MEDIOBANCA

LIMITED LIABILITY COMPANY
CAPITAL EUR 444,509,680.50
REGISTERED OFFICE IN MILAN - PIAZZETTA ENRICO CUCCIA, 1
REGISTERED IN THE PUBLIC REGISTER OF COMPANIES IN MILAN
VAT NUMBER 10536040966
REGISTERED IN REGISTER OF BANKS AND BANKING GROUPS WITH NO. 10631
PARENT COMPANY OF MEDIOBANCA BANKING GROUP

NOTICE OF RESULTS OF THE OFFER

Relating to the public offer of

Issue of up to EUR 500,000,000 Fixed Rate Notes due 16 February 2029 (the "Notes")

issued under the

Euro 40.000.000.000

Euro Medium Term Note Programme

SERIES NO: 634
TRANCHE NO: 1
ISIN CODE: XS2750224201

Issuer and Lead Manager

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

Manager of the Placement Network

UniCredit Bank GmbH, acting through its Milan Branch

Distributor

UniCredit S.p.A.

In accordance with Paragraph 10 (*Terms and Conditions of the Offer*) - Part B of the Issuer's Final Terms dated 22 January 2024, it is hereby stated as follows:

(i) the Offer Period for the captioned Notes ended on 13 February 2024;
(ii) 10,488 applications imputable to no. 10,396 applicants have been received;
(iii) all the Notes requested will be allotted on the Issue Date;
(iv) the Aggregate Nominal Amount of the Notes effectively placed is equal to EUR 232,534,000, represented by no. 232,534 Notes having each a Nominal Amount of EUR 1,000.

(v) The Aggregate Nominal Amount issued is equal to EUR 232,534,000.

Terms used herein and not otherwise defined shall have the same meaning ascribed to them in the Final Terms of the Notes.

The Notes will be issued under the Euro Medium Term Note Programme dated 28 December 2023, approved by the Central Bank of Ireland.

Full information on the Issuer and the Offer can be obtained only on the basis of the combination of the Base Prospectus and the Final Terms. The Base Prospectus and the Final Terms are available on the websites indicated in the Offering Documentation.

15 February 2024