

IMPORTANT

IMPORTANT: If you are in any doubt about the contents of this prospectus, you should obtain independent professional advice.



MAIYUE TECHNOLOGY LIMITED

邁越科技股份有限公司

(Incorporated in the Cayman Islands with limited liability)

GLOBAL OFFERING

Number of Offer Shares under the Global Offering	:	125,000,000 Shares (Subject to the Over-allotment Option)
Number of Hong Kong Offer Shares	:	12,500,000 Shares (Subject to reallocation)
Number of International Placing Shares	:	112,500,000 Shares (Subject to reallocation and the Over-allotment Option)
Offer Price	:	Not more than HK\$1.40 per Offer Share (payable in full on application in Hong Kong dollars, subject to refund, plus brokerage fee of 1%, SFC transaction levy of 0.0027%, AFRC transaction levy of 0.00015% and Stock Exchange trading fee of 0.00565%) and expected to be not less than HK\$1.05 per Offer Share
Nominal value	:	HK\$0.01 per Share
Stock code	:	2501

Sole Sponsor



Sole Overall Coordinator, Joint Global Coordinator, Joint Bookrunner and Joint Lead Manager



Joint Global Coordinators, Joint Bookrunners and Joint Lead Managers (in alphabetical order)



Joint Bookrunners and Joint Lead Managers (in alphabetical order)



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 prospectus, 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 prospectus.

A copy of this prospectus, having attached thereto the documents specified in "Documents delivered to the Registrar of Companies and On Display" in Appendix V to this prospectus, has been registered by the Registrar of Companies in Hong Kong as required by section 342C of the Companies (Winding Up and Miscellaneous Provisions) Ordinance (Chapter 32 of the Laws of Hong Kong). The Securities and Futures Commission of Hong Kong and the Registrar of Companies in Hong Kong take no responsibility for the contents of this prospectus or any of the other documents referred to above.

The final Offer Price is expected to be fixed by agreement between our Company and the Sole Overall Coordinator (for itself and on behalf of the Underwriters) currently on the Price Determination Date, which is scheduled on or about Wednesday, 4 October 2023, or such later date as may be agreed between our Company and the Sole Overall Coordinator (for itself and on behalf of the Underwriters). The Offer Price will not be more than HK\$1.40 per Share and is currently expected to be not less than HK\$1.05 per Share unless otherwise announced. Applicants for the Hong Kong Offer Shares are required to pay, on application, the maximum Offer Price of HK\$1.40 per Share together with a brokerage fee of 1%, SFC transaction levy of 0.0027%, AFRC transaction levy of 0.00015% and Stock Exchange trading fee of 0.00565% subject to refund if the Offer Price as finally determined should be lower than HK\$1.40 per Offer Share.

The Sole Overall Coordinator (for itself and on behalf of the Underwriters) may, with our consent, extend or reduce the indicative Offer Price range stated in this prospectus (which is HK\$1.05 to HK\$1.40 per Share) at any time on or before the morning of the last day for lodging applications under the Hong Kong Public Offer. In such a case, notices of the extension or reduction of the indicative Offer Price range will be published on the Stock Exchange's website at www.hkexnews.hk and our Company's website at www.maiyuesoft.com not later than the morning of the day which is the last day for lodging applications under the Hong Kong Public Offer. If, for any reason, the Offer Price is not agreed between the Sole Overall Coordinator (for itself and on behalf of the Underwriters) and our Company on or before Wednesday, 4 October 2023, the Global Offering (including the Hong Kong Public Offer) will not proceed and will lapse. See "Structure and Conditions of the Global Offering" and "How to Apply for Hong Kong Offer Shares" for further details.

The Offer Shares 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 Offer Shares are being offered and sold only outside the United States in offshore transactions in reliance on Regulation S.

Prospective investors of the Global Offering should note that the obligations of the Underwriters under the Underwriting Agreements are subject to termination by notice in writing to our Company given by the Sole Overall Coordinator (for itself and on behalf of the Underwriters) upon the occurrence of any of the events set out under "Underwriting — Underwriting Arrangements and Expenses — Hong Kong Public Offer — Grounds for Termination" at any time prior to 8:00 a.m. (Hong Kong time) on the Listing Date. Should the Sole Overall Coordinator (for itself and on behalf of the Underwriters) terminate the Underwriting Agreements in accordance with the terms of the Underwriting Agreements, the Global Offering will not proceed and will lapse.

ATTENTION

We have adopted a fully electronic application process for the Hong Kong Public Offer. We will not provide printed copies of this prospectus or printed copies of any application forms to the public in relation to the Hong Kong Public Offer.

