

HERENCIA RESOURCES PLC

SEED CAPITAL RAISE of £300,000 at 2.5P per SHARE

THANK YOU TO FOR A WONDERFUL RESPONSE SO FAR!

STILL OPEN!

Herencia Resources Plc has extended the closure date of its Capital Raise of up to £300,000. We received a strong response from shareholders and will keep the round open till the gold deal settles. Don't miss out, we determined to get Herencia re-listed and need everyone help. If you have interest in participating in the capital raise, please email the Herencia Resources Directors:

Carl Dumbrell carl@herenciaresources.com & Graham Duncan g.duncan@graham-duncan.com

About Herencia Resources

Herencia Resources was formerly listed on AIM. The company has over 500 shareholders, a clean balance sheet and is compliant on all reporting requirements. The Herencia Board is focused on the progressive acquisition and commercialization of new assets that will lead to the re-listing of the company on the AIM. The Company's strategy to relisting is laid out below. We encourage you to consider the investment opportunity presented.

The Company's has agreements in place to complete a capital restructure (Phase 1) and is now progressing towards purchase, exploration and mining of a 50/50 Joint Venture position in the Great Caesar Mining Lease located in North Queensland Australia (Phase 2). This will be followed by the purchase of a second and larger mining asset that will provide sufficient scale for Herencia Resources to relist on the AIM (Phase 3)

Phase 1: Capital Restructure and Resolution of Prior Debt Completed

- All shares in Herencia Resources have been consolidated to a total of 16,821,850 ordinary shares at a face value of 2.5P.
- Convertible Note Holders in Herencia Resources have agreed to waive all convertible notes that were not converted to shares prior to the Company's delisting in 2019.
- Accumulated debt of £75,000 expended on maintaining the company since delisting has been converted to equity at a face value of 2.5P.
- The resulting restructured Company has issued capital of **19,821,850 ordinary shares** with a face value of 2.5P valuing the current shell Company at **£495,546**.

Phase 2: Acquisition, Exploration and Mining - Great Caesar Leases

Current Tranche 1 Capital Raise

- The current Tranche 1 capital raise of **£300,000 is at a face value of 2.5P** issuing 12,000,000 new ordinary shares
- Funds will be used for the purchase and initial exploration of the Great Caesar Gold mining leases in North Queensland, Australia.
- Herencia Shareholders who invest in the Tranche 1 capital raise will receive first right of refusal to invest in the subsequent Tranche 2 and Tranche 3 capital raises.

Tranche 2 Capital Raise

- The Tranche 2 capital raise of **£300,000 is at a face value of 2.5P** issuing 12,000,000 ordinary shares
- This is proposed for December 2024 after the initial exploration results from the Great Caesar Mining Leases are available.
- Funds will be used for the 2nd Stage of Exploration and subsequent Feasibility Study prior to commencement of mining at the Great Caesar Mining Leases.
- Herencia Shareholders who have participated in the Tranche 1 capital raise will receive first right of refusal to invest in this Tranche 2 capital raise

Tranche 3 Capital Raise

- The Tranche 3 capital raise of **£300,000 is at a face value of 2.5P** issuing 12,000,000 ordinary shares
- This is proposed for May 2025 after the results of the 2nd Stage of Exploration and Feasibility Study are available.
- Funds will be used to commence contract mining operations at the Great Caesar Mining Leases.
- Herencia Shareholders who have participated in the Tranche 1 capital raise will receive first right of refusal to invest in this Tranche 3 capital raise
- On completion this capital raise Herencia will have **issued capital of 55,821,850 ordinary shares**

Phase 3: Acquisition of Second Mining Project and Progress to Relisting on AIM

Tranche 4 Capital Raise

- The Tranche 4 capital raise of **£600,000 is at a face value of 2.5P** issuing 12,000,000 ordinary shares
- This is proposed for October 2025 after a Second Mining Project has been identified for acquisition by Herencia Resources and mining operations at the Great Caesar Mining Leases have generated cashflow
- Funds will be used to secure rights to the acquisition of the second mining project and progress deeper exploration at the Great Caesar Mining Leases.

Tranche 5 Capital Raise and Relisting

- The Tranche 5 capital raise of **£5,000,000 is at a face value of 10P** issuing 50,000,000 ordinary shares
- This is proposed for the 2nd Quarter of 2026 along with the relisting of Herencia Resources.
- On completion of this capital raise Herencia will have **issued capital of 117,821,850 ordinary shares** at a **projected relisting price of 10P** and Market Capital of **£11.78M**

How can you participate in the current raise and what is the minimum or maximum amount you can invest?

Download and complete the **Investor Form** from the Herencia web site. **£2,000** minimum with no maximum.

Further information

A copy of Herencia investor presentation can be downloaded from the link below:

<https://herenciaresources.com/wp-content/uploads/2024/04/Herencia-Great-Caesar-Investor-Presentation-24th-April-2024-Final.pdf>

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