
Completion of Institutional Component of Entitlement Offer

ASX Announcement

10 April 2025

Highlights

- Institutional Component of **Entitlement Offer** successfully raised approximately \$260,000 at issue price of \$0.005 per share
- Binding commitments received for **Placement** to raise approximately \$270,000 at \$0.005 per share.

Mighty Kingdom Limited (ASX: MKL) ("**MKL**" or "the **Company**") is pleased to announce the successful completion of the institutional component of its accelerated non-renounceable entitlement offer ("Institutional Entitlement Offer") and the concurrent placement to institutional and sophisticated investors ("Placement"), as initially announced on 8 April 2025.

The Institutional Entitlement Offer has raised approximately \$260,000 at the offer price of \$0.005 per new share. In addition, the Company has received binding commitments for approximately \$270,000 under the Placement, also at \$0.005 per share. Approximately 51.9 million new shares will be issued pursuant to the Institutional Entitlement Offer and approximately 54.0 million new shares will be issued pursuant to the Placement. All eligible shareholders who were offered participation in the Institutional Entitlement Offer by the joint lead managers took up their entitlements in full.

The Company advises that with respect to the Placement, approximately 32.4 million new shares will be issued pursuant to the Company's Placement Capacity under Listing Rule 7.1, with the remaining 21.6 million to be issued pursuant to Placement Capacity under Listing Rule 7.1A.

All new shares to be issued under the Institutional Entitlement Offer and Placement will rank equally with existing ordinary shares of the Company.

Retail Entitlement Offer

Eligible retail shareholders will be invited to participate in the Retail Entitlement Offer at the same issue price as the Institutional Entitlement Offer. The Retail Entitlement Offer will open at 10:00am (Adelaide time) on Tuesday 15 April 2025 and close at 5:00pm (Adelaide time) on Tuesday, 29 April 2025.

Eligible retail shareholders will be those with registered addresses in Australia on the Record Date of 7:00pm (Adelaide time) on Thursday 10 April 2025. Eligible retail shareholders wishing to participate in the Retail Entitlement Offer should carefully read the Prospectus dated 8 April 2025 and refer to their personalised Entitlement and Acceptance Form which will be made available on Tuesday 15 April 2025.

Indicative Timetable and Next Steps

The anticipated key dates for the Entitlement Offer and placements are outlined in the table below. Dates and times are indicative only and subject to change. All times refer to Adelaide, Australia time.

Event	Date
Announcement of Entitlement Offer / Cleansing Notice / Appendix 3B lodged with ASX	Tuesday 8 April 2025
Institutional Entitlement Offer opens	Tuesday 8 April 2025
Institutional Entitlement Offer closes	Wednesday 9 April 2025
Announcement of results of Institutional Entitlement Offer	Thursday 10 April 2025
Record date for Retail Entitlement Offer (7:00pm Adelaide time)	Thursday 10 April 2025
Settlement of New Shares issued under Institutional Entitlement Offer and Placement	Monday 14 April 2025
Allotment of New Shares issued under Institutional Entitlement Offer and Placement	Tuesday 15 April 2025
Prospectus despatched to shareholders Retail Entitlement Offer opens	Tuesday 15 April 2025
Quotation of New Shares issued under the Institutional Entitlement Offer and Placement ¹	Wednesday 16 April 2025
Retail Entitlement Offer closes (5:00pm Adelaide time)	Tuesday 29 April 2025
Announcement of results of Retail Entitlement Offer	Tuesday 6 May 2025
Settlement of New Shares issued under Retail Entitlement Offer and Retail Shortfall Bookbuild	Tuesday 6 May 2025
Allotment of New Shares issued under Retail Entitlement Offer	Tuesday 6 May 2025
New Shares issued under Retail Entitlement Offer commence trading on ASX	Wednesday 7 May 2025

¹ The Company advises that the date of Quotation of New Shares pursuant to the Institutional Entitlement Offer and Placement has been updated from the timetable included in the Prospectus dated 8 April 2025.

This timetable is indicative only and subject to change. MKL reserves the right to amend any or all of these dates and times, subject to the Corporations Act 2001 (Cth), the ASX Listing Rules and other applicable laws.

In particular, the Company reserves the right to extend the closing date for the Retail Entitlement Offer, to accept late applications (either generally or in particular cases) and to withdraw or not proceed with the Entitlement Offer or a component of it at any time before allotment of the relevant new shares, in each case in consultation with the Joint Lead Managers. Any extension of the Retail Entitlement Offer closing date will have a consequential effect on the subsequent dates. If the Entitlement Offer (or any part of it) is withdrawn or not proceeded with, application monies received will be refunded in full (without interest) in accordance with the requirements of the Corporations Act.

Further Information and Important Notices

Offer Documentation

Detailed information about the Entitlement Offer is available in the Prospectus. Eligible shareholders are encouraged to read the Prospectus carefully before making any investment decision.

Foreign Jurisdictions

This announcement has been prepared for publication in Australia and may not be released or distributed in the United States. This announcement does not constitute an offer to sell, or a solicitation of an offer to buy, any securities in the United States or in any other jurisdiction in which such an offer would be illegal. The New Shares to be offered in the Entitlement Offer and placements have not been, and will not be, registered under the U.S. Securities Act of 1933 (the "U.S. Securities Act") or the securities laws of any state or other jurisdiction of the United States. Accordingly, the New Shares may not be offered or sold, directly or indirectly, in the United States, unless they have been registered under the U.S. Securities Act (which MKL has no obligation to do or procure) or are offered and sold in a transaction exempt from, or not subject to, the registration requirements of the U.S. Securities Act and any other applicable U.S. state securities laws.

Forward-Looking Statements

This announcement contains forward-looking statements, which may be identified by words such as “anticipates”, “expects”, “estimates”, “plans”, “believes”, “potential”, “aims” and other similar expressions. These forward-looking statements are based on the Company’s expectations and beliefs as at the date of this announcement, and are subject to various known and unknown risks and uncertainties. Actual results, performance or outcomes may differ materially from those expressed or implied in such statements depending on a variety of factors. Factors that could cause actual results or performance to differ from those projected include general business, industry and economic conditions, market volatility, exchange rate fluctuations, regulatory developments, or unforeseen events. Forward-looking statements should not be relied upon as guarantees of future performance. Except as required by law or regulation (including the ASX Listing Rules), MKL undertakes no obligation to publicly update or revise any forward-looking statements in this announcement, whether as a result of new information or future events.

– ENDS –

Authorised for release by the Chair of Mighty Kingdom Limited

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