

Professionalising your co-operative

Official partners of Co-operative Business NZ and BCCM

nz.coop **BCCM**
CO-OPERATIVE BUSINESS NEW ZEALAND

New Zealand | Australia

syndex.
a peace of mind solution



Welcome to Syndex

We understand the co-operative spirit. At the heart of every co-operative is a shared vision – a collective commitment to building something meaningful that serves the community, fosters collaboration, and creates lasting value. We champion this vision and are here to support it.

Co-operatives, like other purpose-driven organisations, face the challenge of balancing growth and impact with the administrative demands that come with managing members, compliance, and governance. We believe that the heart of a co-operative should be focused on its mission and its people, not bogged down by complex processes. That's where Syndex comes in.

What we do

Syndex is a members management platform that supports the growth and sustainability of co-operatives. We help streamline the administrative tasks that can take time away from your co-operative's core values and goals. Our solution replaces outdated, manual systems with automated processes that bring efficiency, scalability, and transparency.

Together, we can help your co-operative thrive while staying true to your collective purpose, building a fairer, more inclusive economy for all.

Hear from your fellow co-operatives

Read our case studies and hear from people you trust. See the [insights](#) section of our website or click the links below.

Yenda Producers' Co-operative Society

Key-man risk drives Yenda to seek a secure digital registry.

[Read story](#)

Dairy Farmers Milk Collective

DFMC hits gold with a registry fit for co-ops.

[Read story](#)

New Zealand Plumbers Merchants

Efficient member management aligns with NZPM's co-op principles.

[Read story](#)





Custom solutions for co-ops

The problems we solve:

- ✓ **Registry Management:** Over-reliance on Excel and vulnerability to key-person risk.
- ✓ **Member Relations:** Manual, time-consuming, and inconsistent communication processes.
- ✓ **Rebate Processing:** Inefficient and costly rebate processing that is slow, manual and prone to errors.
- ✓ **Secondary Markets:** Inflexible, manual processes for 'sharing up', exiting, or 'dry' shareholders. Lengthy redemption timeframes for retiring members. Forced redemptions shrink capital base.
- ✓ **Capital Raising:** Restrictions within capital structures limiting potential growth.



Member registry management

Solutions for compliance, governance, corporate actions, member engagement and share administration

- ✓ Automation for efficiencies and error-free admin
- ✓ Direct communication with members; bulk emailing, mail-merge reports/letters.
- ✓ Security and scalability with a Salesforce back-end

Optimised rebate technology

Revolutionising rebate season

- ✓ Flexible & cost-effective rebate processing
- ✓ Professional branding & comms
- ✓ Complete digitisation with full control

Secondary market flexibility

Seamless digital member-to-member trading to optimise shareholding positions

- ✓ Fully interactive trading marketplaces - continuous or periodic
- ✓ Reduce the need for redemptions
- ✓ Partial and direct trade matching for new and retiring members
- ✓ Members self-serve, reducing admin and friction
- ✓ Promotes fair, orderly and transparent trading

Raising capital capability

Tailored solutions for capital raising from external sources. Syndex has co-arranged with partners:

- ✓ Capital Notes
- ✓ Sale and leaseback of infrastructure

Example – In 2023, EastPack raised \$30m from a Capital Note Issue through a partnership between MyFarm, MC Capital and Syndex.



How does Syndex differ from other service providers?

Our ecosystem aggregates capital raising, liquidity solutions, registry share management, dividend and rebate distribution, and member communications on one digital platform, offering a comprehensive and unmatched member management solution.

