

Unveiling Insights from Ecclestone on the Future of Mining and Investment from Riyadh's Future Minerals Forum Event

written by Tracy Weslosky | January 22, 2024

The recent [Future Minerals Forum](#) (FMF) event in Riyadh has been a groundbreaking affair, especially through the lens of Christopher Ecclestone from [Hallgarten + Company](#), a seasoned speaker at this event for the past three years. Ecclestone's depiction of the event as "epic" captures both its grand scale and the significant shift in its thematic focus towards more sustainable and strategic practices. This year, the event diverged from its traditional path, emphasizing a nuanced approach that Ecclestone described as a movement from quantity to "quality over quantity."

The Financial Landscape: Big Moves and Strategic Investments

A pivotal aspect of the event, as highlighted by Ecclestone, was its financial dynamics. He recalled last year's [significant investment](#) in Ivanhoe Electric Inc. (NYSE American: IE | TSX: IE) and drew attention to this year's major development involving [Surefire Resources NL](#) (ASX: SRN), an Australian vanadium developer. This [announcement](#) is particularly noteworthy, marking Surefire's plan to ship its Victory Bore vanadium-titanium magnetite concentrate to Saudi Arabia for

refining. The arrangement with the Saudi-based Ajlan & Bros Mining and Metals Company not only signifies an investment into Victory Bore but also underlines the strategic collaboration aimed at joint development and downstream processing. This deal is a testament to the robust and dynamic investment landscape within the mining sector, indicating a strategic shift towards partnerships that leverage regional advantages and technological advancements.

Saudi Arabia's Cautious Foray into Mining

Ecclestone shed light on Saudi Arabia's growing engagement in the mining sector. The country is cautiously yet strategically approaching large-scale mining ventures. This deliberate and calculated approach is evidenced by the activities of [Ma'aden](#), the largest mining company in Saudi Arabia. Founded in 1997, Ma'aden exemplifies the nation's ambition in harnessing its mineral resources. The company's significant ventures, such as the \$10.8 billion aluminum complex agreement with Alcoa, showcase its expansive capabilities and strategic intent in the global mining arena. Ma'aden's focus, which initially centered on gold mining, has diversified into multiple minerals, reflecting the kingdom's broader vision for its mining sector.

Shifting Focus: Battery Metals and Green Transition

Ecclestone noted a marked shift in the event's focus towards battery metals and the green transition, more pronounced this year than in previous events. However, there was a notable avoidance of geopolitical discussions, suggesting a strategic decision to focus on industry growth and sustainability rather

than delve into contentious global politics.

Skepticism and Realism in Valuation

In his assessment of the Saudi mining sector, Ecclestone expressed skepticism regarding the high valuation of unexplored resources. This cautious stance introduces a realistic perspective to the generally optimistic industry outlook.

In Conclusion

The Future Minerals Forum event in Riyadh stands as a harbinger of change in the mining and investment sectors. Christopher Ecclestone's insights paint a picture of an industry at a crossroads, embracing strategic growth and sustainable practices while remaining mindful of the challenges ahead. The event not only reflects the current state of the mining world but also signals the direction of its future development.

**Technology Metals Report
(01.19.2024): Rainbow Rare
Earths Discovery, Middle East
Critical Minerals Chess Play,
and ANSTO Invests in Critical**

Minerals Research

written by Tracy Weslosky | January 22, 2024

Key highlights in this Technology Metals Report include significant developments such as Rainbow Rare Earths Limited's discovery in South Africa, China's unveiling of the new heavy rare earth mineral Bayanoboite-Y, and the Australian Nuclear Science and Technology Organisation (ANSTO)'s \$13.9 million funding for critical minerals research.

CMI Masterclass: The Middle East's Escalating Investment Interest in Africa's Critical Minerals

written by Tracy Weslosky | January 22, 2024

The "CMI Masterclass: The Middle East's Escalating Investment Interest in Africa's Critical Minerals" hosted by Tracy Weslosky, Director of the [Critical Minerals Institute](#) (CMI), brought together a panel of experts including CMI Directors Melissa "Mel" Sanderson, Jack Lifton, and Russell Fryer. The masterclass delved into the growing trend of Middle Eastern investment in Africa's critical minerals sector. The discussion opened with an exploration of why this trend is significant for investors and the global market. The panelists examined the reasons behind the Middle Eastern capital flow towards Africa's rich mineral resources, emphasizing its strategic importance in

the global supply chain and the potential it holds for reshaping the critical minerals industry.

The conversation then shifted to the implications of this trend for American companies, particularly those committed to sustainability. A key question raised was whether Middle Eastern investments in Africa could influence or deter support from the American investment community. This part of the discussion also touched upon the competitive dynamics between China and the Middle East in Africa, considering their respective investment strategies and objectives.

Finally, the masterclass addressed the broader impacts of Middle Eastern investments in the sector, using the example of Robert Friedland's company, which received a significant investment from the Middle East. This case study led to a discussion on the potential positives and negatives of attracting Middle Eastern capital. While acknowledging the immediate financial benefits, the panelists debated the long-term implications of such investments. They explored the strategic, economic, and geopolitical ramifications, weighing the short-term gains against possible long-term challenges. This comprehensive analysis provided a nuanced understanding of the complex interplay between investment, sustainability, and global geopolitics in the critical minerals sector. To enjoy the full CMI Masterclass, [click here](#)

Defense Metals Signs MOU with

Ucore to Ship Rare Earth Carbonate to RapidSX™ Facility in Ontario

written by Tracy Weslosky | January 22, 2024

Defense Metals Corp. (TSXV: DEFN | OTCQB: DFMTF) and Ucore Rare Metals Inc. (TSXV: UCU | OTCQX: UURAF) have entered into a non-binding Memorandum of Understanding (MOU) to explore joint efforts in establishing a North American rare earth element (REE) supply chain. As a significant step under this MOU, Defense Metals will send a mixed rare earth carbonate sample from its Wicheeda REE project in British Columbia to Ucore's RapidSX™ Commercialization and Demonstration Facility (CDF) in Kingston, Ontario.

Unveiling Hallgarten & Company's Latest Insight: Model Resources Portfolio: Peak Climate Hysteria

written by Tracy Weslosky | January 22, 2024

In the ever-evolving world of resource investment, keeping abreast of the latest trends and market shifts is crucial for investors, I spoke with [Hallgarten + Company](#)'s Christopher Ecclestone in London this morning who is headed to the [Future](#)

[Minerals Forum](#) (FMF), scheduled to take place 9-11 January in Riyadh, Saudi Arabia as one of the speakers.

He responded by sending me a newly released research report from Hallgarten + Company he had written titled: [Model Resources Portfolio: Peak Climate Hysteria](#). In it, Christopher Ecclestone, provides an in-depth analysis of the current economic landscape, blending market data with insightful commentary on environmental and economic trends.

