SYNDEX PORTAL USER GUIDE



The Syndex Portal provides information about your investment in NZPM Co-operative through enabling you to view your investment portfolio and share transactions, access key shareholder documents such as your Year-End Statements, Graded Cash Statements and Distribution Statements (Dividend Payment Notices), and apply for new shares.

This user guide has been created to help you quickly navigate to these key areas of the portal.

About Syndex

Syndex is an online investment trading platform provider for issuers and investors. NZPM uses Syndex services to manage shareholder investments. Syndex have created the Portal to provide investors with increased transparency and trading efficiencies.

Accessing the Portal

To access your portal, **you will need to first activate your account** through the link emailed by Syndex. Once activated you can continue to login <u>here</u> or via the Syndex website. Your portal account will show you information about all your investments held in NZPM including your personal, company and trust investments.

You will be asked to set up your account details which will include completing your Anti-Money Laundering (AML) Identity Verification. This is a legislative requirement that NZPM must comply with.

syndex. NZ

NZPM co-operative

Dear NZPM, Welcome to Syndex

NZPM Group Limited is delighted to invite you to activate your new portal account. This is managed on Syndex, a secure, cloud-based platform that will provide you with all you need to manage your investments with NZPM Group. Imited. Communications relating to your investments will be conducted via our online portal. Once your portal account has been activated you can login here.

How to activate your account

Simply click "Activate My Account" below to confirm your email address, create your account password, and get the process underway.

Activate my Accou



Viewing your Investment Portfolio

To view your current shareholding and transaction history click the '**My Investments' tab**.

Click into the **'Portfolio' tab** to find your current investment balances.



Then to view the transaction history for each investment, click the corresponding arrow on the far left.

co-operative			Dashboard	My Investments	~7 N	larkets	Communic	ations		(
My Investments Your current investme	S ent holdings									
Portfolio	Transactions	Income	Performance							
	Account 👻	Issue 👻	Manager 🕆 👻	Asset Class ⊸ Issue⊺	Гуре 👻	Unit No.	Currency 👻	Current Quantity	Amount Invested	Latest Valuation
~ Actions	NZPM Sample Account 1	NZPM - RPS Floating	NZPM Group Limited	Private	Equity	NZPM1234	NZD	10.000	\$10,000.00	
Event		Effective Date		Quantity	v	/alue Paid	Unit/Share Price		Original Purchase Valu	e
New Issue		1 Dec 2022		10		\$10.00	\$ 1.00		\$10,000.0	0
New Issue		1 Sept 2022		100		\$100.00	\$ 1.00		\$10,000.0	0
New Issue		1 Jun 2022		25		\$25.00	\$ 1.00		\$10,000.0	0
New Issue		1 Mar 2022		23		\$23.00	\$ 1.00		\$10,000.0	0
New Issue		1 Dec 2021		68		\$68.00	\$ 1.00		\$10,000.0	0
New Issue		1 Sept 2021		78		\$78.00	\$ 1.00		\$10,000.0	0

My investments

How to apply for new Redeemable Preference Shares

To navigate to the Share Application page, go to the **'Dashboard' tab** and click the 'View All' button in the 'Live Markets' section. Alternatively, you can click on the 'Live Markets' option on the 'Markets' drop-down.

N2 co-	operative	III Dashboard	My Investments	✓ Markets	Communications		0
	Market Activity	© ∽ ^{2 Fe}	llo NZPM	Live Markets My Markets Activity	Notifications		
	Live Markets	© ^	Account Manager	Type Currency	Messages	^	
	RETAIL				NZPM Group Limited Redeemable Preference Shares – Maximum	29 Nov 2022	
	NZPM - RPS 24 Month Fi 2022 Dec	xed -	\$120,00 NZD	0.00			
	MIN INVESTMENT: NZD 250						
	Find out more		NZPM Sample 1 NZPM Sample 2				
	NZPM RPS 48 Month Fi 2022 Dec Prinste Equity	xed -		View Portfolio			
	MIN INVESTMENT: NZD 250						
	Find out more						
	v	W All					

Then proceed to the 'Primary' tab which lists the share investment options for NZPM. There are four Redeemable Preference Share options: three fixed term options of 24, 36 and 48 months and a floating option. A fixed term option is an investment that earns a fixed dividend rate for a fixed period of time and cannot be redeemed until the end of the fixed period.

