

**ASX Announcement**  
**25 October 2022**

## **HALO unveils landmark Forbes Australia Exclusive Collaboration Partnership**

- HALO Technologies secures an exclusive collaboration partnership agreement with the Australian licence holder of global finance media brand Forbes.
- HALO to receive extensive marketing & event opportunities with the Forbes Australia, including on the Forbes Australia website, magazine and relevant events.
- Agreement leverages an existing and established audience to drive adoption of HALO's product suite and revenue growth

Halo Technologies will be Presenting Partner of Forbes Australia's Business Summit – Nov 18<sup>th</sup>, 2022.

**HALO Technologies Holdings Ltd** ('HALO', 'HAL' or 'the Company'), an online global equities research and trade execution software solution that brings sophisticated institutional-grade analytical frameworks and market insights to everyday investors, is pleased to announce it has signed an exclusive partnership and collaboration agreement and a referral agreement with Success Publishing Pty Ltd ('Success Publishing'), the licenced publisher of Forbes Australia.

Forbes is a global media company focused on business, investing, technology, entrepreneurship, leadership and lifestyle. It has recently expanded its geographical footprint with the launch of Forbes Australia.

Under the 3yr exclusive partnership and collaboration agreement, HALO will receive extensive advertising and promotional benefits with Forbes Australia, including advertising on the Forbes Australia website/banner ads, advertising and advertorial placements and other branded publications, plus dedicated event speaking slots and sponsorship opportunities at Forbes Australia events. The partnership provides strong validation of HALO's world-leading technology offerings through alignment with internationally recognised brand, and direct marketing access to the Forbes Australia subscriber base.

HALO will also receive the right to promote and publicise its partnership, aligning its brand with the esteemed Forbes name.

Success Publishing holds the exclusive Australian licence for Forbes Australia for the next 10 years.

### **Partnership and collaboration agreement details**

Under the terms of the agreement, Forbes Australia publisher Success Publishing has agreed to:

- Allow nominated HALO representatives to attend and speak at relevant events hosted under the Forbes Australia brand.
- Provide HALO advertising on the Forbes Australia website or in any other publication issued under the Forbes banner or brand name.
- Publish a quarterly HALO advertorial on the Forbes Australia website.

- Grant HALO the right to publish a banner advert on all or any direct electronic communications, to the extent Success Publishing allows banner advertising on said communications.
- Afford HALO the right to co-sponsor any investment or financial event hosted by Success Publishing.
- To the maximum extent permitted by privacy or other applicable laws, provide HALO with key branding opportunities, via any Forbes Australia publication or its website.

The collaboration provides for HALO exclusive rights to brand finance-themed virtual and physical events hosted under the Forbes Australia banner.

HALO will also receive first right of refusal for any additional investment in the equity of Success Publishing and has the right to promote and publicise the partnership and collaboration agreement using the Forbes brand by name.

### Referral agreement terms

In addition to the collaboration agreement, Success Publishing has also been engaged by HALO as a non-exclusive, independent referral and marketing partner for its HALO Global and Macro Vue service.

The initial term of the Referral Agreement is three years, after which it will continue indefinitely subject to the right of either party to terminate with 30 days written notice.

Under the referral agreement, Success Publishing will earn a monthly referral fee of 5% of the aggregate subscription amount received by HALO for any successfully converted referrals to HALO at standard commercial rates. The agreement provides strong incentivisation for Success Publishing to drive the adoption of HALO's product suite with its existing audiences and further grow product adoption and revenue for HALO.

### Corporate Authorised Representative agreement

HALO recently signed an Australian asset management advisory firm to access the HALO Professional service. The deal represents approximately AU\$500 million of client funds under management (FUM) and builds on the momentum of the company's direct agreement in September with a Corporate Authorised Representative representing funds under management of ~AU\$300 million (*see ASX announcement 26 September 2022*).

### HALO CEO George Paxton comments:

*The announcement of this collaborative agreement with Forbes Australia is a significant moment in the listed life of HALO Technologies," he said.*

*"The Forbes brand is internationally recognised and globally respected for its financial insights, events and media coverage, making the alignment with HALO is a logical and exciting step for the company and its shareholders.*

*"This deal will provide HALO with access to significant marketing opportunities that promote the company's software and services direct to the Forbes Australia audience, significantly expanding the company's marketing reach to a sophisticated and aspirational audience with an interest in financial and investment products and services.*

*“The synergies between the Forbes brand and HALO’s product offering are clear, and HALO looks forward to working collaboratively with Success Publishing Pty Ltd – the Forbes Australia licence holder.”*

#### **Company Address**

Halo advises, in accordance with Listing Rule 3.14, that, effective 31 October, its registered office will change to:

Level 8, 210 George Street  
Sydney, NSW , 2000

*Ends.*

#### **For further information please contact:**

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#### **About HALO Technologies**

HALO is an online global equities research and trade execution software solution that brings sophisticated institutional-grade analytical frameworks and market insights to everyday investors. HALO includes two distinct and integrated offerings in HALO Global, designed for hands on investors who want professional grade tools without the cost, and HALO Trading which offers global trade execution capability and ready-made themed investment portfolios that are ideal for ‘low-touch’ and ‘values based’ investors and SMSFs.

For further information, please visit: [www.halo-technologies.com/](http://www.halo-technologies.com/)