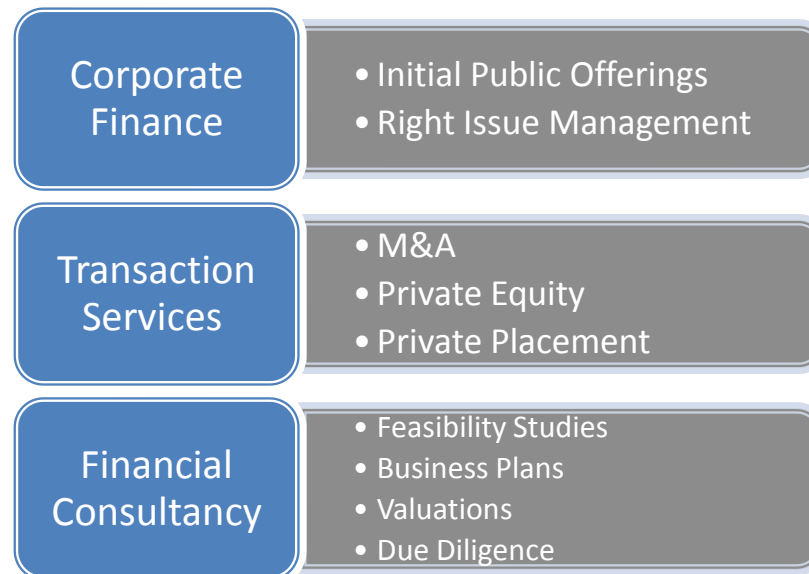


Corporate Finance & Advisory

Investment Management Group has been providing comprehensive Corporate Finance & Advisory (CF&A) services to its valuable clients since its inception in 1998. Our Corporate Finance & Advisory (CF&A) services are in following three distinct areas:



Professional Advisory to assist companies in 'Adding Value'

Corporate Finance

CF&A offers comprehensive equity issue management Services. We are responsible for some of most successful IPOs on the Muscat Securities Market. We have raised more than US\$ 1.8 billion from equity issue for our clients. We make use of all the key areas of our Investment Banking Services for successful management of IPOs. In addition to covering all regulatory aspects Our services include corporate advisory, due diligence, valuation /offer pricing, marketing and issue administration.

Our issue management services are comprehensive and cover;

- Managing all activities culminating at successful subscription and listing
- devising overall transaction approach
- conducting detailed Due Diligence
- preparation of relevant documents such as prospectus, application forms, brochures / advertisements
- coordination with all stakeholders, service providers and regulatory authorities
- managing marketing campaigns and road shows
- managing the subscription process and dissemination of relevant information
- Managing the underwriting process
- Managing post subscription issues; refund, transfer of funds and MSM Listing

Transaction Management

Transaction Management services of CF&A offers complete solution from *transaction structuring* to *transaction closing* covering all imperative aspects of the prospective deal.














Companies looking to raise private equity or to privately place stakes may use these services. We manage the process across GCC region and can pinpoint our fund raising campaign to suit client's choice of investor profile. This process includes all key services of Corporate Finance & Advisory such as valuation, documentation, due diligence, marketing, client handling, process administration and transaction structuring. We provide key input to the clients throughout the process to better tailor the offer.

Following is the detailed flow covering key tasks of Transaction Management:







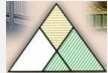








Corporate Finance & Advisory

CF&A Track Record

<p>2010</p>  <p>Al Khalili United Enterprises Initial Public Offering - Issue Manager and Collecting Bank</p>	<p>2010</p>  <p>Oman National Engineering & Investment Company Right Issue - Financial Advisor, Issue Manager and Sole Collecting Bank</p>	<p>2010</p>  <p>Muscat Gas Company SAOG Private Placement of Shares - Financial Advisor</p>	<p>2010</p>  <p>Vision Real Economy Fund Initial Public Offering - Collecting Bank</p>	<p>2010</p>  <p>Muscat Finance Co. SAOG Right Issue- Sole Collecting Bank</p>
<p>2010 \$10.7 mm</p>  <p>OMANTEL Share Placement</p>	<p>2009</p>  <p>Oman Al Arabi Fund Initial Public Offering - Advisory & Issue Management</p>	<p>2009</p>  <p>Welcare Diagnostics and Treatment Center (First Medical Centre LLC) Financing Options Study</p>	<p>2009</p>  <p>Takamul Investment Company Joint Venture Valuation</p>	<p>2009</p>  <p>Dhofar Cattle Company SAOG Capitalization Study</p>
<p>2009 \$15.6mm</p>  <p>Construction Materials Industry Right Issue - Advisory & Issue Collecting Bank</p>	<p>2008 \$8mm</p>  <p>Al Batinah Development Co. Right Issue - Advisory & Issue Collecting Bank</p>	<p>2008 \$7.3mm</p>  <p>Omani Packaging Right Issue - Advisory & Issue Collecting Bank</p>	<p>2008 R.O 0.5mm</p>  <p>Omani Filters Industry Right Issue Sole Collecting Bank</p>	<p>2008 R.O 23.6mm</p>  <p>Global Financial Investments Right Issue-Private Placement Sole Collecting Bank</p>

