

# Appendix 3B

## New issue announcement, application for quotation of additional securities and agreement

*Information or documents not available now must be given to ASX as soon as available. Information and documents given to ASX become ASX's property and may be made public.*

Introduced 01/07/96 Origin: Appendix 5 Amended 01/07/98, 01/09/99, 01/07/00, 30/09/01, 11/03/02, 01/01/03, 24/10/05, 01/08/12, 04/03/13

### Name of entity

Goldphyre Resources Limited

### ACN

149 390 394

We (the entity) give ASX the following information.

## Part 1 - All issues

*You must complete the relevant sections (attach sheets if there is not enough space).*

|   |   |   |
|---|---|---|
| 1 | +Class of +securities issued or to be issued  | i) Ordinary Shares<br>ii) Options   |
| 2 | Number of +securities issued or to be issued (if known) or maximum number which may be issued   | i) 330,000<br>ii) (330,000)   |
| 3 | Principal terms of the +securities (e.g. if options, exercise price and expiry date; if partly paid +securities, the amount outstanding and due dates for payment; if +convertible securities, the conversion price and dates for conversion) | i) Ordinary Fully Paid Shares<br>ii) Options, exercise price of \$0.08 expiring 30 September 2016 |

+ See chapter 19 for defined terms.

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|    |   |                       |
|----|---|-----------------------|
| 4  | Do the <sup>+</sup> securities rank equally in all respects from the <sup>+</sup> issue date with an existing <sup>+</sup> class of quoted <sup>+</sup> securities?   | i) Yes<br>ii) Yes     |
|    | If the additional <sup>+</sup> securities do not rank equally, please state: <ul style="list-style-type: none"> <li>• the date from which they do</li> <li>• the extent to which they participate for the next dividend, (in the case of a trust, distribution) or interest payment</li> <li>• the extent to which they do not rank equally, other than in relation to the next dividend, distribution or interest payment</li> </ul> |                       |
| 5  | Issue price or consideration  | i) 8 cents<br>ii) N/A |
| 6  | Purpose of the issue<br>(If issued as consideration for the acquisition of assets, clearly identify those assets)   | Exercise of Options   |
| 6a | Is the entity an <sup>+</sup> eligible entity that has obtained security holder approval under rule 7.1A?<br><br>If Yes, complete sections 6b – 6h <i>in relation to the <sup>+</sup>securities the subject of this Appendix 3B</i> , and comply with section 6i  | Yes                   |
| 6b | The date the security holder resolution under rule 7.1A was passed  | 30 November 2015      |
| 6c | Number of <sup>+</sup> securities issued without security holder approval under rule 7.1  | Nil                   |
| 6d | Number of <sup>+</sup> securities issued with security holder approval under rule 7.1A  | Nil                   |
| 6e | Number of <sup>+</sup> securities issued with security holder approval under rule 7.3, or another specific security holder approval (specify date of meeting)   | Nil                   |
| 6f | Number of <sup>+</sup> securities issued under an exception in rule 7.2   | 330,000               |

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+ See chapter 19 for defined terms.

| 6g          | If +securities issued under rule 7.1A, was issue price at least 75% of 15 day VWAP as calculated under rule 7.1A.3? Include the +issue date and both values. Include the source of the VWAP calculation.   | N/A  |        |        |             |                            |            |  |
|-------------|--|--|--------|--------|-------------|----------------------------|------------|--|
| 6h          | If +securities were issued under rule 7.1A for non-cash consideration, state date on which valuation of consideration was released to ASX Market Announcements   | N/A  |        |        |             |                            |            |  |
| 6i          | Calculate the entity's remaining issue capacity under rule 7.1 and rule 7.1A – complete Annexure 1 and release to ASX Market Announcements   | LR 7.1: 11,029,662<br>LR 7.1A: 15,259,775  |        |        |             |                            |            |  |
| 7           | <p>+Issue dates</p> <p><small>Note: The issue date may be prescribed by ASX (refer to the definition of issue date in rule 19.12). For example, the issue date for a pro rata entitlement issue must comply with the applicable timetable in Appendix 7A.</small></p> <p><small>Cross reference: item 33 of Appendix 3B.</small></p> | 19 August 2016   |        |        |             |                            |            |  |
| 8           | Number and +class of all +securities quoted on ASX (including the +securities in section 2 if applicable)  | <table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: center;">Number</th> <th style="text-align: center;">+Class</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">152,597,748</td> <td>Fully paid ordinary shares</td> </tr> <tr> <td style="text-align: center;">68,856,465</td> <td>Options, exercise price \$0.08, expiring 30 September 2016</td> </tr> </tbody> </table> | Number | +Class | 152,597,748 | Fully paid ordinary shares | 68,856,465 | Options, exercise price \$0.08, expiring 30 September 2016 |
| Number      | +Class   |  |        |        |             |                            |            |  |
| 152,597,748 | Fully paid ordinary shares   |  |        |        |             |                            |            |  |
| 68,856,465  | Options, exercise price \$0.08, expiring 30 September 2016   |  |        |        |             |                            |            |  |

