

凌源钢铁股份有限公司公开发行可转换公司债券募集说明书摘要

股票代码:600231 债券简称:凌钢股份

保荐机构(主承销商):平安证券

平安证券 PING AN SECURITIES (住所:深圳市福田区福田街道益田路5023号平安金融中心B座第22-25层) 平安证券股份有限公司 二〇二〇年四月

一、重要提示
凌钢股份董事、监事、高级管理人员承诺募集说明书及其他信息披露资料不存在任何虚假记载、误导性陈述或重大遗漏,并对其真实性、准确性、完整性承担个别和连带的法律责任。
凌钢股份全体董事、监事、高级管理人员及中介机构(以下简称“中介机构”)承诺募集说明书及其他信息披露资料不存在任何虚假记载、误导性陈述或重大遗漏,并对其真实性、准确性、完整性承担个别和连带的法律责任。
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二、本次发行概况
1. 发行名称:凌源钢铁股份有限公司公开发行可转换公司债券
2. 发行规模:不超过人民币4.00亿元,且募集资金净额不超过人民币4.00亿元
3. 发行对象:符合《管理办法》规定的合格投资者
4. 发行方式:一次发行,分期偿还
5. 发行期限:自发行之日起至2026年4月13日止
6. 票面金额:100元
7. 发行利率:票面利率为4.00%
8. 发行费用:本次发行费用总额为人民币1,000.00万元

三、募集资金用途
1. 募集资金用途:补充流动资金,偿还银行贷款
2. 募集资金使用计划:募集资金将全部用于补充流动资金和偿还银行贷款
3. 募集资金使用效益:募集资金使用后将提高公司的偿债能力和运营效率

四、风险因素
1. 利率风险:债券利率波动可能影响发行人的偿债能力
2. 流动性风险:债券流动性不足可能影响发行人的偿债能力
3. 信用风险:发行人信用评级下降可能影响发行人的偿债能力

五、发行人基本情况
1. 公司概况:凌源钢铁股份有限公司,成立于1997年,主要从事钢铁生产
2. 股权结构:控股股东为凌源钢铁集团有限责任公司
3. 财务状况:公司财务状况良好,偿债能力强

六、债券发行条款
1. 债券名称:凌源钢铁股份有限公司公开发行可转换公司债券
2. 债券简称:凌钢股份
3. 债券代码:20200413
4. 发行规模:不超过人民币4.00亿元

七、债券发行安排
1. 发行时间:2020年4月13日
2. 发行地点:上海证券交易所
3. 发行方式:一次发行,分期偿还

八、债券发行费用
1. 发行费用:人民币1,000.00万元
2. 发行费用构成:承销费、律师费、审计费等

九、债券发行结论
凌钢股份本次发行可转换公司债券符合《管理办法》等相关法律法规的规定,发行方案合法有效

凌源钢铁股份有限公司
第七届董事会第三十三次会议决议公告

Table with 2 columns: Item, Content. Details about the company's financial statements and operational data.

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