

METEX

Global Metals
Exchange

Investor Presentation
December 2020

Metex Corp Pty Ltd
ACN: 624 831 821



Issuer and Date

This Pitch Deck is issued by Metex Corp Pty Ltd (ACN 624 831 821) (“Company”) and is dated 3rd September 2020.

Offer

The Offer contained in this Pitch Deck is an invitation to private retail investors or “sophisticated investors” (in accordance with subsection 708 (8) or (10) of the Corporations Act) and “professional investors” (in accordance with subsection 708 (11) of the Corporations Act) to subscribe for ordinary shares in the Company.

No Investment Advice

The information contained in this Pitch Deck should not be taken as financial product advice and has been prepared as general information only. To the extent permitted by the applicable International Laws, regulations and rules, the Company is not liable for any losses that are indirect or otherwise, that may be in connection to the reliance of this document.

Please consult your legal, financial or business professional advisor for advice prior to participating in this Offer.

Invitation

The invitation contained in this Pitch Deck is for the participation in this Offer.

No individual or body is authorised by the Company to give any information or make any representation in connection with this Offer that is not contained in this Pitch Deck.

All information that has been held out but is not contained in this Pitch Deck may not be relied upon as having been authorised by the Company.

Neither a representative of a company or any persons associated with the Company may warrant the future performance of Metex Corp Pty Ltd (ACN 624 831 821).

Past Performance

The past performance of the Company should not be relied upon as indicative of future performance.

Not a Disclosure Document

This Pitch Deck has been prepared on the basis that the amount proposed to be raised is below AUD \$2 million and prospective applicants are private retail investors, or sophisticated or professional investors. As such, any offer or issue made under or in connection with this Pitch Deck does not require a disclosure document as defined under the Corporations Act.

This Pitch Deck is not a disclosure document within the meaning of the Corporations Act and has not been prepared to the same level of disclosure required for a prospectus or product disclosure statement. No verification or substantive due diligence review of the information contained in this Pitch Deck has been undertaken. Prospective applicants should not construe the contents of this Pitch Deck as tax or investment advice.

No financial product advice is provided in this Pitch Deck and nothing in it should be taken to constitute a recommendation or statement of opinion that is intended to influence a person or persons in making a financial product decision.

This Pitch Deck does not purport to be complete, accurate or to contain all information which its recipients may require to make an informed assessment of whether to invest in the Company. This Pitch Deck does not take into account the objectives, circumstances (including financial situation) or needs of any particular person. Before acting on the information contained in this Pitch Deck, or making a decision to invest in the Company, potential applicants should make their own enquiries and seek professional advice (including financial product advice from an independent person licensed by ASIC to give such advice) as to whether investment in the Company is appropriate in light of their own circumstances.

None of the Company or its officers, advisors, agents or representatives (Relevant Parties) endorse or have independently audited or in any way verified any of the information contained in this Pitch Deck. In addition, some of the information contained in this Pitch Deck has been obtained from third parties and has not been independently verified.

Accordingly, no representation, warranty or undertaking, express or implied, is made and no responsibility is accepted by the Relevant Parties as to the accuracy, currency or completeness of any part of this Pitch Deck or any supplement to it or any further information supplied by or on behalf of the Relevant Parties in connection with the Company.

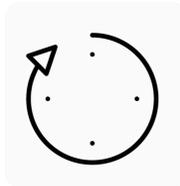
Metex Exchange is one of the worlds first online exchanges for tokenised metals.

Metex Exchange makes it easy for anyone build their wealth one gram at a time, easily gaining access to 4 precious metals, with options to take physical delivery of select metals.

As a pioneering fintech company, Metex Exchange is set to disrupt traditional metals trading.



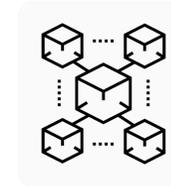
24/7 Real Time Trading
Trades settle almost instantly providing a seamless user experience and true market price discovery.



Global Reach
Metex Exchange welcomes traders from over 150 countries. The borderless nature of crypto means anyone can participate.



Blockchain Segment
The use of finance or asset backed tokens is exploding globally, and Metex Exchange is part of this growing ecosystem.