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|   | Number    | +Class   |
|---|-----------|--|
| 9 Number and +class of all +securities not quoted on ASX (including the +securities in section 2 if applicable) | 4,500,000 | Options, exercise price \$0.125, expiring 30 November 2018 |
|   | 4,500,000 | Options, exercise price \$0.175, expiring 30 November 2018 |
|   | 3,430,000 | Options, exercise price \$0.10, expiring 21 April 2021     |
|   | 3,430,000 | Options, exercise price \$0.15, expiring 21 April 2021     |
|   | 5,000,000 | Options, exercise price \$0.125, expiring 2 May 2019       |
| 10 Dividend policy (in the case of a trust, distribution policy) on the increased capital (interests)           |           |  |

**Part 2 – DELETED – NOT APPLICABLE**

**Part 3 - Quotation of securities**

*You need only complete this section if you are applying for quotation of securities*

34 Type of +securities  
*(tick one)*

(a)  +Securities described in Part 1

(b)  All other +securities

Example: restricted securities at the end of the escrowed period, partly paid securities that become fully paid, employee incentive share securities when restriction ends, securities issued on expiry or conversion of convertible securities

**Entities that have ticked box 34(a)**

**Additional securities forming a new class of securities**

*Tick to indicate you are providing the information or documents*

35  If the +securities are +equity securities, the names of the 20 largest holders of the additional +securities, and the number and percentage of additional +securities held by those holders

36  If the +securities are +equity securities, a distribution schedule of the additional +securities setting out the number of holders in the categories  
 1 - 1,000  
 1,001 - 5,000  
 5,001 - 10,000  
 10,001 - 100,000  
 100,001 and over

37  A copy of any trust deed for the additional +securities

+ See chapter 19 for defined terms.

**Quotation agreement**

- 1 +Quotation of our additional +securities is in ASX's absolute discretion. ASX may quote the +securities on any conditions it decides.
  
- 2 We warrant the following to ASX.
  - The issue of the +securities to be quoted complies with the law and is not for an illegal purpose.
  
  - There is no reason why those +securities should not be granted +quotation.
  
  - An offer of the +securities for sale within 12 months after their issue will not require disclosure under section 707(3) or section 1012C(6) of the Corporations Act.  
Note: An entity may need to obtain appropriate warranties from subscribers for the securities in order to be able to give this warranty
  
  - Section 724 or section 1016E of the Corporations Act does not apply to any applications received by us in relation to any +securities to be quoted and that no-one has any right to return any +securities to be quoted under sections 737, 738 or 1016F of the Corporations Act at the time that we request that the +securities be quoted.
  
  - If we are a trust, we warrant that no person has the right to return the +securities to be quoted under section 1019B of the Corporations Act at the time that we request that the +securities be quoted.
  
- 3 We will indemnify ASX to the fullest extent permitted by law in respect of any claim, action or expense arising from or connected with any breach of the warranties in this agreement.
  
- 4 We give ASX the information and documents required by this form. If any information or document is not available now, we will give it to ASX before +quotation of the +securities begins. We acknowledge that ASX is relying on the information and documents. We warrant that they are (will be) true and complete.

