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30 January 2017

Pre-reinstatement disclosure

Murray Cod Australia Limited (the **Company**) makes the following pre-reinstatement disclosure in accordance with ASX's relisting conditions. Capitalised terms not defined have the meaning ascribed in the Company's replacement prospectus dated 5 December 2016 (**Prospectus**).

Statement of securities subject to voluntary escrow

The Company advises the following securities are subject to voluntary escrow:

Number	Type	Escrow period
81,285,715	Fully paid ordinary shares	24 months from the re-commencement of official quotation
600,000	Fully paid ordinary shares	3 months from the re-commencement of official quotation
64,000,000	Unquoted options exercisable at \$0.075, if within 4 years from the re-commencement of official quotation 100 tonnes of Murray Cod are produced and sold by the Company, on or before 16 January 2022	24 months from the re-commencement of official quotation
5,000,000	Class A performance rights	24 months from the re-commencement of official quotation
5,000,000	Class B performance rights	24 months from the re-commencement of official quotation
5,000,000	Class C performance rights	24 months from the re-commencement of official quotation

Confirmations

The Company confirms as follows:

1. The conditions to the Offers as set out in section 2.3 of the Prospectus have been satisfied, and 200,000,000 Shares were issued under the Public Offer at \$0.05 per Share on 16 January 2017.

2. Satisfaction of the conditions precedent and completion of the Bidgee Agreement took place on 17 January 2017, including the payment of \$1,100,000 and the issue of 40,714,286 Shares and 40,000,000 options exercisable at \$0.075 on or before the date that is 5 years after the date of issue to the shareholders of Bidgee and 5,000,000 Class A, 5,000,000 Class B and 5,000,000 Class C Performance Rights to Kimbalex.
3. Satisfaction of the conditions precedent and completion of the MBRPL Agreement took place on 17 January 2017, including the issue of 38,571,429 Shares and 20,000,000 Options exercisable at \$0.075 on or before the date that is 5 years after the date of issue.
4. Satisfaction of the conditions precedent and completion of the Ryan Agreement took place on 17 January 2017, including the payment of \$1,450,000.
5. Satisfaction of the conditions precedent and completion of the Brigalow Agreement took place on 17 January 2017, including the payment of \$550,000.
6. Satisfaction of the conditions precedent and completion of the Charles Agreement took place on 17 January 2017, including payment of \$1,300,000 and the issue of 2,000,000 Shares and 4,000,000 Options exercisable at \$0.075 on or before the date that is 5 years after the date of issue.
7. The issue of:
 - (a) 5,000,000 Options exercisable at \$0.075 on or before the date that is 5 years after the date of issue to Panaquatic Health Solutions Pty Ltd pursuant to the Panaquatic Offer;
 - (b) 1,000,000 Shares and 350,000 Options exercisable at \$0.075 on or before the date that is 4 years after the date of issue to Alto Capital pursuant to the Lead Manager Offer;
 - (c) 21,000,000 Options exercisable at \$0.075 on or before the date that is 5 years after the date of issue to Directors pursuant to the Company's Employee Incentive Scheme; and
 - (d) 600,000 Shares to Zebina Minerals Pty Ltd.
8. There have been no material subsequent events to alter the Company's consolidated statement of financial position as detailed in section 6 of the Prospectus.
9. There are no legal, regulatory or contractual impediments to the Company undertaking the activities the subject of the commitments disclosed in the Prospectus.
10. The Company is in compliance with the Listings Rules, and in particular, Listing Rule 3.1.