Fully Compliant
Metex is fully compliant with AUSTRAC regulations and is also a registered bullion dealer.



Andrew Sassi

Director - CEO & Founder

Andrew has had extensive experience in financial and capital markets with over two decades in senior client facing stock broking roles gaining experience in governance, stakeholder relations, capital raisings and trading. His capital markets experience includes venture capital, private equity, corporate finance and IPO's. Andrew has participated in major financial systems software implementations, deployed across the spectrum of trading instruments for corporate banking institutions.

The growth in the digital world and technology over the last 2 plus decades has led to Andrew becoming a founder of Metex Metals Exchange, which is in a unique position to disrupt the metals trading industry.

Brett Wilkins-Byrd

Director - Compliance & CTO

Brett has over 20 years of experience in integrating software, business training and online services within both business management and digital commerce.

Brett has extensive experience in compliance systems and various compliance & audit roles.

Brett's broad digital skill sets and compliance experience ensure he is well positioned to manage the technical projects within Metex.

Dominic Virgara

Director - CFO

Dominic is the owner and Managing Director of Techforce Personnel Pty Ltd a national recruitment company commencing operations in 2010. He is a qualified CPA by profession and has been a high performing recruitment

Director and CFO, with the Clements Group (now Hoban Recruitment) for over 20 years before starting up Techforce. During his tenure, Dom provided strategic, financial and marketing guidance for his companies. Dominic brings strong financial discipline to the role of Metex CFO.

Chay Winstanley

Non Executive Director

Chay brings to Metex professional expertise in law, business, finance and asset tokenisation (blockchain).

With experience managing several businesses in the past, including a finance brokerage firm and a digital marketing agency, Chay has strong analytical, research and management skills.

Advisors

Legal Partner & Advisor

Harly Zappino (Agile Legal)

Legal Partner & Advisor

Kenny Lee (Agile Legal)



Accounting Partner

Simon Tscharke (Venture Private Advisory)

