



Announcement Summary

Entity name

MITHRIL RESOURCES LIMITED

Date of this announcement

Tuesday January 02, 2024

The +securities the subject of this notification are:

☒ Other

Total number of +securities to be issued/transferred

ASX +security code	Security description	Total number of +securities to be issued/transferred	Issue date
New class - code to be confirmed	Convertible Notes	700,000	02/01/2024

Refer to next page for full details of the announcement

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Part 1 - Entity and announcement details

1.1 Name of entity

MITHRIL RESOURCES LIMITED

We (the entity named above) give notice of the issue, conversion or payment up of the following unquoted +securities.

1.2 Registered number type

ABN

Registration number

30099883922

1.3 ASX issuer code

MTH

1.4 The announcement is

☒ New announcement

1.5 Date of this announcement

2/1/2024

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Part 2 - Issue details

2.1 The +securities the subject of this notification are:

☒ Other

Please specify

700,000 Convertible Note, face value of \$1.00

2.2a This notification is given in relation to an issue of +securities in a class which is not quoted on ASX and which:

☒ does not have an existing ASX security code ("new class")

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Part 3C - number and type of +securities the subject of this notification (new class) where issue has not previously been notified to ASX in an Appendix 3B

New +securities

ASX +security code

New class - code to be confirmed

+Security description

Convertible Notes

+Security type

+Convertible debt securities

ISIN code**Date the +securities the subject of this notification were issued**

2/1/2024

Will all the +securities issued in this class rank equally in all respects from their issue date?☒ Yes**Have you received confirmation from ASX that the terms of the +securities are appropriate and equitable under listing rule 6.1?**☒ No**Please provide a URL link for a document lodged with ASX setting out the material terms of the +securities being issued.**<https://cdn-api.markitdigital.com/apiman-gateway/ASX/asx-research/1.0/file/2924-02759267-2A1497370>**+Convertible debt securities Details****Type of +security**

Convertible note or bond

+Security currency

AUD - Australian Dollar

Face value

AUD 1.00000000

Interest rate type

Fixed rate

Frequency of coupon/interest payments per year

Annual

First interest payment date

2/4/2024

Interest rate per annum

18.00 %

Is the interest rate per annum estimated at this time?☒ No**s128F of the Income Tax Assessment Act status applicable to the +security**

Not applicable

**Is the +security perpetual (i.e. no maturity)?**☒ No**Maturity date**

2/4/2024

Select other feature(s) applicable to the +security☒ Convertible☒ Redeemable**Is there a first trigger date on which a right of conversion, redemption, call or put can be exercised (whichever is first)?**☒ No**Details of the existing class of +security that will be issued if the securities are converted, transformed or exchanged**

Other

Description

MTH: Fully Paid Ordinary Shares

Any other information the entity wishes to provide about the +securities the subject of this notification

700,000 Convertible Notes with a Face Value of \$1.00 per Note, Conversion price equal to the price set at the next equity capital raising and Maturity Date being the earlier of three (3) months from the Subscription Date or settlement of the next capital raising.

Please provide any further information needed to understand the circumstances in which you are notifying the issue of these +securities to ASX, including why the issue of the +securities has not been previously announced to the market in an Appendix 3B

This Appendix 3G is being lodged immediately upon completion of the subscription

Issue details

Number of +securities

700,000

Were the +securities issued for a cash consideration?☒ Yes**In what currency was the cash consideration being paid?**

AUD - Australian Dollar

What was the issue price per +security?

AUD 1.00000000

Purpose of the issue

To raise additional working capital



Part 4 - +Securities on issue

Following the issue, conversion or payment up of the +securities the subject of this application, the +securities of the entity will comprise:
(A discrepancy in these figures compared to your own may be due to a matter of timing if there is more than one application for quotation/issuance currently with ASX for processing.)

4.1 Quoted +Securities (Total number of each +class of +securities quoted)

ASX +security code and description	Total number of +securities on issue
MTH : ORDINARY FULLY PAID	3,368,804,470

4.2 Unquoted +Securities (Total number of each +class of +securities issued but not quoted on ASX)

ASX +security code and description	Total number of +securities on issue
MTHAAE : OPTION EXPIRING 16-NOV-2025 EX \$0.015	25,000,000
MTHAAC : PERFORMANCE RIGHTS	33,333,333
MTHAAF : OPTION EXPIRING 09-DEC-2025 EX \$0.007	214,285,714
MTHAAD : OPTION EXPIRING 26-APR-2024 EX \$0.015	175,000,000
New class - code to be confirmed : Convertible Notes	700,000

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Part 5 - Other Listing Rule requirements

5.1 Were the +securities issued under an exception in Listing Rule 7.2 and therefore the issue did not need any security holder approval under Listing Rule 7.1?

☒ No

5.2 Has the entity obtained, or is it obtaining, +security holder approval for the issue under listing rule 7.1?

☒ No

5.2b Are any of the +securities being issued without +security holder approval using the entity's 15% placement capacity under listing rule 7.1?

☒ Yes

5.2b.1 How many +securities are being issued without +security holder approval using the entity's 15% placement capacity under listing rule 7.1?

700,000

5.2c Are any of the +securities being issued without +security holder approval using the entity's additional 10% placement capacity under listing rule 7.1A (if applicable)?

☒ No

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