Navigating Through ‘Peak Climate Hysteria’

The report kicks off with a provocative discussion on what he classifies as “Peak Climate Hysteria.” This concept delves into the growing skepticism and political polarization surrounding climate change initiatives, especially when viewed through the lens of economic impact on lower-income demographics. The report suggests that while there’s a general acknowledgment of climate change, the public’s patience may be wearing thin with policies perceived as economically burdensome. This sentiment is especially palpable in regions like the UK and Australia, where extreme weather patterns have sparked debates on the authenticity and implications of the prevailing climate change narrative.

Market Dynamics and Commodity Insights

A significant portion of the report is dedicated to reviewing the performance of various commodities and sectors, providing valuable insights for investors. Gold’s robust position above US\$2000 is highlighted as a particularly positive indicator, reflecting the metal’s enduring appeal in uncertain times. The report also sheds light on Teck Resources Limited’s (TSX: TECK.A | TSX: TECK.B | NYSE: TECK) recent strategic moves in Latin America, painting a promising picture for the company’s future. Another notable mention is the economic reforms in Argentina

under President Javier Milei, hinting at a liberal shift that could reshape the country's investment landscape.

The Lithium sector, pivotal in the green energy transition, is examined in the context of Chile's state interventions and a global slowdown in EV sales. This analysis is critical for understanding the sector's trajectory amidst fluctuating demand and pricing pressures.

Sector-Specific Analysis and Forecasts

Hallgarten + Company's report doesn't shy away from deep dives into specific sectors, offering granular insights that are both informative and strategic. The spotlight on Teck Resources extends into a detailed look at its joint ventures and new ventures, especially in the copper-gold space, underscoring the company's proactive approach in a competitive market.

The Antimony market receives particular attention, with the report highlighting its growing demand, especially in the solar photovoltaic industry. This insight is crucial for investors looking to tap into emerging opportunities within the renewable energy sector. Similarly, the bullish stance on the Tin market, backed by data on declining stock levels and potential supply tightness in China, provides a valuable perspective for those weighing investment options in this niche but significant sector.

Strategic Portfolio Adjustments

Understanding the dynamics of portfolio management is crucial in resource investing, and the report addresses this by detailing recent changes in its model portfolio. The addition of EMX Royalties and [AbraSilver](#), along with a short position in Aya Gold & Silver, is indicative of the company's strategic shifts in response to market trends. This section not only reveals

specific investment moves but also offers a broader view of the company's investment philosophy and approach to risk management.

Broad Market Commentary and Future Outlook

The report concludes with a broader commentary on the state of the resource investment market, particularly focusing on the junior gold explorers. It addresses the challenges faced by these companies in a fluctuating market and the broader implications of market dynamics on their performance. His commentary is essential for understanding the complexities and nuances of investing in junior explorers and the factors that can significantly impact their success or failure.

In summary, Hallgarten + Company's "[Model Resources Portfolio: Peak Climate Hysteria](#)" report stands out as a comprehensive and thought-provoking analysis of the current resource investment landscape in usual Ecclestone fashion. A blend of market data, sector-specific insights, and broader economic commentary provides a valuable resource for investors looking to navigate the complexities of this dynamic field. While this commentary offers a rapid-fire snapshot of the report's rich content, those interested in a deeper dive into the world of resource investing will find reading the full report an exceptionally good use of their time. To access this report, [click here](#)

Technology Metals Report

(01.05.24): The Intensifying Competition of BYD Surprises Tesla

written by Tracy Weslosky | January 22, 2024

Welcome to the latest **Technology Metals Report (TMR)** where we highlight the Top 10 news stories that members of the [Critical Minerals Institute](#) (CMI) have forwarded to us over the last 2-weeks.

Key highlights in this **Technology Metals Report** includes Tesla's impressive Q4 delivery record, overshadowed by BYD's surge as the top EV maker, underscoring the intensifying competition in the electric vehicle market. Energy Fuels Inc. has made significant strides, first by entering into an MOU with Astron Corporation to bolster the U.S. rare earths supply, and then by expanding its uranium production in response to favorable market conditions. Nio Inc. has made a technological leap with its innovative EV battery, boasting a 1,000km range, while global trends in the critical minerals and EV market show shifts influenced by economic and political developments. Notably, Codelco and SQM's new lithium venture in Chile represents a strategic move in the lithium market. The impact of China's rare earths export ban stands as a significant moment, compelling the U.S. to foster technological self-reliance. The landmark merger between Allkem and Livent to form Arcadium Lithium marks a major consolidation in the lithium industry. Atomionics' innovative use of AI and gravity in mining exploration showcases a technological breakthrough. The EU's ambitious goals for critical minerals, despite challenges, indicate a strong commitment to securing essential resources for its green transition. Lastly, KoBold Metals' ambitious global lithium

exploration, backed by industry giants, highlights the growing importance of lithium in the clean energy sector.

The 10-stories selected for this edition of the TMR with source links to source stories for this fast-paced sector are listed chronologically for your ease and review.

Tesla delivers record Q4 cars, but China's BYD steals top EV spot (January 3, 2024, [Source](#)) – In the fiercely competitive electric vehicle (EV) market, Tesla Inc. (NASDAQ: TSLA) achieved a significant milestone by delivering a record 484,507 vehicles in the fourth quarter of 2023, surpassing market expectations and fulfilling its annual target. Despite this success, Tesla was eclipsed by China's BYD in terms of sales volume, losing its position as the leading EV manufacturer. BYD, backed by Warren Buffett, delivered 526,409 vehicles, primarily in China, indicating a consumer preference for more affordable models in an economy burdened by high interest rates. Although Tesla's aggressive sales strategies led to a notable 11% growth over the previous quarter and a total production of 1.85 million units in 2023, it fell short of CEO Elon Musk's ambitious target of 2 million. The company's stock remained stable amidst a generally declining market. Meanwhile, BYD's strategy of price cuts appears to be paying off, gaining market share despite potential impacts on profit margins. Tesla, in a bid to boost sales, offered discounts and incentives, such as six months of free fast charging for deliveries made by the end of December. This strategy was partly in response to some models of its Model 3 sedan losing U.S. federal tax credits in 2024. Tesla's delivery performance stands out in comparison to domestic U.S. car companies, but it is also facing challenges like regulatory scrutiny over its self-driving technology and the need to adapt to changing tax credit policies.