Click the 'Details' button on the specific share issue you wish to apply for. Here you will find information on the share issue, including the Product Disclosure Statement (Found under the 'Documents Tab' as shown on the next page).

NZPM

M perat	ive				II Dashboard	🛛 My	Investments	≁ [™] Markets	Communications			0
Live Markets Active offers in the Syndex Primary Market												
::	Opportu	nities	Primary		Secondary	Periodic						
		Manager	Ŷ	Issue		Issue Type	Currency	Total Units/Shares	Minimum Investment	Minimum Investment Value	Offer End Date	
De	etails	NZPM Group Lin	nited	NZPM - R 2022 Dec	PS 24 Month Fixed -	Private Equity	NZD	Open Fund	250	\$ 250.00	Open	
De	etails	NZPM Group Lin	nited	NZPM - R 2022 Dec	PS 48 Month Fixed -	Private Equity	NZD	Open Fund	250	\$ 250.00	Open	
De	etails	NZPM Group Lin	nited	NZPM - R 2022 Dec	PS 36 Month Fixed -	Private Equity	NZD	Open Fund	250	\$ 250.00	Open	
De	etails	NZPM Group Lin	nited	NZPM - R	PS Floating	Private Equity	NZD	Open Fund	250	\$ 250.00	Open	
De	etails	NZPM Group Lin	nited	NZPM - C	Irdinary Shares	Private Equity	NZD	Open Fund	10,000	\$ 10,000.00	Open	
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Click the **'Apply' button** to navigate through the application process.

All applications will have to complete AML verification requirements before being accepted by the Board. This is required for all directors and shareholders (holding more than 25%) of a company, and all trustees and some beneficiaries of Trusts.

NZPM co-operative	# Dashboard	My Investments	~ Markets	Communications	0
NZPM - RPS 24 NZPM Group Limited	4 Month Fixed - 202	22 Dec	RETAIL	\bigcirc	
Issue Type Offer End Date Financial Year End	Private Equity Total Units/S 1 Dec 2023 Minimum Inv 31 Mar 2023 Minimum Inv	hares estment Quantity 250 estment Value \$	0 Jnit/Share(s) 250.00 NZD		
Apply O this issue	List O Not currently tradeable online	Bid Not currently trad online	sable		
Overview	Gallery Documents	Trade History	Contact		_
Redeemable Preference Sh Redeemable Preference Sh from time to time. Alteration	ares are offered as equity securities, all Redee ares are authorised and payable quarterly in ar is take effect from the first day of the next qua	nable Preference Shares rank equally i ears. Dividends are payable at annual rterly period. The maximum investmen	n every respect, including as I ates. Each investment term c : value and redemption terms	to payment of dividends before and after liquidation. Dividends an be viewed at www.nzpm.co.nz/investor-centre. We after thes are outlined in the current Product Disclosure Statement.	on e rates

How to view your key documents

Key documents such as Distribution Statements, Graded Cash Statements and Year End Statements are located within *'My Documents'*. This is populated through email attachments i.e. if you have received statements via email they will appear in the portal.

To view '*My Documents*', click on the '*Documents*' option under the '*Communications' drop-down*.

You can then filter by clicking on the different options on the left-hand side under **'By Type'**.



Contact Us

For further questions or assistance, NZPM and Syndex contact information is located in the **'Contact us'** option under the **(2)** icon in the top right corner.

Some personal details can be updated under the **'Investment Accounts'** option under the **(2)** icon. For other personal detail updates, please contact the NZPM Share Registrar.

