



SPAFID CONNECT

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Diffusione presunta

Oggetto : UniCredit issues US\$1,250,000,000
3.750% Notes due 2022 and
US\$750,000,000 4.625% Notes due 2027

Testo del comunicato

Vedi allegato.



PRESS RELEASE

UniCredit issues US\$1,250,000,000 3.750% Notes due 2022 and US\$750,000,000 4.625% Notes due 2027

First transaction under new USD Global MTN Program

Leveraging on the positive market reaction to the new strategic plan ('Transform 2019'), and recent completion of the €13 billion rights issue, UniCredit SpA has successfully issued US\$1,250,000,000 3.750% Notes due on 12 April 2022 and US\$750,000,000 4.625% Notes due on 12 April 2027 (collectively, the "Notes") for a total amount of US\$ 2 billion.

The Notes represent the inaugural transaction under the newly established US\$30 billion Global MTN Program (the "Program"). Such innovative structure in Italy that combines 144A and RegS format allows UniCredit to distribute Notes to institutional investors globally.

The set-up of the Program represents an important step in the implementation of Transform 2019, allowing the bank to further diversify its funding sources and to establish a benchmark curve in USD over time.

The Notes have not been registered under the United States Securities Act of 1933, as amended (the "Securities Act"), and may only be sold (i) within the United States to qualified institutional buyers, as defined under Rule 144A of the Securities Act, in transactions exempt from registration under the Securities Act and (ii) outside the United States in accordance with Regulation S of the Securities Act or pursuant to another applicable exemption from registration.

Based on the book building process that allowed to gather more than US\$6 billion demand from over 200 investors distributed across the world, the following characteristics of the Notes have been set:

- for the 5 year tenor, coupon at 3.750%, paid semiannually, with an issue/re-offer price of 99.513%;
- for the 10 year tenor, coupon at 4.625%, paid semiannually, with an issue/re-offer price of 99.085%;

Given the very positive market feedback and the sizable orderbook, the initial guidance has been tightened considerably achieving a final issue spread equal to 200bps over the 5-year U.S. Treasury and 240bps over the 10-year U.S. Treasury respectively.



UniCredit Bank AG, Citigroup, Goldman Sachs, Morgan Stanley, Nomura and UBS have managed the placement and acted as Joint Bookrunners for the Notes.

The minimum denomination of the bond issue is US\$200,000 and US\$1,000 thereafter. The Settlement for both issues is due on 12 April 2017.

The rating assigned to UniCredit S.p.A.'s senior unsecured long term debt are: Baa1 (Moody's) / BBB- (S&P) / BBB+ (Fitch).

Milan, 06th April 2017

Contacts:

Media Relations Tel. +39 02 88623569; e-mail: MediaRelations@unicredit.eu

Investor Relations Tel. + 39 02 88621872; e-mail: InvestorRelations@unicredit.eu

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