Energy Fuels' Strategic MOU with Astron: Shaping the Future of

the U.S. Rare Earths Supply Chain (December 30, 2023, [Source](#)) – [Energy Fuels Inc.](#) (NYSE American: UUUU | TSX: EFR) has recently entered into a significant Memorandum of Understanding (MOU) with Astron Corporation Ltd. to jointly develop the Donald Rare Earth and Mineral Sands Project in Victoria, Australia. This collaboration, [announced](#) on December 27, 2023, marks a crucial step in establishing a U.S.-focused rare earths supply chain, vital for meeting future national needs. The project will provide Energy Fuels with 7,000 to 14,000 metric tons of rare earth concentrate annually from the Donald deposit, processed at their White Mesa Mill in Utah. This arrangement not only utilizes the mill's capacity to manage radioactive elements but also supports the production of critical minerals like uranium. The project is set to initially produce 800 – 1,000 metric tons of Neodymium-Praseodymium (NdPr) oxide by Q1 2024, with prospects for expansion. This development is strategically important in light of the U.S. government's impending policy to restrict critical minerals sourced from Foreign Entities of Concern, effective from 2025. By fostering a sustainable, competitive, and independent supply chain, Energy Fuels' initiative is poised to significantly impact the electric vehicle and clean energy sectors in the U.S., reducing dependency on foreign sources, especially China, and bolstering national security and technological advancement.

A Chinese EV company developed a battery with a 1,000km range – and its CEO tested it out on a 14-hour livestream (December 29, 2023, [Source](#)) – Chinese electric vehicle (EV) company Nio Inc., often compared to Tesla, recently showcased a groundbreaking development in EV technology by introducing a battery with an impressive 1,000km range. The company's CEO, William Li, widely regarded as China's answer to Elon Musk, embarked on a 14-hour live-streamed journey covering 1,044km from Shanghai to Xiamen to demonstrate the battery's capabilities. Despite challenging

weather conditions, Li's Nio ET7, powered by the company's new 150 kWh battery with the highest energy density for a mass-produced EV battery, completed the trip with 3% charge remaining. Scheduled for mass production in April 2024, these batteries, though costly at around \$42,100, represent a significant advancement in EV technology. Nio's unique business model allows customers to buy cars without a battery, offering a subscription for battery swaps at over 2,000 stations across China. Despite financial challenges and each car resulting in a \$12,000 loss for Nio, this strategy has elevated Li's stature, drawing parallels with Tesla's Elon Musk. Li further showcased Nio's technological prowess at the annual "Nio Day," revealing the new ET9 flagship to thousands of Nio enthusiasts.

The Critical Minerals Institute Report (12.27.2023): Politics Driving Marketable Commodities into 2024 (December 27, 2023, [Source](#)) – The December 2023 [Critical Minerals Institute](#) report highlights key global economic and political developments influencing the critical minerals and electric vehicle (EV) markets. U.S. inflation decreases and potential interest rate cuts in 2024 have positively impacted equity markets, while China's anticipated economic recovery bodes well for commodity sectors. The EV market is experiencing significant growth, particularly in China, despite challenges from U.S. and EU policies aiming to reduce dependency on foreign entities. The U.S. Department of Energy's proposed FE0C guidelines and the EU's Critical Raw Materials Act reflect a strategic shift towards stabilizing and localizing critical minerals supply chains. The report also notes significant fluctuations in the lithium market, with expectations of a bottom forming soon, and discusses the broader market dynamics of other critical minerals like cobalt, graphite, nickel, and manganese, in the context of a global economic slowdown. The performance of uranium in 2023 and the potential impact of lower interest rates in 2024 on the

global economy and critical minerals demand are key areas of focus.

Chile's Codelco to control new lithium venture with miner SQM (December 27, 2023, [Source](#)) – Chile's state-owned copper miner, Codelco, has entered into a significant partnership with mining company Sociedad Química y Minera de Chile S.A. ("SQM") (NYSE: SQM), gaining majority control in a new lithium venture. This move aligns with President Gabriel Boric's directive for greater government involvement in lithium production. Chile, holding the title of the world's second-largest lithium producer, aims to revitalize its market share, which is at risk of declining due to aging mining projects and increasing global competition. The deal, marking a pivotal step in Boric's national lithium strategy, mandates public-private partnerships for all lithium projects. Set to start in January 2025, Codelco will take over SQM's existing contracts and collaborate on increasing lithium production in the Atacama Desert. This partnership is not only a strategic move to stabilize SQM's market position but also sets a precedent for future lithium contracts in Chile, potentially reshaping the country's role in the global lithium market.

Global Rare Earths Market Heats Up as China Implements Export Ban (December 21, 2023, [Source](#)) – The recent [ban by China](#) on the export of rare earth processing technology represents a pivotal moment in the global rare earths market, particularly impacting the strategic metals sector. This ban, covering technology for extracting, separating, and producing rare earth metals and alloys, along with some magnet production technologies, has significant implications for industries like electronics, clean energy, and defense. Experts from the [Critical Minerals Institute](#), including Melissa Sanderson and Peyton Jackson, highlight the necessity for the United States to proactively respond by investing in both green technologies, such as bio-extraction, and traditional processing methods. They emphasize

the risks of over-dependence on other nations and the importance of developing technological self-reliance. The U.S. government's funding of Lynas Rare Earths Ltd. (ASX: LYC) and Energy Fuels Inc.'s (NYSE American: UUUU | TSX: EFR) advanced solvent extraction system exemplifies a shift towards addressing these challenges through domestic initiatives. This strategic move is not only a reaction to China's export ban but also a step towards ensuring a more sustainable and secure future in the critical minerals sector.

Allkem shareholders approve \$10.6 billion Livent lithium merger (December 19, 2023, [Source](#)) – Australian lithium producer Allkem Limited (ASX: AKE | TSX: AKE) and U.S. company Livent Corporation (NYSE: LTHM) have agreed on a significant [\\$10.6 billion merger](#), marking a major move in the lithium industry. This decision, approved by 72% of Allkem's voting shareholders, will result in the formation of Arcadian Lithium PLC (NYSE: ALTM | ASX: LTM), a formidable entity in the global lithium market. The merger, which has received all necessary regulatory approvals, positions Arcadium Lithium as one of the world's largest lithium companies, with operations spanning Australia, Argentina, and Canada. The new company will be integral in supplying lithium, a critical component for electric vehicle batteries, to various battery manufacturers. Under the terms of the deal, Allkem shareholders will exchange their shares on a one-for-one basis for shares in Arcadium Lithium, owning 56% of the new company, while Livent shareholders will receive 2.406 shares in Arcadium for each of their shares. Livent CEO Paul Graves is set to lead the new company, which will be the world's third-largest lithium producer. The merger comes amidst a surge in dealmaking activity in the lithium sector and is recommended by independent financial advisors and proxy firms. Additionally, Livent plans to expand its operations in Western Australia's prominent lithium districts.

Singapore's Atomionics taps gravity, AI in hunt for critical minerals (December 19, 2023, [Source](#)) – Singapore-based startup Atomionics is transforming the mineral exploration industry with its innovative technology, Gravio, which combines gravity detection and artificial intelligence. This “virtual drill” technique offers a more precise and efficient method for locating ore bodies of critical minerals like copper, nickel, and zinc. Atomionics has already engaged with three major mining companies and is implementing its technology in Australia and the U.S. The technology's real-time data processing significantly accelerates the task of defining ore bodies, offering a cost-effective alternative to traditional exploration methods. The ability to build an accurate virtual picture of mineral deposits before physical drilling can greatly reduce costs, as exploratory drilling is expensive and often misses the target. Atomionics aims to decrease these unsuccessful attempts by at least half. This innovative approach holds the potential to be a game-changer in the mineral exploration sector, presenting a low-cost alternative to traditional methods and contributing to the energy transition.

