CMC MARKETS INVESTMENTS LIMITED

TRANSFER BONUS

TERMS & CONDITIONS

Introduction

1. These terms and conditions ("**Transfer Bonus Terms**") form the basis of the opportunity to participate in the CMC Markets Investments Limited offer ("**Transfer Bonus Offer**").
2. Taking part in this Transfer Bonus Offer constitutes acceptance of these Transfer Bonus Terms. CMC Markets Investments Limited (Company Registration Number 12816952) ("**CMC Invest**") is the provider of this Transfer Bonus Offer. CMC Invest is authorised and regulated by the Financial Conduct Authority ("**FCA**") (registration number 948126). CMC Invest reserves the right to withdraw the Transfer Bonus Offer, or vary or cancel any of these Transfer Bonus Terms at any time, in its sole discretion and without prior notice, subject to Applicable Law.
3. Capitalised terms used but not defined herein have the meaning given to them in the CMC Invest General Terms of Business ("**General Terms**").

Conditions of Eligibility

4. The Transfer Bonus Offer is available to customers who have satisfied the eligibility criteria set out below in Clause 5 ("**Eligible Customer**").
5. The eligibility criteria for the Transfer Bonus Offer are that the Eligible Customer must:
   (a) hold an Account with CMC Invest;
   (b) transfer eligible assets to CMC Invest via the Application or wherever possible by requesting a manual transfer by contacting support@cmcinvest.com within the Offer Period (see clause 6 below) from one or a combination of the following (collectively "**Eligible Transfers**"):
      i. a HMRC approved ISA manager in accordance with the General Terms;
      ii. a Self-Invested Personal Pension ("**SIPP**") held with a UK authorised pension scheme in accordance with the General Terms; or
      iii. investments* held with FCA regulated financial, trading, investing and/or broker firm(s) which CMC Invest is able to accept for transfer; and
   (c) (c) not initiate Account closure and/or transfer assets held in their Account (either partially or fully) to another provider for a minimum period of 12 months from the date the Transfer Bonus is credited to their Account.

****Please note that Cash ISA and Junior Cash ISA transfers are currently not included as an Eligible Transfer under these Transfer Bonus Terms***.

Offer Period

6. The Transfer Bonus Offer is open from 00:01 (UK time) on 13 August 2026 and closes at 22:00 (UK time) on 9 October 2026 ("**Offer Period**"). All Eligible Transfers must be initiated within the Offer Period. An Eligible Transfer will be treated as initiated within the Offer Period where CMC Invest receives a completed transfer instruction from the Eligible Customer within the Offer Period, whether submitted through the Application or through CMC Invest's manual transfer process. The Offer Period may be extended or otherwise varied by CMC Invest at any time.

Important Information

7. The Transfer Bonus Offer entitles an Eligible Customer to receive a cash bonus, ("**Transfer Bonus**") which will be credited to their General Investment Account ("**GIA**"). The amount awarded will depend on the total GBP value of all Eligible Transfers initiated within the Offer Period and is set out in Appendix 1 below.
8. Once all Eligible Transfers initiated by an Eligible Customer within the Offer Period have settled, CMC Invest will calculate the total value of those Eligible Transfers for the purpose of determining the Transfer Bonus payable under Appendix 1. Each asset will be valued using its end-of-day market price on the date on which that asset settles with CMC Invest.
9. The Transfer Bonus will be credited to an Eligible Customer's GIA on or before 19th October 2026 and can only be used to place trades on the Application and/or credit a customer's CMC Invest ISA or SIPP in accordance with the General Terms, ISA Terms and Conditions and SIPP Terms and Conditions (as applicable) including any applicable eligibility, contribution or subscription limits.
10. If an Eligible Customer (i) partially or fully transfers any asset from their Account to a different provider or (ii) closes their Account within 12 months of receiving the Transfer Bonus, then the Eligible Customer must return the Transfer Bonus to CMC Invest. Where a Transfer Bonus becomes repayable, CMC Invest may recover the amount due from any available cash held in the Eligible Customer’s Account. If there is insufficient cash, and subject to Applicable Law and the General Terms, CMC Invest may, after giving the Eligible Customer reasonable notice, sell such investments held in the Account as are reasonably necessary to recover the outstanding amount.

General Legal Terms

11. CMC Invest will not be liable to an Eligible Customer in relation to this Transfer Bonus Offer (including for any losses arising as a result of use of this Transfer Bonus Offer) and the provisions of clause 21 ("Our liability towards you, and limitations of that liability") of the General Terms shall apply to this Transfer Bonus Offer as if set out here in full.
12. CMC Invest collects personal information from all Eligible Customers in order to conduct the Transfer Bonus Offer. If any information requested by CMC Invest is not provided by the Eligible Customer, the Eligible Customer may not be able to participate in the Transfer Bonus Offer. Information collected from Eligible Customers as part of the Transfer Bonus Offer is subject to the CMC Invest Privacy Policy as found on the CMC Invest website and will be handled in accordance with Applicable Law.
13. In addition to any other rights and remedies available to CMC Invest, in the case of any breach or suspected breach of these Transfer Bonus Terms, CMC Invest is entitled to deem an Eligible Customer ineligible for the Transfer Bonus and may reclaim from the Eligible Customer any Transfer Bonus payments previously made pursuant to this Transfer Bonus Offer.
14. Each Eligible Customer who successfully takes part in the Transfer Bonus Offer is responsible for any and all taxes payable (if any) as a result of this Transfer Bonus Offer being awarded, received, or accepted.
15. A failure by CMC Invest to enforce any of these Transfer Bonus Terms in any instance(s) will not give rise to any claim by any Eligible Customer or prevent CMC Invest from taking enforcement action later.
16. Eligible Customers who make any Eligible Transfers within the Offer Period in accordance with these Transfer Bonus Terms will automatically participate in the Transfer Bonus Offer. To opt out of the Transfer Bonus Offer and these Transfer Bonus Terms please email support@cmcinvest.com confirming the request to do so.

17. These Transfer Bonus Terms and any non-contractual obligations arising out of or in connection with these Transfer Bonus Terms are governed by, and interpreted in accordance with, the laws of England and Wales.
18. The courts of England and Wales have exclusive jurisdiction to hear any and all disputes or claims (including non-contractual disputes or claims) arising out of or in connection with these Transfer Bonus Terms.

Risk Warning

CMC Invest is an execution only provider and does not provide investment advice and individual investors should make their own decisions. The value of investments can go up as well as down and you may receive back less than your original investment. When transferring your pension, you should ensure you are not giving up safeguarded or defined benefits and that you won't be charged excessive exit fees by your current provider. Seek independent financial advice if you are unsure about any aspect of transferring your investments.

These Terms are dated 12 August 2026.

Appendix 1 – Bonus Structure

The table below shows the Transfer Bonus calculation. Once all Eligible Transfers that were initiated within the Offer Period have settled, CMC Invest will use the end-of-day price on the day of settlement to calculate the total current market value of Eligible Transfers to determine the Transfer Bonus payable in accordance with the table below. No Transfer Bonus will be payable where the total value of an Eligible Customer's Eligible Transfers is less than £25,000 using the end-of-day price on the day of settlement.

Amount transferred	Bonus Awarded
£25,000 or more but less than £50,000	£250
£50,000 or more but less than £75,000	£600
£75,000 or more but less than £100,000	£700
£100,000 or more but less than £250,000	£1,000
£250,000 or more but less than £500,000	£1,600
£500,000 or more	£2,000