

# OFFICE

## COVER SHEET

0 0 0 0 1 6 3 4 2

S.E.C. Registration Number

S M I N V E S T M E N T C O R P .

(Company's Full Name)

1 0 T H F L O O R O N E E - C O M

C E N T E R , H A R B O R D R I V E , M O A

C O M P L E X , P A S A Y C I T Y

(Business Address : No. Street/City/Province)

**Elmer B. Serrano**

Contact Person

**(02) 687-1195**

Company Telephone Number

1 2

Month

3 1

Day

Fiscal Year

FORM TYPE

FORM TYPE

Annual Meeting

Annual Meeting

Secondary License Type, If Applicable

Secondary License Type, If Applicable

Dept. Requiring this Doc.

Dept. Requiring this Doc.

Amended Articles Number/Section

Amended Articles Number/Section

Total No. of Stockholders

Total No. of Stockholders

Total Amount of Borrowings

Domestic

Domestic

Foreign

Foreign

To be accomplished by SEC Personnel concerned

File Number

File Number

LCU

LCU

Document I.D.

Document I.D.

Cashier

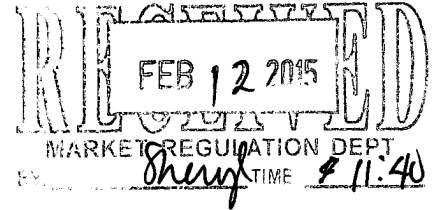
Cashier

STAMPS

Remarks = pls. Use black ink for scanning purposes.

SECURITIES AND EXCHANGE COMMISSION  
SEC Bldg., EDSA, Greenhills  
Mandaluyong City

February 9, 2015  
SECURITIES AND EXCHANGE  
COMMISSION



Attention: **Mr. Vicente Graciano P. Felizmenio, Jr.**  
*Director, Markets and Securities Regulation Department*

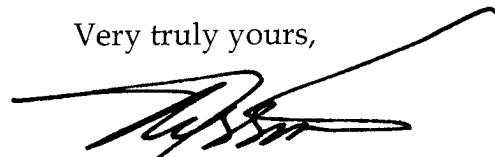
Re: Notice of Listing of SMIC shares


Gentlemen:

Please find attached for your reference the Notice of Listing of SM Investments Corporation's (SMIC) shares which we will be sending to the PSE in connection to the Conversion Notice we have received from the bondholder/s of SMIC Convertible Bond.

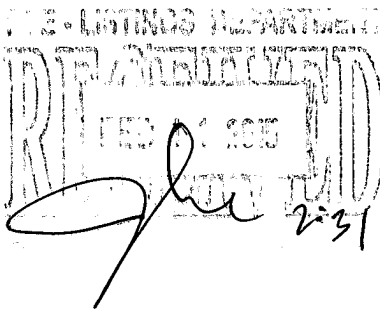
We trust that you find the foregoing in order. Thank you.

Very truly yours,



ELMER B. SERRANO .  
Corporate Secretary 

Encl. a/s



INVESTMENTS  
CORPORATION

February 9, 2015

**PHILIPPINE STOCK EXCHANGE, INC.**  
3rd Floor, Philippine Stock Exchange Plaza  
Ayala Triangle, Ayala Avenue, Makati Avenue  
Makati City

Attention: **Ms. Marsha M. Resurreccion**  
*Head, Issuer Regulation Division*

Re: Notice of Listing of SMIC shares

Madame:

We would like to request the Philippine Stock Exchange to issue the Notice of Listing in connection with the Conversion Notice we have received from the following bondholder of the SM Investments Corporation's (SMIC) Convertible Bond:

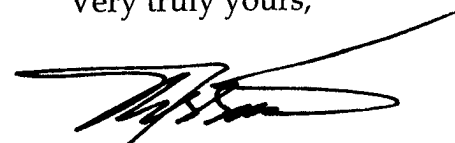
<u>Bondholder</u>	<u>No. of shares issuable to the Bondholder</u>
DEUTSCHE BANK AG LONDON	68,378

Please note that the Philippine Stock Exchange has already issued its Notice of Approval last May 23, 2012 (attached hereto as "Annex A") approving the application of SMIC to list the additional 13,664,091 common shares, with a par value of P10.00 per share as part of the issuance of its Convertible Bond due 2017.

In compliance with said Notice of Approval to effect the actual listing and trading of the shares attached is the Sworn Corporate Secretary's Certificate confirming the receipt of notice of conversion from the respective Bondholder indicating therein the name of the Bondholder and the corresponding number of shares to be listed equivalent to the converted bonds ("Annex B").

Thank you.

Very truly yours,



**ELMER B. SERRANO**  
Corporate Secretary

**SM Investments Corporation**  
10/F One E-Com Center  
Harbor Drive  
Mall of Asia Complex  
1300, Pasay City, Philippines



May 24, 2012

**SM Investments Corporation**  
10th Floor, One E-Corn Center  
Harbor Drive, MOA Complex  
Pasay City.

Attention : **Harley T. Sy**  
President

Re : Notice of Approval  
Underlying Common Shares of Convertible Bonds

Gentlemen:

We are pleased to inform you that The Philippine Stock Exchange, Inc. (the "Exchange" or "PSE") approved on May 23, 2012, the application of SM Investments Corporation ("SM" or the "Company") to list additional 13,884,091 common shares, with a par value of ₱10.00 per share, to cover the underlying SM common shares of the Convertible Bonds Due 2017 issued by the Company on February 15, 2012, at a conversion price of ₱781.446 per share. The Company's Convertible Bonds Due 2017 were issued at a total issue price of US\$250,000,000.00.

