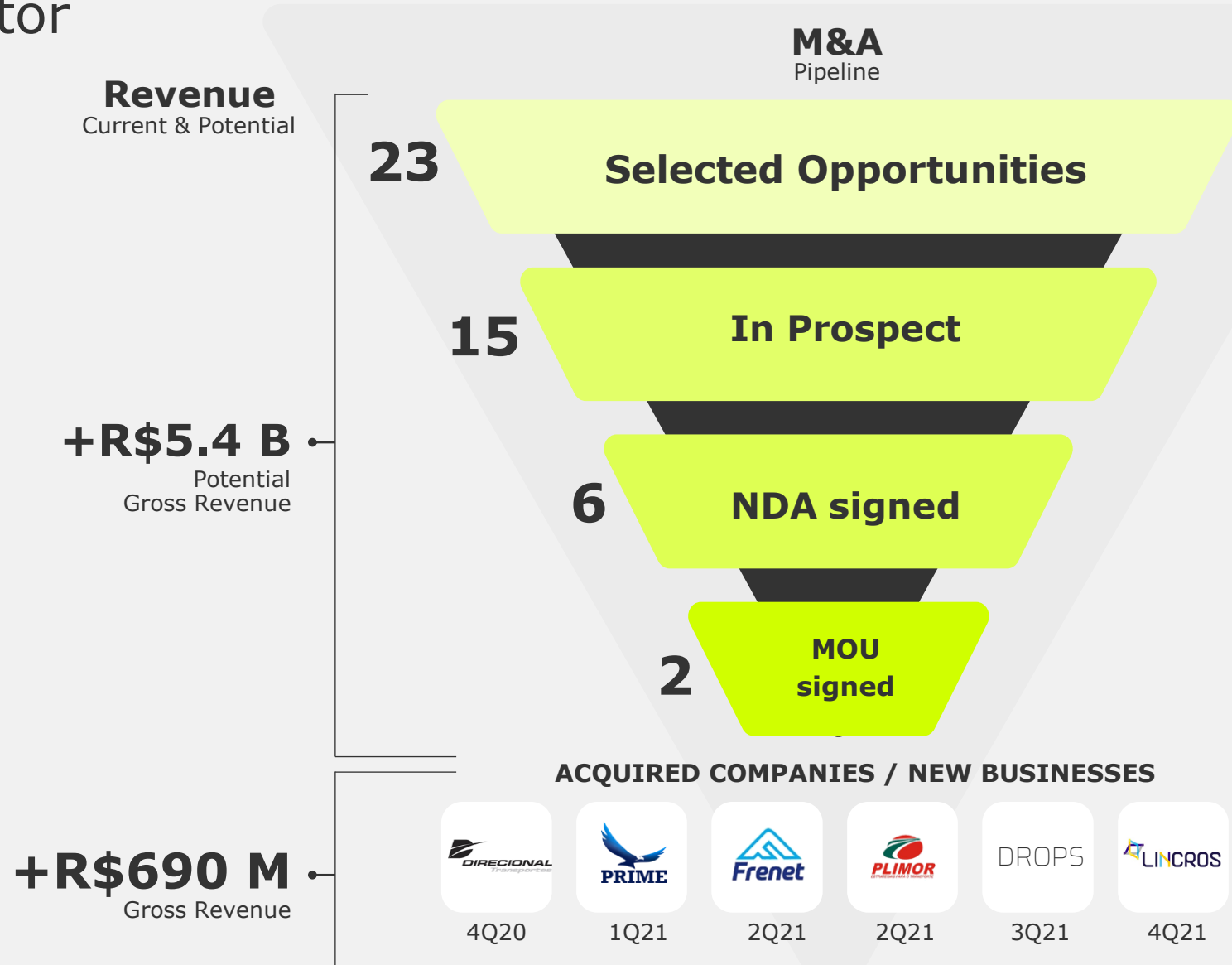
10%<sup>1</sup>

Note: (1) 4Q21 LTM Gross Revenue  
 (2) Phygital = Physical + Digital

# Sequoia is strengthening its position as a market consolidator

## Disciplined Model for Acquisitions:

Strategy is a priority when an opportunity is identified



Note: (1) NRR = Net Revenue Retention

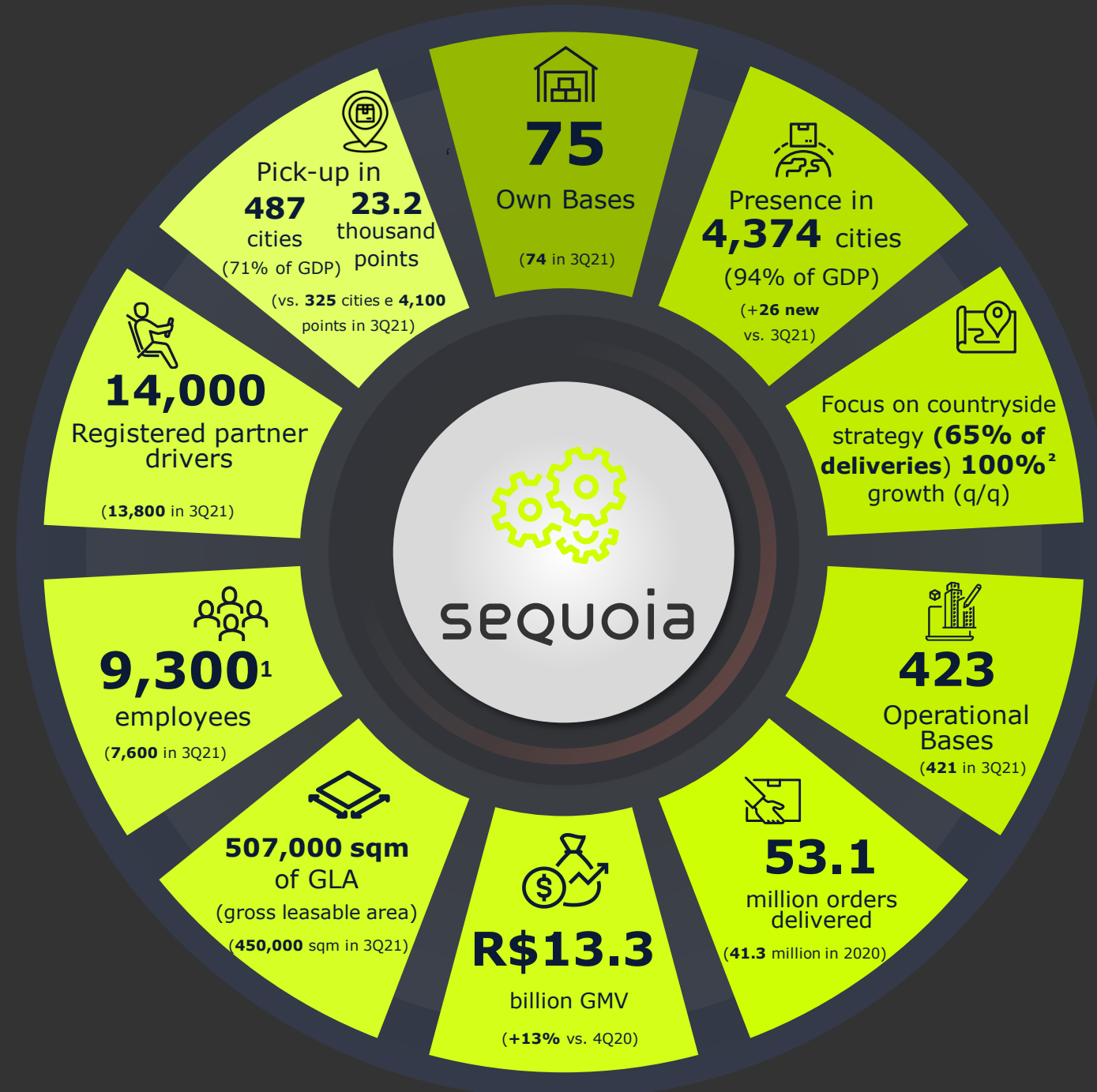


# OPERATING HIGHLIGHTS

**Bruno Henrique Souza**  
COO

# Evolving Operating Ecosystem

We remain focused In the national expansion, operational coverage and entry in new segments



(1) Considers full time employees and third parties' employees.