EU sets critical mineral goals, but faces struggle to hit them (December 18, 2023, [Source](#)) – The European Union (EU) has ambitious targets for securing critical minerals essential for its green transition, as outlined in the Critical Raw Materials Act (CRMA), which aims to mine, recycle, and process significant portions of its annual needs for key materials like lithium and cobalt by 2030. These efforts are crucial for manufacturing clean technology products and reducing dependence on China, the dominant player in global mineral processing. However, the EU faces considerable challenges, including funding shortages, high energy costs, local opposition, and the need to expedite project permits. Additionally, the EU's efforts are comparatively underfunded compared to massive investments in green subsidies

by countries like the U.S. The situation is further complicated by higher EU energy costs leading to reduced metal production and delays in mining projects in Portugal and Serbia. Despite these hurdles, there are positive signs, such as potential projects meeting EU supply needs and innovations to minimize material use. The EU also seeks to diversify imports and forge global partnerships, aiming to position itself as a clean tech leader by focusing on high-value manufacturing and relying on reliable allies for mineral sourcing.

Billionaire-backed KoBold Metals widens lithium hunt across four continents (December 14, 2023, [Source](#)) – KoBold Metals, a California-based startup financially backed by prominent billionaires including Bill Gates and Jeff Bezos, is broadening its search for lithium, a crucial component in the clean energy and electric vehicle sectors, across four continents. Utilizing advanced artificial intelligence technology, CEO Kurt House announced plans to explore for lithium in regions such as South Korea, Quebec, the United States, Australia, and Africa, with specific emphasis on Namibia and the Democratic Republic of Congo. Previously focused on nickel and copper, with successful ventures in Quebec and Zambia, KoBold is now transitioning to include lithium in its mining portfolio. This strategic move aligns with their long-term goal to become the leading supplier of critical metals within 10 to 15 years. The startup, supported by Breakthrough Energy Ventures, collaborates with major players like BHP Group and Rio Tinto on projects in Australia and Canada. This expansion reflects KoBold's ambition to fill the exploration void left by larger mining firms, which have recently prioritized operational efficiency and shareholder returns over new mineral discoveries.

InvestorNews Critical Minerals Media Coverage:

- January 3, 2024 – Rare earths company stock price has had

a 'meteoric' rise of over 21x the past 15 months
<https://bit.ly/3vo6Xn3>

- December 29, 2023 – Energy Fuels announces an MOU for a \$122M investment in Astron that will supply a “new U.S.-based supply chain for decades” <https://bit.ly/3tzBfm9>
- December 29, 2023 – Hallgarten Initiates Coverage of Edison Lithium: Pivoting to Sodium-Ion Battery Technology <https://bit.ly/3tG08wq>
- December 27, 2023 – The Critical Minerals Institute Report (12.27.2023): Politics Driving Marketable Commodities into 2024 <https://bit.ly/48sqnVU>
- December 21, 2023 – Global Rare Earths Market Heats Up as China Implements Export Ban <https://bit.ly/3TAClsv>
- December 21, 2023 – Setback for U.S. Rare Earth Industry: China Tightens Export Laws on Key Technologies, Impeding American Efforts to Gain Independence Despite Financial Incentives <https://bit.ly/4aGvQdQ>
- December 20, 2023 – An update on the graphite sector and what to expect in 2024 and beyond <https://bit.ly/3v8xLHG>
- December 19, 2023 – Australia updates their Critical Minerals List and Adds a second, introducing the Australian Strategic Materials List <https://bit.ly/3RQx7aG>

InvestorNews Critical Minerals Videos:

- December 30, 2023 – Jack Lifton with Mark Chalmers on Energy Fuels Rare Earth Deal and Increasing US Uranium Production <https://bit.ly/3TM5wsK>
- December 30, 2023 – Mark Chalmers of Energy Fuels Discusses Increasing Uranium Production in the United States <https://bit.ly/3TDPH7k>
- December 30, 2023 – Energy Fuels' Strategic MOU with Astron: Shaping the Future of the U.S. Rare Earths Supply Chain <https://bit.ly/41PPujp>

- December 18, 2023 – Ucore’s Strategic Leap: Pat Ryan Discusses the First Mover Advantage in Rare Earths Processing at Louisiana’s Strategic Metals Complex <https://bit.ly/3GKa2jL>

Critical Minerals IN8.Pro Member News Releases:

- January 4, 2024 – Ucore Acquires Alexandria, Louisiana, Facility for Rare Earth Element Processing Plant <https://bit.ly/3RJC00s>
- January 2, 2024 – Panther Metals PLC Corporate Summary: Positioned to Succeed <https://bit.ly/3tDKSQI>
- January 2, 2024 – First Phosphate Closes Second Tranche of Oversubscribed Private Placement for Total Current Financing of \$7.5 Million <https://bit.ly/48jDCbP>
- December 29, 2023 – Panther Metals PLC: Obonga Project Awkward East Claim Purchase Agreement <https://bit.ly/3NKBeTr>
- December 28, 2023 – Appia Rare Earths & Uranium – A Year in Review <https://bit.ly/48xo3gh>
- December 28, 2023 – Kraken Energy Receives Permit to Resume Phase I Drill Program at Harts Point and Provides Corporate Update <https://bit.ly/48pALxM>
- December 27, 2023 – Energy Fuels Enters into MOU to Secure Near-Term, Large-Scale Australian Source of Rare Earth Minerals to Supply New U.S.-Based Supply Chain for Decades <https://bit.ly/47lDF5v>
- December 27, 2023 – Ucore Comments on China’s Ban on the Export of Rare Earth Technology <https://bit.ly/3RYiimD>
- December 27, 2023 – Appia Announces Closing of Non-Brokered Flow-Through Private Placement <https://bit.ly/41EDIbJ>
- December 27, 2023 – Defense Metals Completes Geotechnical Field Data Collection for Wicheeda Rare Earth Element

