



Henry Morgan

Announcement

Henry Morgan Limited

ACN 602 041 770

30 May 2017

Correspondence to securityholders

Attached is a copy of correspondence which is being sent to shareholders and optionholders in Henry Morgan Limited today.

Stuart McAuliffe
Managing Director
Henry Morgan Limited
stuart@henrymorgan.com.au



HENRY MORGAN LIMITED
ACN 602 041 770
LEVEL 9 RIVERSIDE CENTRE
123 EAGLE STREET
BRISBANE QLD 4000

Henry Morgan

30 May 2017

Dear Option holder

Henry Morgan Limited (ASX:HML) (**Company**) has today announced that it intends to issue one (1) free bonus option (**Bonus Option**) for every five (5) Shares held by shareholders with an address in Australia or New Zealand (**Eligible Shareholders**) at 5:00 pm (Brisbane time) on Thursday **8 June 2017** (the **Record Date**).

The Bonus Options will be issued at no cost, have an exercise price of \$2.05 and an expiry date of 15 June 2020 (**Bonus Option Issue**). The full terms of the Bonus Option Issue will be set out in a forthcoming prospectus. The Company will apply to the ASX for quotation of these Bonus Options.

As a holder of existing Company options (ASX:HMLO) (**Existing Options**), you are not entitled to participate and receive Bonus Options in accordance with the terms of issue of the Existing Options.

You will only be entitled to participate in the Bonus Option Issue if your Existing Options have been validly exercised (and resulting Shares are allotted and issued) before the Record Date. A "Notice of Exercise of Options Form" (**Form**) is attached to this letter.

There is no obligation on holders of Existing Options to exercise their Existing Options.

If you have any queries in relation to completing the Form, please contact the Company between 8.30am and 5.00pm (Brisbane time) Monday to Friday on 1300 110 436 if calling within Australia, or +61 1300 110 436 if calling from outside Australia.

If you have any queries regarding your current holdings, please contact our Registry, Link Market Services Limited, on 1300 554 474 (from within Australia) or +61 2 8280 7454 (outside Australia).

If you are unsure whether to exercise your Existing Options, you should consult your stockbroker, financial adviser or other professional adviser.

Yours sincerely

Stuart McAuliffe
Managing Director
Henry Morgan Limited



Henry Morgan

HENRY MORGAN LIMITED
ACN 602 041 770
LEVEL 9 RIVERSIDE CENTRE
123 EAGLE STREET
BRISBANE QLD 4000

30 May 2017

[Name of security holder]
[Security holder's address]

Dear Shareholder

Henry Morgan Limited ACN 602 041 770 (ASX:HML) – Bonus Option Issue

On 30 May 2017, Henry Morgan Limited (the **Company**) announced that it intends to issue one (1) free bonus option (**Bonus Option**) to eligible Shareholders of the Company (**Eligible Shareholders**) for every five (5) Shares held as at 5:00pm on the record date of 8 June 2017 (the **Record Date**).

The Bonus Options will be issued at no cost, have an exercise price of \$2.05 and an expiry date of 15 June 2020 (the **Bonus Option Issue**). The full terms of the Bonus Option Issue will be set out in a forthcoming prospectus (the **Prospectus**). The Company will apply to the ASX for quotation of these Bonus Options.

A Prospectus in relation to the Bonus Option Issue will be lodged with the Australian Securities and Investment Commission (**ASIC**) and the Australian Securities Exchange (**ASX**) on or about Friday 2 June 2017 and will be available both on the ASX website and at www.henrymorgan.com.au. Physical copies are also available from the Company upon request.

A proposed timetable for the Bonus Option Issue is set out in the table below:

Event	Date
Announcement of Bonus Option Issue Letters to Existing Option Holders Letter to Ineligible Shareholders	Tuesday 30 May 2017
Lodgement of Prospectus with ASIC and ASX	Friday 2 June 2017
Shares trading on Ex basis	Wednesday 7 June 2017
Record Date	Thursday 8 June 2017 (5:00pm Brisbane time)
Issue of Bonus Options Trading on deferred settlement basis ends	Wednesday 14 June 2017
Normal Trading (T+2) starts	Thursday 15 June 2017
Bonus Options expire	5:00pm (Brisbane time) Monday 15 June 2020

This timetable is indicative only and may be subject to change subject to the requirements of the Corporations Act and the ASX Listing Rules.

Due to the cost involved of making the Bonus Option Issue to Shareholders with registered addresses outside of Australia and New Zealand, the Company will not be issuing the Bonus Options to those Shareholders (**Ineligible Shareholders**).

This letter is to inform you that as a Shareholder with a registered address in either Australia or New Zealand, the Bonus Offer Issue is being extended to you. Accordingly as an Eligible Shareholder, you will be issued one (1) Bonus Option for every five (5) Shares that you hold as at 5:00pm on the Record Date. Entitlements to the Bonus Option are non-renounceable and accordingly will not be traded on the ASX.

