FOS Capital Ltd
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foscapital.com.au
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3B/41 Rose St Richmond, VIC, 3121

3 June 2021

The Manager
Market Announcements Office
ASX Limited
20 Bridge Street,
Sydney NSW 2000

FOS Capital Limited – Pre-Quotation Disclosure

The following information is provided to ASX Limited (**ASX**) for release to the market in connection with the admission of FOS Capital Limited (ASX: FOS) (**FOS Capital** or **Company**) to the Official List of ASX and quotation of the Company's fully paid ordinary shares (**Shares**).

Capitalised terms used but not defined in this announcement have the meanings given to those terms in the replacement prospectus issued by the Company on 7 May 2021 (**Prospectus**).

Issue of Shares

FOS Capital has successfully completed the issue of 12,000,000 Shares under the Offer. The Shares were issued at the Offer Price of $0.25 per Share and the Offer raised gross proceeds of $3,000,000.

FOS Capital has received cleared funds for all of the Shares issued under the Offer.

The refund of application monies with respect to oversubscriptions was undertaken on 2 June 2021.

The allocation policy for the Offer is described at section 7.2 of the Prospectus.

Capital Structure

The Company confirms that upon admission, the capital structure of the Company is 35 million fully paid ordinary shares.

Holding statements and refund cheques

CHESS transaction confirmation statements and issuer sponsored holding statements, together with refund cheques, were despatched to Shareholders on 2 June 2021.

Securities subject to ASX escrow restrictions

The following Shares are classified as restricted securities and are subject to ASX mandatory escrow restrictions:

Number	Class	Escrow Period
33,000,000	Fully paid ordinary Shares	24 months from Listing

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Other pre-quotation disclosure

The following documents have been provided for release to the market:

- Appendix 1A and Information Form and Checklist.
- Prospectus dated 7 May 2021 (which replaced the prospectus dated 30 April 2021).
- Constitution of the Company.
- Audited accounts of the Company for the for the full years ended 30 June 2019 and 30 June 2020 and its reviewed accounts for the half year ended 31 December 2020.
- Baker & McAuliffe Holdings Pty Ltd's audited accounts for the full years ended 30 September 2019 and 30 September 2020 and its reviewed accounts for the three month period ended 31 December 2020.
- Securities Trading Policy.
- Distribution Schedule.
- Top 20 holders' statement.

Authorised for lodgement on behalf of the Board by:



Hemant Amin
Company Secretary
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