

PDAC 2020: Critical materials to soar, capital markets say yes to gold and uranium may be the star in 2020

Finished PDAC yesterday, this annual resource and capital market social marathon was described to me best by one client as an "...annual get together with 5,000 of my closest friends."

Right off the press from [PDAC's site](#), they write: "Attendance at the 88th Prospectors & Developers Association of Canada (PDAC) 2020 Convention totalled 23,144, highlighting the resilience and innovation of the international mineral exploration and mining sector."

Let me share with you what we learned. Now some of you receive email updates from me through a special [InvestorIntel email list](#). If you like what I sent out yesterday, or would like to be added to the [InvestorIntel Special Report](#) list, just [click here to join](#)

Distributed on March 4th – Preparing for Day 04 of PDAC this morning, let me share some of my conclusions from this significant annual event. Significant in that I often refer to PDAC as the metaphorical market **canary in the coal mine**. And for those of our readers new to this phrase, "a canary in a coal mine is an advanced warning of some danger. The metaphor originates from the times when miners used to carry caged canaries while at work; if there was any methane or carbon monoxide in the mine, the canary would die before the levels of the gas reached those hazardous to humans if methane gas became present and thereby alert miners to the danger."

In my experience over the last dozen plus years I have attended PDAC, this event is our [market canary](#) and so far,

you're either going to love my conclusions, or perhaps despise them. Either way, I recommend, like me – that you pay attention to the indicators, if only for reflection.

This said, let's start with the usual disclaimer that I am not a licensed investment adviser, and I am not making any investment recommendations. What I am is a professional writer and investment banker that is commenting on feedback provided to me after doing over 3-dozen+ interviews over the last 72 hours with CEOs attending PDAC 2020. Also, under no circumstances have I ever met anyone or any software program that could predict the future, even for the moment. So, let's call this a gambling girl's bet on what 'may' potentially be happening... understanding that none of us truly knows...



Critical Material Market may soar in 2020:

The uptick for the critical materials sector is going to exceed even my personal hopes and wildest expectations. It started on Sunday morning, I met with a well-known investor in the sector, his comment to me was: “This sector is currently 5-minutes to midnight. We are not at the 1-minute to midnight marker yet, but we could be at any moment.” His point? If you’re not ready for this market surge, he doesn’t care – because he is ready. And let me add, I am familiar with at least 3 critical material private events, including 1 invitation-only one this week, which suggests others agree. Noted a key business story in the Globe and Mail yesterday morning titled “Canada, U.S. co-operating to secure vital rare-earth minerals”. Nothing of consequence in that text, let

me add, this is NOT just rare earths, notice I stated 'critical materials'? So, for instance, our (InvestorIntel) client [ZEN Graphene Solutions Ltd.](#) (TSXV: ZEN) (up over 40% last month) is proving that investors are indeed getting in...what's that line? We could be closer than we think...

Increased Interest in the Junior Gold Markets:

There is increased interest from the capital markets in gold. Some gold CEOs are using terms like 'flowing' when referring to capital options, the CEOs from several juniors I spoke with yesterday genuinely believe we will see this translate to stock movement in the markets 'soon'? We will see.

Copper is the Buzz Word for Billionaires:

Copper is the buzz word, or so Robert Friedland has everyone thinking. Me? I think copper is excellent if you have it or already in on a deal, but to me – once the billionaire's start promoting the sector, it usually means that the [middle-class millionaire](#) has missed the boat to break on through to the other side!



Socially Conscious Stocks are Winners.

I interviewed Jim Payne of [dynaCERT Inc.](#) (TSXV: DYA | OTCQB: DYFSF) on Monday and he currently has the #1 moving TSX Venture stock. He was heading to go meet with Prime Minister Trudeau after our interview, yesterday I interviewed Dan Blondal of [Nano One Materials](#)...and did you see their recent news on their [private placement](#)? Instead of raising \$5 million, they were oversubscribed, and raised \$11 million. Enough said, the evidence is clear.

Uranium may be the star of the year!

Speaking of critical materials, we are waiting for the Nuclear Fuel Working Group to provide additional recommendations here later today, we are all waiting for the investment community to comprehend the announcement just over a week ago on the [\\$1.5 billion commitment](#) from the U.S. government over the next 10 years to buy American uranium -- we are watching the leaders, and it did not escape our notice that there was an increase in [insider buying](#) for leading American producer [Energy Fuels Inc.](#) (NYSE American: UUUU | TSX: EFR) last week -- we did an interview with Mark Chalmers yesterday.

With all of this said, the overall resource sector not sending good indicators for the market this year in that we heard many members of management request N-O-T to be interviewed. Asking that they not be quoted, their response to questions on their perceptions would most aptly be described as tortoise-like in that they appeared to want to retreat into their shells and hide from any PR whatsoever! Why, one wonders...

Many of the TSX Venture exploration companies seemed to be 'worn' -- the impact of 2019 on the juniors could be

seen on many faces.

-- Note that the rest of the above report had our usual discussions on upcoming events, so again – if you would like to receive these reports, [click here](#)

OR, if you wanted to attend PDAC and didn't make it...we have 42 promo videos filmed by our partners Moovly Media Inc. (TSXV: MVY | OTCQB: MVVYF) you can access below! Enjoy!

