

20 June 2023

Despatch of Entitlement Issue Prospectus

Moho Resources Limited ("Moho" or "the Company") advises that a letter has been despatched to eligible shareholders outlining how to access the Company's prospectus for a non-renounceable entitlement issue of one (1) fully paid ordinary share in the capital of the Company (**Share**) for every three (3) Shares held at an issue price of \$0.015 per Share, to raise up to \$1,297,889 (together with one (1) free attaching option to acquire a Share (**New Option**) for every two (2) Shares issued exercisable at \$0.03 per Option on or before 1 August 2025) (**Offer**).

Acceptance for the Offer will close at 5:00pm WST on Tuesday 11 July 2023.

A letter to ineligible shareholders notifying them of the Offer and their inability to participate has also been despatched.

Further details of the Offer, including details on how eligible shareholders may accept the Offer, are set out in the Prospectus and are available online at www.advancedshare.com.au/Investor-Login

This release is authorised by the Managing Director of Moho Resources Limited.

Yours faithfully
Ralph Winter
Managing Director and Company Secretary

20 June 2023

Please login Advanced Share Registry to access your personalized Entitlement & Acceptance form and Prospectus electronically

www.advancedshare.com.au/Investor-Login

Dear Shareholder

MOHO RESOURCES LIMITED – TRANSACTION SPECIFIC PROSPECTUS

As announced on 25 May 2023, Moho Resources Limited (ACN 156 217 971) (**Moho**) is undertaking a:

- (a) non-renounceable entitlement issue of one (1) fully paid ordinary share in the capital of the Company (**Share**) for every three (3) Shares held by eligible shareholders at an issue price of \$0.015 per Share, to raise up to \$1,297,889 (together with one (1) free attaching option to acquire a Share (**New Option**) for every two (2) Shares issued exercisable at \$0.03 per New Option on or before 1 August 2025) (**Entitlement Offer**);
 - (b) offer of up to 25,957,775 New Options to participants in the placement (as announced on 25 May 2023) (**Placement Offer**); and
 - (c) offer of 5,000,000 New Options to the lead manager of the placement (**Broker Offer**),
- (together, the **Offer**)

The Company lodged a prospectus for the Offer (**Prospectus**) with ASIC and ASX on 8 June 2023.

The Company intends to apply the funds raised from the Entitlement Offer (less expenses) to the general working capital and applied to exploration of the Whistlepipe Critical Minerals Project, Silver Swan North Project and Burracoppin Project. For further specifics of the use of funds please refer to section 3.2 of the Prospectus.

Following completion of the Offer (assuming all securities are issued under the Entitlement Offer, Placement Offer and Broker Offer) the Company will have issued approximately 86,525,918 Shares and 74,220,734 New Options increasing the total Shares on issue to 346,103,671 and increasing the total Options on issue to 261,357,315.

We are writing to you as an eligible shareholder on the Entitlement Offer's record date, entitle to participate in the Entitlement Offer (**Eligible Shareholders**).

To access your personalised Entitlement & Acceptance Form and Prospectus electronically, please follow the below steps:

1. Please go to www.advancedshare.com.au/Investor-Login
2. If you have a member account with Advanced Share Registry, please use your User ID and password to login.

If you do not have a member account, please go to 'Simple login'. Please use your SRN/HIN and your postcode to login.

For overseas shareholders, please enter your SRN/HIN and select your residing country in the drop down list.
3. Please go to '**Document Print**'
4. Please click on '**Corporate Action Form**'

To access your personalized Entitlement & Acceptance Form and Prospectus by post:

If you prefer to receive a printed copy of Entitlement & Acceptance Form and Prospectus in the mail, please kindly call Company's registry, Advanced Share Registry, on +61 8 9389 8033 or send your request via email to admin@advancedshare.com.au.

The Entitlement Offer closes at 5:00pm (WST) on 11 July 2023.

