

**FIRST Advisers Pty Ltd**

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**FIRST**ADVISERS

## SHAREHOLDER SURVEILLANCE AND BENEFICIAL OWNERSHIP ANALYSIS

FIRST Advisers has been providing beneficial ownership analysis to listed companies for 20 years. We are independent, Australian owned and, as IR specialists, very client-focused in our approach. FIRST Advisers provides course content for, and presents the module on, Shareholder Analytics for AIRA's Diploma Course

- **SHAREHOLDER SURVEILLANCE**

We anticipate the volatility in the market and high level of turnover experienced in recent weeks is likely to continue, requiring companies to increase their monitoring of the underlying changes in beneficial ownership as an added line of defence against potential takeover activity.

FIRST Advisers is offering companies a three month Surveillance program focused on monitoring movements of major shareholders on weekly or daily basis. This is not the same as conducting a full beneficial ownership analysis **as its scope is different, requiring an intensive, adaptable but highly targeted form of tracking and monitoring.**

There is no lock-in contract and the fee will be dependent on the number of investors being monitored but could be as low as \$500 per week.

- **BENEFICIAL OWNERSHIP ANALYSIS**

In recognition of the present need to conserve cash flow, we are offering a free report during the June quarter to all new clients on signing a 12 month contract. Extended fee holidays can also be provided for longer term contracts with pricing determined based on the frequency of reporting.

Our reports are delivered online through our CRM platform, AccessIR, with extended periods of complimentary access provided, depending on the length of contract. We are open to discussing how we might be able to meet your needs during a particularly challenging time.

**Dan Jones:** 0431 986 831

## INVESTOR RELATIONS SUPPORT

FIRST Advisers' senior IR consultants will provide an hour free for every hour of billable time over the June quarter for new clients. This can apply to a range of IR activities from IR counsel to drafting ASX Releases to assistance writing the annual report.

**Victoria Geddes:** 0421 084914

**Ben Rebbeck:** 0421 237 717

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## DESIGN AND CREATIVE SUPPORT FOR ANNUAL REPORTS AND PRESENTATIONS

Creating an annual report requires a team effort, starting with the development of design concepts and an overall thematic that reflects the year just ended. This informs the layout and content which then follows.

FIRST Advisers will provide a 20% discount to new clients on the design of their annual report and its production, including layout of the front section of the report, typesetting and sourcing of appropriate stock library photos.

Note: This can be combined with the IR offer of a 50% discount on the IR hourly rate for drafting content for the front section of the annual report.

**Campbell van Venrooy:** 0414 586 322

## MEDIA MANAGEMENT, CRISIS COMMUNICATION AND GENERAL CORPORATE COMMUNICATION

FIRST Advisers is offering a 50% discount to its standard hourly rate during the June quarter for companies to use when additional support is required during this time. This is to assist companies who may not have access to internal resources; whose in-house resource is temporarily unavailable; or who are experiencing periods of increased demand due to issues arising from the pandemic.

A former journalist, Giles Rafferty has extensive experience of the media both in Australia and the UK and has been working with listed companies for many years across a range of communications projects from financial PR to crisis comms. Giles' specialism is video communication and he also presents the Managing the Media module at AIRA's Diploma Course.

**Giles Rafferty:** 0481 467 903