

Hong Kong Exchanges and Clearing Limited and The Stock Exchange of Hong Kong Limited take no responsibility for the contents of this announcement, make no representation as to its accuracy or completeness and expressly disclaim any liability whatsoever for any loss howsoever arising from or in reliance upon the whole or any part of the contents of this announcement.

This announcement appears for information purposes only and does not constitute an invitation or offer to acquire, purchase or subscribe for securities or an invitation to enter into any agreement to do any such things, nor is it calculated to invite any offer to acquire, purchase or subscribe for any securities.

The material contained in this announcement is not for distribution or circulation, directly or indirectly, in or into the United States. This announcement is solely for the purpose of reference and does not constitute an offer to sell or the solicitation of an offer to buy any securities in the United States or any other jurisdiction in which such offer, solicitation or sale would be unlawful prior to registration or qualification under the securities laws of any such jurisdiction. The securities referred to herein have not been and will not be registered under the United States Securities Act of 1933, as amended (the "Securities Act"), and may not be offered or sold within the United States, except pursuant to an exemption from, or in a transaction not subject to, the registration requirements of the Securities Act. Accordingly, the securities offer are being offered and sold only outside the United States in offshore transaction in compliance with Regulation S under the Securities Act.

NOTICE OF LISTING ON THE STOCK EXCHANGE OF HONG KONG LIMITED



Guotai Junan Holdings Limited 國泰君安控股有限公司

(incorporated in British Virgin Islands with limited liability)

U.S.\$500,000,000 2.00 per cent. Guaranteed Notes due 2026 (the "Notes")
(Stock Code: 40649)

under the U.S.\$3,000,000,000 Medium Term Note Programme

unconditionally and irrevocably guaranteed by

Guotai Junan Securities Co., Ltd. 國泰君安證券股份有限公司

(incorporated in the People's Republic of China with limited liability)

Joint Global Coordinators, Joint Bookrunners and Joint Lead Managers

**Guotai Junan
International**

**Standard Chartered
Bank**

ICBC

ABC International

Bank of Communications

**Shanghai Pudong
Development Bank**

BOSC International

Joint Bookrunners and Joint Lead Managers

CCB International

Bank of China

**CMB Wing Lung
Bank Limited**

**China Minsheng
Banking Corp., Ltd.**

**China CITIC Bank
International**

**Industrial Bank Co., Ltd.
Hong Kong Branch**

**China PA Securities
(Hong Kong) Company
Limited**

UBS

HSBC

BofA Securities

Application has been made to The Stock Exchange of Hong Kong Limited for the listing, and permission to deal in the Notes issued under the Programme by way of debt issues to professional investors (as defined in Chapter 37 of the Rules Governing the Listing of Securities on The Stock Exchange of Hong Kong Limited) only, as described in the offering circular dated 12 April 2021 and the pricing supplement relating thereto dated 14 April 2021. The listing of the Notes is expected to become effective on or about 22 April 2021.

Hong Kong SAR, 22 April 2021

As at the date of this announcement, the directors of Guotai Junan Holdings Limited are Fung Yim, Jian Yu and Lebin Xie.

As at the date of this announcement, the directors of Guotai Junan Securities Co., Ltd. are He Qing, Wang Song, Yu Jian, Liu Xinyi, Guan Wei, Zhou Lei, Zhong Maojun, Wang Wenjie, Lin Facheng, Zhou Hao, An Hongjun, Xia Dawei, Shi Derong, Chen Guogang, Ling Tao, Jin Qingjun and Lee Conway Kong Wai.