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Eyemaxx issues corporate bond with comprehensive collateralisation concept

- **5.50 % interest p.a. with a five-year term and quarterly interest payment**
- **Valuable portfolio real properties are made available as collateral for bond creditors – mainly collateralisation by way of real estate liens – even senior ones**
- **Balanced two-pillar business model combines real property substance in the portfolio with attractive developer returns**
- **Public offering planned in Germany, Austria and Luxembourg from 3 July to 20 July 2020**
- **Additional exchange offer for Eyemaxx bond 2016/2021**

Aschaffenburg, 1 July 2020 – „5.50 % interest per year – WITH COLLATERAL“ is the motto for the new 2020/2025 bond of Eyemaxx Real Estate AG (ISIN DE000A289PZ4). Because with its ‘concrete gold’ bond the real estate company combines an attractive coupon with a comprehensive collateralisation concept, under which real estate liens are to be entered with the full nominal value of the bond for the bond creditors by way of collateral. Collaterals in a total amount of EUR 30 million hence constitute the basis of the collateralisation concept, including EUR 20 million even as senior real estate liens in the land register and another amount of EUR 10 million as second real estate liens. Moreover, the ongoing rents of the senior real estate liens are assigned to a trustee by way of collateral for the bond interest rates to be paid out on a quarterly basis, so that all interest payments of the 2020/2025 bond are fully covered by these rents. Current expert opinions which underpin the fair value of the real properties which are to serve as collateral, are available. A large part of the real properties originate from the logistics sector, which is in high demand. In addition, the rent income of the real properties is pledged as collateral for the coupon payments.

The Management Board of Eyemaxx has decided today, with the approval of the Supervisory Board, to issue the corporate bond. The proceeds of the issue are to be used exclusively for the refinancing of capital market liabilities (refunding of the 2016/2021 bond).

With Eyemaxx an experienced and always reliable issuer offers a new capital market product. During the past years Eyemaxx has already repaid a total of six bonds and convertible bonds with a volume of more than EUR 80 million on time to the investors.

The framework data of the new bond:

- Issuing volume of up to EUR 30 million
- 5.50 % interest coupon per year
- Quarterly interest payment
- Term of five years up to 2025

- A large number of covenants and comprehensive collateralisation concept
- Public offering in Germany, Austria and Luxembourg and private placement
- Subscription period from 3.7. - 20.7.2020 (12:00 noon CEST), unless there is an early closure
- Minimum subscription EUR 1,000
- Additional exchange offer for Eyemaxx bond 2016/2021 (ISIN DE000A2AAKQ9), incl. premium of 1.5 percent through additional cash component of EUR 15.00 per exchanged bond

The execution of the bond issue is subject to the authorisation of the securities prospectus by the Luxembourg Financial Supervisory Authority CSSF and the notification to the Federal Financial Supervisory Authority (BaFin) in Germany and the Austrian Financial Markets Supervisory Authority (FMA). This is expected to be completed during the coming days.

Investors can hence subscribe to “5.50 % interest rate p.a. – WITH COLLATERAL” from next Friday onwards. Subscription is possible through the subscription functionality DirectPlace of Deutsche Börse AG.

Moreover, an exchange offer for the creditors of the Eyemaxx bond 2016/2021 in the ratio of 1:1 is planned from 3 July 2020 to 16 July 2020 (6pm CEST). Holders of the 2016/2021 bond receive upon acceptance of the exchange offer for each 2016/2021 bond a 2020/2025 bond, plus the accrued interest up to 21 July 2020 (included) and an additional cash amount of EUR 15.00. Furthermore, the 2020/2025 bonds are to be offered to qualified investors within the framework of a private placement. The admission of the 2020/2025 bonds to the Open Market of the Frankfurt Stock Exchange is scheduled for 22 July 2020.

Eyemaxx offers investors – apart from the collateralisation – a two-pillar business model in the real estate sector which has been proven and successful for many years. The company combines the valuable real property substance of its own real estate portfolio with attractive developer returns, generated from a contractually fixed project pipeline, mainly for residential and office buildings of currently around EUR 900 million. In both pillars of the business model the focus lies on the real estate markets in Germany and Austria. The equity capital of the company increased to EUR 65.0 million at the end of the last fiscal year.

Dr. Michael Müller, CEO, founder and major shareholder of Eyemaxx Real Estate AG: “I am convinced that attractive interest rates backed by a viable collateralisation concept meet currently more than ever before the needs of the investors. Return without any regrets is the dictate of the moment on the capital markets which are marked by uncertainty and a high volatility. The real estate substance, 5.50 % interest rate and entry in the land register are the basis of our new bond. Investors know that they can rely on it.”

The securities prospectus, which is relevant for the exchange offer and the public offering, will be available after its approval by the Commission de Surveillance du Secteur Financier (CSSF) on the website of Eyemaxx Real Estate AG www.eyemaxx.com. The following needs to be considered in this respect.

DISCLAIMER:

This release is neither a financial analysis nor an advice or recommendation concerning financial instruments nor an offer, a request or an invitation to buy or sell securities of Eyemaxx Real Estate AG and is not for publication, circulation or distribution in or into the United States of America, to or in Australia, Canada, Japan or any other countries in which such a publication or distribution would be unlawful. An offering of bonds of

Eyemaxx Real Estate AG will be made exclusively through and on the basis of the securities prospectus approved by the competent supervisory authority together with possible addenda.

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About Eyemaxx Real Estate AG

Eyemaxx Real Estate AG is a real estate company with a long-standing successful track record, focussing on residential properties in Germany and Austria. In addition, Eyemaxx also realises commercial properties in central Europe. In the company's recent past its corporate strategy has also included hotels and serviced apartments as well as developing urban districts in Germany.

Eyemaxx' business activities take a dual-pronged approach. These include high-margin projects and also the continued expansion of its stocks of let commercial properties, which generate ongoing rental income and thus constant cash flows. In so doing, Eyemaxx uses the expertise offered by its experienced management team together with a strong team of real estate professionals, and also a well-established and broad network which opens up additional access to attractive properties and projects. As a result, the current project pipeline has been grown to a total of around EUR 902 million.

The shares of Eyemaxx Real Estate AG are listed in the General Standard of the Frankfurt Stock Exchange and in the direct market plus on the Vienna Stock Exchange. The company has also issued several bonds, which are likewise listed on the stock exchange.

You can find more information at www.eyemaxx.com

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IBAN: DE87 7955 0000 0011 6071 16 | BIC: BYLADEM1ASA