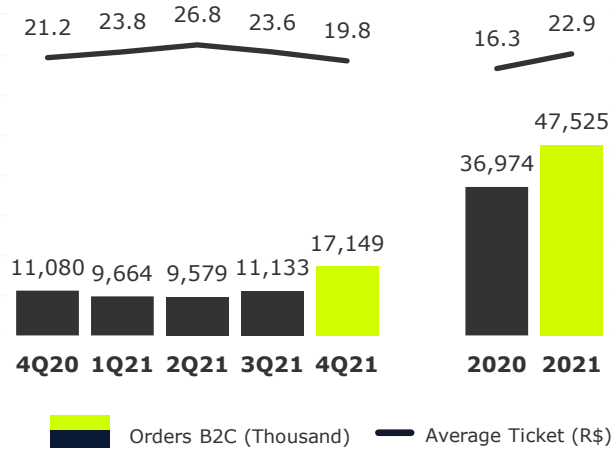
(2) Considers 4Q21 vs. 3Q21 growth in the countryside in the B2C light goods segment.

# Operating Data

Record-high Number of Orders in 4Q21– Strong Performance of SFx

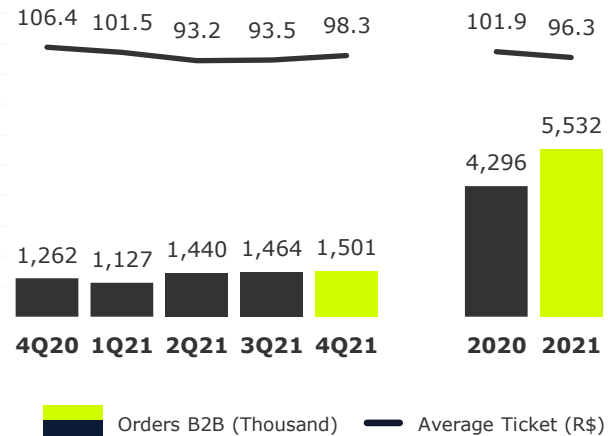
**+55%**  
4Q21

## Orders B2C



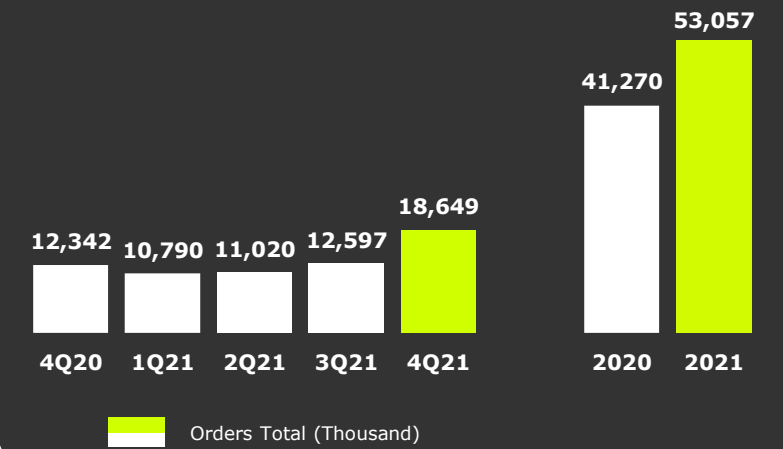
**+19%**  
4Q21

## Orders B2B



**+51%**  
4Q21

## Orders TOTAL



**Record-high** and a new level in number of Orders, boosted by **6.9 million Orders delivered by SFx** in 4Q21.

Highlight for the **B2C segment strong performance** during **Black Friday** and **Christmas**.



