



MEDIOBANCA

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LIMITED LIABILITY COMPANY

CAPITAL EURO 442,988,970

REGISTERED OFFICE IN MILAN - PIAZZETTA ENRICO CUCCIA, 1

REGISTERED IN THE PUBLIC REGISTER OF COMPANIES IN MILAN

TAX CODE AND VAT NUMBER 00714490158

REGISTERED IN REGISTER OF BANKS AND BANKING GROUPS WITH NO. 10631.0

PARENT COMPANY OF MEDIOBANCA BANKING GROUP

NOTICE TO SECURITYHOLDERS

relating to the public offer of

“Issue of Up to 20.000 Autocallable Certificates linked to EUROSTOXX® Banks Index due 4th April 2022”

(the “Certificates”)

(Codice ISIN XS1775417378)

Issuer, Lead Manager

MEDIOBANCA - Banca di Credito Finanziario S.p.A.

Distributor

CheBanca! S.p.A.

In accordance with Paragraph 3 (iii) (Initial Reference Level) – Part A of the Issuer's Prospectus, dated 21st February 2018, it is hereby stated that the Issuer, in its role as Calculation Agent, has determined the Initial Reference Level of the Reference Item and it states the following definitive values:

ISIN Code	Reference Item	Issue Date	Initial Reference Level
XS1775417378	EUROSTOXX® Banks Index	26 March 2018	117,534

* The Initial Reference Level is equal to 95 per cent. of the official closing value of the Reference Item at the Valuation Time on the Issue Date.

Terms used herein and not otherwise defined shall have the same meaning ascribed to them in the Offering Documentation of the Certificates.



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The Certificates have been issued under the Prospectus (the "**Prospectus**") approved by the Central Bank of Ireland (the competent Irish Authority) on 21st February 2018. The Prospectus has been transmitted to Consob 21st February 2018, with a certificate of approval notified by the Central Bank of Ireland.

Full information on the Issuer and the Offer can be obtained only on the basis of the Offering Documentation. The Prospectus is available on the website of the Issuer and Lead Manager (www.mediobanca.com) and on the website of the Distributor (www.chebanca.it).

29 March 2018