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ASX Release,
By e-lodgement

AusAmerican Corporate Bond Offering/Finance Update

Highlights

- **Registration for unsecured notes offering completed**
- **ISIN number issued**
- **AUD \$12.5 formal underwriting complete and funds will be available to pay first instalment of Shenglong transaction**
- **Demand for remaining AUD \$17.5 million of the initial AUD \$30 million offering strong**
- **Company to undertake second offering of unsecured notes for an additional AUD\$30 million in early 2015**

AusAmerican Mining Limited (ASX: AIW) ("AusAmerican" or "the Company") is pleased to announce that it has today completed the registration of its unsecured corporate bonds (subordinated notes) offering. The offering is registered under ISIN AU3CB0225852 and is available for settlement within Austraclear.

The company has previously announced that it has entered into a formal agreement with Australian Capital Investment Group Corporation Ltd ("AusCap") to underwrite AUD \$12.5 million for the issue of the unsecured corporate bonds (subordinated notes). These funds will be received by the company in order to, upon receipt of all relevant approvals, make the first tranche payment to the vendor.

Investor demand for the initial AUD\$30million offering is strong in the subscription and the company will finalise this offer shortly which will enable it to meet the second tranche payment to the vendor. The Company will be also be looking to complete the second offering of an additional AUD\$30 million early next year for a total of AUD\$60 million.

A copy of the Information Memorandum and Pricing Supplement follow this announcement. The offer was only open to eligible professional and sophisticated investors in accordance with Part 6D.2 of the Corporations Act 2001.

AusAmerican CEO Jim Malone said, "We are delighted with the investor response to AusAmerica's note offering to date, which demonstrates confidence in the Company's growth



strategy and provides us with the ability to complete our acquisition of the Shenglong transaction".

The seven-year senior unsecured notes offer a coupon of 11.5% per annum. The unlisted, unrated notes are being offered to qualified professional and sophisticated investors.

AusCap Senior Manager Debt Markets, Peter Fisher, said the transaction "clearly shows how the bond market can be supportive of growing companies. The corporate bond market provides AusAmerican with a new and differentiated investor base focused on the cash flow generation capabilities of the company now and into the future."

Sincerely,

A handwritten signature in blue ink, appearing to read "Jim Malone", with a long horizontal flourish extending to the right.

Jim Malone
CEO

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