

Rearchitecting senior exchange listings and capital market execution.

Case Studies

EXCHANGE
LISTING

\$19.78 million U.S. Public Offering. Nasdaq Capital market listing

Key Takeaways

- SurgePays, Inc. utilizes its blockchain software platform to offer a comprehensive suite of prepaid, financial services for the underbanked, and top selling wholesale products to independently owned convenience stores, mini-marts, tiendas, and bodegas more cost efficiently than existing wholesale distribution models.
- Firm commitment underwritten initial public offering of 4,600,000 units, each consisting of (i) one share of common stock and (ii) one warrant to purchase a share of common stock

Highlights

- Introduction, negotiation, and management of underwriter for firm commitment offering
- Managed the Nasdaq application process and assisted the Company with creating its board and committees for compliance with Nasdaq requirements.

“We brought Exchange Listing on board early in the Nasdaq uplisting process. They provided extraordinary strategic counsel, including the road map which led us to finalize our offering and successfully execute our goal of completing a Nasdaq uplisting,”

Brian Cox, CEO

Sector	FinTech
Industry	Financial Services
Location	USA
Type of Listing	Uplist
Exchange	Nasdaq
Cap Raise	\$ 19.78 million
Services	Underwritten Offering Capital Market Support

\$16 million U.S. Initial Public Offering. Nasdaq Capital market listing.

Key Takeaways

- o Emerging Medical device healthcare company with a proprietary, FDA cleared surgical implant system for sacroiliac joint fusion procedures
- o ECG telemedicine technology to bring new medical grade heart attack detection technology to the treatment and prevention of cardiovascular disease
- o Pre Revenue Company with an EBITDA loss of \$6.1 million prior to the IPO.
- o Firm commitment downsized underwritten initial public offering of 3,000,000 shares of common stock for \$16 million US at \$5.00 per share
- o At the \$5.00 per share offer price, Tenon had a market cap of \$56 million, closed at \$22.50 for a return of 350% from the offer price

Highlights

- o Introduction, negotiation and management of underwriter for firm commitment offering
- o Successful management and integration of complex compliance with Nasdaq, SEC regulatory, corporate governance and legal listing requirements

“Exchange Listing has provided incredible value with its extensive network and deep capital market guidance and actionable knowledge. Their team was hyper focused on the successful outcome of securing necessary growth capital and the Nasdaq listing of Tenon. With the closing of this financing, Tenon Medical can begin to address the greatly underserved market opportunity that exists in this space.”

Steven Foster, CEO

Sector	MedTech
Industry	Healthcare Technology
Location	USA
Type of Listing	IPO
Exchange	Nasdaq
Cap Raise	\$ 16.0 million
Services	Underwritten Offering Capital Market Support

Simultaneous with the Nasdaq Capital Market listing, closing of a \$6.0m raise and an \$11.0m debt conversion.

Key Takeaways

- Cosmos Holdings is an international pharmaceutical company with a proprietary line of nutraceuticals
- Organic listing on Nasdaq Capital Markets
- Financing and private placement of Series A Convertible Preferred Stock and warrants resulting in gross proceeds of \$6.0m
- Previously Cosmos converted over \$11 million of the Company's debt to equity

Highlights

- Finalized Nasdaq Capital Markets listing requirements prior to trading
- Managed the Nasdaq application and listing process
- Collaborated with underwriter and banking syndicate
- Successful management and integration of complex compliance with Nasdaq, OTC, SEC regulatory, and legal listing requirements
- Board participation and recruitment
- Development of corporate governance and Board composition
- Ongoing engagement post-listing for capital market, regulatory, and governance support

“Not only did the Exchange Listing team advise us throughout the listing and financing process to meet the required listing metrics for Nasdaq, Peter Goldstein, the CEO of Exchange Listing LLC, served on our Board of Directors and headed our Audit Committee. We would not have reached this pinnacle event of trading on the Nasdaq today without his work, commitment and incredible support throughout this complex experience.”

