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BOOK RUNNING LEAD MANAGER	REGISTRAR TO THE OFFER	COMPANY SECRETARY AND COMPLIANCE OFFICER
 Capital Advisors (P) Ltd PANTOMATH CAPITAL ADVISORS PRIVATE LIMITED Reg. office: Pantomath Nucleus House, Saki Vihar Road, Andheri East, Mumbai - 400072 Maharashtra, India. Telephone: +91-22 6194 6700, Email and Investor Grievance Id: ipo@pantomathgroup.com Website: www.pantomathgroup.com; Contact Person: Bharti Ranga; SEBI Registration No: INM000012110	 LINK INTIME INDIA PRIVATE LIMITED C-101, 247 Park, 1st Floor, L.B.S. Marg, Vikhroli West, Mumbai, 400 083, Maharashtra, India. Telephone: +91 22 4918 6200; Email/ Investor grievance email: aeroflexindustries.ipo@linkintime.co.in Website: www.linkintime.com; Contact person: Shanti Gopalkrishnan SEBI Registration No: INR000004058	Kinjal Kamlesh Shah, AEROFLEX INDUSTRIES LIMITED Plot No. 41, 42/13, 42/14 & 42/18, near Taloja MIDC, Village Chal, Behind IGPL, Panvel, Navi Mumbai - 410 208, Maharashtra, India. Telephone: +91 22 61467100/ 22 22850888; Email ID: corporate@aeroflexindia.com; Website: www.aeroflexindia.com Investors can contact the Company Secretary and Compliance Officer, the Book Running Lead Manager or the Registrar to the Offer in case of any pre-Offer or post-Offer related grievances, such as non-receipt of letters of Allotment, non-credit of Allotted Equity Shares in the respective beneficiary account, nonreceipt of refund orders or non-receipt of funds by electronic mode, etc. For all Offer related queries and for redressal of complaints, investors may also write to the BRLM.

AVAILABILITY OF THE RHP: Investors are advised to refer to the RHP and the “Risk Factors” beginning on page 37 of the RHP before applying in the Offer. A copy of the RHP will be made available on the website of SEBI at www.sebi.gov.in and is available on the websites of the BRLM, Pantomath Capital Advisors Private Limited at www.pantomathgroup.com, the website of the Company, Aeroflex Industries Limited at www.aeroflexindia.com and the websites of the Stock Exchanges, for BSE at www.bseindia.com and for NSE Limited at www.nseindia.com.

AVAILABILITY OF BID CUM APPLICATION FORM: Bid cum Application Form can be obtained from the Registered Office of our Company, **AEROFLEX INDUSTRIES LIMITED:** Telephone: +91 91 22 61467100/ 22 22850888; **BRLM:** Pantomath Capital Advisors Private Limited, Telephone: +91-22 6194 6700 and **Syndicate Members: Pantomath Capital Advisors Private Limited**, Telephone: +91-22 6194 6700 and **Pentagon Stock Brokers Private Limited (formerly known as Pantomath Stock Brokers Private Limited)**, Tel.: +91 22 42577000 and at selected locations of Sub-Syndicate Members (as given below), Registered Brokers, SCSBs, Designated RTA Locations and Designated CDP Locations for participating in the Offer. Bid cum Application Forms will also be available on the websites of the Stock Exchanges at www.bseindia.com and www.nseindia.com and at all the Designated Branches of SCSBs, the list of which is available on the websites of the Stock Exchanges and SEBI.

SUB-SYNDICATE MEMBERS: Asit C Mehta Investments Ltd, Axis Securities Limited, Choice Equity Broking Private Limited, ICICI Securities Ltd, IIFL Securities Ltd, JM Financial Services Limited, LKP Securities, Marwadi Shares & Finance, Motilal Oswal Securities Limited, Nirmal Bang Securities Pvt Limited, Pentagon Stock Brokers Private Limited, Pravin

Ratilal Share & Stock Brokers Limited, RKSV Securities Pvt Ltd., RR Equity Brokers Private Limited, Sharekhan Ltd.; SMC Global Securities Ltd.; Systematix Shares and Stocks (India) Limited, YES Securities (India) Limited and Zerodha Broking Limited.

ESCROW COLLECTION BANK(S): Kotak Mahindra Limited. | **REFUND BANK(S):** Kotak Mahindra Limited.

PUBLIC OFFER ACCOUNT BANK(S): Axis Bank Limited. | **SPONSOR BANKS:** Kotak Mahindra Limited and Axis Bank Limited.

UPI: UPI Bidders can also Bid through UPI Mechanism.

All capitalised terms used herein and not specifically defined shall have the same meaning as ascribed to them in the RHP.

Place: Mumbai

Date: August 14, 2023

For **AEROFLEX INDUSTRIES LIMITED**

On behalf of the Board of Directors

Sd/-

Kinjal Kamlesh Shah

Company Secretary & Compliance Officer

AEROFLEX INDUSTRIES LIMITED is proposing, subject to applicable statutory and regulatory requirements, receipt of requisite approvals, market conditions and other considerations, to undertake an initial public offer of its Equity Shares and has filed the RHP with RoC on August 11, 2023. The RHP shall be available on the website of SEBI at www.sebi.gov.in, websites of the Stock Exchanges i.e., BSE at www.bseindia.com and NSE at www.nseindia.com and is available on the websites of the BRLM, i.e. Pantomath Capital Advisors Private Limited at www.pantomathgroup.com. Any potential investors should note that investment in equity shares involves a high degree of risk and for details relating to such risk, please see the section titled “Risk Factors” on page 37 of the RHP. Potential investors should not rely on the DRHP filed with SEBI for making any investment decision. Specific attention of the investors is invited to “Risk Factors” beginning on page 37 of the RHP.

Investor should note that investment in equity shares involves a high degree of risk and for details relating to such risks, please see the section titled ‘Risk Factors’ beginning on page 37 of the RHP. Potential investors should not rely on the DRHP for making any investment decision. 1- The Equity Shares have not been and will not be registered under the United States Securities Act of 1933, as amended (the “**U.S. Securities Act**”) or any other applicable law of the United States and, unless so registered, may not be offered or sold within the United States except pursuant to an exemption from, or in a transaction not subject to, the registration; requirements of the U.S. Securities Act and applicable state securities laws. Accordingly, the Equity Shares are being offered and sold (a) only to persons reasonably believed to be (i) “qualified institutional buyers” (as defined in Rule 144A under the U.S. Securities Act and referred to as ‘U.S. QIBs’) in transactions exempt from the registration requirements of the U.S. Securities Act, and (ii) Qualified Purchasers, as defined in Section 2(a)(51) of the U.S. investment Company Act of 1940, and (b) outside the United States in offshore transactions in compliance with Regulation S and the applicable laws of the jurisdiction where those offers and sales are made. There will be no public offering of the Equity Shares in the United States.

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