

Hong Kong Exchanges and Clearing Limited, The Stock Exchange of Hong Kong Limited ("Stock Exchange") and Hong Kong Securities Clearing Company Limited ("HKSCC") take no responsibility for the contents of this announcement, make no representation as to its accuracy or completeness and expressly disclaim any liability whatsoever for any loss howsoever arising from or in reliance upon the whole or any part of the contents of this announcement.

Unless otherwise defined, capitalised terms used in this announcement shall have the same meanings as those defined in the prospectus (the "Prospectus") of Royal Catering Group Holdings Company Limited (the "Company") dated 1 August 2016.

This announcement is for information purposes only and does not constitute an invitation or offer to acquire, purchase or subscribe for shares or other securities of the Company. Potential investors should read the Prospectus carefully for detailed information about the Placing described below before deciding whether or not to invest in the Placing Shares thereby being offered.

Royal Catering Group Holdings Company Limited

皇璽餐飲集團控股有限公司

(Incorporated in the Cayman Islands with limited liability)

LISTING ON THE GROWTH ENTERPRISE MARKET OF THE STOCK EXCHANGE OF HONG KONG LIMITED BY WAY OF PLACING

**Number of Placing Shares : 500,000,000 Shares (subject to the Offer
Size Adjustment Option)**

**Placing Price : Not more than HK\$0.16 per Placing Share
and not less than HK\$0.11 per Placing
Share plus brokerage fee of 1.0%, SFC
transaction levy of 0.0027% and Stock
Exchange trading fee of 0.005%
(payable in full on application and
subject to refund)**

Nominal value : HK\$0.01 per Share

Stock code : 8300

Sole Sponsor

RaffAello

Sole Bookrunner and Sole Lead Manager

RaffAello
Securities (HK) Ltd

Printed copies of this prospectus are available, for information purpose only, from 5:00 p.m. to 6:00 p.m. on Monday, 1 August 2016 and during normal office hours from 9:00 a.m. to 6:00 p.m. on Tuesday, 2 August 2016 at the offices of (i) RaffAello Securities (HK) Limited at Rooms 2002 and 2002B, 20th Floor, Tower Two, Lippo Centre, 89 Queensway, Admiralty, Hong Kong and (ii) Koala Securities Limited at Room 803, 8th Floor, Hong Kong Chinese Bank Building, 61 Des Voeux Road Central, Hong Kong.

The Company is initially offering 500,000,000 Placing Shares for subscription by way of Placing at the Placing Price, on and subject to the terms and conditions as set out in the Prospectus and the Underwriting Agreement. It is expected that the Underwriters, on behalf of the Company, will conditionally place up to 500,000,000 Placing Shares at the Placing Price to selected individual, professional, institutional and/or other investors.

In addition, the Company has granted the Offer Size Adjustment Option to the Sole Lead Manager (for itself and on behalf of the Underwriters) under the Underwriting Agreement pursuant to which the Sole Lead Manager (for itself and on behalf of the Underwriters) may, at any time up to Tuesday, 2 August 2016, exercise the Offer Size Adjustment Option to require the Company to allot and issue up to 75,000,000 additional Shares at the Placing Price, representing 15% of the initial number of the Placing Shares, on the same terms as those applicable to the Placing, solely to cover any over-allocation in the Placing.

The Shares to be issued pursuant to the Offer Size Adjustment Option will not be used for price stabilisation purpose and is not subject to the Securities and Futures (Price Stabilizing) Rules (Chapter 571W of the Laws of Hong Kong).

Application has been made by the Company to the Stock Exchange for the granting of the approval for the listing of, and permission to deal in, the Shares issued and to be issued pursuant to the Capitalisation Issue, the Placing and any Shares which may fall to be allotted and issued upon the exercise of the Offer Size Adjustment Option or any options that may be granted under the Share Option Scheme as described in the Prospectus. In the event that the Offer Size Adjustment Option is exercised, an announcement will be made by the Company on the Stock Exchange's website at www.hkexnews.hk and the Company's website at www.hkrcg.com.

Applications for the Placing Shares will only be considered on the basis of the terms and conditions as set out in the Prospectus and the Underwriting Agreement.

