

Renounceable Rights Issue Closing Friday, 26 July 2024

Dateline Resources Limited (**Dateline** or **the Company**) reminds shareholders that the 2 for 3 renounceable rights issue offer of new shares in Dateline will close on Friday 26 July 2024.

The renounceable rights issue offer is for 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, shareholders will receive one attaching unlisted option 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:

- Advance the Company's Colosseum Gold and Rare Earths Project;
- Complete a mine planning study in relation to the Company's Colosseum Project;
- Reduce the Company's outstanding debt; and
- General working capital (including to pay the costs of the Rights Issue) purposes.

The Rights Issue is being made to all holders of the Company's fully paid Ordinary shares (each, a Share) who were, 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 are being issued under a Prospectus, with the document already sent to Eligible Shareholders with a personalised entitlement and acceptance form.

Under the Rights Issue, the Company's Non-Executive Chairman, Mr Mark Johnson, has committed to take up his Entitlement (\$1.172 million) and the Company's Managing Director, Mr Stephen Baghdadi, has also committed to take up his Entitlement (\$0.8 million).

Dateline's Managing Director, Stephen Baghdadi, commented:

"We have seen strong support from existing shareholders as well as parties interested in placing any potential shortfall from the Rights Issue. The funds from this raise will allow the Company to accelerate progress at our 1.1 million ounce Colosseum Gold Project in California¹."

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

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Capital Structure (ASX: DTR)

Shares on Issue	1.45B
Top 20 Shareholders	63.8%
Board & Management	33.9%

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

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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**).

Shareholders should note that in accordance with Exception 3 of Listing Rule 7.2, the Directors have reserved the right, 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.

The Company anticipates that it will pay the arranger of (but not the underlying placees under) any placement of the Shortfall a fee which may include cash (i.e. based on a percentage of the amount raised under the Shortfall placement) or options over unissued New Shares or a combination of both.

Timetable

The Rights Issue will close on Friday 26 July 2024. New Shares are expected to be issued on 2 August 2024 and commence trading on the ASX on 5 August 2024.

Prospectus

Further details of the Rights Issue and other information described in this announcement are set out in the Prospectus, a copy of which was 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 is also available at the Company’s website: <https://www.datelineresources.com.au/asx-announcements/>

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.

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.

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.