

\$5.8 million Renounceable Rights Issue

Dateline Resources Limited (**Dateline** or **the Company**) is pleased to announce details of a 2 for 3 renounceable rights issue offer of new shares in Dateline (each, a **New Share**) at an issue price of \$0.006 per New Share (**Issue Price**) to Eligible Shareholders to raise gross proceeds of up to approximately \$5.8 million (**Rights Issue**). For every two shares subscribed for, participating shareholders will receive one attaching option to acquire one fully paid ordinary share, with an exercise price of \$0.02 and a term of 24 months (**Attaching Options**).

The funds raised under the Rights Issue will be used by the Company:

- to fund further exploration at the Company's Colosseum Gold and Rare Earths Project;
- to complete a mine planning study in relation to the Company's Colosseum Project;
- to reduce the Company's outstanding debt; and
- for general working capital (including to pay the costs of the Rights Issue) purposes.

The Rights Issue will be made to all holders of the Company's fully paid Ordinary shares (each, a Share) who are, as at 7pm (Sydney time) on 12 July 2024 (**Record Date**), registered (in accordance with the records of the Company's share registry) with an address in Australia or New Zealand (**Eligible Shareholders**).

The Rights Issue and Attaching Options will be issued under a Prospectus, with the document expected to be lodged with ASIC on 9 July 2024.

The Rights Issue is renounceable, with trading in rights to commence trading on a deferred settlement basis on 11 July 2024 and close on 19 July 2024.

Under the Rights Issue, the Company's Non-Executive Chairman (and substantial Shareholder), Mr Mark Johnson has committed to take up his Entitlement in full (which commitment equates to approximately \$1.172 million worth of New Shares).

In addition, the Company's Managing Director (and substantial Shareholder), Mr Stephen Baghdadi has also committed to take up his Entitlement in full (which commitment equates to approximately \$0.8 million worth of New Shares).

Contact

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Capital Structure (ASX: DTR)

Shares on Issue	1.45B
Top 20 Shareholders	63.8%
Board & Management	36.0%

Board of Directors

Mark Johnson AO
Non-Executive Chairman

Stephen Baghdadi
Managing Director

Greg Hall
Non-Executive Director

Tony Ferguson
Non-Executive Director

Bill Lannen
Non-Executive Director

Colosseum Gold-REE Project*

(100% DTR, California, USA)

27.1Mt @ 1.26g/t Au for 1.1Moz Au

Over 67% in Measured & Indicated
Mineralisation open at depth

Mining studies underway

Rare earths potential with geology
similar to nearby Mountain Pass mine

* ASX announcement 6 June 2024



ASX Announcement

8 July 2024

Shortfall

Any New Shares offered under the Rights Issue that are not subscribed for by Eligible Shareholders and that remain “unissued” on completion of the Rights Issue will form part of the post-Rights Issue shortfall (**Shortfall**).

The Company has appointed Mahe Capital Pty Limited to lead manage the Rights Issue. Mahe Capital is mandated to place any Shortfall. Mahe will, amongst other things, be issued 10 Attaching Options for every \$1 placed by Mahe Capital. The agreement to issue these securities is made without shareholder approval and using the Company’s existing capacity under Listing Rule 7.1.

In accordance with Exception 3 of Listing Rule 7.2, the Directors have reserved the right, in conjunction with Mahe Capital and subject to the Corporations Act and the Listing Rules, to place the Shortfall within 3 months of the Closing Date at an issue price not less than the Issue Price to persons who are not Related Parties (or Associates of Related Parties) of the Company.

Timetable

Eligible Shareholders should refer to the Schedule of this announcement for the corporate action timetable applicable to the Rights Issue on ASX.

Prospectus

Further details of the Rights Issue and other information described in this announcement are set out in the Prospectus, a copy of which is expected to be lodged with ASIC on 9 July 2024 and sent to Eligible Shareholders (together with a personalised entitlement and acceptance form) on or about 17 July 2024. Eligible Shareholders should read the Prospectus carefully and in its entirety before deciding whether to participate in the Rights Issue. A copy of the Prospectus will also be available at the Company’s website: <https://www.datelineresources.com.au/>.