Project Preliminary Feasibility Study
<https://bit.ly/3RGLehB>

- December 27, 2023 – F3 to Spend \$16 Million on Drilling at PLN <https://bit.ly/4aCQwDc>
- December 22, 2023 – First Phosphate Announces Closing of Initial Tranche of Private Placement Financing Along with Date of Second Tranche Closing <https://bit.ly/48LgHWR>
- December 22, 2023 – Ucore Announces Extension of Debt <https://bit.ly/3S7KAev>
- December 22, 2023 – Fathom Nickel Announces the Closing of the First Tranche of Private Placement <https://bit.ly/3S6aCyF>
- December 21, 2023 – Imperial Mining Closes \$1M Critical Minerals Flow-Through Private Placement <https://bit.ly/4aEEsSh>
- December 21, 2023 – Western Uranium & Vanadium Provides Market and Company Updates <https://bit.ly/3tyzFAP>
- December 21, 2023 – Ucore Completes RapidSX(TM) Demo Plant Commissioning – Begins US Department of Defense Demonstration Program <https://bit.ly/3tjI4Iz>
- December 21, 2023 – In Response to Surging Prices, Supportive Government Policies, and a Domestic Focus on Security of Supply, Energy Fuels Has Commenced Production at Three of its U.S. Uranium Mines <https://bit.ly/3Ru3Lxv>
- December 20, 2023 – Panther Metals PLC: Financing Update <https://bit.ly/410C3jB>
- December 20, 2023 – Critical Metals PLC advances the Molulu Copper-Cobalt Project in DRC <https://bit.ly/3ts5TxH>
- December 19, 2023 – Auxico Announces Board Decisions on Key Assets and Filing of Technical Reports <https://bit.ly/3TyNx FY>
- December 19, 2023 – Automotive OEM Validates Nano One LFP and Kicks Off Tonne-Scale Evaluations <https://bit.ly/48g4KZ6>

Global Rare Earths Market Heats Up as China Implements Export Ban

written by Tracy Weslosky | January 22, 2024

China's recent decision to ban the export of [rare earth processing technology](#) marks a significant shift in the global rare earths market. This move, aimed at protecting China's dominance in the strategic metals sector, encompasses technology for extracting and separating rare earths, as well as the production technology for rare earth metals, alloys, and some magnets. The ban has major implications for industries reliant on these materials, such as electronics, clean energy, and defense.

In response to this development, experts from the [Critical Minerals Institute](#) (CMI) have shared their insights. Melissa "Mel" Sanderson, a director at CMI, characterizes China's move as predictable and in line with their stated intentions. She stresses the importance of the United States responding proactively, emphasizing the need to advance initiatives in greener, cleaner spaces like bio-extraction, and to invest in conventional technologies. Sanderson warns of the risks of over-reliance on nations like Australia, which have their own market priorities and limitations.

The consensus among experts is clear: the recent developments serve as a crucial wake-up call for the United States, emphasizing the need to prioritize technological advancements, particularly in sustainable sectors. They stress the importance

of investing in traditional processing and separation technologies to prevent limitations in capacity. CMI Director [Peyton Jackson](#) further elaborates, “The U.S. government [granted](#) Lynas Rare Earths Ltd. (ASX: LYC) \$300 million for a project feasibly achievable with just \$30 million invested at White Mesa Utah. Production at White Mesa is expected to begin in January 2024, as scheduled. This exemplifies a vital point: often, solutions are more straightforward than they initially seem. It falls upon us to bring attention to these simpler, yet effective, approaches.”

CMI Co-Chair [Jack Lifton](#) comments: “The ban will impact mostly non-Chinese countries that are building rare earth processing and fabricating facilities de novo. Western companies, such as Solvay, Neo Performance (Sil-Met), and Lynas have been efficiently separating rare earths for some time. America’s MP and Energy Fuels are either re-starting and/or modifying existing solvent extraction processing systems to handle rare earth separations. Solvent extraction separation is a long-established practice everywhere. The issue is the production of rare earth metals and alloys and from them of rare earth permanent magnets. This is where China’s massive lead in manufacturing technology may be insurmountable. Time will tell.”

In this context, [Energy Fuels Inc.](#) (NYSE American: UUUU | TSX: EFR), a frontrunner in the industry, has embarked on an ambitious project. Jack Lifton explains: “Energy Fuels has begun construction of an up-to-date solvent extraction system with an initial capacity of 1000 tons per year of the total rare earths contained in monazite. The SX plant, designed in-house, will be among the world’s most streamlined and efficient. It will require only a fraction of the traditional number of mixer-settler stations today considered ‘necessary’ for a legacy SX system. The payable product of the EF system will be separated NdPr, also known as didymium. This first phase plant will

produce enough NdPr per year for the production of 700 tons of neodymium-iron-boron type rare earth permanent magnets. Energy Fuels phase one SX plant will be operational on or before May 1, 2024.”

The ban on the export of rare earth processing technology by China and the proactive steps taken by companies like Energy Fuels underscore a larger issue: the strategic importance of rare earth elements and the technological independence of nations. The insights from CMI directors, combined with the initiatives of industry players like Energy Fuels, suggest a path forward for the U.S. to increase investment in both green and conventional technologies. This strategy is essential not only to address the immediate challenges posed by China’s policy change but also to pave the way for a more sustainable and secure future in the rare earths and broader critical minerals sector.

Australia updates their Critical Minerals List and Adds a second, introducing the Australian Strategic Materials List

written by Tracy Weslosky | January 22, 2024

The Albanese Government of Australia has recently undertaken a notable [revision](#) of its critical minerals policies, underscoring

the nation's focus on energy, job creation, and national defense. These revisions include updating the Critical Minerals List and introducing a new Strategic Materials List, an integral part of a larger strategy to establish Strategic Critical Minerals Hubs across the country.

Significant changes to the Critical Minerals List have been made, notably adding fluorine, molybdenum, arsenic, selenium, and tellurium, while removing helium. This update brings Australia's list into closer alignment with those of its international strategic partners. These minerals play a vital role in the energy transition and are heavily utilized in the defense and technology sectors.

Alastair Neill, Director of the [Critical Minerals Institute](#) (CMI), offered an expert perspective on these additions. He remarked, "It was interesting to see some of the additions. Arsenic is involved pretty well in Europe and the US, but again China, has 40% of the world's production, I think the next largest is Peru. So there is lots of arsenic in North America. But just because of the environmental hoops that you have to go through to deal with that I think has prevented sort of domestic production. They also added molybdenum, which is an interesting choice, and tellurium, and selenium, which are very small markets by themselves." Neill's insights highlight the strategic considerations and complexities in the global supply chain of these minerals.

Additionally, the new [Strategic Materials](#) List complements the Critical Minerals List by identifying essential commodities for the energy transition that are not at risk of supply chain disruptions. This list includes copper, nickel, aluminum, phosphorous, tin, and zinc, notable for their established industries and stable supply chains.

A key component of this initiative is the feasibility study for Strategic Critical Minerals Hubs, aimed at identifying potential locations for critical minerals infrastructure precincts, especially for commodities that might face supply chain disruptions. This study is informed by the Government's Critical Minerals Strategy and input from industry and state and territory resources ministers.

Minister for Resources and Northern Australia, Madeleine King, has emphasized that these changes are the culmination of extensive consultations with industry, the public, and state and territory governments. The updates are poised to enhance Australia's stature as a significant exporter of clean energy materials, reflecting the critical role of these minerals in the greening of Australia's economy and its national defense.

