

Please have this filed under the headline "Publication of Prospectus"

Regulatory Announcement

RNS Number: 8478B
Bank of Montreal
August 27, 2024

The following supplement has been approved by the Financial Conduct Authority and is available for viewing:

1st Supplement dated August 27, 2024 relating to the U.S.\$30,000,000,000 Note Issuance Programme of Bank of Montreal.

The 1st Supplement and the document incorporated by reference therein have been submitted to the National Storage Mechanism and will shortly be available for inspection at: <https://data.fca.org.uk/#/nsm/nationalstoragemechanism>.

DISCLAIMER - INTENDED ADDRESSEES

Please note that the information contained in the Prospectus dated July 12, 2024, as supplemented by the 1st Supplement dated August 27, 2024 (together, the "Prospectus"), may be addressed to and/or targeted at persons who are residents of particular countries (specified in the Prospectus) only and is not intended for use and should not be relied upon by any person outside these countries and/or to whom the offer contained in the Prospectus is not addressed. Prior to relying on the information contained in the Prospectus you must ascertain from the Prospectus whether or not you are part of the intended addressees of the information contained therein.

The Notes have not been and will not be registered under the United States Securities Act of 1933, as amended (the "Securities Act") or the securities laws of any state of the United States and are subject to United States tax law requirements. Subject to certain exceptions, the Notes may not be offered, sold or delivered, directly or indirectly, in the United States or to or for the account of a "U.S. person" (as defined in Regulation S under the Securities Act). No public offering of the Notes is being made in the United States. This announcement does not constitute an offer to sell or a solicitation to buy securities in the United States or in any other jurisdiction where such offer or solicitation would be unlawful.

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To view the full document, please paste the following URLs into the address bar of your browser:

1st Supplement dated August 27, 2024
http://www.ms-pdf.londonstockexchange.com/ms/8478B_1-2024-8-27.pdf

Document Incorporated by Reference

Third 2024 Report to Shareholders
http://www.ms-pdf.londonstockexchange.com/ms/8478B_2-2024-8-27.pdf

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