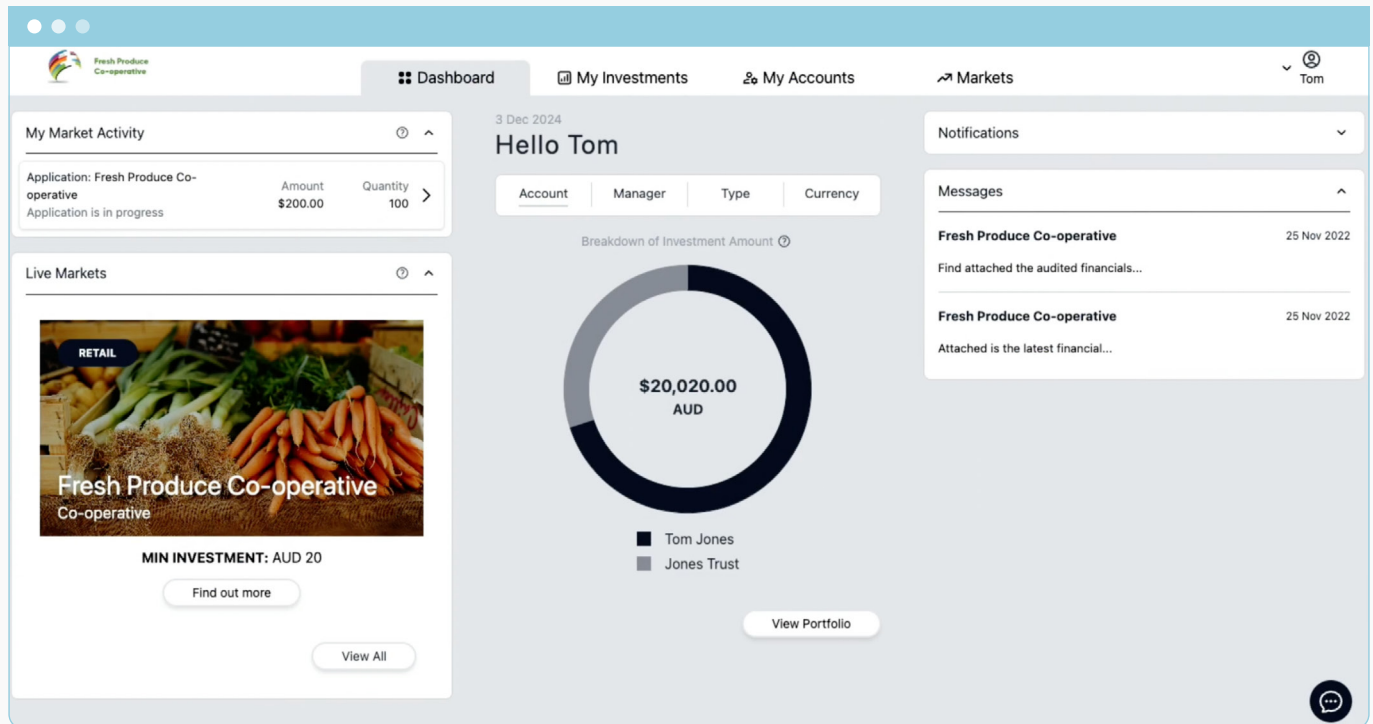


"With Syndex it's easy to recover costs \$ for \$ through efficiencies, but for us, it's more about the professionalism we can now offer our members."



Member portal: Improving communications

Empower your members and reduce administration demands in one go. The portal displays a member's shareholding; a centralised view with easy document storage, communications and access 24/7. Members self-manage their files, statements and trade history, meaning you don't have to!



Capital raising and the Syndex marketplace

A key tool we offer for co-operatives seeking to raise capital is the issuance of Cooperative Capital Units (CCUs). These units allow you to attract investment in a way that preserves the co-operative model and prioritises the collective benefits of members and stakeholders. We've also seen success raising Capital Notes and the sale and leaseback of infrastructure.

Our platform is versatile, giving you the option to feature in our public marketplace (under license or via our specialist partner *AU only), where you can reach a broader community of investors, or trade and issue CCUs within your own private community off-market.