The Critical Minerals List and the Strategic Materials List will be updated regularly to reflect changing economic and geostrategic dynamics. The inclusion of minerals like copper, nickel, aluminum, phosphorous, tin, and zinc on the Strategic Materials List highlights their economic and strategic importance, especially in light of the global energy transition.

The Australian Government maintains both the Critical Minerals List and the Strategic Materials List to identify minerals crucial for the nation's modern technologies, economy, and national security. These lists are subject to review at least every three years and may be adjusted in response to global strategic, technological, economic, and policy changes. The Critical Minerals List comprises minerals essential for modern technologies and national security, while the Strategic Materials List includes those important for the global transition to net zero and other strategic applications, but with currently stable supply chains. The government's ongoing support for the extraction and processing of these minerals is a

critical aspect of monitoring their market developments.

Technology Metals Week-in-Review: US Tax Rules Impacts EV Market, \$3Bn Raise for ARA Partners & Appian's \$230M into USSM

written by Tracy Weslosky | January 22, 2024

This week's **Technology Metals Week in Review** captures the multifaceted nature of the critical minerals sector, highlighting key financial deals, policy developments, international trade dynamics, and strategic initiatives that are shaping the global economic and environmental landscape over the last week. Special thanks to the [Critical Minerals Institute](#) (CMI) Directors that source these stories for review for both the CMI and InvestorNews audience.

Stricter Federal Tax Credit Rules in 2024 May Limit Electric Vehicle Choice: December 16, 2023 ([Source](#)) – In 2024, the eligibility for federal tax credits on electric vehicles will tighten, potentially excluding popular models like Tesla Model 3 and Ford Mustang Mach-E due to more stringent sourcing requirements. The Biden administration's new rules, part of the Inflation Reduction Act, aim to promote North American manufacturing and reduce dependence on China for batteries and essential materials. This change marks a significant shift in

the electric vehicle market, which has seen increased sales partly due to these credits. While electric vehicles are a rapidly growing segment, the new restrictions could impact the affordability and availability of certain models, creating a challenge for both consumers and manufacturers. *Referral, CMI Co-Chairman [Jack Lifton](#)*

Appian's Major Financing for US Strategic Metals: December 18, 2023 ([Source](#)) – Appian Capital Advisory LLP has made a significant move in the battery metals sector by providing a \$230-million financing package to US Strategic Metals (USSM). This financial support aims to boost the development of USSM's cobalt/nickel mine and establish a hydrometallurgical battery metals recycling facility in Fredericktown, Missouri. The package includes a \$120-million secured term loan, a \$70-million royalty financing arrangement, and warrants. USSM's project focuses on mining and processing critical minerals like cobalt, nickel, lithium, and copper. This initiative will not only aid in recycling but also in the production of battery metals for the electric vehicle (EV) supply chain in the United States, marking a significant stride in the domestic production and recycling of essential battery materials. *Referral, CMI Director [Russell Fryer](#)*

Canada's 2035 Zero Emissions Vehicle Mandate: December 17, 2023 ([Source](#)) – In a landmark move for environmental policy, the Canadian government will announce regulations mandating all new cars to be zero emissions by 2035. This initiative, termed the Electric Vehicle Availability Standard, aims to address the long wait times for EVs, which have been a major barrier to their uptake. The regulation will gradually increase the required proportion of zero emissions vehicles (ZEVs), including battery electric, hydrogen, and plug-in hybrid vehicles, in new car sales – reaching 20% by 2026, 60% by 2030, and 100% by 2035. This move is complemented by incentives for companies to sell

EVs and build public fast chargers, alongside the government's commitment to build 84,500 chargers by 2029. The mandate has faced pushback from auto manufacturers but is seen as crucial in addressing rising carbon emissions and the inefficiency of the current vehicle fleet in Canada. *Referral, CMI Co-Chairman [Jack Lifton](#)*

Vital Metals' Rare Earths Deal with China: December 17, 2023 ([Source](#)) – Vital Metals Limited (ASX: VML), operating in Canada's Northwest Territories, has struck a significant deal with Chinese company Shenghe Resources. All the material mined so far at the Nechalacho mine will be sold to Shenghe, which now holds a 9.9% stake in Vital Metals, potentially rising to over 18%. This decision represents a shift in strategy for Vital Metals, which previously aimed to contribute to breaking China's dominance in rare earths supply. The deal will provide Vital with crucial funding for its operations and future developments, including the exploration of the larger Tardiff deposit and lithium-related projects. However, the deal has raised questions regarding national security and the influence of foreign investments in critical mineral sectors. *Referral, CMI Co-Chairman [Jack Lifton](#)*

CMI Summit III: Achieving Critical Minerals Mastery in Today's Markets: December 14, 2023 ([Source](#)) – The [Critical Minerals Institute](#) (CMI) has announced the CMI Summit III, scheduled for August 21st and 22nd, 2024, at The National Club in Toronto, Canada. This event, themed "Achieving Critical Minerals Mastery in Today's Markets," will gather industry leaders, investors, and experts to discuss critical mineral topics such as investment opportunities, the impact of specialist companies, global market trends, and African market dynamics. The summit will address challenges and opportunities in the critical minerals sector, focusing on geopolitical influences and strategies for thriving in a dynamic market. Industry leaders

like Mark Chalmers from [Energy Fuels Inc.](#) (NYSE American: UUUU | TSX: EFR), Tuan Tran from [Ara Partners](#), Dan Blondal from [Nano One Materials Corp.](#) (TSX: NANO), and Pat Ryan from [Ucore Rare Metals Inc.](#) (TSXV: UCU | OTCQX: UURAF) will contribute to the high-level discussions and expert-led panels. *Referral, CMI Managing Director [Tracy Weslosky](#)*

Advanced Magnet Lab's Commercial Manufacturing Plan in the U.S.: December 15, 2023 ([Source](#)) – Advanced Magnet Lab, Inc. (AML) announced its plan for high-rate commercial manufacturing of non-sintered permanent magnets in the U.S. Utilizing its PM-Wire™ technology, AML focuses on producing magnets for various applications, including electric motors. The company's collaboration with Oak Ridge National Laboratory (ORNL) in developing an electric vehicle motor is a notable example of its innovative approach. AML plans to co-locate manufacturing with customers or supply chain partners, with potential site locations being discussed in several U.S. jurisdictions. This initiative represents a significant advancement in the domestic production of critical magnet technologies, essential for various industries, including aerospace, defense, and automotive. *Referral, CMI Director, [Alastair Neill](#)*