# 4Q21 Special Dates

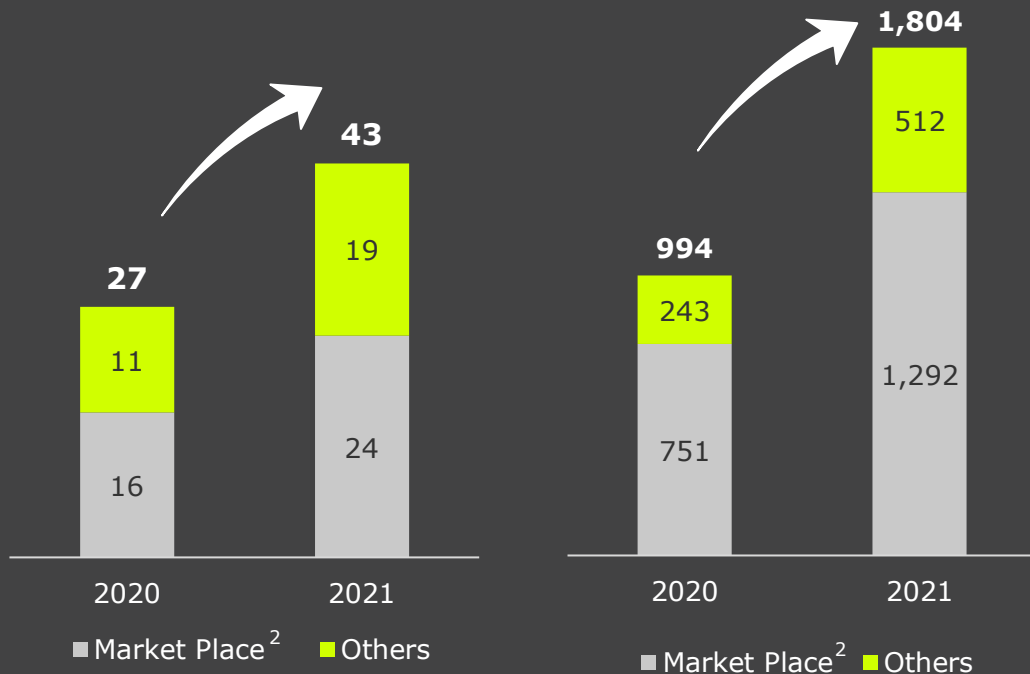
**Black Friday<sup>1</sup>** week of November 26th to December 2nd, 2021

**Revenues** (R\$ mm)

**Growth 57%** → 25% Others  
→ 32% Market Place

**Orders** ('000)

**Growth 81%** → 23% Others  
→ 58% Market Place



## Black Friday<sup>1</sup>

week of November 26th to December 2nd, 2021

- Deliveries from more than **9,000 sellers to 430 cities**
- **65%** of deliveries to **countryside regions**
- **70% of packages** delivered weighing **less than 3 kilograms**
- Transported **GMV** (Gross Merchandise Value) of **~R\$700 million**

## CHRISTMAS<sup>1</sup>

week of December 20th to December 26th, 2021

**Revenues**  
2021 vs 2020  
**108%**

**Orders**  
2021 vs 2020  
**135%**

# Great potential for our digital solutions



Acquired in 4Q21

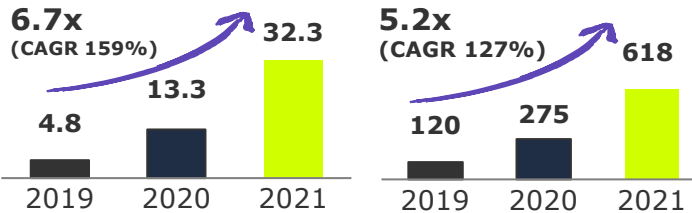
Freight Marketplace for SMBs

Founded in 2015

Revenue of R\$8 M in 2021

Active Sellers  
(thousand)

GFV (million)



Become the market leader through partnerships in the e-commerce

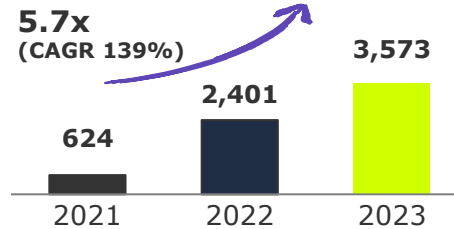


DROPS

Founded in 3T21

Pick-up and drop-off points ("PUDO"), reversal logistics and development of related activities

Number of PUDOs



Become the market leader in PUDOs



LINCROS

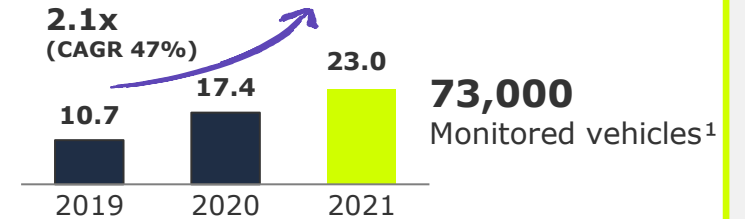
Acquired in 4Q21

SaaS for Routing, Control Tower and Tracking

Founded in 2015

Revenue of R\$23 M in 2021

Revenue (R\$ M)



Become the leading solution in logtech



Benchmark

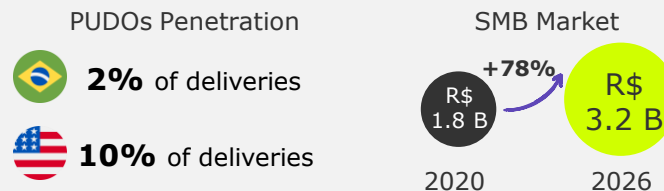
Market Value: US\$1 B

Founded in 2013

Freight Marketplace in US  
Estimated revenue: ~US\$50 M



SMB market with strong growth perspective and PUDO's low penetration



Benchmark

Market Value: US\$1 B

Founded in 2013

Data-led solution to improve last-mile experience in e-commerce with operation in 55 countries  
Estimated revenue: ~US\$33 M



Note: (1) Considers the 2021 end figure.