Sign here:   
(Company secretary)

Date: 19 August 2016

Print name: Leigh-Ayn Absolom

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+ See chapter 19 for defined terms.

## Appendix 3B – Annexure 1

### Calculation of placement capacity under rule 7.1 and rule 7.1A for eligible entities

Introduced 01/08/12 Amended 04/03/13

#### Part 1

| <b>Rule 7.1 – Issues exceeding 15% of capital</b>   |  |
|---|--|
| <b><i>Step 1: Calculate “A”, the base figure from which the placement capacity is calculated</i></b>  |  |
| <b><i>Insert</i></b> number of fully paid +ordinary securities on issue 12 months before the +issue date or date of agreement to issue  | 99,665,004   |
| <b><i>Add</i></b> the following: <ul style="list-style-type: none"> <li>• Number of fully paid +ordinary securities issued in that 12 month period under an exception in rule 7.2</li> <li>• Number of fully paid +ordinary securities issued in that 12 month period with shareholder approval</li> <li>• Number of partly paid +ordinary securities that became fully paid in that 12 month period</li> </ul> <p><i>Note:</i></p> <ul style="list-style-type: none"> <li>• <i>Include only ordinary securities here – other classes of equity securities cannot be added</i></li> <li>• <i>Include here (if applicable) the securities the subject of the Appendix 3B to which this form is annexed</i></li> <li>• <i>It may be useful to set out issues of securities on different dates as separate line items</i></li> </ul> | <p>15,500,000 fully paid ordinary shares issued on 18/3/2016 and approved by shareholders on 22/4/2016</p> <p>1,687,500 fully paid ordinary shares issued on 22/4/2016 and approved by shareholders on 22/4/2016</p> <p>29,030,772 fully paid ordinary shares issued on 22/4/2016 and approved by shareholders on 22/4/2016</p> <p>1,000,000 fully paid ordinary shares issued on 27/5/2016, rule 7.2 exception 4</p> <p>700,000 fully paid ordinary shares issued on 30/6/2016, rule 7.2 exception 4</p> <p>25,000 fully paid ordinary shares issued on 8/7/2016, rule 7.2 exception 4</p> <p>1,225,000 fully paid ordinary shares issued on 15/7/2016, rule 7.2 exception 4</p> <p>1,820,000 fully paid ordinary shares issued on 22/7/2016, rule 7.2 exception 4</p> <p>550,000 fully paid ordinary shares issued on 29/7/2016, rule 7.2 exception 4</p> <p>476,972 fully paid ordinary shares issued on 5/8/2016, rule 7.2 exception 4</p> <p>587,500 fully paid ordinary shares issued on 12/8/2016, rule 7.2 exception 4</p> <p>330,000 fully paid ordinary shares issued on 19/8/2016, rule 7.2 exception 4</p> |

+ See chapter 19 for defined terms.

|   |  |
|---|--|
| <b>Subtract</b> the number of fully paid +ordinary securities cancelled during that 12 month period   | Nil  |
| <b>“A”</b>  | 152,597,748  |
| <b>Step 2: Calculate 15% of “A”</b>   |  |
| <b>“B”</b>  | 0.15<br><i>[Note: this value cannot be changed]</i>  |
| <b>Multiply</b> “A” by 0.15   | 22,889,662   |
| <b>Step 3: Calculate “C”, the amount of placement capacity under rule 7.1 that has already been used</b>  |  |
| <p><b>Insert</b> number of +equity securities issued or agreed to be issued in that 12 month period <i>not counting</i> those issued:</p> <ul style="list-style-type: none"> <li>• Under an exception in rule 7.2</li> <li>• Under rule 7.1A</li> <li>• With security holder approval under rule 7.1 or rule 7.4</li> </ul> <p><i>Note:</i></p> <ul style="list-style-type: none"> <li>• <i>This applies to equity securities, unless specifically excluded – not just ordinary securities</i></li> <li>• <i>Include here (if applicable) the securities the subject of the Appendix 3B to which this form is annexed</i></li> <li>• <i>It may be useful to set out issues of securities on different dates as separate line items</i></li> </ul> | <p>6,860,000 unlisted options issued on 22/4/2016</p> <p>5,000,000 unlisted options issued on 3/5/2016</p> |
| <b>“C”</b>  | 11,860,000   |
| <b>Step 4: Subtract “C” from [“A” x “B”] to calculate remaining placement capacity under rule 7.1</b>   |  |
| <p>“A” x 0.15</p> <p><i>Note: number must be same as shown in Step 2</i></p>  | 22,889,662   |
| <p><b>Subtract</b> “C”</p> <p><i>Note: number must be same as shown in Step 3</i></p>   | 11,860,000   |
| <p><b>Total</b> [“A” x 0.15] – “C”</p>  | <p>11,029,662</p> <p><i>[Note: this is the remaining placement capacity under rule 7.1]</i></p>            |