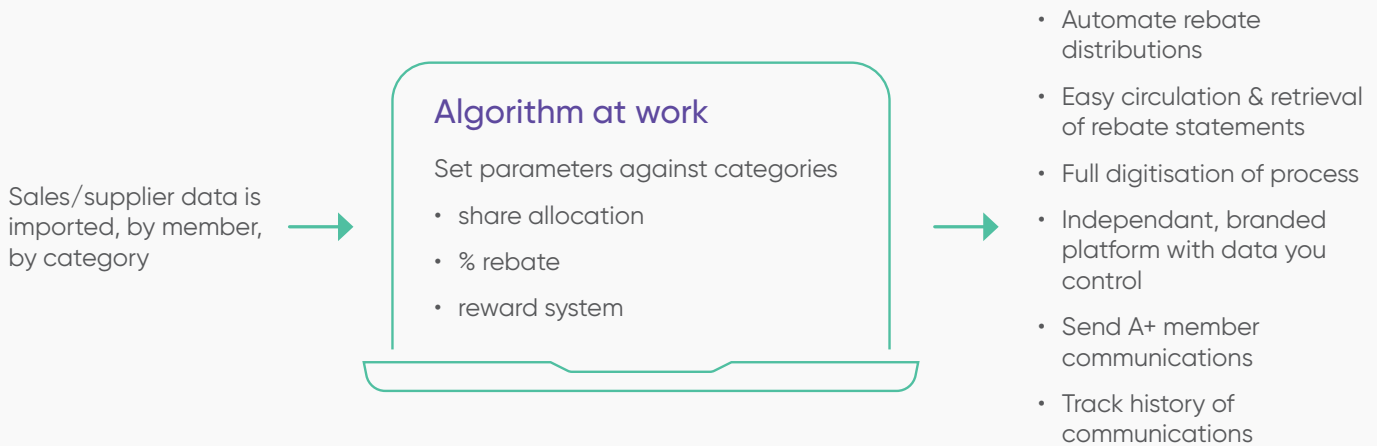
Syndex provides the flexibility to manage your capital raise in the way that best suits your co-operative's needs, whether you're looking for a wide-reaching exposure or a more controlled, member-focused process.

"The Syndex registry is gold"



Optimised rebate technology

Syndex uses a unique algorithm to offer a flexible, cost-effective and professional rebate processing system.



Mini-case study

Paul at NSW Traders Coop managed their registry, including rebate and dividend processing for many years. He used an in-house proprietary application to crunch the numbers and paper mail to communicate over 3,000 letters (per rebate).

A switch to using Syndex's registry, including rebate technology, has resulted in:

- ✓ A digital overhaul that significantly reduces paper usage
- ✓ A modern professional look and feel for communications
- ✓ Minimised maintenance of data
- ✓ Data security peace of mind
- ✓ \$7,000 saving on the annual rebate and distribution processing alone (paper, envelopes, postage and employee hours)



"Pulling together all the data, templated letters and forms is fantastic. To get to a state of readiness to press 'go' is a result of simple steps with so much time saved."



Liquidity: bringing flexibility to secondary market trading

Incorporating liquidity solutions into your investment structure addresses the evolving demands of members and enhances the opportunity and member-centric nature of your business.

Syndex offers digital Secondary Market functionality for Private Markets where members can buy or sell shares in a Periodic or Continuous Secondary Market.

Periodic Market



This market operates as a trading event or auction that opens, and closes, within a defined period. Controlled by the manager, this market is customisable and suitable for shares, units, commodities or other proportional investments.

Highlights:

- ✓ Fully interactive marketplace via a digital platform and self-service, secure account holder portal
- ✓ A market you control – frequency, participants, price ~ floor/ceiling, proxy orders, timing
- ✓ Low administration – automation of participant communication and documentation
- ✓ Dual-view – switch seamlessly between a simple layout and a more in-depth view





About us

Syndex is a 100% privately owned and operated business, with origins in New Zealand, and now Australia. Since 2015 we've been connecting investors to private businesses and bringing digital efficiencies to the latter, staying with them as they grow, professionalise and sometimes IPO.

Our Syndex team brings extensive industry expertise and experience, having held senior executive roles in commercial banking, technology, governance, business development, professional services, and funds administration. This deep knowledge enhances our platform's design and development, enriches our support and training, and ensures a deep understanding of our customers' needs.

Our technology, together with our ongoing commitment to servicing our clients has helped us secure over \$7.3 billion in assets under administration. We think this is proof that our customers' satisfaction is everything to us.

Info@Syndex.Exchange

syndex.exchange

Syndex.com.au

|
"Formerly (administrative) tasks were handled by
1 person working 20 hours per week, now it takes
1 person 2 hours per month."
|