This prospectus is available at the website of the Hong Kong Stock Exchange at www.hkexnews.hk and our website at www.maiyuesoft.com. If you require a printed copy of this prospectus, you may download and print from the website addresses above.

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IMPORTANT NOTICE TO INVESTORS: FULLY ELECTRONIC APPLICATION PROCESS

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This prospectus is available at the website of the Hong Kong Stock Exchange at www.hkexnews.hk under the “HKEXnews > New Listings > New Listing Information” section, and our website at www.maiyuesoft.com. If you require a printed copy of this prospectus, you may download and print from the website addresses above.

To apply for the Hong Kong Offer Shares, you may:

- (1) apply online via the **HK eIPO White Form** service through the designated website at www.hkeipo.hk or in the **IPO App** (which can be downloaded by searching “**IPO App**” in App Store or Google Play or downloaded at www.hkeipo.hk/IPOApp or www.tricorglobal.com/IPOApp); or
- (2) apply through the **CCASS EIPO** service to electronically cause HKSCC Nominees to apply on your behalf, including by:
 - i. instructing your **broker** or **custodian** who is a CCASS Clearing Participant or a CCASS Custodian Participant to give **electronic application instructions** via CCASS terminals to apply for the Hong Kong Offer Shares on your behalf; or
 - ii. (if you are an existing **CCASS Investor Participant**) giving **electronic application instructions** through the CCASS Internet System (<https://ip.ccass.com>) or through the CCASS Phone System by calling +852 2979 7888 (using the procedures in HKSCC’s “An Operating Guide for Investor Participants” in effect from time to time). HKSCC can also input **electronic application instructions** for CCASS Investor Participants through HKSCC’s Customer Service Centre at 1/F, One & Two Exchange Square, 8 Connaught Place, Central, Hong Kong by completing an input request.

If you have any question about the application online via the **HK eIPO White Form** service for the Hong Kong Offer Shares, you may call the enquiry hotline of our Hong Kong Share Registrar, Tricor Investor Services Limited, at +852 3907 7333 on the following dates:

Thursday, 28 September 2023 — 9:00 a.m. to 6:00 p.m.
Friday, 29 September 2023 — 9:00 a.m. to 6:00 p.m.
Tuesday, 3 October 2023 — 9:00 a.m. to 6:00 p.m.
Wednesday, 4 October 2023 — 9:00 a.m. to 12:00 noon

We will not provide any physical channels to accept any application for the Hong Kong Offer Shares by the public. The contents of the electronic version of this prospectus are identical to the printed prospectus as registered with the Registrar of Companies in Hong Kong pursuant to section 342C of the Companies (WUMP) Ordinance.

If you are an **intermediary, broker** or **agent**, please remind your customers, clients or principals, as applicable, that this prospectus is available online at the website addresses above.

Please refer to the section headed “How to Apply for Hong Kong Offer Shares” in this prospectus for further details of the procedures through which you can apply for the Hong Kong Offer Shares electronically.

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You may apply through the **HK eIPO White Form** service or give or cause your broker or custodian who is a CCASS Clearing Participant or a CCASS Custodian Participant to give **electronic application instructions** for a minimum of 2,000 Hong Kong Offer Shares. Instructions for more than 2,000 Hong Kong Offer Shares must be in one of the numbers set out in the table. You are required to pay the amount next to the number you select.

No. of Hong Kong Offer Shares applied for	Amount payable on application	No. of Hong Kong Offer Shares applied for	Amount payable on application	No. of Hong Kong Offer Shares applied for	Amount payable on application
	<i>HK\$</i>		<i>HK\$</i>		<i>HK\$</i>
2,000	2,828.24	90,000	127,270.71	2,000,000	2,828,238.00
4,000	5,656.48	100,000	141,411.90	2,500,000	3,535,297.50
6,000	8,484.71	200,000	282,823.80	3,000,000	4,242,357.00
8,000	11,312.95	300,000	424,235.70	3,500,000	4,949,416.50
10,000	14,141.19	400,000	565,647.60	4,000,000	5,656,476.00
20,000	28,282.38	500,000	707,059.50	4,500,000	6,363,535.50
30,000	42,423.56	600,000	848,471.40	5,000,000	7,070,595.00
40,000	56,564.75	700,000	989,883.30	5,500,000	7,777,654.50
50,000	70,705.96	800,000	1,131,295.20	6,000,000	8,484,714.00
60,000	84,847.15	900,000	1,272,707.10	6,250,000*	8,838,243.76
70,000	98,988.34	1,000,000	1,414,119.00		
80,000	113,129.52	1,500,000	2,121,178.50		

* Maximum number of Hong Kong Offer Shares you may apply for.

No application for any other number of Hong Kong Offer Shares will be considered and any such application is liable to be rejected.