# Integrated digital ecosystem solution

Digital solutions reaches R\$ 215 million in revenue in 2021, a growth of 9x vs. 2020

## Pick up, Drop off and Reverse Logistics

624 PUDOs in 4Q21 with expectation to reach 3,500 until 2023  
 Potential: Nobody home, Kirana Model e Dark Stores.

**SFX/FRENET**  
 Integrates SMB market demands, digital channels and customers

**DROPS/FRENET**  
 Integration of new logistics demands, reverse logistics, customers, market and demand for PUDOs

## SaaS for Routing, Control Tower and Tracking

73,000 monitored vehicles  
 R\$ 4.6 billion in GFV  
 2.5 million routes operated

# sequoia

- 53 million in Orders
- R\$ 46 billion in GMV

## Freight Marketplace

32 thousand active sellers  
 R\$ 618 million in GFV



**LINCROS**  
 Integration of routing, control tower e tracking platforms  
**SFX/FRENET/DROPS**

**DROPS/FRENET/SFX**  
 Pick-up integration, reverse logistics and last mile



## First mile and omnichannel solution for multiple origins

6.9 million Orders in 4Q21  
 Pick-up in 487 cities  
 Coverage of 4,374 cities



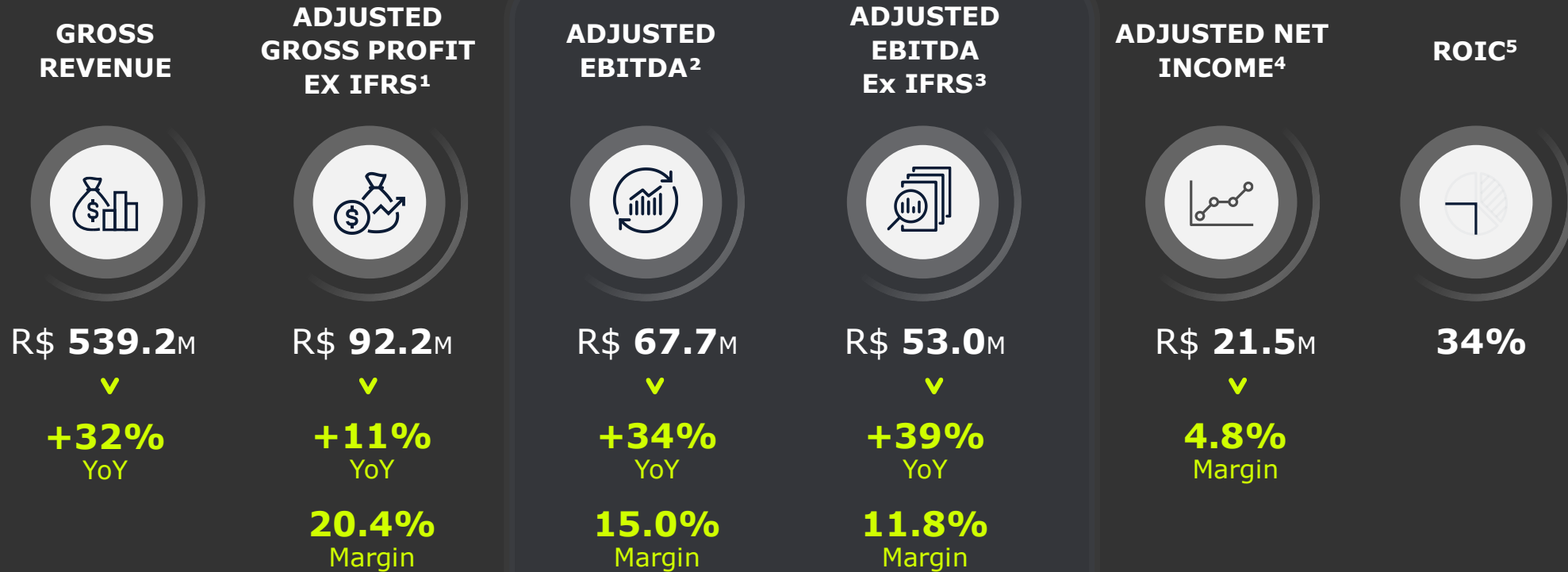
3

## 4Q21 RESULTS

Fernando Stucchi  
CFO & IRO

# 4Q21 Highlights

## EBITDA



(1) Excludes IFRS 16 effects by adding rental costs and excludes depreciation and amortization costs.

(2) Excludes non-recurring expenses with: (i) mergers and acquisitions; and (ii) other revenue/expenses.

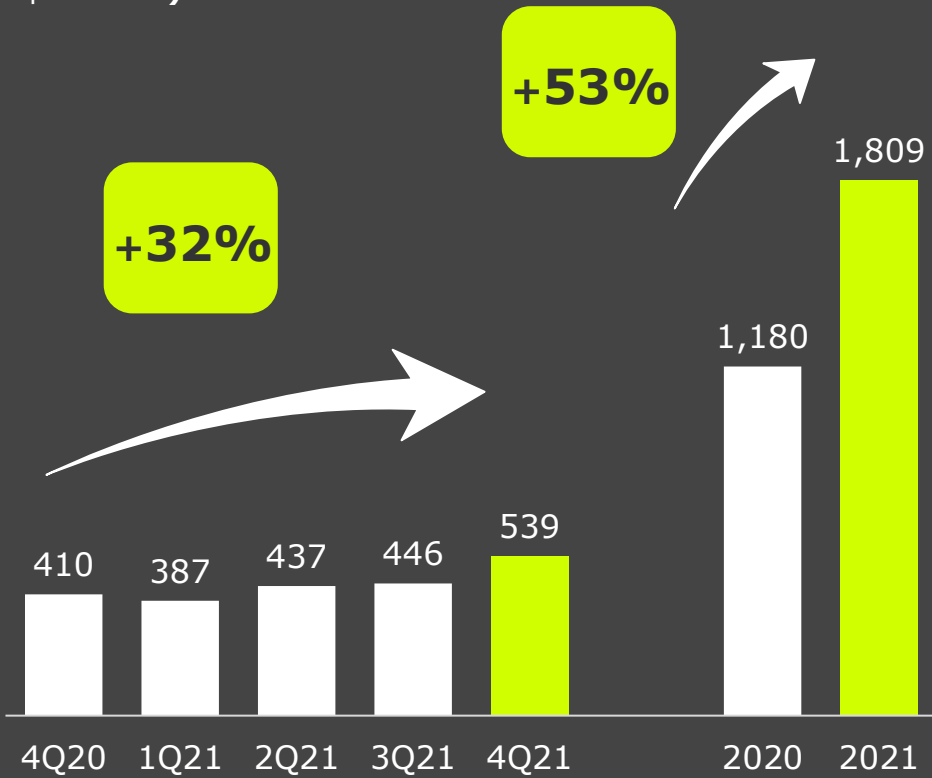
(3) Excludes effects with IFRS 16 by adding rental costs and expenses and excludes non-recurring expenses with: (i) mergers and acquisitions; and (ii) other revenue/expenses.