China's Increased Rare Earth Quotas for 2023: December 16, 2023 ([Source](#)) – China, the world's largest producer and consumer of rare earths, has issued its third batch of rare earth mining quotas for 2023, totaling 15,000 tonnes, and smelting and separation quotas of 13,850 tonnes. These quotas are closely monitored as they are critical indicators of global rare earth supply. The increase in quotas indicates a response to higher demand needs, highlighting China's significant role in the rare earth industry. This year, the total rare earth mining and smelting quotas have increased by 21.4% and 20.7%, respectively, compared to last year. The rise in rare earth imports in China also underscores the growing global demand for these essential

materials. *Referral, CMI Director, [Alastair Neill](#)*

Ara Partners Closes Over \$3 Billion of New Capital Commitments: December 13, 2023 ([Source](#)) – Ara Partners, a leading private equity and infrastructure investment firm specializing in industrial decarbonization, has closed over \$3 billion of new capital commitments. Fund III, focused on buyout and growth investments in the decarbonization sector, exceeded its initial target, closing on \$2.8 billion. Ara's strategy aims to reduce carbon emissions in industries, including industrial and manufacturing, chemicals, energy efficiency, and agriculture. The fund has already made significant investments, demonstrating Ara's commitment to environmentally impactful and high-growth companies globally. *Referral, CMI Managing Director [Tracy Weslosky](#)*

China's Interest in US-Vietnam Rare Earths Plan: December 16, 2023 ([Source](#)) – Following President Xi Jinping's visit to Hanoi, China has expressed interest in Vietnam's rare earths, suggesting Vietnam should send its rare earth deposits to China for processing. This comes amid US efforts to encourage Vietnam to directly export its rare earths to counter China's dominance. Vietnam, with substantial rare earth reserves, is seen as a key player in diversifying the global supply away from China. Beijing's offer to assist in building a railway through Vietnam's rare-earth heartland further underscores the strategic importance of these minerals and the geopolitical complexities involved. *Referral, CMI Director [Russell Fryer](#)*

This week's Technology Metals Week in Review serves as a testament to the dynamic and critical role of technology metals in our contemporary global economy and environmental strategies. For more information, visit www.CriticalMineralsInstitute.com

InvestorNews Critical Minerals Media Coverage:

- December 14, 2023 – The Critical Minerals Institute Announces the CMI Summit III: A 2-Day Event Led by Prominent Industry Leaders Themed “Achieving Critical Minerals Mastery in Today’s Markets” <https://bit.ly/41oV1x7>
- December 13, 2023 – Top 3 best valued lithium juniors, as lithium prices near a bottom <https://bit.ly/48fMK0d>

InvestorNews Critical Minerals Videos:

- December 15, 2023 – CMI Masterclass: Securing North America’s Future, A Conversation on the Critical Minerals Supply Chains with Jack Lifton <https://youtu.be/Ug0u0xKlHuw>
- December 12, 2023 – CMI Masterclass: Flow Through and Critical Minerals <https://youtu.be/SLvpYVCnbTA>

Critical Minerals News Releases

- December 15, 2023 – F3 Announces Stock Option and RSU Grant <https://bit.ly/48oIkF4>
- December 14, 2023 – First Phosphate Announces Intention to Complete \$2,000,000 Non-Brokered Private Placement <https://bit.ly/3NsoikK>
- December 14, 2023 – Continued Exceptional Drilling Results at Halleck Creek <https://bit.ly/3tgDbjg>
- December 13, 2023 – Elcora Announces Approval of Stock Option Plan and Restricted Share Unit Plan by Shareholders <https://bit.ly/48j80I2>
- December 12, 2023 – Western Uranium & Vanadium Corp. Closes Fully Subscribed Brokered LIFE Financing of \$7.25 Million <https://bit.ly/3Ro3Wu2>
- December 12, 2023 – Louisiana Governor Executes Ucore’s

SMC Industrial Tax Exemption Contract
<https://bit.ly/4ak1GN6>

- December 12, 2023 – Appia Announces Scandium and Cobalt Discovery at Its New Buriti Target at the PCH Project, Brazil; Reverse Circulation Drill Hole Returns 24 Metres of Mineralization Averaging 128 ppm Scandium Oxide, 272 ppm Total Cobalt Oxides and 2,106 ppm Total Rare Earth Oxides from Surface <https://bit.ly/3GCCW5h>
- December 11, 2023 – Power Nickel Files Complaint on Widespread Potential Illegal Short Selling of its Shares <https://bit.ly/41mQziC>
- December 11, 2023 – First Phosphate and Ultion Technologies Enter MOU for Purchase of LFP / LFMP Commercial Production Technology and Offtake of 6,000 annual Tonnes of LFP Cathode Active Material for Specialty Products <https://bit.ly/3tbBNyj>
- December 11, 2023 – Panther Metals PLC: Substantial Holding Released From Escrow <https://bit.ly/3t4DPR1>
- December 11, 2023 – Appia Announces Closing of PCH Project Acquisition <https://bit.ly/3GDc30v>

**Investor.Coffee (12.11.2023):
CDN Healthcare Deal, U.S.
Dollar Gains Strength on**

Japan's Nikkei Rebound

written by Tracy Weslosky | January 22, 2024

[DIAGNOS Inc.](#) (TSXV: ADK | OTCQB: DGNOF), a company we have followed for several years out of Montreal, [announced](#) a landmark move for the Canadian healthcare sector this morning. DIAGNOS Inc., a pioneer in artificial intelligence (AI)-driven health solutions, has announced a significant distribution agreement with global ophthalmic leader EssilorLuxottica. This exclusive Canadian contract, unveiled on December 11, 2023, signifies a pivotal moment for DIAGNOS, cementing its place in the market with its cutting-edge retinal analysis technology.

Renowned for its effectiveness in the early detection of eye conditions, DIAGNOS's technology will now reach a broader audience through EssilorLuxottica's expansive network, promising an enhancement in the quality of eye health care. The three-year agreement, which includes a renewal option, entails a per-patient exam payment model to DIAGNOS. André Larente, DIAGNOS' President, highlighted this partnership's role in broadening the accessibility of their innovative technology, aligning with their mission to foster visual health in Canada and globally.

Market Watch: Global and US Economic Indicators

As the business day commences, futures indicate a downtrend, shadowing a dip in commodities like oil and gold. In the U.S., we are awaiting the Federal Reserve's monetary policy meeting and upcoming inflation data, which will shed light on the possibility of a soft landing for the economy. European shares are also experiencing a downturn, while Japan's Nikkei has seen a rebound. The U.S. dollar is gaining strength against the

Japanese yen.

U.S. Central Bank's Interest Rate Decision

The U.S. Federal Reserve is set to release its interest rate decision on Wednesday, following last month's unchanged benchmark rate. Wall Street is increasingly optimistic about maintaining the status quo in December, as efforts to curb inflation without triggering a recession seem fruitful.

In recent global and U.S. economic updates, the market is witnessing a downward trend in futures, mirroring declines in commodities such as oil and gold. Investors in the U.S. are particularly focused on the upcoming Federal Reserve's monetary policy meeting and the release of inflation data, which are crucial in assessing the prospects of a soft economic landing. Meanwhile, European shares are experiencing a downturn, in contrast to Japan's Nikkei which has shown a rebound. The U.S. dollar is strengthening against the Japanese yen.

