

31.03.2009 - 21:56 Uhr

## EANS-Adhoc: OMV Aktiengesellschaft / OMV announces Eurobond transaction

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OMV / oil / gas / energy / / debt / Eurobond

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- OMV has today issued its debut Eurobond transaction with a volume of EUR 750 mn and a maturity of 5 years - OMV is currently rated by Moody's Investors Service with "A3 (stable)" and by FitchRatings with "A- (stable)" - Austrian retail investors can subscribe the 6.25% OMV bonds from April 2 to 3

OMV Aktiengesellschaft, the leading energy group in Central Europe, today priced its inaugural Eurobond transaction. The bonds are issued out of OMV's new EUR 3 bn Euro Medium Term Note Program (EMTN). The bond issue improves the debt structure of the Group.

The EMTN program is a funding program, which allows OMV to issue debt in the Euromarkets on a regular or continuous basis. Each issue is a drawdown from the EMTN program. OMV is not obliged to issue and free to use the program at any time. The program offers flexibility regarding volume, maturity and structure of each issue.

Recently, OMV conducted a European roadshow, visiting Vienna, Frankfurt, London and Paris to meet with fixed-income investors. OMV is rated A3 and A- from both Moody's and Fitch respectively, thereby establishing OMV as a high-quality corporate issuer.

With this first transaction issued out of its EMTN program, OMV has established itself in the international bond markets. The bonds have a volume of EUR 750 mn, a denomination of EUR 1,000, a coupon of 6.25% and are maturing on April 7, 2014. The order book was well oversubscribed and the transaction priced at 370 bps over mid-swaps. Use of proceeds is for refinancing existing indebtedness and extends the maturity of debt, therefore optimizing OMV's debt structure. OMV has applied for listings in Luxembourg and Vienna.

The sale of the bonds to Austrian retail investors is planned for April 2 to 3. Retail investors in Austria can subscribe the bonds in the domestic branches of Austrian banks.

Barclays Capital, Erste Group, Société Générale and J.P. Morgan acted as joint bookrunners on this transaction.

For more information please refer to our homepage [www.omv.com](http://www.omv.com) > Investor Relations > OMV Share & Bonds.

Disclaimer: This press announcement constitutes neither an offer to sell nor a solicitation to buy any securities. A prospectus according to directive 2003/71/EG and regulation (EC) No. 809/2004, has been approved by the Commission de Surveillance du Secteur Financier, Luxembourg (CSSF) on March 31, 2009 and will be notified to the Austrian Financial Market Authority and the German Bundesanstalt für Finanzdienstleistungsaufsicht. The prospectus has been published on the homepage of the Luxembourg Stock Exchange ([www.bourse.lu](http://www.bourse.lu)) and is available free of charge at the principle office of OMV

Aktiengesellschaft, Otto-Wagner-Platz 5, 1090 Vienna. In connection with the offering of securities of the issuer only the prospectus shall be legally binding. The information of this press announcement is not legally binding.

This press release and the information contained herein are not for distribution in or into the United States of America and must not be distributed to U.S. persons (as defined in Regulation S of the U.S. Securities Act of 1933, as amended ("Securities Act")) or to publications with a general circulation in the United States. This press release does not constitute an offer to sell or a solicitation of an offer to purchase any securities in the United States. The securities of OMV Aktiengesellschaft have not been and will not be registered under the Securities Act and may not be offered, sold or delivered within the United States or to U.S. persons absent registration under or an applicable exemption from the registration requirements of the Securities Act. There will be no public offer of securities of OMV Aktiengesellschaft in the United States.

end of announcement

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Branche: Oil & Gas - Downstream activities

ISIN: AT0000743059

WKN: 874341

Index: ATX Prime, ATX

Börsen: Wiener Börse AG / official dealing

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