

## NOT FOR DISTRIBUTION OR RELEASE IN THE UNITED STATES

16 July 2024

Dear Shareholder,

I am pleased to invite you to participate in a 4 for 15 pro-rata non-renounceable entitlement offer of new fully paid ordinary shares in the Company (**New Shares**) at an offer price of \$0.10 per New Share (**Offer Price**) to raise gross proceeds of up to approximately \$15.1 million (**Offer**).

Funds from the Offer will be used in accordance with the Company's strategic objectives:

The background to the Offer and the key risks facing the Company in the next 12 to 24 months are described in more detail in the Company's Investor Presentation lodged with ASX on 8 July 2024

Under the Offer, Eligible Shareholders are entitled to acquire 4 New Shares for every 15 Shares held at 7.00pm (Sydney time) on 11 July 2024 (Record Date). Eligible shareholders can also participate in the Top-Up Facility.

To apply please visit the offer website at <https://events.miraqle.com/kgl-offer/> where you will find the Offer Booklet, application forms and further information.

New Shares issued through the Offer will rank equally with existing Shares on issue.

**The Offer closes at 5.00pm (Sydney time) on 25 July 2024.**

If you have any questions in respect of the Offer, please call the Offer information line on 1300 853 781 (within Australia) or +61 1300 853 781 (outside Australia) from 8.30am to 5.30pm (Sydney time) Monday to Friday or at: [registrars@linkmarketservices.com.au](mailto:registrars@linkmarketservices.com.au)

On behalf of the Board and management team of the Company, I invite you to consider this investment opportunity and thank you for your ongoing support.

Yours faithfully

**Jeff Gerard**

Chairman

KGL Resources Limited

**KGL Resources Limited**

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**Offer Contact Information**

Telephone: 1800 853 781  
Email:  
[registrars@linkmarketservices.com.au](mailto:registrars@linkmarketservices.com.au)  
Website:  
<https://events.miraqle.com/kgl-offer/>

[kglresources.com.au](https://kglresources.com.au)

## IMPORTANT NOTICE

Neither this communication, nor the Offer Booklet nor any other document relating to the Offer constitutes an offer to sell, or the solicitation of an offer to buy, any securities in the United States, and none of these documents may be distributed or released in the United States.

The Entitlements and the New Shares have not been, and will not be, registered under the U.S. Securities Act of 1933, as amended (the **U.S. Securities Act**) or the securities laws of any state or other jurisdiction of the United States. The Entitlements may not be taken up by, and the New Shares may not be offered or sold, directly or indirectly, to, persons in the United States or to persons acting for the account or benefit of persons in the United States (to the extent such persons are acting for the account or benefit of persons in the United States), and may only be offered and sold outside the United States in “offshore transactions” (as defined in Rule 902(h) under the U.S. Securities Act) in reliance on Regulation S under the U.S. Securities Act.

### KGL Resources Limited

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### Offer Contact Information

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