



### CHANGE ORDER #1 TO SOW SCHEDULE 20 InvestorLine Journeys Quotes and Research

This Change Order #1 (the "**Change Order**") is entered into and effective as of March 19, 2021 pursuant to the Schedule #20 dated September 30<sup>th</sup>, 2020 (the "**Schedule**") and incorporates by reference all terms and conditions of the Master Services Agreement between [Markit On Demand Inc.] ("**Markit**"), and Bank of Montreal ("**Client**"). The parties expressly agree that in the event of a conflict, inconsistency or ambiguity between the terms and conditions of this Change Order; the Master Services Agreement and SOW; the terms and conditions of this Change Order shall govern and control as to the scope of services described herein.

- The existing Section K. Service Fees, Payments and Invoicing of the schedule is hereby modified as follows:

The Service Fee for the work enumerated in this SOW shall consist of the fees below. Design fees are due on the completion of the design phase of each experience and monthly service fees commence upon launch and acceptance of each experience in a Production environment.

Phase	Example Content	One-time design fee	Monthly Service fee
MVP Stock + Search Experience	<ul style="list-style-type: none"> <li>Symbol search</li> <li>Quote</li> <li>News</li> <li>Company profile Information</li> </ul>	20,000 USD	8,000 USD
Stock Experience	<ul style="list-style-type: none"> <li>Charts</li> <li>Press releases</li> <li>Key ratios</li> <li>Company financials</li> <li>Options</li> <li>Historical prices</li> <li> Screener</li> </ul>	25,000 USD	10,000 USD
Advanced ETF Experience	<ul style="list-style-type: none"> <li>Themed ETF Grouping</li> <li>ETF Finder Questionnaire</li> </ul>	45,000 USD	9,000 USD
ETF Experience	<ul style="list-style-type: none"> <li>Quote</li> <li>Chart</li> <li>Fund details</li> <li>Strategy</li> <li>Average Annual Returns</li> <li>Screener</li> </ul>	40,000 USD	7,000 USD
Markets and Calendar Experience	<ul style="list-style-type: none"> <li>Monitor for upcoming earnings</li> <li>Dividends</li> <li>Corporate actions</li> <li>Large moves</li> <li>High volumes, etc.</li> </ul>	45,000 USD	6,000 USD
Research and News Experience	<ul style="list-style-type: none"> <li>CFRA and Morningstar research</li> <li>Trading Central Value Analyzer, Ability to search, Recent ratings changes, News experience based on user's holdings, video</li> </ul>	45,000 USD	6,000 USD



Personalization Experience	<ul style="list-style-type: none"> <li>Relevant news and info based on user's holdings, watchlist and activity</li> <li>Smarttext</li> </ul>	20,000 USD	4,000 USD
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2. Section N. Content shall be added to the schedule

Markit is authorized to act as the agent of Client for the purchase of certain data and/or content required by Client for this project and is authorized to contract on behalf of Client for such purchase. Client is responsible for paying the provider(s) for all licensing expenses; any amount of sales, use, excise, gross receipts, value added, goods and services, or other taxes; and any other fees applicable to or arising from the provision or the use of such data and/or content, including any additional fees should the provider(s) increase their fees at any time. Markit will pass back any third-party provider fees with no markup.

Client intends to contract with the following providers:

Provider	Description of Data Package	Monthly Fee
Acquire Media	North American Press Release Package Includes: Accesswire Business Wire North American Press Releases CanadaNewswire GlobeNewswire – Canada GlobeNewswire – US Newsfile PR Newswire PR Web Reportable North America Press Releases TheNewswireCA	\$1,150.00 Year 1 \$1,400.00 Year 2

Client will be responsible for all exchange agreements, obtaining exchange approvals, and any additional third party content, where applicable.

ACCEPTED [MARKIT ON DEMAND INC.,]	ACCEPTED Bank of Montreal
SIGNATURE 	SIGNATURE 
PRINT NAME Catherine Allegra	PRINT NAME Silvio Stroescu
TITLE Senior Vice President	TITLE President, BMO InvestorLine
DATE OF SIGNATURE March 24, 2021	DATE OF SIGNATURE March 18th, 2021