(4) Excludes goodwill amortization and non-recurring expenses.

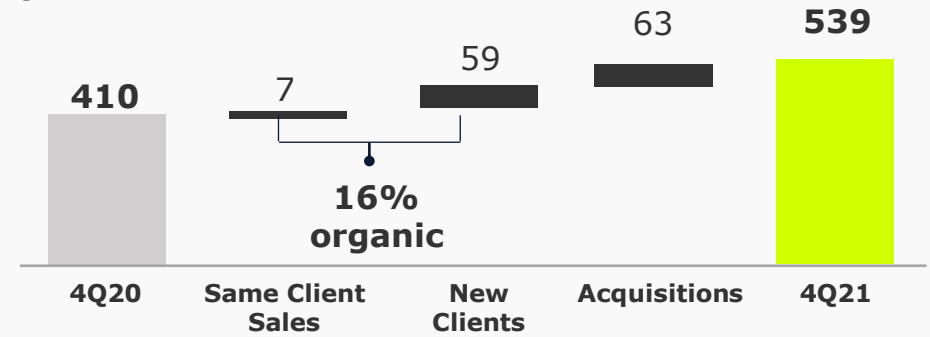
(5) Adjusted ROIC is calculated by the sum of Adjusted EBITDA LTM (Annualizing the acquired) + Depreciation LTM, multiplied by (1 - Income tax rate) and divided by residual value + working capital. (The income tax rate applied to calculate ROIC was 34%.)

# Operating Revenue

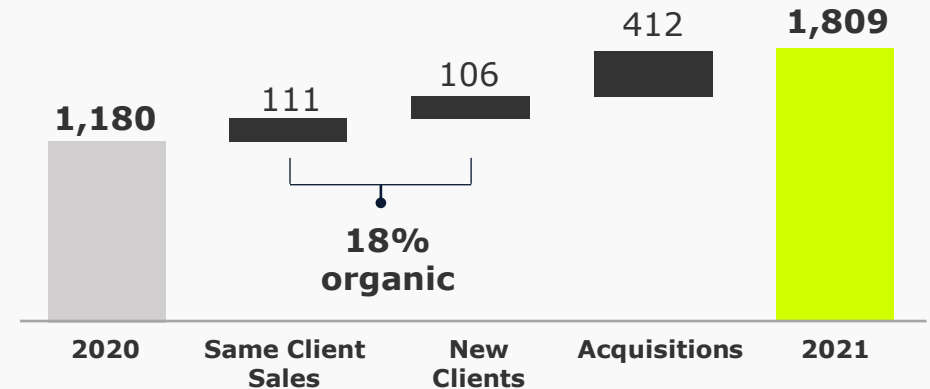
## Gross Revenue History (R\$ million)



## Gross Revenue Evolution 4Q20 x 4Q21 (R\$ million)



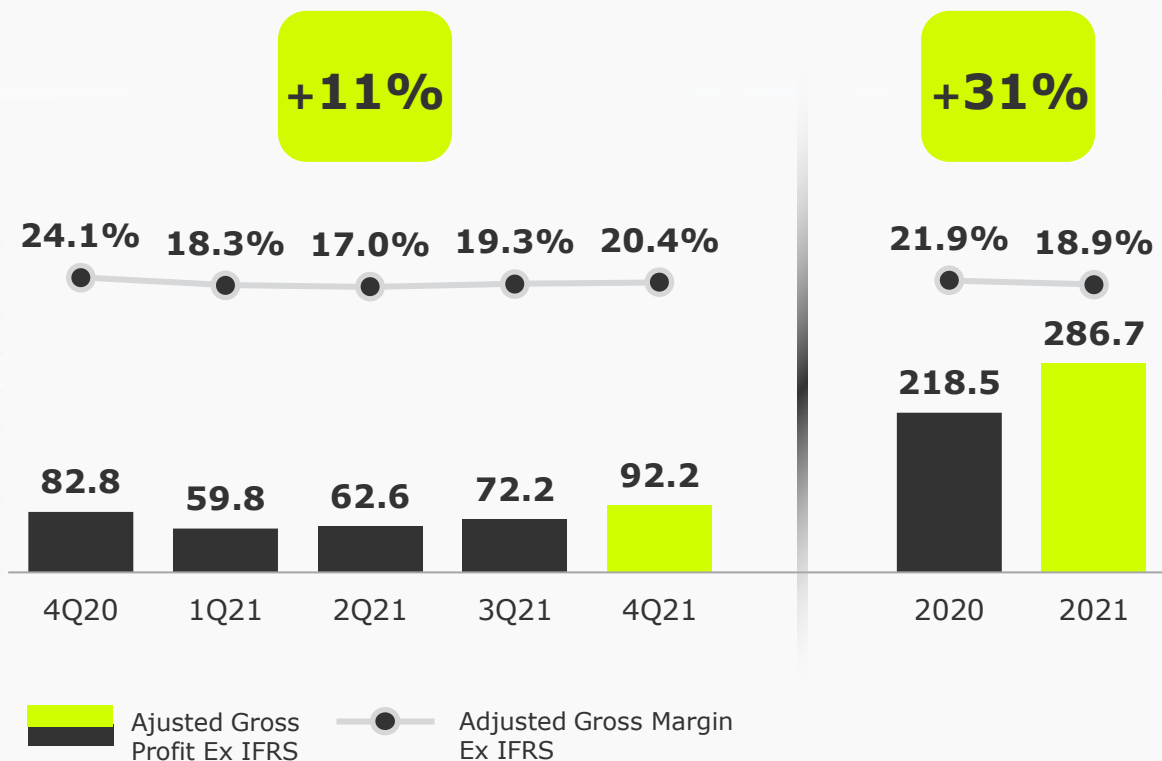
## Gross Revenue Evolution 2020 x 2021 (R\$ million)