The U.S. Federal Reserve is poised to announce its decision on interest rates this Wednesday, following a period of unchanged rates. There's a growing sentiment on Wall Street that the Fed might maintain the current rates in December, buoyed by successful measures to control inflation without pushing the economy into recession.

Some Business News Highlights:

- In corporate developments, French AI company Mistral AI, founded by ex-employees of Meta and Google, has [raised](#) €385 million in a second funding round, marking a significant milestone. This funding, led by investors such

as Andreessen-Horowitz and LightSpeed Ventures, positions Mistral AI as a key player in the global AI landscape. The company also launched Mixtral 8x7B, an AI platform intended to compete with leading AI platforms like OpenAI's ChatGPT and Google's Bard.

- In the healthcare sector, U.S. insurer Cigna (NYSE: CI) has [ended](#) its merger talks with Humana Inc. (NYSE: HUM), citing price disagreements, and instead announced a significant \$10 billion share buyback plan. This development follows several years after regulatory interventions blocked major consolidations in the health insurance sector.
- In the tech industry, NVIDIA Corporation (NASDAQ: NVDA) is [expanding](#) its footprint in Vietnam, partnering with leading tech companies in the country. This expansion, announced by NVIDIA's CEO, focuses on AI and digital infrastructure, aligning with Vietnam's ambitions to advance in chip design and manufacturing, especially in the context of ongoing U.S.-China trade tensions.
- In the energy sector, Occidental Petroleum Corp. (NYSE: OXY) has confirmed its [acquisition](#) of CrownRock, an energy producer in the Permian basin, in a \$12 billion deal. This acquisition is a strategic move for Occidental's growth in the energy sector.
- TC Energy Corp.'s (TSX: TRP | NYSE: TRP) Coastal GasLink project is currently facing legal challenges due to construction delays, which could significantly impact its financial liabilities. This comes as the C\$14.5 billion project was completed at over double its initial budget.
- In corporate leadership news, Tellurian Inc. (NYSE American: TELL) has announced a major change by [removing](#) its chairman and co-founder, Charif Souki, from his executive role. This change is part of the company's strategy to improve its prospects, particularly focusing

on its Driftwood LNG project.

- Tesla Inc. (NASDAQ: TSLA) is under pressure from Nordic pension funds to [respect](#) collective bargaining rights for its employees. Concurrently, the company is defending its use of “Autopilot” and “self-driving” terminology amid regulatory examination in California.

Globally, the Middle East continues to experience intense conflict with no resolution in sight. The UK’s manufacturing sector is showing signs of recovery, which could bolster the sector in the coming year. UK Prime Minister Rishi Sunak faces a critical week with a COVID-19 inquiry and a key parliamentary vote on asylum policy. The EU has reached a provisional deal on AI regulation, which includes governing biometric surveillance. Bosch is adapting to changing auto sector demands, leading to significant job cuts. Signa Development Finance’s potential insolvency proceedings highlight ongoing market challenges. Lastly, BP Plc’s Bilbao Plant sale to Gunvor reflects BP’s strategic transformation and commitment to becoming a net-zero company.

We kicked off our morning by tweeting our Top 10 Trending columns and videos for the last week that we encourage you to review:

1. Top 10 Trending on #InvestorNews, in the #1 Position, READ: #TechnologyMetals Week-in-Review: The British Stake Claim in #Quebec and the #Uranium Boom in North America <https://bit.ly/47jhbmH> cc: @IN8News @Energy_Fuels @F3Uranium @Ucore @FirstPhosphate @CriticalMnlInst #criticalminerals
2. Top 10 Trending on #InvestorNews, in the #2 Position, READ: The #CriticalMineralsInstitute Report (CMI 11.2023): #Neodymium price is down 33% over the Past Year, Record

Plug-In #EV Car Sales for September <https://bit.ly/3QV2dfE>
cc: @IN8News #RareEarths #Lithium #ElectricVehicles
@CriticalMnlInst #criticalminerals

3. Top 10 Trending on #InvestorNews, in the #3 Position,
READ: Harris Administration's \$3.5 Billion Investment in
U.S. #Battery Manufacturing and #CleanEnergy Transition
<https://bit.ly/46hagJe> cc: @IN8News #criticalminerals
#Biden @CriticalMetals_ @CriticalMnlInst
4. Top 10 Trending on #InvestorNews, in the #4 Position,
READ: Update on the #Teck and #Glencore deal: "Never Fear,
the Feds are Here" <https://bit.ly/4a1fULR> cc: @IN8News
#MetallurgicalCoal @TeckResources @Glencore
5. Top 10 Trending on #InvestorNews, in the #5 Position,
READ: Exploring the Future of #Battery Technology and
#CriticalMinerals <https://bit.ly/3G4HSQ1> cc: @IN8News
@CriticalMnlInst @FirstPhosphate
6. Top 10 Trending on #InvestorNews, in the #6 Position,
WATCH: Progress in #Pathogen Defense, Dr. Carolyn Myers
Discusses #FendX's Collaboration with Dunmore for
#REPELWRAP™ <https://youtu.be/rLDSZ8KMBqs> via @YouTube
#Nanotechnology #PathogenRepellent #VirusRepellent
#DiseaseControl @FendXTech \$FNDX.C \$FDXTF
7. Top 10 Trending on #InvestorNews, in the #7 Position,
WATCH: Greg Fenton on how #Zentek's Advancement in
#Aptamer Technology is Revolutionizing #Biotech
<https://youtu.be/LJrNda7ZHRQ> via @YouTube
#PathogenDetection #ZenGUARD #HVACFilters @ZentekLtd \$ZTEK
\$ZEN.V
8. Top 10 Trending on #InvestorNews, in the #8 Position,
WATCH Jack Lifton interviews Mark Chalmers on #EnergyFuels
Strategic Path to Dominance in the North American
#RareEarths Market <https://youtu.be/a1xrRJB5hAw> via
@YouTube #Uranium #cirticalminerals @Energy_Fuels \$UUUU
\$EFR

9. Top 10 Trending on #InvestorNews, in the #9 Position,
WATCH: Terry Lynch on @PowerNickel's collaboration with
#CVMR Corporation for developing Canada's first
#CarbonNeutral #Nickel mine <https://youtu.be/x0tY6U7ovRE>
via @YouTube #CriticalMinerals #BatteryMetals \$PNPN.V
\$PNPNF @terrybali
10. Top 10 Trending on #InvestorNews, in the #10 Position,
READ: Who might follow #PatriotBattery Metals #lithium
exploration success in Canada in 2024?
<https://bit.ly/48fFh1P> via @YouTube #criticalminerals
@BrunswickExplo1 @WinsomeRes