1. Peter Clausi on PDAC 2020 <https://youtu.be/CWdmlY5UjFg>
2. PDAC 2020 InvestorIntel Update with Paul Gill of Lomiko Metals <https://youtu.be/VRFG0kXop1E>
3. PDAC 2020 InvestorIntel Promo Interview with Wayne Tisdale of Canadian Palladium <https://youtu.be/fEgjEYLU6x4>
4. Ron Wortel kicks off PDAC 2020 – likes gold. <https://youtu.be/Bbrhvei8dTc>
5. Dr Francis Dube from ZEN Graphene on PDAC 2020 <https://youtu.be/Vv4eejXqdnk>
6. President Felix Lee on PDAC 2020 <https://youtu.be/0U2ZoUYW10k>
7. Dev Randhawa of Fission Uranium at PDAC 2020 <https://youtu.be/XFDVbVZKMwE>
8. InvestorIntel's ii6 Summit Coordinator Andrew Neary on PDAC 2020 <https://youtu.be/FHikopRZl90>
9. InvestorIntel interviews Brendon Grunewald of Moovly Media at PDAC 2020 <https://youtu.be/oQ-vglWUgCo>
10. InvestorIntel interviews the Nigerian Delegation at PDAC 2020 <https://youtu.be/MGMQ4f0n8xA>
11. InvestorIntel interviews David Arenberg of DAI at PDAC 2020 <https://youtu.be/HaiAahREPOw>
12. InvestorIntel interviews David Morgan at PDAC 2020 <https://youtu.be/uOPz6wHWtdA>
13. InvestorIntel interviews Tom Drivas of Appia Energy at PDAC 2020 <https://youtu.be/vRMix-y030E>
14. InvestorIntel interviews Henry Weingarten at PDAC 2020

<https://youtu.be/IhA83H-01P0>

15. InvestorIntel interviews Robert Klein of Western Uranium & Vanadium at PDAC 2020 <https://youtu.be/RvEYQ72Jf0A>
16. InvestorIntel interviews Dave Hodge from Zimtu at PDAC 2020 https://youtu.be/4ahbCrfGg_4
17. InvestorIntel interviews Barrington Miller of the CSE at PDAC 2020 <https://youtu.be/-ZzJFr3UK9s>
18. InvestorIntel interviews Lee Burton of Spartan Resources at PDAC 2020 <https://youtu.be/05Gr0bVzYmA>
19. InvestorIntel interviews Frank Kutzschan at PDAC 2020 <https://youtu.be/BFzaHEVZ6Xo>
20. InvestorIntel interviews Mark Chalmers of Energy Fuels Inc at PDAC 2020 https://youtu.be/D_TPFw0-Qac
21. InvestorIntel interviews Alastair Neill at PDAC 2020 <https://youtu.be/bGTXiYjhK2A>
22. InvestorIntel interviews Tom Meredith of West Red Lake Gold Mines Inc. at PDAC 2020 <https://youtu.be/gNF-yN6ff88>
23. Brendon Grunewald of Moovly Media at PDAC 2020 <https://youtu.be/CMUCbEIVqD8>
24. InvestorIntel interviews Phil McGuire at PDAC 2020 <https://youtu.be/iUEQieD2yyQ>
25. InvestorIntel with the Jamaica Stock Exchange at PDAC 2020 <https://youtu.be/8rolevxJlAo>
26. InvestorIntel interviews Anthony Cohen of Plato Gold Corp. at PDAC 2020 <https://youtu.be/ayC9DHjsrR8>
27. InvestorIntel interviews Pres. & CEO Cynthia Le Sueur-Aquin of Laurion Mineral at PDAC 2020 https://youtu.be/4L2H_YnJwQE
28. InvestorIntel interviews Mike Druhan of MedX Health at PDAC 2020 <https://youtu.be/vxs-5H0wTaQ>
29. InvestorIntel interviews Jim Payne of dynaCERT at PDAC 2020 <https://youtu.be/c4KpBpez-YQ>
30. InvestorIntel interviews Scott Sheldon of Go Metals at PDAC 2020 https://youtu.be/I_wN9liQMeY
31. InvestorIntel interviews John Covello of Laurion Mineral Exploration Inc at PDAC 2020

<https://youtu.be/7RoPiq1ni4Y>

32. Nano One Materials' Dan Blondal at PDAC 2020
https://youtu.be/iBUhYHAF4_M
33. Ron Wortel speaks with Chuck Downie of Taiga Gold
<https://youtu.be/QU2nUrBDBRY>
34. Ron Wortel and Chuck Downie doing a PDAC Moovly...
<https://youtu.be/Tk-rML80qH8>
35. InvestorIntel interviews Greg Andrews of Search Minerals at PDAC 2020
<https://youtu.be/K0scepQPuqo>
36. InvestorIntel interviews Dr Randy Miller of Search Minerals at PDAC 2020
<https://youtu.be/8wIfb99EUq4>
37. InvestorIntel interviews Byron King at PDAC 2020
<https://youtu.be/v5uxCSmiWgY>
38. Peter Clausi and Alf Stewart discuss Searchlight Resources
https://youtu.be/aLS1jxW0_ng
39. InvestorIntel interviews Will Felderhof of Zephyr Minerals at PDAC 2020
<https://youtu.be/MIrgmySm5ck>
40. InvestorIntel interviews Stephen Lautens of Angkor Resources Corp. at PDAC 2020
https://youtu.be/eR0_dR4Fvoc
41. InvestorIntel's CEO Tracy Weslosky on Day 4 of PDAC 2020
<https://youtu.be/jBNXbg6Nir4>
42. InvestorIntel interviews Brent Cook at PDAC 2020
<https://youtu.be/v8KCwFThctY>