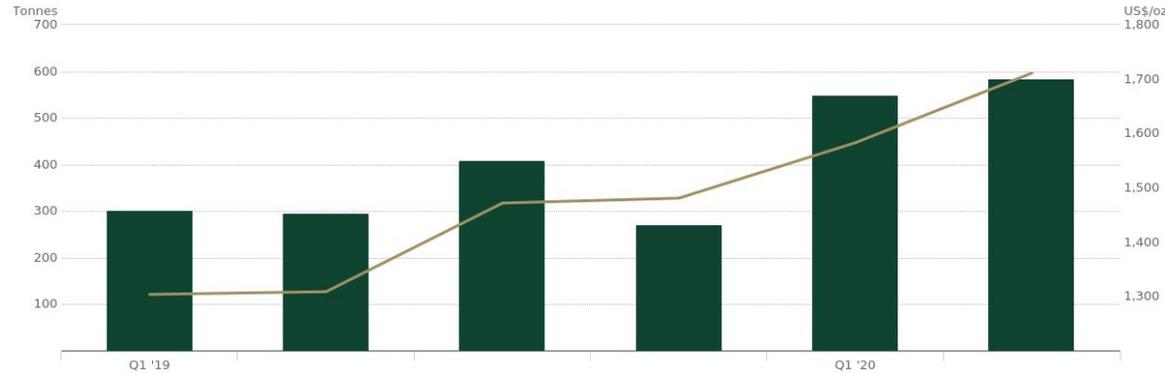
Marketing Partner

Robert Chambers



Gold Demand vs Price

GOLDHUB

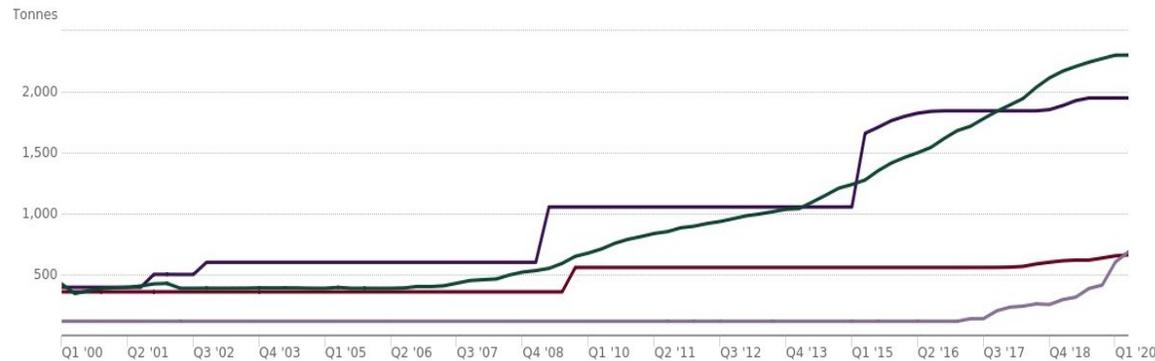


- Demand for Gold is shifting from traditional holding methods to more modern methods of trading. Demand for investment is up.
- The global Covid19 situation is accelerating this shift.
- Inflows into gold ETFs accelerated in Q2, taking H1 inflows to a record-breaking 734t.

Investment | LBMA Gold Price (US\$/Oz)

Quarterly Official Gold Reserves

GOLDHUB



- Russia now holding more gold reserves than China
- New increase in demand from countries like Turkey where economic recovery from Covid19 has begun
- Supply has fallen 4% due to impact on mining and recycling activities.

China | India | Russian Federation | Turkey



ISSUE



Regionalised, slow, outdated, paper-based metals trading.



OPPORTUNITY



One global market for metals trading that is modern, reliable and fast.



SOLUTION



Dedicated exchange for digital assets and tokenised metals.

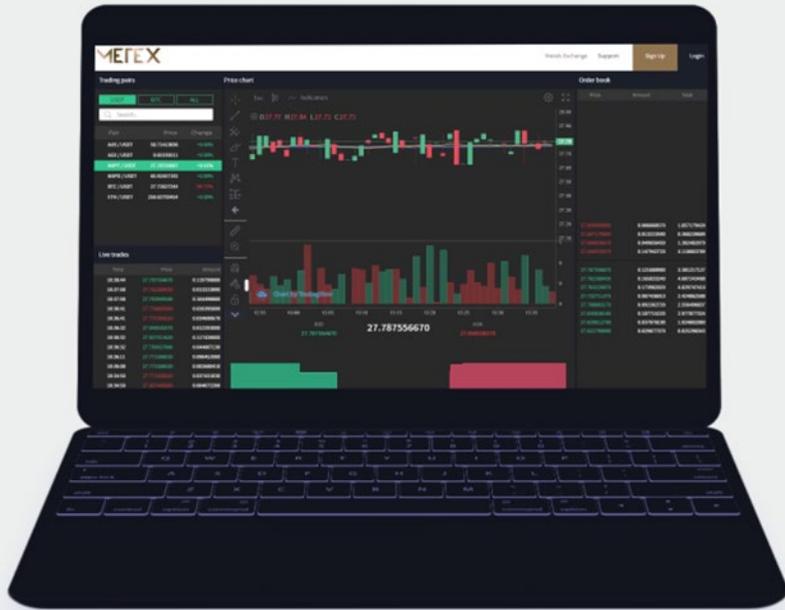
Safe Haven Asset

- Unprecedented liquidity measures by major central banks
- Ultra-low interest rates globally
- Precious metal demand increases during uncertainty

Precious metals are expected to be top performers in the current and mid term outlook, especially when overlaying economic & political uncertainty.

Digital Currency & Asset Tokenisation

- Assets are increasingly being tokenised on public blockchains
- Digitised assets are highly versatile, easily transferrable and in most cases don't require an intermediary to complete transactions (peer to peer)
- There are now hundreds of digital currency exchanges globally with >\$100 Billion USD value traded daily
- Institutional investors now beginning to hold crypto currencies and digital assets.



1

Create an account at www.metex.exchange

2

Setup security settings (SMS code or google authenticator)

3

Deposit crypto to their unique Metex Exchange address (BTC or USDT)

4

Submit a buy order, stipulating the buy price limit and quantity

5

Choose to hold or trade your tokens at anytime

All assets on the Metex Exchange are 100% asset backed, and stored in Australian Vaults.