Greg Siokas, CEO

Sector	Healthcare
Industry	Pharmaceutical Nutraceutical
Location	Greece
Type of Listing	Uplisting
Exchange	OTC > Nasdaq
Cap Raise	\$ 6.0 million
Services	NASDAQ Listing Requirements Uplisting Compliance Board Recruitment Board Member Post-Listing Capital Market Support

\$15 million U.S. Initial Public Offering. Nasdaq Capital market listing

Key Takeaways

- Emerging FinTech company operating an embedded, highly secure digital payments and banking platform that powers commerce experiences for clients and their customers
- Firm commitment underwritten initial public offering of 3,614,458 units, each consisting of (i) one share of common stock and (ii) one warrant to purchase a share of common stock

Highlights

- Introduction, negotiation, and management of underwriter for firm commitment offering
- Successful management and integration of complex compliance with Nasdaq, SEC regulatory, corporate governance, and legal listing requirements
- Ongoing engagement post-listing for capital market support

“The Exchange Listing team advised us throughout the listing and financing process as well as to troubleshoot issues related to some of the most critical and sensitive milestones. We would not be trading on the Nasdaq today without their incredible support and guidance throughout this complex experience.”

Luke D’Angelo, CEO

Sector	FinTech
Industry	Financial Services
Location	USA
Type of Listing	IPO
Exchange	Nasdaq
Cap Raise	\$ 15 million
Services	Underwritten Offering Capital Market Support

\$16.5 million U.S. Initial Public Offering. Nasdaq Capital market listing

Key Takeaways

- Emerging digital healthcare company with a proprietary ECG telemedicine technology to bring new medical-grade heart attack detection technology for the treatment and prevention of cardiovascular disease
- Firm commitment underwritten initial public offering of 2,750,000 units, each consisting of (i) one share of common stock and (ii) one warrant to purchase a share of common stock

Highlights

- Introduction, negotiation, and management of underwriter for firm commitment offering
- Successful management and integration of complex compliance with Nasdaq, SEC regulatory, corporate governance, and legal listing requirements
- Ongoing engagement post-listing for ongoing capital market support

“Working with Exchange Listing as IPO counsel put us in a winning position. Their exemplary team put us in contact with a best-in-class investment banker and legal team. We are thrilled to now be listed on the Nasdaq Capital Markets.”

Branislav Vajdic, CEO

Sector	MedTech
Industry	Healthcare Technology
Location	USA
Type of Listing	IPO
Exchange	Nasdaq
Cap Raise	\$ 16.5 million
Services	Underwritten Offering Capital Market Support

Simultaneous with the Nasdaq Capital Market listing, closing of upsized & oversubscribed \$12.6 million offering. Follow on offerings include a \$13 Million Private Placement, \$6 Million Convertible Debt, and a \$20 Million Underwritten Public Offering.

Key Takeaways

- Previously TSX/OTC/FRA listed company that Exchange Listing was instrumental in listing on NASDAQ Capital Markets
- Firm Commitment Underwritten initial public offering simultaneous with Nasdaq Listing
- Within 90 days of listing, Siyata Mobile closed US\$13M Private Placement led by a leading Israeli institutional fund with assets under management of over US\$60B

Highlights

- Introduction, negotiation, and management of underwriter and syndicate for firm commitment offering
- Successful management and integration of complex compliance with Nasdaq, TSX, SEC regulatory, corporate governance, and cross border legal listing requirements
- Pre-IPO and IPO investor identification, introduction and negotiating of growth capital investment
- Structured and closed complex financing needs, which cannot be ordinarily solved with conventional financing
- Ongoing engagement post-listing for ongoing capital market support
- Board participation and recruitment

Sector	Technology
Industry	Mobile Telecommunications
Location	Global
Type of Listing	Uplisting
Exchange	Nasdaq
Cap Raise	\$ 20 million
Services	Underwritten Offering Investor Introductions Cross-Border Compliance Capital Market Support Board Participation & Recruitment

“Exchange Listing was an essential part of our NASDAQ listing team. Their guidance and expertise allowed us to focus on our business and operations while they focused on our capital markets and NASDAQ”

Marc Seelenfreund, CEO

Exchange Listing Facilitates and Advises Nasdaq Listing for Advanced Human Imaging, raises \$10.5m

