

Macquarie Bank Limited

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ASX/Media Release

Macquarie Bank Limited – Macquarie Bank Capital Notes 3 Offer Closes

SYDNEY, 27 August 2021 – Macquarie Bank Limited (ASX: MBL) (“MBL”) today announced that it has closed its offer of Macquarie Bank Capital Notes 3 (the “Offer”) (“BCN3”) on 24 August 2021. MBL issued 6,548,480 BCN3 at an issue price of A\$100 each, raising A\$654.848 million.

BCN3 are expected to commence trading on the ASX on a normal settlement basis on Monday, 30 August 2021, under the ASX code “MBLPD”.

Allocation Policy

Broker Firm Offer and Institutional Offer:

Allocations to Syndicate Brokers and Institutional Investors were determined under the Bookbuild completed on 4 August 2021.

Allocations to individual Broker Firm Applicants by a Syndicate Broker were at the discretion of that Syndicate Broker.

Securityholder Offer:

Valid Applications received under the Securityholder Offer were accepted in full.

The total allocation for the Securityholder Offer is \$A154.848 million.

Holding Statements

CHESS and issuer sponsored Holding Statements indicating the number of BCN3 allocated to successful Applicants are expected to be dispatched by Thursday, 2 September 2021. Refunds for any over payment are also expected to be dispatched by this date.

Applicants can confirm their holding before receiving their Holding Statement in the following ways:

- Broker Firm Applicants should contact their Syndicate Broker; and
- Other Applicants can email the Registrar at BCN3Offer@linkmarketservices.com.au or call the BCN3 Offer Information line on 1300 963 991 (within Australia) or on +61 1300 963 991 (outside Australia) (Monday to Friday, 8.30am to 5.30pm, AEST) to confirm their allocations.

Institutional Investors have already been advised of their allocations.

Any successful Applicant wishing to trade their BCN3 prior to receiving their Holding Statement is responsible for confirming their allocation to ensure they do not sell any BCN3 that they do not own. Any person who sells BCN3 before receiving their Holding Statement does so at their own risk.

First Distribution Payment

Distributions on BCN3 are scheduled to be paid on 7 March, 7 June, 7 September and 7 December each year (or the next business day if not a business day), commencing on 7 December 2021. The record date for the first BCN3 distribution is expected to be 22 November 2021.

The Distribution Rate for the first Distribution is 2.4841%.

Issue Date VWAP

For the purposes of the BCN3 Exchange calculations, the Issue Date VWAP is A\$161.16.

Tax Ruling

As noted in the Prospectus, MBL applied for a class ruling to confirm the Australian tax consequences for certain holders of BCN3. The ATO is expected to issue this class ruling shortly in the anticipated form. A copy of the class ruling will be made available at macquarie.com and on the ATO website at www.ato.gov.au.

Participation by related parties of MBL

In compliance with ASX requirements, MBL advises that 3,200 BCN3 were issued to directors of MBL and their associates in aggregate.

Largest holders and holder distribution schedule

A statement of the 20 largest BCN3 holders, including the number and percentage of BCN3 held by those holders, and the distribution schedule of BCN3 holders are attached.

Definitions

Unless otherwise defined, capitalised words used in this announcement have the meanings given to them in the Replacement Prospectus.

Disclaimer

The information provided in this announcement and the Replacement Prospectus dated 11 August 2021 ("Replacement Prospectus") is not personal investment advice and has been prepared without taking into account your investment objectives, financial situation or particular needs (including financial and taxation issues). It is important that you read the Replacement Prospectus in full before deciding to invest in BCN3 and consider the risks that could affect the performance of BCN3.

NOT FOR DISTRIBUTION OR RELEASE IN THE UNITED STATES

This announcement does not constitute an offer of any securities (including the BCN3) for sale or issue. No action has been taken to register or qualify BCN3 or the Offer or to otherwise permit a public offering of BCN3 outside Australia. In particular, this announcement does not constitute an offer of securities for sale in the United States. Neither the BCN3 nor the Macquarie Group Limited Ordinary Shares have been or will be registered under the U.S. Securities Act of 1933, as amended (the Securities Act), or the securities laws of any state or other jurisdiction of the United

States, and they may not be offered, sold or resold in the United States or to, or for the benefit of, any "U.S. person" (as defined in Regulation S under the Securities Act) except pursuant to an exemption from the registration requirements of the Securities Act and applicable US State Securities laws.