+ See chapter 19 for defined terms.

Part 2

| <b>Rule 7.1A – Additional placement capacity for eligible entities</b>   |   |
|--|---|
| <b>Step 1: Calculate “A”, the base figure from which the placement capacity is calculated</b>  |   |
| <b>“A”</b><br><i>Note: number must be same as shown in Step 1 of Part 1</i>  | 152,597,748                                       |
| <b>Step 2: Calculate 10% of “A”</b>  |   |
| <b>“D”</b>   | 0.10<br><i>Note: this value cannot be changed</i> |
| <b>Multiply “A” by 0.10</b>  | 15,259,775  |
| <b>Step 3: Calculate “E”, the amount of placement capacity under rule 7.1A that has already been used</b>  |   |
| <b>Insert</b> number of +equity securities issued or agreed to be issued in that 12 month period under rule 7.1A<br><br><i>Notes:</i> <ul style="list-style-type: none"> <li>• <i>This applies to equity securities – not just ordinary securities</i></li> <li>• <i>Include here – if applicable – the securities the subject of the Appendix 3B to which this form is annexed</i></li> <li>• <i>Do not include equity securities issued under rule 7.1 (they must be dealt with in Part 1), or for which specific security holder approval has been obtained</i></li> <li>• <i>It may be useful to set out issues of securities on different dates as separate line items</i></li> </ul> | Nil   |
| <b>“E”</b>   | Nil   |

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|  |   |
|--|---|
| <b>Step 4: Subtract “E” from [“A” x “D”] to calculate remaining placement capacity under rule 7.1A</b> |   |
| “A” x 0.10<br><i>Note: number must be same as shown in Step 2</i>                                      | 15,259,775  |
| <b>Subtract “E”</b><br><i>Note: number must be same as shown in Step 3</i>                             | Nil   |
| <b>Total</b> [“A” x 0.10] – “E”  | 15,259,775<br><i>Note: this is the remaining placement capacity under rule 7.1A</i> |

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+ See chapter 19 for defined terms.

# Issue of Goldphyre Resources Limited Securities

## Secondary Trading Notice Notification Pursuant to Paragraph 708A(5)(e) of the Corporations Act 2001 (“Act”)

On 19 August 2016, Goldphyre Resources Limited (“Company”) issued 330,000 fully paid ordinary shares (“Securities”) upon exercise of \$0.08 listed options, expiring 30 September 2016.

### Secondary Trading Exemption

The Act restricts the on-sale of securities issued without disclosure, unless the sale is exempt under section 708 or 708A. By the Company giving this notice, sale of the Securities noted above will fall within the exemption in section 708A(5) of the Act.

The Company hereby notifies ASX under paragraph 708A(5)(e) of the Act that:

- (a) the Company issued the Securities without disclosure to investors under Part 6D.2 of the Act;
- (b) as at 19 August 2016 the Company has complied with the provisions of Chapter 2M of the Act as they apply to the Company, and section 674 of the Act; and
- (c) as at 19 August 2016 there is no information:
  - i. that has been excluded from a continuous disclosure notice in accordance with the ASX Listing Rules; and
  - ii. that investors and their professional advisers would reasonably require for the purpose of making an informed assessment of:
    - A. the assets and liabilities, financial position and performance, profits and losses and prospects of the Company; or
    - B. the rights and liabilities attaching to the Securities.

For further information, please contact:

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Leigh-Ayn Absolom

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