Gold, Silver, Platinum & Palladium can all be traded against either Bitcoin or USD Tether digital currencies.

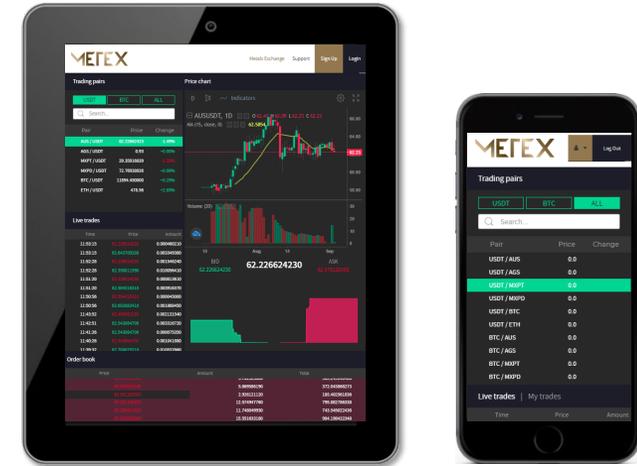
Token holders of Gold and Silver have the ability to sell, withdraw or even physically redeem their metal.



FASTER → 24/7 → ANY VALUE → GLOBAL

Metex Exchange improves the ease and efficiency of metal trading, bringing this asset class into the digital world.

The platform is built to scale globally and to accommodate multiple metal backed tokens from token issuers around the world.



	Metex Exchange	VS	Traditional Metals Trading
Buy/Sell Process	User controlled		Via broker or bullion dealer
Trading Hours	24/7		9am – 5pm (business hours)
Available Metals	4 Metals Available		Mainly limited to Gold & Silver
Efficient Quantity	Competitive pricing per gram		Usually 500g to 1kg minimum for low premiums
Trading Method	Peer to Peer		Peer to Bullion Dealer
Metal Pricing	True price discovery via Buy / Sell market		Set pricing
Product Delivery	Immediately received in exchange wallet		Requires pickup / storage / insurance
Utility	Future engagement within DeFi Market		Simply buy and hold

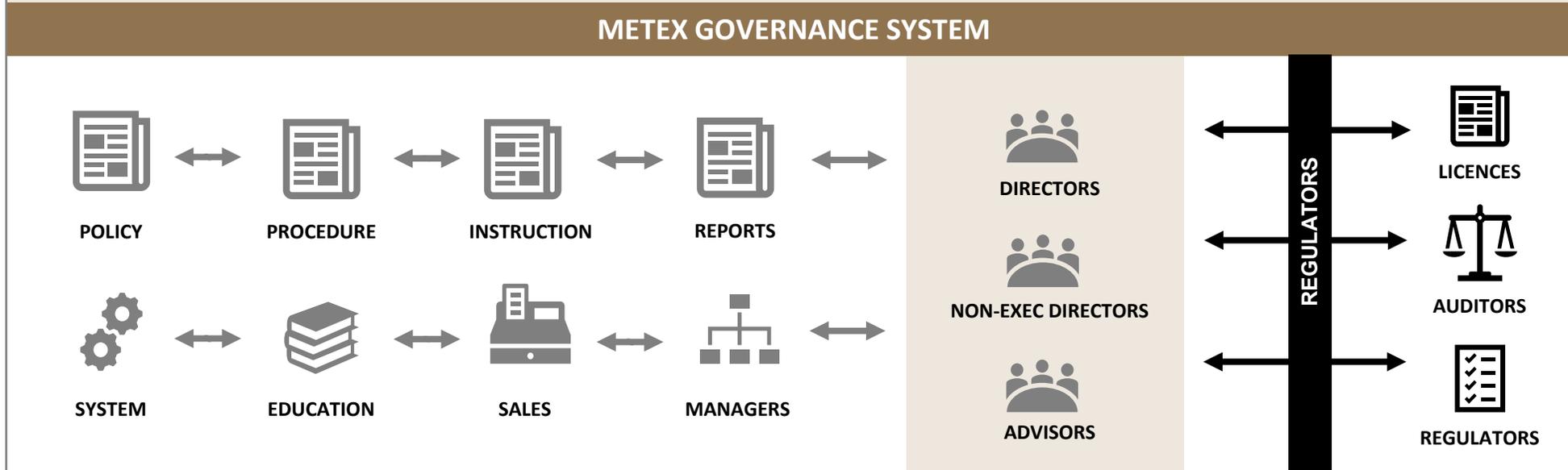
PURPOSE	REGULATIONS	SYSTEMS
Metex Corp Pty Ltd uses a commercial retail channel to provide metals distribution & education services to users.	Metex is compliant under: <ul style="list-style-type: none"> AUSTRAC Metex can accept international customers from all countries (excluding USA and some sanctioned countries).	Metex has in place governance and compliance processes which meet Australian and International Regulations. These include Regulatory Guidance and Compliance supported with policies, procedures, staff Instruction, training and process review.