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MACQUARIE BANK LIMITED

**INVESTOR RANGES
 FRIDAY 27 AUGUST 2021**

<u>Ranges</u>	<u>Investors</u>	<u>Securities</u>	<u>% Issued Capital</u>
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Security Code : MBLPD MACQUARIE BANK CAPITAL NOTES 3

Totals for Security Code MBLPD

1 to 1000	7,849	2,304,000	35.18
1001 to 5000	725	1,558,786	23.80
5001 to 10000	61	454,252	6.94
10001 to 100000	33	819,636	12.52
100001 and Over	5	1,411,806	21.56
Total	8,673	6,548,480	100.00

The number of security investors holding less than a marketable parcel of 0 securities (\$0.00 on / /) is 0 and they hold 0 securities.

end of report

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MACQUARIE BANK LIMITED
**FIRST 20 INVESTORS REPORT
 FRIDAY 27 AUGUST 2021**

<u>Rank</u>	<u>Investor</u>	<u>Current Balance</u>	<u>% Issued Capital</u>
Security: MBLPD - MACQUARIE BANK CAPITAL NOTES 3			
1	HSBC CUSTODY NOMINEES (AUSTRALIA) LIMITED	688,776	10.52%
2	J P MORGAN NOMINEES AUSTRALIA PTY LIMITED	230,174	3.51%
3	NETWEALTH INVESTMENTS LIMITED <WRAP SERVICES A/C>	189,573	2.89%
4	NATIONAL NOMINEES LIMITED	169,748	2.59%
5	BNP PARIBAS NOMINEES PTY LTD HUB24 CUSTODIAL SERV LTD <DRP A/C>	133,535	2.04%
6	BNP PARIBAS NOMINEES PTY LTD <AGENCY LENDING DRP A/C>	81,280	1.24%
7	CITICORP NOMINEES PTY LIMITED	80,344	1.23%
8	MUTUAL TRUST PTY LTD	52,710	.80%
9	BNP PARIBAS NOMS PTY LTD <DRP>	49,000	.75%
10	AUSTRALIAN EXECUTOR TRUSTEES LIMITED <NO 1 ACCOUNT>	48,670	.74%
11	UBS NOMINEES PTY LTD	34,077	.52%
12	BNP PARIBAS NOMINEES PTY LTD <PITCHER PARTNERS DRP>	31,500	.48%
13	LEX CAPITAL PTY LTD	30,000	.46%
14	DIMBULU PTY LTD	28,000	.43%
15	NETWEALTH INVESTMENTS LIMITED <SUPER SERVICES A/C>	25,646	.39%

MACQUARIE BANK LIMITED

**FIRST 20 INVESTORS REPORT
FRIDAY 27 AUGUST 2021**

<u>Rank</u>	<u>Investor</u>	<u>Current Balance</u>	<u>% Issued Capital</u>
16	HSBC CUSTODY NOMINEES (AUSTRALIA) LIMITED - A/C 2	24,300	.37%
17	PERSHING AUSTRALIA NOMINEES PTY LTD <ACCUM A/C>	23,580	.36%
18	BALMORAL FINANCIAL INVESTMENTS PTY LTD <NO 2 A/C>	23,196	.35%
19	LEDA HOLDINGS PTY LTD	20,000	.31%
20	MR ANTHONY HEWITT STEVENS	20,000	.31%

TOTAL FOR TOP 20:	1,984,109	Investors 20	30.30%
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TOTAL IN THIS REPORT:	1,984,109	Investors 20	30.30%
TOTAL OTHER INVESTORS:	4,564,371	8,653	69.70%
GRAND TOTAL:	6,548,480	8,673	100.00%

end of report