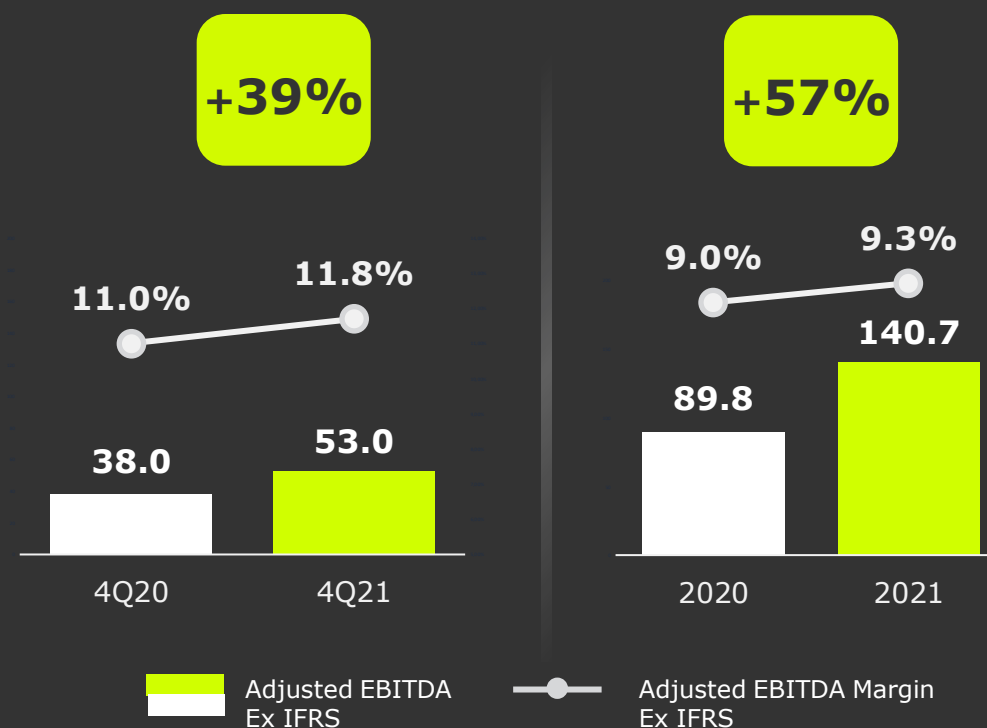
# Profitability

## Gross Margin Recovery and EBITDA Margin Expansion

### Adjusted Gross Profit Ex IFRS<sup>1</sup> (R\$ million)



### Adjusted EBITDA Ex IFRS<sup>2</sup> (R\$ million)



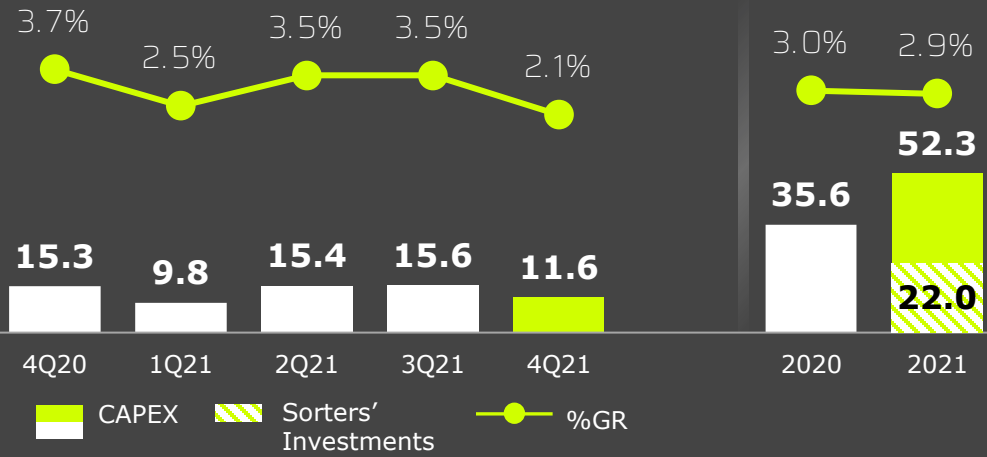
(1) Excludes IFRS 16 effects by adding rental costs and excludes depreciation and amortization costs.

(2) Excludes effects with IFRS 16 by adding rental costs and expenses and excludes non-recurring expenses with: (i) mergers and acquisitions; and (ii) other revenue/expenses.

