

IMPORTANT

IMPORTANT: If you are in any doubt about any of the contents of this document, you should obtain independent professional advice.

Huashi Group Holdings Limited (华视集团控股有限公司)

(Incorporated in the Cayman Islands with limited liability)

[REDACTED]

Number of [REDACTED] : [REDACTED] Shares (subject to the [REDACTED])
Number of [REDACTED] Shares : [REDACTED] Shares (subject to reallocation)
Number of [REDACTED] : [REDACTED] Shares (subject to reallocation and the [REDACTED])
[REDACTED] : Not more than HK\$[REDACTED] per [REDACTED] and expected to be not less than HK\$[REDACTED] per [REDACTED] plus brokerage of 1%, SFC transaction levy of 0.0027%, the Stock Exchange trading fee of 0.00565% and AFRC transaction levy of 0.00015% (payable in full on application in Hong Kong dollars and subject to refund)
Nominal value : US\$0.05 per Share
[REDACTED] : [REDACTED]

Sole Sponsor, [REDACTED] and [REDACTED]

RAINBOW.

RAINBOW CAPITAL (HK) LIMITED
流博資本有限公司

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A copy of this document, having attached thereto the documents specified in the section headed “1. Documents Delivered to the Registrar of Companies” in Appendix V to this document, has been registered by the Registrar of Companies in Hong Kong as required under section 342C of the Companies (Winding Up and Miscellaneous Provisions) Ordinance (Chapter 32 of the Laws of Hong Kong). The Securities and Futures Commission of Hong Kong and the Registrar of Companies in Hong Kong take no responsibility as to the contents of this document or any other documents referred to above.

The [REDACTED] is expected to be determined by agreement between our Company and the [REDACTED] (for itself and on behalf of the [REDACTED]) on the [REDACTED] which is expected to be on or around [REDACTED] or such later date as may be agreed by our Company and the [REDACTED] (for itself and on behalf of the [REDACTED]) but in any event no later than [REDACTED]. The [REDACTED] will be not more than HK\$[REDACTED] per [REDACTED] and is expected to be not less than HK\$[REDACTED] per [REDACTED], unless otherwise announced.

The [REDACTED] (for itself and on behalf of the [REDACTED]) may, with our Company’s consent, reduce the indicative [REDACTED] stated in this document and/or the number of [REDACTED] under the [REDACTED] at any time prior to the morning of the last day for lodging applications under the [REDACTED]. In such a case, a notice of reduction in the indicative [REDACTED] and/or the number of [REDACTED] will be published on the website of the Stock Exchange at www.hkexnews.hk and the website of our Company at www.youmeimu.com not later than the morning of the last day for lodging applications under the [REDACTED]. Details of the arrangement will then be announced by our Company as soon as practicable. Further details are set out in the sections headed “Structure and Conditions of the [REDACTED]” and “How to Apply for the [REDACTED]” in this document.

The [REDACTED] have not been and will not be registered under the [REDACTED] or any state securities laws of the United States and may not be offered, sold, pledged or transferred within the United States, except pursuant to an exemption from, or in a transaction not subject to, the registration requirements of the [REDACTED] and in accordance with any applicable U.S. securities law. The [REDACTED] are being offered and sold only outside the United States in offshore transactions in reliance on Regulation S.

If, for any reason, the [REDACTED] is not agreed between the [REDACTED] (for itself and on behalf of the [REDACTED]) and our Company on or before [REDACTED], the [REDACTED] will not proceed and will lapse immediately.

Prior to making an investment decision, prospective investors should consider carefully all the information set out in this document, including the risk factors set out in the section headed “Risk Factors” in this document. Pursuant to the [REDACTED], the [REDACTED] (for itself and on behalf of the [REDACTED]) has the right in certain circumstances to terminate the obligations of the [REDACTED] at any time prior to 8:00 a.m. (Hong Kong time) on the [REDACTED]. Should the [REDACTED] (for itself and on behalf of the [REDACTED]) terminate the [REDACTED], the [REDACTED] will not proceed and will lapse. Further details of these termination provisions are set out in the section headed “[REDACTED]” in this document. It is important that prospective investors refer to that section for further details.

ATTENTION

We have adopted a fully electronic application process for the [REDACTED]. We will not provide printed copies of this document or printed copies of any application forms to the public in relation to the [REDACTED]. This document is available at the website of the Hong Kong Stock Exchange at www.hkexnews.hk and our website at www.youmeimu.com. If you require a printed copy of this document, you may download and print from the website addresses above.

[REDACTED]

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[REDACTED]

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