No Rights Issue offer in the United States

The information in this announcement does not constitute an offer in any jurisdiction in which, or to any person to whom, it would not be lawful to make such an offer. No action has been taken to register the Rights Issue, the rights to New Shares (**Entitlements**) or the New Shares, or otherwise to permit a public offering of the Entitlements or New Shares (or any Additional New Shares, if applicable), in any jurisdiction other than Australia or New Zealand.

This announcement does not constitute an offer to sell, or a solicitation of an offer to buy, any securities in the United States. The Entitlements and the New Shares have not been, and will not be, registered under the US Securities Act of 1933 (**US Securities Act**) or the securities laws of any State or other jurisdiction of the United States. The Entitlements may not be acquired and/or taken up by persons in the United States and the New Shares (or any Additional New Shares, if applicable) may not be offered or sold in the United States except in transactions exempt from,

or not subject to the registration requirements of the US Securities Act and the applicable securities laws of any State or other jurisdiction of the United States.

RIGHTS ISSUE TIMETABLE

Announcement of Rights Issue	8 July 2024
“ex” Date	11 July 2024
Rights quoted on a deferred settlement basis	
Record Date	12 July 2024
Prospectus sent to Eligible Shareholders	17 July 2024
Opening Date	17 July 2024
Rights trading ends at close of trading	19 July 2024
Last Date to extend the Closing Date	23 July 2024
Closing Date	26 July 2024
Issue Date	2 August 2024
Trading of New Shares begins	5 August 2024

The above referred times and dates are indicative only. The Company reserves the right, subject to the Corporations Act and the Listing Rules to change the times and dates of the above noted Rights Issue timetable and to accept late applications (either generally, or in particular cases) without notice. Any extension of the Closing Date will have a consequential impact on the subsequent indicative dates (including the Issue Date) for the Rights Issue.

This announcement has been approved by the Company’s Board of Directors.

For more information, please contact:

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About Dateline Resources Limited

Dateline Resources Limited (ASX: DTR) is an Australian publicly listed company focused on mining and exploration in North America. The Company owns 100% of the Colosseum Gold-REE Project in California.

The Colosseum Gold Mine is located in the Walker Lane Trend in East San Bernardino County, California. On 6 June 2024, the Company announced to the ASX that the Colosseum Gold mine has a JORC-2012 compliant Mineral Resource estimate of 27.1Mt @ 1.26g/t Au for 1.1Moz. Of the total Mineral Resource, 455koz @ 1.47/t Au (41%) are classified as Measured, 281koz @ 1.21g/t Au (26%) as Indicated and 364koz @ 1.10g/t Au (33%) as Inferred.¹

The Colosseum is located less than 10km north of the Mountain Rare Earth mine. Work has commenced on identifying the source of the mantle derived rocks that are associated with carbonatites and are located at Colosseum.

Forward-Looking Statements

This announcement may contain “forward-looking statements” concerning Dateline Resources that are subject to risks and uncertainties. Generally, the words “will”, “may”, “should”, “continue”, “believes”, “expects”, “intends”, “anticipates” or similar expressions identify forward-looking statements. These forward-looking statements involve risks and uncertainties that could cause actual results to differ materially from those expressed in the forward-looking statements. Many of these risks and uncertainties relate to factors that are beyond Dateline Resources’ ability to control or estimate precisely, such as future market conditions, changes in regulatory environment and the behaviour of other market participants. Dateline Resources cannot give any assurance that such forward-looking statements will prove to have been correct. The reader is cautioned not to place undue reliance on these forward-looking statements. Dateline Resources assumes no obligation and does not undertake any obligation to update or revise publicly any of the forward-looking statements set out herein, whether as a result of new information, future events or otherwise, except to the extent legally required.

¹ See the Company’s announcement dated June 6, 2024. The Company confirms that it is not aware of any new information or data that materially affects the information included in its June 6, 2024 announcement and that all material assumptions and technical parameters underpinning the estimates continue to apply and have not materially changed.