If you have any queries regarding your eligibility to participate in the Bonus Option Issue, please contact Jody Wright, the Company Secretary between 8.30am and 5.00pm (Brisbane time) Monday to Friday on 1300 110 436 if calling within Australia, or +61 1300 110 436 if calling from outside Australia.

Yours faithfully



Stuart McAuliffe
Managing Director
Henry Morgan Limited

IMPORTANT INFORMATION

This letter is issued by the Company. This letter is not a prospectus or offering document under Australian law or under any other law. It is for information purposes only and does not constitute an offer, invitation or recommendation to subscribe for, retain or purchase any entitlements or securities in the Company in any jurisdiction. This letter does not constitute financial product advice and does not and will not form any part of any contract for the acquisition of entitlements or the Company shares.

NOT FOR DISTRIBUTION OR RELEASE INTO THE UNITED STATES

This letter does not constitute an offer to sell, or a solicitation of an offer to buy, any securities in the United States.



Henry Morgan

HENRY MORGAN LIMITED
ACN 602 041 770
LEVEL 9 RIVERSIDE CENTRE
123 EAGLE STREET
BRISBANE QLD 4000

30 May 2017

[Name of security holder]
[Security holder's address]

Dear Shareholder

Henry Morgan Limited ACN 602 041 770 (ASX:HML) – Bonus Option Issue

On 30 May 2017, Henry Morgan Limited (the **Company**) announced that it intends to issue one (1) free bonus option (**Bonus Option**) to eligible Shareholders of the Company for every five (5) Shares held as at 5:00pm on the record date of 8 June 2017 (the **Record Date**).

The Bonus Options will be issued at no cost, have an exercise price of \$2.05 and an expiry date of 15 June 2020 (the **Bonus Option Issue**). The full terms of the Bonus Option Issue will be set out in a forthcoming prospectus (the **Prospectus**). The Company will apply to the ASX for quotation of these Bonus Options.

A Prospectus in relation to the Bonus Option Issue will be lodged with the Australian Securities and Investment Commission (**ASIC**) and the Australian Securities Exchange (**ASX**) on or about Friday 2 June 2017 and will be available both on the ASX website and at www.henrymorgan.com.au.

A proposed timetable for the Bonus Option Issue is set out in the table below:

Event	Date
Announcement of Bonus Option Issue Letters to Existing Option Holders Letter to Ineligible Shareholders	Tuesday 30 May 2017
Lodgement of Prospectus with ASIC and ASX	Friday 2 June 2017
Shares trading on Ex basis	Wednesday 7 June 2017
Record Date	Thursday 8 June 2017 (5:00pm Brisbane time)
Issue of Bonus Options Trading on deferred settlement basis ends	Wednesday 14 June 2017
Normal Trading (T+2) starts	Thursday 15 June 2017
Bonus Options expire	5:00pm (Brisbane time) Monday 15 June 2020

This timetable is indicative only and may be subject to change subject to the requirements of the Corporations Act and the ASX Listing Rules.

In accordance with the ASX Listing Rules, the Company has considered the number of shareholders with registered addresses outside of Australia and New Zealand, the number and value of the shares

held by those shareholders, and the number and value of Bonus Options that those shareholders would be offered pursuant to the Bonus Option Issue. Taking this into consideration, as well as taking into consideration the costs of complying with the legal requirements and the requirements of the regulatory authorities of those relevant jurisdictions outside of Australia and New Zealand, the Company believes it to be unreasonable to extend the Bonus Option Issue to all shareholders. Accordingly, the Offer pursuant to the Bonus Option Issue will only be extended to those who are the shareholders of the Company as at 5.00pm (Brisbane time) on Thursday 8 June 2017, and who have registered addresses in Australia or New Zealand. Entitlements to the Bonus Option are non-renounceable and accordingly will not be traded on the ASX.

As you are a shareholder with a registered address outside of Australia or New Zealand, the offer pursuant to the Bonus Option Issue will not be extended to you.

If you have any queries regarding your eligibility to participate in the Bonus Option Issue, please contact Jody Wright, the Company Secretary between 8.30am and 5.00pm (Brisbane time) Monday to Friday on 1300 110 436 if calling within Australia, or +61 1300 110 436 if calling from outside Australia.

Yours faithfully



Stuart McAuliffe
Managing Director
Henry Morgan Limited

IMPORTANT INFORMATION

This letter is issued by the Company. This letter is not a prospectus or offering document under Australian law or under any other law. It is for information purposes only and does not constitute an offer, invitation or recommendation to subscribe for, retain or purchase any entitlements or securities in the Company in any jurisdiction. This letter does not constitute financial product advice and does not and will not form any part of any contract for the acquisition of entitlements or the Company shares.

NOT FOR DISTRIBUTION OR RELEASE INTO THE UNITED STATES

This letter does not constitute an offer to sell, or a solicitation of an offer to buy, any securities in the United States.