

Rocky Li

From: Serena Zhao
Sent: 13 December 2023 16:30
To: Rocky Li
Subject: FW: Annual information

Follow Up Flag: Follow up
Flag Status: Flagged

Should you have any queries, please do not hesitate to contact us.

Best regards,

Serena Zhao

Director

[Business Advisory](#) | [Tax Advisory](#) | [Financial Planning](#) |

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From: Nicholas Gruen (Lateral Economics) <ngruen@gmail.com>
Sent: Wednesday, December 13, 2023 4:27 PM
To: Steven Kounnas <steven@phoria.com.au>
Cc: Trent Clews-de Castella <trent@phoria.com.au>; Serena Zhao <serena@tridentfinancial.com.au>
Subject: Re: Annual information

Thanks Steven

I think that's all — but I'll let you know.

cheers,

Nicholas

Nicholas Gruen
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On Wed, 13 Dec 2023 at 16:09, Steven Kounnas <steven@phoria.com.au> wrote:

Hi Nicholas

I hope you have been well.

As with previous years, we continue to grow and expand, however there has not been another investment round, dividend or exit event that would justify a change in the market value. As such, no change is required from previous years.

Please let me know if you require any further information.

Thanks

Steven Kounnas

Co-founder & COO

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Melbourne, Australia

On 10 Dec 2023, at 4:57 pm, Nicholas Gruen <ngruen@gmail.com> wrote:

Hi Trent and Steven,

I hope you and the company are continuing to travel well and have put another great year behind you.

As you know, each year I need some documentation from you for my super fund. I am hoping you can provide me with this information regarding the securities I hold with Phoria that provides information on:

- Any events between 30 June 2022 and 30 June 2023 that would justify a change to the market value that we provided in our return for the previous financial year — which also came from you last year. If so, please provide us

with details including information that would enable us to determine the new market value of our holding.

- Any dividend or distributions paid during the year ended 30 June 2023

Thanks in advance.

cheers,

Nicholas

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