The actual listing and the eligibility for trading of the underlying SM common shares of the Convertible Bonds will take effect only after the following requirements have been complied with:

1. The Company pays the PSE listing fee and any other fees or surcharges;
2. The Company pays the SEC listing fee;
3. The Company submits a sworn Undertaking that each time a Bondholder converts its Convertible Bonds, the Company shall submit a sworn Corporate Secretary's certificate certifying the following:
  - a. The Company's receipt of notice(s) of conversion indicating therein the name(s) of the Bondholder(s) and the corresponding number of common shares equivalent to the converted Bonds;
  - b. The actual conversion of the Bonds and the corresponding issuance by the Company of the common shares equivalent to the converted Bonds; and
  - c. The underlying common shares of the Convertible Bonds will be duly lodged with the Philippine Depository and Trust Corporation ("PDTC") on the scheduled listing date. This certificate should make reference to the number of shares for listing, the date of actual lodgment and the listing application covering such shares.

4. The Company submits the duly signed duplicate original copy of this letter.

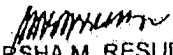
The listing date of the underlying common shares of the Convertible Bonds will be scheduled one (1) trading day from receipt of the aforementioned Corporate Secretary's certificate in item no. 3 above.

The PSE and SEC listing fees should be paid within the fifteen (15) calendar days from receipt of this notice. Otherwise, the Company shall be fined a 25% surcharge plus a 1% interest on the PSE listing fee billed for every day of delay. A copy of the official receipt covering the SEC listing fee should be submitted to the Exchange. All documents must be duly received by the PSE Listings Department.

This approval is being issued on the basis of the representations made to the Exchange. However, in the event that the representations are found to be inaccurate, false, misleading and/or incomplete, then this approval shall be considered null and void.

If these conditions are acceptable to you, please indicate your conformity by signing on the space provided below. The duplicate original should be returned to the Exchange so that we can proceed with the final processing of your application.


Very truly yours,

  
MARSHA M. RESURRECCION  
Head, Issuer Regulation Division

CONFORME:

SM INVESTMENTS CORPORATION

by:

  
MR. JOSE T. SIO  
VVP AND CHIEF FINANCIAL OFFICER

Authorized Signatory  
(Signature over Printed Name)

Date: .....

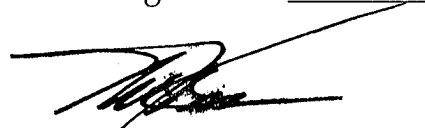

29

SECRETARY'S CERTIFICATE

I, **ELMER B. SERRANO**, of legal age, Filipino, and with office address at Martinez Vergara Gonzalez & Serrano, Suite 2401, The Orient Square, F. Ortigas Jr. Road, Ortigas Center, Pasig City, being the Corporate Secretary of SM Investments Corporation (the "Corporation"), a corporation duly organized and existing under and by virtue of Philippine Law with address at 10<sup>th</sup> Floor, One E-Com Center, Harbor Drive, Mall of Asia Complex, Pasay City, do hereby certify that:

- a. The principal amount of Bonds to be converted: US\$1,000,000.00
- b. The number of shares (excluding fractions) issuable to such Bondholder: 68,378;
- c. The name of person in whose name the Shares issuable upon conversion are to be registered: DEUTSCHE BANK AG LONDON  
 PDTC Participant / Broker's Name: DEUTSCHE BANK AG MANILA  
 PDTC Participant / Broker's Code: DEUB1000000  
 Sub-account No.: 1
- d. The Conversion Date: 02/05/2015; Conversion Price: Php624.625

IN WITNESS WHEREOF, this Certificate has been signed this FEB 1 2015  
at Pasig City.

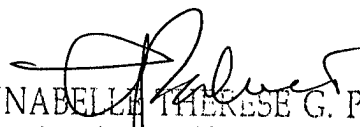
  
**ELMER B. SERRANO**  
Corporate Secretary 

REPUBLIC OF THE PHILIPPINES)  
PASIG CITY ) S.S.

Before me, a notary public in and for the city named above, personally appeared Mr. Elmer B. Serrano with Tax Identification No. 153-406-995, who is personally known to me to be the same person who presented the foregoing instrument and signed the instrument in my presence, and who took an oath before me as to such instrument.

Witness my hand and seal this FEB 1 2015.

Doc. No. 367  
Page No. 15  
Book No. 1  
Series of 2015.

  
**ANNABELLE THERESE G. PALOMAR**  
Appointment No. 291 (2014-2015)  
Notary Public for Pasig City  
Until December 31, 2015  
Attorneys Roll No. 63620  
Suite 2401 The Orient Square  
F. Ortigas, Jr. Road, Ortigas Center, Pasig City  
PTR No. 0381605; 01.07.15; Pasig City  
IBP No. 0985151; 01.06.15; RSM