

FOURTH SUPPLEMENTARY PROSPECTUS

Soon Mining Limited ACN 603 637 083

1. IMPORTANT INFORMATION

This fourth supplementary prospectus (**Fourth Supplementary Prospectus**) relates to and is intended to be read with the prospectus issued by Soon Mining Limited (**Soon**) dated 17 July 2015 (**Prospectus**), the supplementary prospectus dated 31 July 2015, the second supplementary prospectus dated 16 October 2015 and the third supplementary prospectus dated 10 November 2015 (together, the **Disclosure Documents**) in relation to the offer of up to 22,500,000 Shares at an issue price of \$0.20 per Share to raise up to \$4,500,000, with oversubscriptions of up to a further 27,500,000 Shares at an issue price of \$0.20 per Share to raise up to a further \$5,500,000 (total maximum subscription of \$10,000,000).

This Fourth Supplementary Prospectus is dated 12 January 2016 and was lodged with the Australian Securities and Investments Commission (**ASIC**) on that date. Neither ASIC nor ASX Limited take any responsibility for the contents of this Fourth Supplementary Prospectus.

This Fourth Supplementary Prospectus supplements, and should be read together with, the Disclosure Documents. If there is any inconsistency between the Disclosure Documents and this Fourth Supplementary Prospectus, this Fourth Supplementary Prospectus will prevail. Other than as set out below, all details in relation to the Disclosure Documents remain unchanged. This Fourth Supplementary Prospectus will be issued with the Disclosure Documents as an electronic prospectus and may be accessed on the Company's website at www.soonmining.com.

Unless expressly stated, words and expressions in this Fourth Supplementary Prospectus have the meanings given to them in the Disclosure Documents (as relevant).

This is an important document and should be read in its entirety. If you do not understand it you should consult your professional advisers without delay.

2. EXTENSION OF THE OFFER

The Company advises that the Closing Date of the Offer has been extended and the revised Offer timetable is as follows:

Key Dates

Closing Date of the Offer	28 March 2016
Completion of Acquisition	30 March 2016
Expected despatch of holding statements	1 April 2016
Expected date of quotation of Shares on ASX	8 April 2016

All references to key dates in the Disclosure Documents shall be replaced with the key dates set out above. The above dates are indicative only. The Directors of the Company reserve the right to vary these dates, including to extend the Offer Period or to close the Offer early. The new date nominated will become the Closing date of the Offer.

3. STATUS OF THE OFFER

As at the date of this Fourth Supplementary Prospectus, the Company has received applications for 22,680,000 Shares for a total subscription amount of \$4,536,000.

As at the date of this Fourth Supplementary Prospectus, the Company has not issued any Shares under the Offer and its Shares have not been admitted to quotation on the ASX.

On 10 December 2015, the ASX issued to the Company a conditional letter of approval for admission to the official list of ASX (**Approval Letter**), which outlines the conditions that the Company must meet to be admitted to Official Quotation. In particular, the Company is endeavouring to provide evidence to the satisfaction of ASX that it has met Condition 7(a) of Listing Rule 1.1, namely that on admission there will be at least 400 holders each having a parcel of the main class of securities with a value of at least \$2,000, excluding restricted securities.

4. ASIC RELIEF

Pursuant to sections 723(3) and 724(1)(b) of the Corporations Act, the Shares offered under the Prospectus must be admitted to quotation within 3 months of the date of the Prospectus (**ASX Quotation Deadline**).

In addition, as the Company has stated in the Disclosure Documents that Shares will not be issued unless it has received subscriptions for at least 22,500,000 Shares (equating to \$4,500,000). Pursuant to section 724(1)(a) of the Corporations Act the Company must raise the minimum amount within 4 months of the date of the Prospectus (**Minimum Subscription Deadline**).

By a declaration under section 741(1)(b) of the Corporations Act dated 14 October 2015 (**ASIC Declaration**), ASIC has granted the Company an extension to the time periods set out in sections 723(1), 724(1)(a) and 724(1)(b) of the Corporations Act.

The ASIC Declaration operated to extend:

- the ASX Quotation Deadline so that it must be satisfied within 3 months of this Fourth Supplementary Prospectus; and
- the Minimum Subscription Deadline so that it must be satisfied within 4 months of the date of this Fourth Supplementary Prospectus.

5. RIGHT TO WITHDRAW

In accordance with section 724(2) of the Corporations Act, the Company hereby gives any applicant who, prior to the date of this Fourth Supplementary Prospectus, lodged an application for Shares

under the Disclosure Documents, the opportunity to withdraw their application within one month of this Fourth Supplementary Prospectus.

If you have lodged an Application Form prior to the date of this Fourth Supplementary Prospectus, you will have until 5.00pm Queensland time on 11 February 2016 to withdraw your application and request a refund. To withdraw an application, please send a written request signed by the original applicant to the Company's Share Registry at:

Boardroom Pty Ltd
Level 12, 255 George Street
Sydney NSW 2000

A refund cheque will be sent to the address set out in the application form previously lodged by the applicant. If you do not wish to withdraw your application, you do not need to take any further action.

Pending the issue of the Shares or payment of refunds pursuant to the Prospectus, all application monies will be held in trust in a separate bank account as required by the Corporations Act. Each Applicant agrees to waive the right to claim any interest on the application monies.

6. APPLICATION FORM

From the date of this Fourth Supplementary Prospectus, persons who wish to apply for Shares should use the Application Form which is attached to this Fourth Supplementary Prospectus. Applicants should not use the Application Form which is attached to the Disclosure Documents.

Other than set out above, all details in relation to the Disclosure Documents remain unchanged.

This Fourth Supplementary Prospectus is issued by the Company and its issue has been authorised by a resolution of its Directors.

Each Director has consented to the lodgement of this Fourth Supplementary Prospectus in accordance with section 720 of the Corporations Act and has not withdrawn that consent.

Dated: 12 / 01 / 2012

A handwritten signature in black ink, appearing to read 'Jeremiah Thum', with a stylized flourish at the end.

Jeremiah Thum
Non-Executive Director

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