The Placing is conditional upon the fulfillment of the conditions as set out in the paragraph headed "Structure and Conditions of the Placing — Conditions of the Placing" in the Prospectus. If such conditions are not fulfilled or (where applicable) waived by the Sole Lead Manager (for itself and on behalf of the Underwriters) in accordance with the terms and conditions of the Underwriting Agreement on or before the dates and times as specified therein, the Placing shall lapse and thereafter, all monies received will be refunded to the subscribers of the Placing without interest and the Stock Exchange will be notified immediately. Notice of lapse of the Placing will be published on the Stock Exchange's website at www.hkexnews.hk and the Company's website at www.hkrcg.com on the next Business Day after such lapse. Prospective investors of the Placing should note that the Sole Lead Manager (for itself and on behalf of the Underwriters) is entitled to terminate the Underwriting Agreement by giving notice in writing to the Company upon the occurrence of certain events set out under the paragraph headed "Grounds for termination" in the section headed "Underwriting" in the Prospectus at any time prior to 8:00 a.m. (Hong Kong time) on the Listing Date.

Subject to the granting of the approval for the listing of, and permission to deal in, the Shares on GEM as mentioned in the Prospectus and the compliance with the stock admission requirements of HKSCC, the Shares will be accepted as eligible securities by HKSCC for deposit, clearance and settlement in CCASS with effect from the Listing Date, or on any other date as determined by HKSCC. Settlement of transactions between participants of the Stock Exchange is required to take place in CCASS on the

second Business Day after any trading day. All activities under CCASS are subject to the General Rules of CCASS and CCASS Operational Procedures in effect from time to time. All necessary arrangements have been made for the Shares to be admitted into CCASS.

The Placing Price is currently expected to be fixed by agreement among the Sole Lead Manager (for itself and on behalf of the Underwriters) and the Company on the Price Determination Date. The Price Determination Date is expected to be on or around Wednesday, 3 August 2016. The Placing Price will not be more than HK\$0.16 and is currently expected to be not less than HK\$0.11 per Share unless otherwise announced. If the Company and the Sole Lead Manager (for itself and on behalf of the Underwriters) are unable to reach an agreement on the Placing Price on the Price Determination Date or such later date as may be agreed between the Company and the Sole Lead Manager (for itself and on behalf of the Underwriters), the Placing will not become unconditional and will lapse immediately. In such case, an announcement will be made immediately by the Company on the Stock Exchange's website at www.hkexnews.hk and the Company's website at www.hkrcg.com. The Sole Lead Manager (for itself and on behalf of the Underwriters) may with the consent of the Company reduce the indicative Placing Price range below such indicative Placing Price range as stated in the Prospectus at any time prior to the Price Determination Date. If this occurs, a notice of reduction of the indicative Placing Price range will be published on the Stock Exchange's website at www.hkexnews.hk and the Company's website at www.hkrcg.com.

Announcement of the final Placing Price, the level of indication of interests in the Placing and the basis of allocations of the Placing Shares will be published on the Stock Exchange's website at www.hkexnews.hk and the Company's website at www.hkrcg.com on or before Friday, 5 August 2016.

The Company will not issue any temporary certificates or evidence of title. No receipt will be issued for subscription monies for the Placing Shares. Share certificates for the Placing Shares will only become valid certificates of title when the Placing has become unconditional in all respects and the Underwriting Agreement has not been terminated in accordance with its terms prior to 8:00 a.m. (Hong Kong time) on the Listing Date.

Dealings in the Shares on GEM are expected to commence at 9:00 a.m. on Monday, 8 August 2016. Shares will be traded in board lot of 20,000 Shares each. The stock code for the Shares is 8300.

By order of the Board
Royal Catering Group Holdings Company Limited
Wong Man Wai
Chairman, Chief Executive Officer and Executive Director

Hong Kong, 1 August 2016

As at the date of this announcement, the executive Directors are Mr. Wong Man Wai, Mr. Chan Chak To Raymond and Ms. Lam Wai Kwan; and the independent non-executive Directors are Mr. Ma Yiu Ho Peter, Mr. Cheng Wing Hong and Mr. Cai Chun Fai.

This announcement, for which the Directors collectively and individually accept full responsibility, includes particulars given in compliance with the GEM Listing Rules for the purpose of giving information with regard to the Company. The Directors, having made all reasonable enquiries, confirm that, to the best of their knowledge and belief, (i) the information contained in this announcement is accurate and complete in all material respects and not misleading or deceptive; (ii) there are no other matters the omission of which would make any statement herein or this announcement misleading; and (iii) all opinions expressed in this announcement have been arrived at after due and careful consideration and are founded on bases and assumptions that are fair and reasonable.

This announcement and a copy of the Prospectus will remain on the Stock Exchange's website at www.hkexnews.hk, and in the case of the announcement, on the "Latest Company Announcements" page for at least 7 days from the date of its posting. This announcement and a copy of the Prospectus will also be published on the Company's website at www.hkrcg.com.