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Important Notice

Metals Australia Ltd (ACN 008 982 474) (**Company**) has lodged a prospectus dated 22 February 2024 (**Prospectus**) with the Australian Securities and Investments Commission (**ASIC**) an offer of 83,333,333 fully paid ordinary shares in the capital of the Company (**Shares**) at an issue price of C\$0.0369 per Share to raise approximately C\$3,076,500 (before costs) (**Offer**).

The Prospectus is an important document which should be read in its entirety. If, after reading the Prospectus you have questions about the Offer, or any other matter, please contact your professional advisers without delay.

Neither ASIC nor ASX Limited, nor any of their respective officers, take any responsibility for the contents of the Prospectus or the merits of the investment to which the Prospectus relates.

The electronic copy of the Prospectus available on this website does not constitute an offer of, or an invitation to subscribe for, any securities. You may print out a hard copy of the Prospectus from this website or copy the electronic Prospectus on this website into an electronic file for your personal use only. You must not alter the contents of this electronic file in any way.

Alternatively, you may obtain a hard copy of the Prospectus free of charge by contacting the Company by phone on **+61 08 9481 7833** during office hours or by emailing the Company at info@metalsaustralia.com.au.

To the extent permitted by law, the Company is not liable for any loss incurred from accessing or downloading the Prospectus from this website, including, but not limited to, data corruption or download.

Applications

Anyone who wants to acquire securities in the Company will need to carefully consider the Prospectus and complete an application form attached to or accompanied by the Prospectus (**Application Form**). The completed Application Form must be lodged, and the application monies paid, in accordance with the details set out in the Prospectus and Application Form. The *Corporations Act 2001* (Cth) prohibits any person from passing onto another person an Application Form unless it is attached to or accompanied by a complete and unaltered version of the Prospectus.

The Company reserves the right not to accept an Application Form from a person if it has reason to believe that when that person was given access to the electronic Application Form, it was not provided together with the electronic Prospectus and any relevant supplementary or replacement prospectus or any of those documents were incomplete or altered.

If an Application Form is not completed correctly or if the accompanying payment is the wrong amount, the Company may, in its discretion, still treat the Application Form to be valid. The Company's decision to treat an application as valid and how to construe, amend or complete the Application Form, will be final.

No Advice

Nothing contained on this website or in the Prospectus constitutes investment, legal, business, tax or other advice. In particular, the information on this website and in the Prospectus does not take into account your financial or investment objectives, financial situation or particular needs. In making an investment decision, you must rely on your own examination of the Company, the securities being offered for and the terms of the offering, including the merits and risks involved. You should consult your professional advisers for investment, legal, business, tax or other advice.

Persons to whom Offer is available

For legal reasons, the electronic version of the Prospectus accessible through this website is available to persons accessing this website from within Australia or Canada (British Columbia, Ontario and Quebec Provinces) (together, the **Permitted Jurisdictions**) only. If you are accessing this website from anywhere outside the Permitted Jurisdictions, please do not download the electronic version of the Prospectus.

The Prospectus does not constitute offers of, or invitation to apply for, securities in any jurisdiction where, or to any person to whom, it would not be lawful to issue the Prospectus or to make an offer or invitation. It is the responsibility of any applicant outside the Permitted Jurisdictions to ensure compliance with all laws of any country relevant to their applications, and any such applicant should consult their professional advisers as to whether any government or other consents are required, or whether any formalities need to be observed to enable them to apply for and be allotted any securities.

Acknowledgement

By clicking "I Accept" below, you acknowledge and agree that:

- You have read and understood the above terms and conditions to access the electronic version of the Prospectus;
- You are a resident of a Permitted Jurisdiction and you are requesting a copy of the Prospectus from within a Permitted Jurisdiction;

OR

If you are not a resident of a Permitted Jurisdiction, you have consulted your professional adviser as to whether any governmental or other consents are required or whether any other formalities need to be considered and followed before accessing the Prospectus; and

- You will not pass onto any other person the Application Form unless it is attached to or accompanied by the complete and unaltered electronic version of the Prospectus.



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