# CAPEX, ROIC and Indebtedness

## CAPEX and ROIC

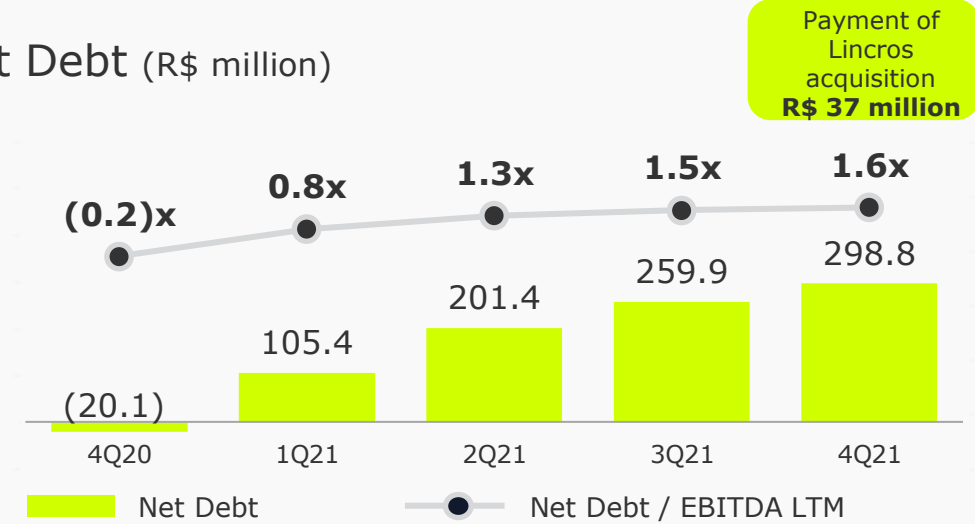
### CAPEX



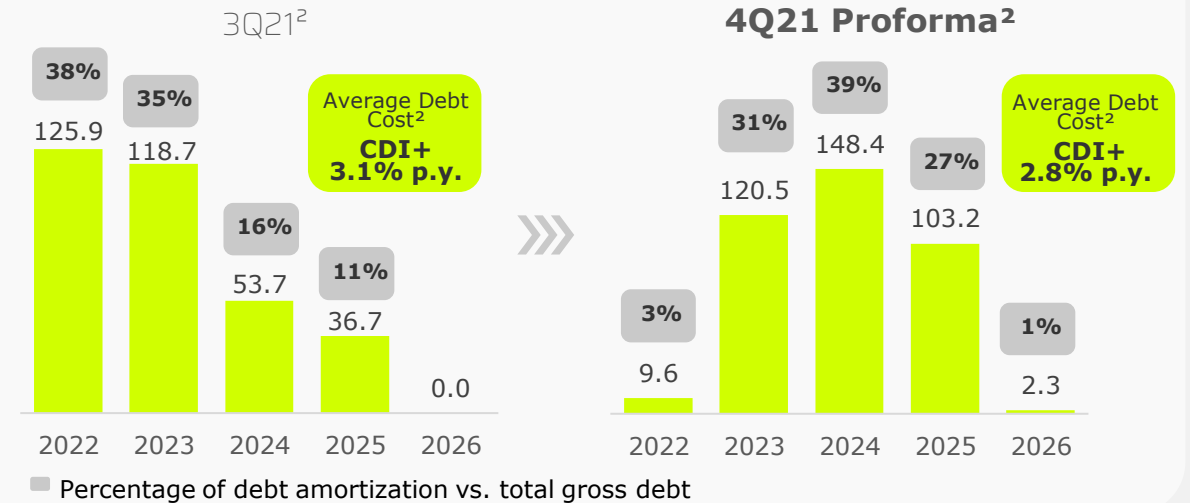
### ROIC



## Net Debt (R\$ million)



## Debt Amortization (R\$ million)



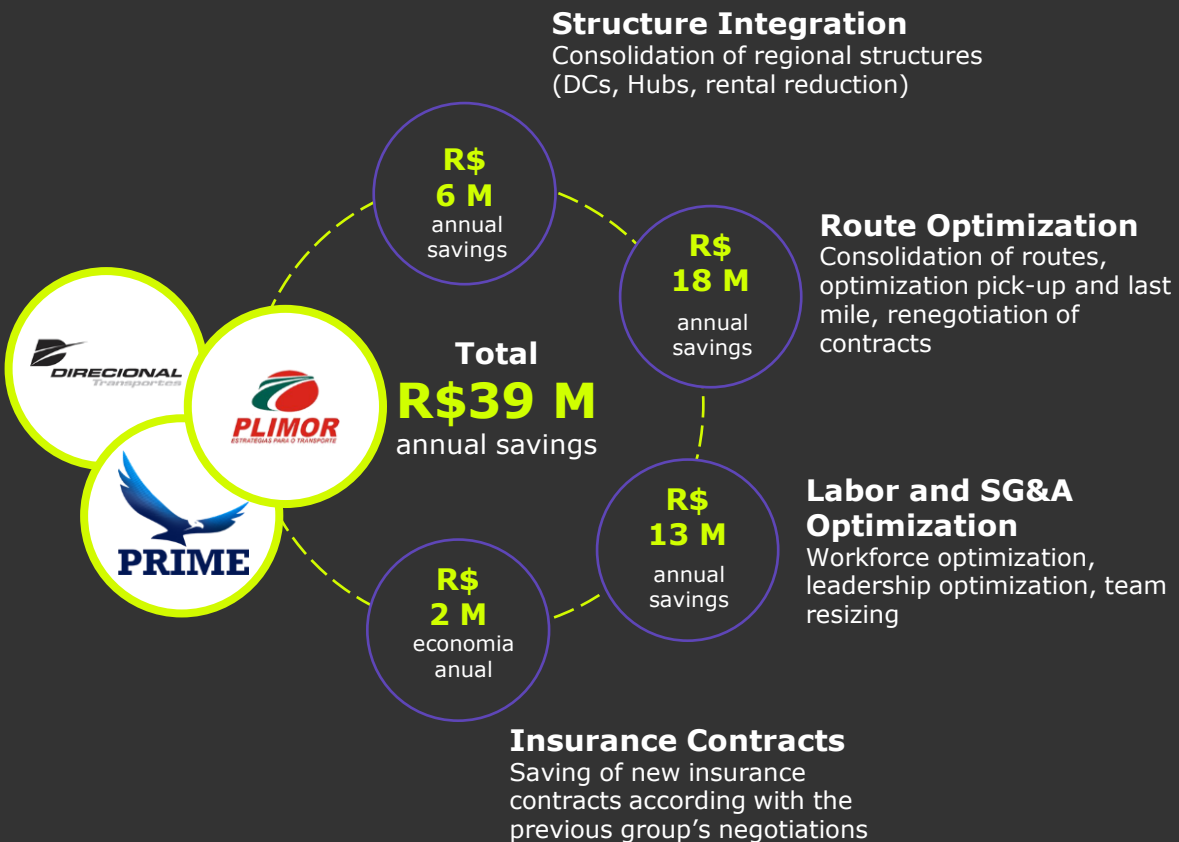
(1) Considers the Adjusted EBITDA LTM (annualizing the acquired companies' EBITDA with less than 12 months of acquisition)

(2) Considers the 4Q21 average CDI of 7.63% for the 3Q21 e 4Q21 Proforma average debt cost calculation.