Corporate Finance & Advisory

CF&A Track Record

<p>2008 R.O 0.51mm</p>  <p>National Cans & Packing Industry Financial Advisors -Private Placement</p>	<p>2008 \$13mm</p>  <p>Construction Materials Industry Right Issue & Private Placement</p>	<p>2008 \$26.24mm</p>  <p>Al Omaniya Financial Services Rights Issue</p>	<p>2008 \$8.76 mm</p>  <p>National Finance Rights Issue - Advisors</p>	<p>2008 R.O 10.1mm</p>  <p>Muscat Finance Company Private Equity Placement & Brokerage</p>
<p>2008 \$611,430</p>  <p>Oman Education & Training Inv Right Issue & Private Placement</p>	<p>2008 \$2.15mm</p>  <p>Construction Materials Industry Right Issue & Private Placement</p>	<p>2008 \$1.8mm</p>  <p>Salalah Mills Right Issue & Private Placement</p>	<p>2008 \$3.9mm</p>  <p>Al Shurooq Investment Services Right Issue & Private Placement</p>	<p>2008 \$40mm</p>  <p>Voltamp Issue Manager & Underwriter Advisory & Placement Collection for IPO</p>
<p>2008 \$13mm</p>  <p>A'Saffa Poultry Farms Right Issue - Advisory & Issue Collecting Bank</p>	<p>2008 \$50mm</p>  <p>Bank Sohar Paid-up Capital - Receiving Bank</p>	<p>2007 \$155mm</p>  <p>Galifar Engineering & Cont. Co Issue Manager & Underwriter Advisory & Placement Collection Bank</p>	<p>2007 \$5.53mm</p>  <p>Global Financial Investment Rights Issue - Advisory & Issue Collecting Bank</p>	<p>2007 R.O.7.5mm</p>  <p>Majan Development Company Private Placement</p>













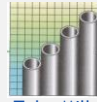


Corporate Finance & Advisory

CF&A Track Record

<p>2007 Rights Issue</p>  <p>Dhofar Beverages Amount Collected: R.O 259,272</p>	<p>2007 IPO</p>  <p>Vision Emerging Fund Amount Collected: R.O 9,938,536</p>	<p>2007 IPO</p>  <p>Bank Sohar Amount Collected: R.O 39,953,906</p>	<p>2007 IPO</p>  <p>Galfar Engineering & Cont. Co Amount Collected: R.O 447,361,250</p>	<p>2007 \$51.94mm</p>  <p>Bank Sohar Issue Manager - Advisory Collection for IPO</p>
<p>2007 Rights Issue</p>  <p>Construction Materials Industry Amount Collected: R.O 717,685</p>	<p>2007 Rights Issue Private Placement</p>  <p>GlobInvest Amount Collected: R.O 1,404,609</p>	<p>2007 Rights Issue</p>  <p>Global Financial Investment Amount Collected: R.O 2,005,436</p>	<p>2007 Rights Issue</p>  <p>Oman United Insurance Amount Collected: R.O 2,582,250</p>	<p>2007 Rights Issue Private Placement</p>  <p>Gulf International Chemical Amount Collected: R.O 252,613</p>
<p>2006 \$10.39mm</p>  <p>Oman United Insurance Issue Manag. -Collection Bank Rights Issue - Advisory & Issue</p>	<p>2005 IPO</p>  <p>Omantel Amount Collected: R.O 181,181,184</p>	<p>2005 \$470.6mm</p>  <p>Omantel Collection for IPO</p>	<p>2005 \$3.5mm</p>  <p>Oman Flour Mills Advisory & Broker</p>	<p>2005 \$25mm</p>  <p>Muscat Hospital Financial Advisory & Valuation</p>

Corporate Finance & Advisory

CF&A Track Record

<p>2005 IPO</p>  <p>Taageer Finance Amount Collected: R.O 2,666,618</p>	<p>2004 Rights Issue</p>  <p>Packaging Company Amount Collected: R.O 711,400</p>	<p>2004 IPO</p>  <p>Al Maha Petroleum Products Amount Collected: R.O 12,631,500</p>	<p>2004 IPO</p>  <p>AES Barka Amount Collected: R.O 50,746,805</p>	<p>2004 IPO</p>  <p>Al Kamil Power Amount Collected: R.O 571,482</p>
<p>2004 \$25mm</p>  <p>Oman Waste Water Financial Advisory</p>	<p>2004 Rights Issue</p>  <p>Al Omaniya Financial Services Amount Collected: R.O 7,855,882</p>	<p>2002 \$26mm</p>  <p>BP Group Advisory & Broker</p>	<p>2002 \$75mm</p>  <p>Muscat Golf Course & Country Club Financial Advisory</p>	<p>2002 \$7.79mm</p>  <p>National Pharmaceutical Rights Issue - Advisory Private Placement</p>
<p>2002 \$12mm</p>  <p>Oman Arab Bank Rights Issue - Advisory & Issue</p>	<p>2002 \$9.09mm</p>  <p>Oman Medical Projects Rights Issue - Advisory & Issue Collecting Bank</p>	<p>2001 \$3.12mm</p>  <p>Al Jazeera Tube Mills Rights Issue - Advisory & Issue Collecting Bank</p>	<p>2001 \$6.49mm</p>  <p>A'Saffa Poultry Farms Issue Manager - Advisory Collection for IPO</p>	<p>2001 \$75mm</p>  <p>Barr Al Jissah Resort & Spa Financial Advisory</p>