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Oggetto : PRICING DEL PRESTITO
OBBLIGAZIONARIO SENIOR
GARANTITO

Testo del comunicato

Vedi allegato.



Press release

DOVALUE: PRICING DEL PRESTITO OBBLIGAZIONARIO SENIOR GARANTITO

Roma, 14 luglio, 2021 - doValue S.p.A. ("doValue" o la "Società") comunica che al completamento dell'attività di bookbuilding, in data odierna ha effettuato il pricing del prestito obbligazionario senior garantito con scadenza 2026 riservate ad alcuni investitori qualificati per un importo complessivo in linea capitale pari a €300 milioni ad un tasso fisso pari al 3.375% annuo con un prezzo di emissione pari al 100.0% (le "Obbligazioni"). Le Obbligazioni saranno garantite mediante garanzie personali di tipologia *senior* concesse da Altamira Asset Management e doValue Greece, soggette a talune limitazioni.

L'emissione e il regolamento delle Obbligazioni sono previsti per il 22 luglio 2021 e sono soggetti a condizioni di mercato standard.

È stata fatta richiesta di ammissione a quotazione delle Obbligazioni sul sistema multilaterale di negoziazione Euro MTF organizzato e gestito dalla Borsa del Lussemburgo. Pertanto, dalla data di emissione, le Obbligazioni saranno quotate sul sistema multilaterale di negoziazione Euro MTF dalla Borsa del Lussemburgo.

La Società ha ottenuto un rating per le Obbligazioni.

I proventi derivanti dall'emissione delle Obbligazioni saranno utilizzati dalla Società (i) per pagare anticipatamente e chiudere il contratto di finanziamento senior stipulato il 22 marzo 2019 (comprendendo gli interessi maturati e i relativi interest rate swap) (ii) per pagare le commissioni e le spese sostenute in relazione all'operazione, e (iii) per utilizzare la parte restante come liquidità per obiettivi d'impresa generali.

doValue, già doBank S.p.A., è il primo operatore in Sud Europa nei servizi di credit management e real estate per banche e investitori. Presente in Italia, Spagna, Portogallo, Grecia e Cipro, doValue vanta oltre 20 anni di esperienza nel settore e circa €160 miliardi (gross book value) di asset sotto la propria gestione. Con oltre 3.200 dipendenti, doValue fornisce un'offerta integrata di servizi: special servicing di NPL, UTP, early arrears, e posizioni performing, real estate servicing, master servicing, data processing e altri servizi ancillari per il credit management.

doValue è quotata sul Mercato Telematico Azionario gestito da Borsa Italiana S.p.A. e, includendo l'acquisizione di Altamira Asset Management e doValue Greece, ha registrato ricavi preliminari lordi pari a circa €418 milioni e un EBITDA esclusi gli elementi non ricorrenti di €125 milioni nel 2020.

Il presente comunicato stampa costituisce una comunicazione al pubblico di informazioni privilegiate da parte della Società, ai sensi del Regolamento (UE) 596/2014 (16 aprile 2014) e del Regolamento delegato (UE) 2016/1055 (29 giugno 2016).

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Sede Legale in Verona, Viale dell'Agricoltura, 7 – Iscrizione al Registro Imprese CCIAA di Verona CCIAA/NREA: VR/19260
Codice Fiscale n° 00390840239 e Partita IVA n° 02659940239 – Capitale Sociale € 41.280.000 interamente versato.

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The Notes and the guarantees thereof will not be, registered under the United States Securities Act of 1933, as amended (the "Securities Act"), or applicable state securities laws. Accordingly, the Notes will be offered only to qualified institutional buyers and to persons outside the United States in reliance on Rule 144A and Regulation S under the Securities Act, respectively. Unless so registered, the Notes may not be offered or sold in the United States except pursuant to an exemption from the registration requirements of the Securities Act and applicable state securities laws.

This announcement does not constitute an offer to sell or the solicitation of an offer to buy the Notes or any other security and shall not constitute an offer, solicitation or sale in the United States or in any jurisdiction in which, or to any persons to whom, such offering, solicitation or sale would be unlawful prior to registration or qualification under the securities laws of any jurisdiction.

The securities are not intended to be offered, sold or otherwise made available to and should not be offered, sold or otherwise made available to any retail investor in the EEA. For these purposes, a retail investor means a person who is one (or more) of: (i) a retail client as defined in point (11) of Article 4(1) of Directive 2014/65/EU (as amended, "MiFID II") or (ii) a customer within the meaning of Directive 2016/97/EU (as amended), where that customer would not qualify as a professional client as defined in point (10) of Article 4(1) of MiFID II. Consequently, no key information document required by Regulation (EU) No 1286/2014 (as amended, the "PRIIPs Regulation") for offering or selling the securities or otherwise making them available to retail investors in the EEA has been prepared and therefore offering or selling the securities or otherwise making them available to any retail investor in the EEA may be unlawful under the PRIIPs Regulation.

