

Unity Launches A\$0.5m Fund Raise

Unity Energy & Resources (**Unity** or the **Company**) is pleased to advise shareholders that it intends to raise approximately A\$0.5 million by issuing approximately 5,000,000 million new fully paid ordinary shares in the Company ("**New Shares**") via a Pre-IPO capital raising (the "**Offer**"). The Company reserves the right and has full discretion to accept oversubscriptions in the Offer.

The fund raise is priced at A\$0.10 per New Share and JS First SDN BHD (**JS First**), Canaccord Genuity (Australia) Limited (**Canaccord**) and Bacchus Capital Advisers (**Bacchus**) have been appointed as Lead Managers to this private placement.

Unity has now established an Australian company, Unity Metals Limited (**Unity Metals**) for its planned IPO on the Australian Securities Exchange (ASX). Recently, Unity Metals signed new mandates with Canaccord, Bacchus and JS First for this pre-IPO fund raise and the planned IPO fund raise. For the IPO, Canaccord has been appointed Lead Manager. Bacchus and JS First will act as Co-Managers.

This is the first time Unity has looked to raise capital with JS First. They are a corporate advisory group headquartered in Kuala Lumpur, Malaysia and they are active throughout SE Asia. JS First also has an office in Phnom Penh, Cambodia and are currently managing 5 IPO's, which are to be listed on the Cambodian Securities Exchange (CSX).

Emerald Resources NL's success at the Okvau Gold Mine is well known in Cambodia and given the proximity of Unity's Ngot Gold Project to Okvau, JS First believes there will be strong interest in Unity with Cambodian investors.

Unity conducted an encouraging non-deal roadshow in Phnom Penh, Cambodia with JS First from 12 to 15 August 2024. Meetings were held with investment banks, institutional investors and HNW clients.

JS First will commence a roadshow for the A\$0.5m pre-IPO capital raise in Phnom Penh today (Monday, 23 September 2024).

Use of Funds

The proceeds of the fund raise will allow Unity to continue exploration on its granted Ngot and O'Phlay exploration licences in Cambodia; review other project opportunities in Cambodia and elsewhere in SE Asia; fund IPO preparations and to provide general working capital.

How to Invest

The offer is extended only for institutional, professional, and experienced investors in Australia, to certain institutional and professional investors in New Zealand, Hong Kong, Singapore, Malaysia, Cambodia, Thailand, Laos and the United Kingdom. It is not for distribution in the United States or Canada.

Included in the email with this letter is the pre-IPO fund raise term sheet.

Firm Bids are due by 4.00pm (AEST) on Tuesday, 1 October 2024. Bids are to be submitted to Gilbert Rodgers (gilbert@unityenergy.com.au).

Allocations, subscriptions agreements and application forms to be sent to successful bidders **by Thursday, 3 October 2024.**

Unity's Managing Director, Mr Craig Mackay said *"Unity's directors encourage qualified shareholders to participate in the pre-IPO fund raise. We believe the proposed pre-IPO raise offers a great opportunity for shareholders. It likely provides the last chance for a cheaper entry into Unity on the back of some very exciting gold exploration results and in the bullish gold market, prior to the envisaged IPO later in 2024."*

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Contact Details

For further information please do not hesitate to contact us.

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Managing Director

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About Unity

Unity Energy and Resources (Singapore) Limited is an unlisted, public company that is building a portfolio of highly prospective minerals projects in Southeast Asia.

Currently the Company is focused on the discovery of "giant" intrusion-related gold (IRG) and/or porphyry copper-gold deposits in Cambodia.

Unity is planning an IPO and to list on the ASX in Q4/CY2024.

For more information, please visit www.unityenergy.com.au

This News Release has been authorised by the Managing Director of Unity Energy & Resources (Singapore) Limited.

Competent Persons Statement

The information in this report that relates to exploration results is based on information compiled by Craig Mackay, a Competent Person, who is a Member of the Australasian Institute of Mining and Metallurgy. Mr Mackay is the Managing Director of the Company and has sufficient experience that is relevant to the style of mineralisation and type of deposit under consideration and to the activity being undertaken to qualify as a Competent Person as defined in the 2012 Edition of the 'Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves'. Mr Mackay consents to the inclusion in the report of the matters based on his information in the form and context in which it appears.

Forward Looking Statements

Certain statements in this document are or maybe "forward-looking statements" and represent Unity's intentions, projections, expectations or beliefs concerning among other things, future exploration activities. The projections, estimates and beliefs contained in such forward-looking statements necessarily involve known and unknown risks, uncertainties and other factors, many of which are beyond the control of Unity, and which may cause Unity's actual performance in future periods to differ materially from any express or implied estimates or projections. Nothing in this document is a promise or representation as to the future. Statements or assumptions in this document as to future matters may prove to be incorrect and differences may be material. Unity does not make any representation or warranty as to the accuracy of such statements or assumptions.

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