Participation in the Entitlement Offer

The number of securities for which you are entitled to apply for under the Entitlement Offer (**Entitlement**) is shown on your personalised Entitlement and Acceptance Form.

Fractional entitlements will be rounded down to the nearest whole number.

Any Entitlement not taken up pursuant to the Entitlement Offer will form the shortfall (**Shortfall Offer**). Eligible Shareholders who wish to subscribe for additional securities above their Entitlement are invited to apply under the Shortfall Offer by making payment for such shortfall in accordance with section 2.5 of the Prospectus. The directors reserve the right to issue shortfall at their absolute discretion.

Entitlement and Acceptance Form Applications

Your acceptance of securities under the Entitlement Offer must be made following the instructions on your personalised Entitlement and Acceptance Form and paying the application monies electronically by BPay or EFT in accordance with the instructions of the Entitlement and Acceptance Form.

Actions required of Eligible Shareholders

There are a number of actions you may take in relation to the Entitlement Offer, which are outlined in the Entitlement and Acceptance Form and are set out below:

1. accept your full Entitlement;
2. accept your full Entitlement and apply for additional securities as part of the Shortfall Offer;
3. take up a proportion of your Entitlement and allow the balance to lapse; or
4. if you do not wish to accept all or part of your Entitlement, you are not obliged to do anything.

Participation in the Placement Offer and Broker Offer

Only participants in the placement (as announced on 25 May 2023) (**Placement Participants**) will be eligible to apply for the New Options under the Placement Offer. Accordingly, the application form will be provided by the Company to the Placement Participants only.

Only the lead manager to the placement will be eligible to apply for the New Options under the Broker Offer. Accordingly, the application form will be provided by the Company to the Broker only.

The Placement Participants and the Broker will need to follow the instructions on the personalised application form. The New Options are being issued for nil cash consideration. Further details are set out in sections 2.3 and 2.4 of the Prospectus.

Key dates for the Offer

Lodgement of Prospectus with the ASIC	Thursday, 8 June 2023
Lodgement of Prospectus and Appendix 3B with ASX	Thursday, 8 June 2023
Ex date	Wednesday, 14 June 2023
Record Date for determining Entitlements	Thursday, 15 June 2023
Offers opening date, Prospectus sent out to Shareholders and Company announces this has been completed	Tuesday, 20 June 2023
Last day to extend the Closing Date for the Entitlement Offer	Thursday, 6 July 2023
Closing Date for the Entitlement Offer as at 5:00pm*	Tuesday, 11 July 2023
Closing Date for the Placement Offer and Broker Offer as at 5:00pm*	Tuesday, 11 July 2023
Securities under the Entitlement Offer quoted on a deferred settlement basis	Wednesday, 12 July 2023
ASX notified of under subscriptions under the Entitlement Offer	Tuesday, 18 July 2023
Issue date and lodgement of Appendix 2A with ASX applying for quotation of the Securities under the Entitlement Offer	Tuesday, 18 July 2023
Shareholders vote at the General Meeting	Friday, 21 July 2023
Issue date and lodgement of Appendix 2A with ASX applying for quotation of the New Options under the Placement Offer and Broker Offer	Friday, 21 July 2023
Quotation of New Options issued under the Placement Offer and Broker Offer*	Tuesday, 25 July 2023

*The Directors may extend the Closing Date by giving at least 3 Business Days' notice to ASX prior to the Closing Date. Accordingly, the date the Securities are expected to commence trading on ASX may vary.

**Quotation of the New Options is subject to the Company being able to satisfy ASX of the quotation requirements set out in Chapter 2 of the ASX Listing Rules. The quotation dates are indicative only and are subject to change.

You should read the entire Prospectus carefully and seek professional advice before deciding whether to invest in the Entitlement Offer. If you have any queries concerning the Entitlement Offer, please contact your financial adviser or Mr Ralph Winter, Moho Resources Limited's Company Secretary, on +61 8 9481 0389.

Yours sincerely

RALPH WINTER
MANAGING DIRECTOR AND COMPANY SECRETARY