In member states of the EEA, this announcement and any offer of the securities referred to herein in any Member State of the European Economic Area ("EEA") will be made pursuant to an exemption under the Prospectus Regulation from the requirement to publish a prospectus for offers of the securities referred to herein. Accordingly, any person making or intending to make an offer in a Member State of Notes which are the subject of the offering contemplated may only do so in circumstances in which no obligation arises for the Issuers or any of the initial purchasers to publish a prospectus pursuant to Article 3 of the Prospectus Regulation, in each case, in relation to such offer. Neither the Issuers nor the initial purchasers have authorized, nor do they authorize, the making of any offer of Notes in circumstances in which an obligation arises for the Issuers or the initial purchasers to publish a prospectus for such offer. The expression "Prospectus Regulation" means Regulation (EU) 2017/1129.

The securities are not intended to be offered, sold or otherwise made available to and should not be offered, sold or otherwise made available to any retail investor in the United Kingdom ("UK"). For these purposes, a retail investor means a person who is one (or more) of: (i) a retail client, as defined in point (8) of Article 2 of Regulation (EU) No 2017/565 as it forms part of domestic law by virtue of the European Union (Withdrawal) Act 2018 ("EUWA"); or (ii) a customer within the meaning of the provisions of the FSMA and any rules or regulations made under the FSMA to implement Directive (EU) 2016/97, where that customer would not qualify as a professional client, as defined in point (8) of Article 2(1) of Regulation (EU) No 600/2014 as it forms part

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of domestic law by virtue of the EUWA. Consequently no key information document required by Regulation (EU) No 1286/2014 as it forms part of domestic law by virtue of the EUWA (the "UK PRIIPs Regulation") for offering or selling the Notes or otherwise making them available to retail investors in the UK has been prepared and therefore offering or selling the Notes or otherwise making them available to any retail investor in the UK may be unlawful under the UK PRIIPs Regulation.

In the UK, this announcement and any offer of the securities referred to herein in the UK will be made pursuant to an exemption under the Prospectus Regulation from the requirement to publish a prospectus for offers of the securities referred to herein. Accordingly, any person making or intending to make an offer in the UK of Notes which are the subject of the offering contemplated may only do so in circumstances in which no obligation arises for the Issuers or any of the initial purchasers to publish a prospectus pursuant to Article 3 of the UK Prospectus Regulation, in each case, in relation to such offer. Neither the Issuers nor the initial purchasers have authorized, nor do they authorize, the making of any offer of Notes in circumstances in which an obligation arises for the Issuers or the initial purchasers to publish a prospectus for such offer. The expression "UK Prospectus Regulation" means Regulation (EU) 2017/1129 as it forms part of domestic law by virtue of the EUWA.

This communication is being distributed only to, and is directed at persons who (i) have professional experience in matters relating to investments falling within Article 19(5) of the Financial Services and Markets Act 2000 (Financial Promotion) Order 2005, as amended (the "Financial Promotion Order") (ii) are persons falling within Article 49(2)(a) to (d) (high net worth companies, unincorporated associations, etc.) of the Financial Promotion Order, (iii) are outside the United Kingdom or (iv) are persons to whom an invitation or inducement to engage in investment activity (within the meaning of section 21 of the Financial Services and Markets Act 2000 in connection with the issue and sale of any securities may otherwise lawfully be communicated or caused to be communicated (all such persons together being referred to as "relevant persons"). This announcement is directed only at relevant persons and must not be acted on or relied on by persons who are not relevant persons. Any investment or investment activity to which this announcement relates is available only to relevant persons and will be engaged in only with relevant persons.

This announcement may include projections and other "forward-looking" statements within the meaning of applicable securities laws. Any such projections or statements reflect the current views of the Issuers about future events and financial performance. The use of any of the words "expect," "anticipate," "continue," "will," "project," "should," "believe," "plans," "intends" and similar expressions are intended to identify forward-looking information or statements. Although the Issuers believe that the expectations and assumptions on which such forward-looking statements and information are reasonable, undue reliance should not be placed on the forward-looking statements and information because the Issuers can give no assurance that such statements and information will prove to be correct. Since forward-looking statements and information address future events and conditions, by their very nature they involve inherent risks and uncertainties.

The forward-looking statements and information contained in this announcement are made as of the date hereof and the Issuers undertake no obligation to update publicly or revise any forward-looking statements or information, whether as a result of new information, future events or otherwise, unless so required by applicable securities laws.

The securities will not be listed on an Italian regulated market, therefore no documents or materials relating to the securities have been or will be submitted to the clearance procedure of the competent authority.

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