ASSET CONTROL

Gold & Silver Standard tokens issued by Ainslie Wealth and stored in Australia.

Platinum & Palladium tokens are issued by Metex and stored within an Australian vault with tokens held under a *bailment agreement*.

Metex uses industry recognized hardware wallet technology for internal asset movement, ensuring secure transactions and storage.

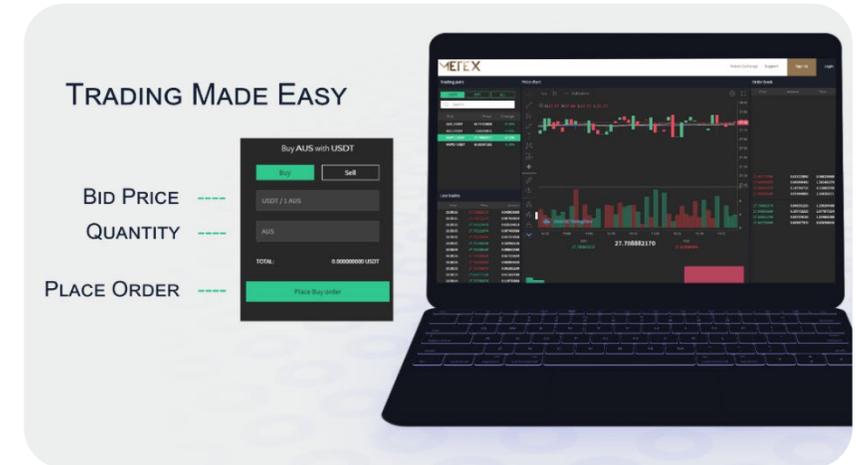


ASIAN MARKET	CRYPTO SAVVY	TRADITIONAL	INSTITUTIONAL / SMSF	HIGH NET TRADERS
Seeking diversification				
From local currency	From volatile investments	From share market	From cash	Seeking
Australia Asset	Mid to long term investment			Short term profit
Primary trading pair				
USDT or Bitcoin → Gold	Australian Dollars → Gold & Silver			Various pairs
<u>Phase 1 (November 2020)</u>		<u>Phase 2 (March 2021)</u>		<u>Phase 3 (June 2021)</u>
Targeted publications deployed on leading mediums		Launch AUD deposits and trading pairs to reduce barriers		Increased liquidity
Chinese marketing representative and local activation	Leverage influencers / advocates to build trust in a highly sensitive market	Launch alternative trading screen for market orders vs current limit orders	Provide SMSF focused strategy for acquisition and smooth on boarding	Launch API integration for professional traders
Launch global referral commission structure		Targeted marketing within leading traditional investment publications and forums.		Launch volume based trading fees

The Metex business model is based on generating profits from operating a Precious Metals Digital Currency Exchange platform.

Metex core revenue streams come from:

- Trading fees & Margin on metals 1 % fee charged to buyer and seller
- Listing fees for the addition of new digital currencies or metals tokens to the exchange



Trading Platform

- Precious Metal Trading Fees
- Cryptocurrency Trading Fees
- Listings Fees

Liquidity & Trading

- Metex inventory traded on exchange
- Arbitrage trading / bots

Asset Tokenisation

- Bullion Dealers
- Suppliers
- Producers

Already Monetised	Yes	No	No
Short Term Contribution	100%	0%	0%
Long Term Contribution	80%	10%	10%

Initial \$1,000,000 AUD

To support growing the business over the next 12 months Metex Corp will be raising a further \$1 million in funding.

