Ad hoc announcement pursuant to Art. 53 LR

Important Notice:

z In the first half of 2026, the Company realized an operating income of RMB12.130 billion, representing a year-on-year increase of 23.04%; net profit attributable to shareholders of the listed company of RMB2.322 billion, representing a year-on-year increase of 296.73%; and net profit attributable to shareholders of the listed company of RMB3.780 billion deducting non-recurring gains and losses, representing a year-on-year increase of 362.55%. The substantial improvement in the Company's performance during the period was mainly driven by the following factors:

(1) For the anode material business, robust demand in the downstream lithium battery industry sustained a high level of prosperity, fueling strong market demand for anode materials. The Company seized the industry opportunity. By refining production planning and optimizing capacity allocation, it enhanced delivery efficiency and achieved a substantial increase in sales volume. This, in turn, drove a year-on-year improvement in the performance of its anode business.

(2) In the polarizer business, downstream market demand remained generally stable. The Company continued to advance its high-end strategic positioning, resulting in a steady increase in the share of high-value-added products and continuous optimization of the product mix. Combined with production process improvements and supply chain coordination that reduced costs and improved efficiency, the profitability of the polarizer business improved.

(3) For the major investee companies of the Company accounted for under the equity method , operating performance continued to improve year on year. Among them, BASF Shanshan Battery Materials Co., Ltd., an investee company of the cathode business, turned from loss to profit during the period.

## I. Key Accounting Data and Financial Indicators

### (I) Key Financial Data

Unit: Yuan Currency: RMB

| Major accounting data | The Reporting Period (January-June) | The same period of the last year | Increase/decrease over the same period of the previous year (%) |
|---|---|---|---|
| Operating income | 12,130,333,259.92 | 9,858,484,315.28 | 23.04 |