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ROAD KING INFRASTRUCTURE LIMITED

(Incorporated in Bermuda with limited liability)

(Stock Code: 1098)

TENDER OFFERS FOR PURCHASE OF

6.7% GUARANTEED SENIOR NOTES DUE 2024

(ISIN/Common Code: XS2057076387/205707638) (THE "2024 NOTES")

5.9% GUARANTEED SENIOR NOTES DUE 2025

(ISIN/Common Code: XS2127855711/212785571) (THE "MARCH 2025 NOTES")

6.0% GUARANTEED SENIOR NOTES DUE 2025

(ISIN/Common Code: XS2223762209/222376220) (THE "SEPTEMBER 2025 NOTES")

5.2% GUARANTEED SENIOR NOTES DUE 2026

(ISIN/Common Code: XS2281039771/228103977) (THE "JANUARY 2026 NOTES")

5.125% GUARANTEED SENIOR NOTES DUE 2026

(ISIN/Common Code: XS2356173406/235617340) (THE "JULY 2026 NOTES")

AND

CONSENT SOLICITATIONS FOR

THE 2024 NOTES, MARCH 2025 NOTES, SEPTEMBER 2025 NOTES,

JANUARY 2026 NOTES, JULY 2026 NOTES AND

7.75% SENIOR GUARANTEED PERPETUAL CAPITAL SECURITIES

(ISIN/Common Code: XS2079096884/207909688) (THE "2019 PERPETUAL SECURITIES")

The Board refers to the announcements of the Company dated 11 June 2024, 20 June 2024 and 24 June 2024 (the “**Announcements**”) in relation to the Tender Offers and Consent Solicitations. Unless otherwise defined, capitalised terms used in this announcement shall have the same meanings as defined in the Announcements and the Tender Offer and Consent Solicitation Memorandum.

RESULTS OF THE TENDER OFFERS AND THE CONSENT SOLICITATIONS

On 11 June 2024, the Issuers announced the invitation to (i) the Eligible Holders of the outstanding Notes to tender the Notes for purchase by Issuer A and Issuer B for cash at the respective Purchase Prices plus the Accrued Interest; and (ii) to Holders of the Target Securities to approve the Proposed Amendments contained in the Tender Offer and Consent Solicitation Memorandum.

As at the Tender and Voting Deadline, (i) US\$10,980,000 in aggregate principal amount of the 2024 Notes; (ii) US\$11,460,000 in aggregate principal amount of the March 2025 Notes; (iii) US\$10,160,000 in aggregate principal amount of the September 2025 Notes; (iv) US\$12,250,000 in aggregate principal amount of the January 2026 Notes; and (v) US\$4,745,000 in aggregate principal amount of the July 2026 Notes, have been validly tendered pursuant to the Tender Offers. The relevant Issuers will pay in aggregate US\$18,480,846.86 which includes Accrued Interest thereon, but excludes any Consent Fee payable in respect of those Notes on the Settlement Date (currently expected to be on or around 16 July 2024).

Each of the Extraordinary Resolutions as set out in the notice of meeting of each of the Notes were duly passed at the relevant Meeting. The Proposed Amendments are expected to become operative following the execution of the relevant Supplemental Trust Deeds (expected to take place on or around the Settlement Date), relevant notification to trustees confirming that all the conditions precedent to the effectiveness of such Proposed Amendments (including the satisfaction of the Tender Consummation Condition) have been satisfied and the payment of the Consent Fee and any Ineligible Holder Payment on the Settlement Date.

The Company expresses its heartfelt appreciation and gratitude to all stakeholders for their contribution to the successful outcome of the Tender Offers and Consent Solicitations exercise.

ADDITIONAL REDEMPTION OF NOTES

The Company will apply US\$30,000,000 towards the redemption of the Notes as described in the Company’s announcement dated 24 June 2024.

THIS ANNOUNCEMENT IS NOT AN OFFER TO PURCHASE, A SOLICITATION OF AN OFFER TO PURCHASE, OR A SOLICITATION OF AN OFFER TO SELL, ANY SECURITIES.

The Tender Offers and the Consent Solicitations are subject to conditions and may or may not materialise. In addition, the conditions of the Tender Offers and Consent Solicitations may or may not be waived or satisfied.

If any Holder is in any doubt as to the action it should take, it is recommended to seek its own financial and legal advice, including with regard to any tax consequences, from its stockbroker, bank manager, solicitor, attorney, tax adviser or other independent financial or legal adviser. None of the Company, the Issuers, the Dealer Manager, the Information, Tender and Tabulation Agent or any of their respective directors, officers, employees, agents or affiliates makes any recommendation as to whether Holders should tender their Notes and/or consent to the proposed amendments to the provisions relating to the Target Securities pursuant to the Tender Offers and Consent Solicitations.

Unless otherwise stated, all times and dates refer to Hong Kong times and dates.

For and on behalf of
Road King Infrastructure Limited
Zen Wei Peu, Derek
Chairman

Hong Kong, 3 July 2024

As at the date of this announcement, the Board comprises Messrs. Zen Wei Peu, Derek, Fong Shiu Leung, Keter and Ng Fun Hung, Thomas as Executive Directors, Ms. Cai Xun and Mr. Xu Enli as Non-executive Directors and Mr. Wong Wai Ho, Ms. Hui Grace Suk Han, Mr. Cheung Hon Kit and Mr. Ho Tai Wai, David as Independent Non-executive Directors.