Funds will be deployed to commercialise the Metex Trading Platform, the launch of a comprehensive marketing campaign and the development and the Phase 2 Website UI enhancements and Exchange operational functionalities, including a mobile trading app, and the introduction of KYC /AML facilities to support AUD trading pairs.

Allocation	\$
Marketing Launch	\$350,000
Platform Phase 2 Development	\$100,000
Bullion Inventory	\$50,000
Digital Currency Holdings	\$150,000
Working Capital	\$320,000
Capital Raising Fees	\$30,000
Total	\$1,000,000



Market Awareness

Exchange Trial

Liquidity

Fiat Onramp

Usability

METEX CORP PTY LTD - PROFIT AND LOSS (PROJECTION) FOR THE YEARS ENDING 30 JUNE 2022

	2021	2022	2023
	\$	\$	\$
Sales – Trading Commission	407,466	672,318	1,109,325
Sales – Withdrawal Fees	17,700	29,205	29,939
Sales – Tokenisation and Listing Fees	15,000	50,000	80,000
TOTAL SALES	440,166	751,523	1,219,265
Less: Cost of Goods Sold	0	0	0
GROSS MARGIN	440,166	751,523	1,219,265
Other Income	300,000	300,000	300,000
Less: Overheads	855,183	1,062,909	1,118,777
NET PROFIT (AFTER-TAX)	(115,518)	(11,385)	400,487



METEX CORP PTY LTD - BALANCE SHEET (PROJECTION) FOR THE YEARS ENDING 30 JUNE 2023

	2021	2022	2023
	\$	\$	\$
Cash & Cash Equivalents	2,547,629	2,498,333	2,926,343
Receivables	10,000	10,000	10,000
Inventories	77,634	77,634	77,634
CURRENT ASSETS	2,635,263	2,585,967	3,013,977
Plant	74,066	156,846	214,792
Intangibles	1,178	1,178	1,178
NON-CURRENT ASSETS	75,244	158,024	215,970
TOTAL ASSETS	2,710,507	2,743,991	3,229,947
Trade and Other Creditors	47,425	49,796	52,286
Other Liabilities	60,386	102,886	185,865
CURRENT LIABILITIES	107,811	152,682	238,151
NON-CURRENT LIABILITIES	0	0	0
TOTAL LIABILITIES	107,811	152,682	238,151
NET ASSETS	2,602,696	2,591,309	2,991,796



Metex Corp is offering 15.6% of its shares available at 15c per share to new shareholder investors.

Metex will be working towards the following key milestones to be achieved:

- i. Official launching of Retail Exchange July 1 2020
- ii. Launching of Institutional Exchange March 2021

Planned exit strategy will be a listing in Australia with a view to raise funds for international expansion with a focus on China, USA, Canada markets.

Listing activities to be commenced from July 2022 with 2 years solid operating activities.

Investment offer has been developed in partnership with Agile Legal Consulting

Parties Involved	
Company:	Metex Corp Pty Ltd (ACN 624 831 821) having its registered address at 123 Greenhill Road, Unley SA 5061 (Company)
Directors:	Andrew Sassi, Brett Wilkins-Byrd, Domenic Virgara and Chay Winstanly
Shareholders:	36.1 Million Shares on Issue
Investor Type:	Sophisticated / Retail
Allocation	
Recitals:	The investor is interested in investing ordinary shares in the company via private sale.
Investment:	For the purchase of fully diluted Ordinary Shares (Shares) in the Company.
Offer:	Issue of 6,666,667 shares at 15 cents per share
Offer Size:	AUD \$1,000,000 for 15.6% of issued share capital
Minimum Investment :	AUD \$25,000.00 (166,666 shares)
Company Market Capitalisation:	AUD \$6,400,000
Post Raising:	42.8 Million Shares on Issue

The logo for METEX, featuring the word "METEX" in a bold, white, sans-serif font. A vertical orange bar is positioned to the right of the text.

Global Metals
Exchange

Thankyou

www.metex.io
www.metex.exchange

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