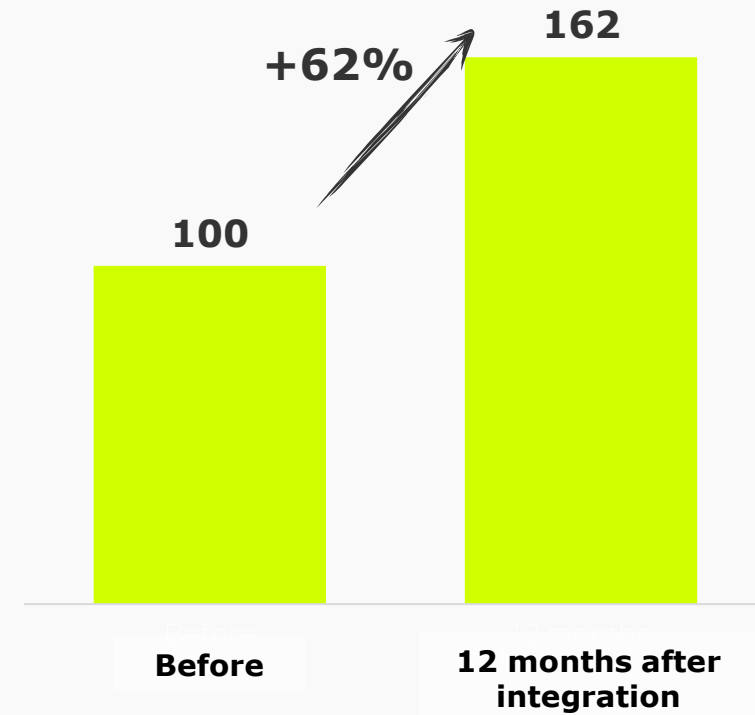


# Integration Process and Capture of Synergies

**Integration process between 6 to 8 months and capture of synergies in 12 months**



**Evolution of post-acquisition EBITDA<sup>1</sup> (Before = 100)**



Source: Alvarez & Marsal  
Note: (1) Prime, Direcional and Plimor acquisitions



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## HR & ESG

Diná Ribeiro Carvalho  
HR & Sustainability Officer

# ESG Agenda | Priorities

Sequoia is at the forefront of ESG in the logistics industry



EMISSION +  
WASTE

**PURSUING CARBON  
NEUTRALITY**



MOBILITY

**IMPROVE  
SUSTAINABLE  
URBAN MOBILITY IN  
PRIORITY CITIES**



COMMUNITY

**INCREASE HUMAN  
DEVELOPMENT IN  
THE SEQUOIA'S  
ECOSYSTEM**



PARTNER  
DRIVERS

**ENSURE SAFETY,  
DEVELOPMENT AND  
FAIR WORK TO  
DRIVERS**

2030 AMBITION

# ESG Agenda | Main Projects and 4Q21's Impacts



- Launch of the Drops operation: CO<sub>2</sub> emissions reduction and improvements in urban mobility:
  - Shorter delivery routes and alternative modal options
  - 624 PUDOs accredited at the end of 4Q21. Expectation to reach 3,500 PUDOs by the end of 2023



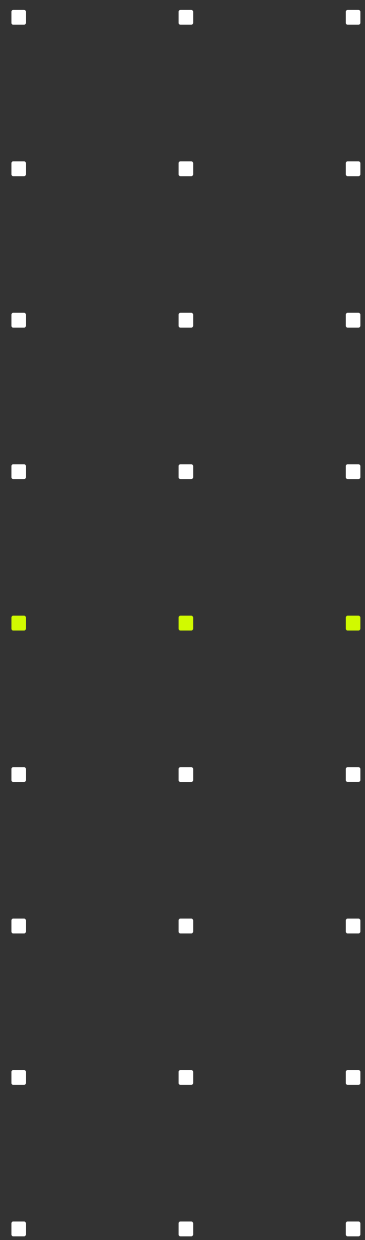
- Implementation of the waste management platform, centralizing the information from all units of the Sequoia group
- Expansion of the Despoluir Program, with the increase of vehicles' environmental verifications



- Awareness initiative regarding health and safety impacting more than 400 partner drivers



- 50 tons of food and personal hygiene goods were transported and delivered to 3,000 families impacted by flood disaster in the states of Bahia and São Paulo
- Start of the fifth *Sementes* Program (Young Apprentices). Selected 30 young apprentices and 41 volunteer educators



# THANK YOU

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