

IMPORTANT

If you are in any doubt about any of the contents of this [REDACTED], you should obtain independent professional advice.



Zhongzhi Pharmaceutical Holdings Limited

中智藥業控股有限公司

(incorporated in the Cayman Islands with limited liability)

[REDACTED]

Number of [REDACTED] : [REDACTED] Shares
Number of [REDACTED] Shares : [REDACTED] Shares (Subject to reallocation)
Number of [REDACTED] : [REDACTED] Shares (Subject to reallocation)
[REDACTED] : Not more than HK\$[REDACTED] per [REDACTED] and expected to be not less than HK\$[REDACTED] per [REDACTED] (payable in full on application in Hong Kong dollars, subject to refund, plus brokerage fee of 1%, SFC transaction levy of 0.0027% and Stock Exchange trading fee of 0.005%)
Nominal value : HK\$0.01 per Share
Stock code : [●]

Sole Sponsor, [REDACTED]



Bookrunner and Lead Manager

[REDACTED]

Financial Advisor



Hong Kong Exchanges and Clearing Limited, The Stock Exchange of Hong Kong Limited and Hong Kong Securities Clearing Company Limited take no responsibility for the contents of this [REDACTED], 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 [REDACTED].

A copy of this [REDACTED] having attached thereto the documents specified in Appendix VI headed “Documents Delivered to the Registrar of Companies in Hong Kong and available for inspection” to this [REDACTED] has been registered with the Registrar of Companies in Hong Kong as required by Section 342C of the Companies (Winding Up and Miscellaneous Provisions) Ordinance of Hong Kong (Chapter 32 of the Laws of Hong Kong). Neither the Securities and Futures Commission of Hong Kong nor the Registrar of Companies in Hong Kong takes any responsibility as to the contents of this [REDACTED] or any other documents referred to above.

The [REDACTED] is expected to be fixed by an agreement between the Global Coordinator (for itself and on behalf of the Underwriters) and the Company on or around [REDACTED], or such other time and date as may be agreed between the Global Coordinator (for itself and on behalf of the Underwriters) and the Company, but in any event no later than [REDACTED]. If, for any reason, the [REDACTED] is not agreed between the Global Coordinator (for itself and on behalf of the Underwriters) and the Company by [REDACTED], the [REDACTED] will not proceed and will lapse. Applicants for [REDACTED] under the [REDACTED] are required to pay, on application, the maximum [REDACTED] of HK\$[REDACTED] (plus 1% brokerage, 0.0027% SFC transaction levy and 0.005% Stock Exchange trading fee) for each [REDACTED]. The Global Coordinator (for itself and on behalf of the Underwriters) may, with the consent of the Company, reduce the indicative [REDACTED] range stated in this [REDACTED] at any time prior to the morning of the last day for lodging applications under the [REDACTED]. In such case, the Company will, as soon as practicable following the decision to make any such reduction, and in any event not later than the morning of the last day for lodging applications under the [REDACTED], cause to be published in [●] (in English) and [●] (in Chinese) and on the Stock Exchange’s website at www.hkexnews.hk and the Company’s website at www.zeus.cn notice of the reduction in the indicative [REDACTED] range.

Prospective investors of the [REDACTED] should note that the Global Coordinator (for itself and on behalf of the Underwriters) are entitled to terminate their obligations under the Underwriting Agreements by notice in writing to be given by the Global Coordinator (for itself and on behalf of the Underwriters) upon the occurrence of any of the events set forth under the “Underwriting” section in this [REDACTED] at any time prior to [REDACTED].

Prior to making an investment decision, prospective investors should consider carefully all of the information set out in this [REDACTED], including the risk factors set out under the “Risk Factors” section in this [REDACTED].

The [REDACTED] have not been and will not be registered under the U.S. Securities Act and may not be offered, sold, pledged or transferred, except pursuant to an exemption from, or in a transaction not subject to, the registration requirements of the U.S. Securities Act and in accordance with any applicable U.S. state securities laws. The [REDACTED] are being offered and sold only outside the United States in offshore transactions in reliance on Regulation S.