Key Takeaways

- Cutting-edge mHealth technology utilizing artificial intelligence to make human scanning possible from a smartphone
- Initial public offering price to the public simultaneous with Nasdaq Listing
- Each unit issued in the offering consisted of two American Depositary Shares ("ADS's") and one warrant to purchase one ADS

Highlights

- Managed the Nasdaq application and listing process
- Collaborated with underwriter and banking syndicate for oversized firm commitment offering
- Collaborated with US and International legal and securities counsel
- Successful management and integration of complex compliance with regulatory and legal listing requirements
- Development of corporate governance and Board composition

“Exchange Listing guidance and knowledge was immensely valuable throughout the early stages of this complex process. This important step for AH1 will allow us to increase liquidity and gain exposure for the Company with institutional and retail investors in the United States.”

Vlado Bosanac, Co-Founder

Sector	MedTech
Industry	mHealth
Location	Australia
Type of Listing	ADR
Exchange	Nasdaq
Cap Raise	\$ 10.5 million
Services	NASDAQ Listing Requirements Complex ADR Compliance Board Recruitment

Simultaneous with the Nasdaq Capital Market listing, closing of upsized & oversubscribed \$50.1 million offering. Follow on offering of \$100 Million Convertible Debt.

Key Takeaways

- o Exchange Listing, LLC advises and facilitates fintech company, GreenBox POS, listing on Nasdaq
- o OTCQB listed company that Exchange Listing was instrumental in listing on Nasdaq Capital Markets
- o IPO shares; realized an increase of more than 30% on initial trading on Nasdaq

Highlights

- o Finalized Nasdaq Capital Markets listing requirements
- o Managed the Nasdaq application and listing process
- o Collaborated with underwriter and banking syndicate for oversized firm commitment offering
- o Successful management and integration of complex compliance with Nasdaq, OTC, SEC regulatory, and legal listing requirements
- o Development of corporate governance and Board composition
- o Ongoing engagement post-listing for capital market, regulatory, and governance support

“Exchange Listing’s guidance and expertise allowed us to successfully complete our IPO and complete a complex Nasdaq listing. We appreciate Exchange Listing’s diligent and efficient approach to assisting us with our NASDAQ listing.”

Ben Errez, Chairman

Sector	Technology
Industry	FinTech
Location	USA
Type of Listing	Uplisting
Exchange	OTCQB > Nasdaq
Cap Raise	\$ 50.1 million
Services	NASDAQ Listing Requirements Uplisting Compliance Board Recruitment Post-Listing Capital Market Support

Exchange Listing facilitates and advises simultaneous Nasdaq Capital Market Listing for Workspport, closing of \$18.1m oversubscribed offering.

Key Takeaways

- Eco-Conscious Maker of mobile panels, solar generator systems, and Tonneau Covers
- Financing and private placement of Regulation A Common Stock and warrants resulting in oversubscribed gross proceeds of \$4.0m
- Proceeds utilized for the global Launch of Terravis Energy Green Hydrogen Energy Systems

Highlights

- Organized and structured successful Regulation A+ offering as OTCQB traded Company
- Introduction, negotiation, and management of underwriter and syndicate for firm commitment offering
- Managed the Nasdaq application and listing process
- Collaborated with underwriter and banking syndicate for oversized firm commitment offering
- Successful management and integration of complex compliance with Nasdaq, OTC, SEC regulatory, and legal listing requirements
- Development of corporate governance and Board composition
- Ongoing engagement post-listing for capital market, regulatory, and governance support

“Exchange Listing recognized our market leadership potential from the early stages. Their incredible counsel, support, professional connections and expertise brought us to completing our IPO and completing a Nasdaq listing.”

Sector	Technology
Industry	Sustainable Energy
Location	Canada
Type of Listing	Uplisting
Exchange	OTCQB > Nasdaq
Cap Raise	\$ 18.1 million
Services	NASDAQ Listing Requirements Regulation A+ Structuring & Oversight Uplisting Compliance Board Recruitment Post-Listing Capital Market Support

Steve Rossi, CEO

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