Appia and the demand for the critical Heavy Rare Earths

written by Jack Lifton | November 6, 2023

The rare earths necessary for the manufacturing of the magnets needed for the type of electric motors that can drive electric cars fall into two categories, the basic critical permanent magnet rare earths, neodymium (Nd) and praseodymium (Pr), and the critical, critical rare earths necessary for that purpose, dysprosium (Dy) and terbium (Tb). Without the addition of Dy and/or Tb to the alloy based on NdPr (a natural mixture called didymium) the magnetic material produced will not be able to maintain its (magnetic) strength at the high operating temperature and cycles of heating and cooling experienced daily by the electric drive motors to be used in EVs.

Stephen Burega Onsite at the Appia Alces Lake Project in Northern Saskatchewan

written by InvestorNews | November 6, 2023

In an exclusive onsite interview from the Alces Lake Project in Northern Saskatchewan, Stephen Burega, the President of [Appia Rare Earths & Uranium Corp.] (CSE: API | OTCQX: APAAF), engages with Tracy Weslosky of InvestorIntel to share insights on the progress of the company's drilling program. Burega praises the team's efficiency and the advances made during his inaugural visit to the site, providing Weslosky and her audience with an up-close view of the operations.

He underscores the effective utilization of the budget, revealing that they have successfully completed one-third of the project and are strategically directing their efforts towards uncovering new targets. The interview includes a special appearance by Appia Project Geologist, Kahlen Branning, who offers viewers a glimpse into a core shed and elaborates on the critical minerals present in the samples, namely terbium, neodymium, and dysprosium.

Further into the discussion, Burega outlines the instrumental role of helicopters in the movement of drilling equipment, underscoring the operation's logistical ingenuity. The conversation concludes on an optimistic note as Burega shares the promising future of the Alces Lake project and its potential in rare earth extraction.

To access the full InvestorIntel interview, click here

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About Appia Rare Earths & Uranium Corp.

Appia is a publicly traded Canadian company in the rare earth element and uranium sectors. The Company is currently focusing on delineating high-grade critical rare earth elements and gallium on the Alces Lake property, as well as exploring for high-grade uranium in the prolific Athabasca Basin on its Otherside, Loranger, North Wollaston, and Eastside properties. The Company holds the surface rights to exploration for 113,837.15 hectares (281,297.72 acres) in Saskatchewan. The

Company also has a 100% interest in 13,008 hectares (32,143 acres), with rare earth element and uranium deposits over five mineralized zones in the Elliot Lake Camp, Ontario. Lastly, the Company holds the right to acquire up to a 70% interest in the PCH Project which is 17,551.07 ha. in size and located within the Goiás State of Brazil. (See June 9th, 2023 Press Release – Click Here)

To learn more about Appia Rare Earths & Uranium Corp., click here

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Appia adds another rare earths project to their portfolio, this time in Brazil

written by InvestorNews | November 6, 2023

Appia has now grown to own (including the 70% agreement to acquire the PCH Project) four significant rare earths/uranium projects globally. The very high grade Alces Lakes continues to be the flagship but now the new Brazil Project adds further to their portfolio. It also gives Appia a chance to significantly accelerate towards being a global rare earths producer at some point in the future.

Stephen Burega of Appia Provides Updates on Advancing its Rare Earths Projects in Canada and Brazil

written by InvestorNews | November 6, 2023

In this InvestorIntel interview, Byron W King talks with Appia Rare Earths & Uranium Corp.'s (CSE: API | OTCQX: APAAF) President Stephen Burega about the completion of due diligence to acquire a rare earths ionic clay project in Brazil. Situated in a mining-friendly jurisdiction, accessible by road, with several mining operations nearby, Stephen says that the project's mineralogy is similar to that of Serra Verde which has one of the largest ionic clay deposits outside of China.

Highlighting the expertise of their consulting geologist, Don Hains, who wrote the NI 43-101 report for Serra Verde, Stephen discusses how a positive evaluation from Don reinforced their excitement and confidence in the project.

Stephen also provides an update on Appia's flagship Alces Lake Rare Earths (REE) Property in Northern Saskatchewan where they have a work program scheduled to start in June on the highest-priority areas of a major structural corridor.

Stephen also indicates that the Company has approximately C$7 million in the bank with C$3 million dedicated to the Alces Lake project and C$1 million earmarked for the Brazil project once the due diligence is completed.

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China may be a good Bond villain, but rare earths experts are skeptical it's behind smear campaign

written by Stephen Lautens | November 6, 2023
In this video, InvestorIntel panelists rare earths experts Jack

Lifton, Tracy Weslosky and Christopher Ecclestone express their skepticism at a report released yesterday that alleges a co-ordinated social media campaign out of China targeted the Australian rare earths mining company, Lynas Rare Earths Ltd. (ASX: LYC), with tweets and Facebook posts criticizing its alleged environmental record and calling for protests of its planned rare earths processing facility in Texas.

While the story has been picked up by mainstream and industry media, a deeper dive makes it look increasingly unlikely that this “campaign” was, as claimed, part of a Chinese effort to undermine foreign attempts to develop a rare earths processing capability outside of China and maintain China’s current dominance. While China makes a good James Bond villain in western politics and the popular press, a look at the evidence doesn’t necessarily point in their direction as the main movers in this case. For people familiar with online campaigns, this one attributed to China’s influence campaign known as DRAGONBRIDGE seems particularly weak and unfocused. The campaign and its associated hashtags never trended on Twitter, which is unfortunately all too easy to do with modern botfarms and technology.

Some tweets came out of China or were posted in Chinese, but that doesn’t a conspiracy make. A look at the tweets indicates some of them came from newly-created, zero-follower accounts, which is not the way to get something trending. China has much greater cyberwarfare capabilities than shown in this example. If anything, it is more reminiscent of anti-mining environmental activist campaigns that are a part of life for many mining companies. These can be co-ordinated by small but dedicated groups of activists unhappy with a company’s environmental or human rights records, real or perceived. In order to rise above the noise of social media, they often use multiple accounts and contacts with other groups to look larger than they are to increase their influence. The brief online campaign against Lynas – especially tweets from Malaysia where Lynas has a rare earths plant – looks far more like that than it does a co-ordinated attack by the Chinese cybersecurity forces.

Could the Chinese government have paid brief attention and contributed a few gratuitous kicks to a social media campaign that gave Lynas a poke? Possibly. We know that for years Russia has waged a disruptive social media war in the US and other western countries simply to make trouble, often working both sides of an issue to cause instability. The media has breathlessly connected the dots between China and the recent announcement that the US Department of Defense is increasing funding of Lynas's rare earths facility in Texas. It is hard to believe that the Chinese cyberwarfare establishment thinks that they can undo $120 million in strategic funding by the DoD with a few tweets.

The Mandiant report also says that in June Chinese DRAGONBRIDGE social media accounts began targeting two other rare earths companies – the Canadian rare earths mining company Appia Rare Earths & Uranium Corp. (CSE: API | OTCQB: APAAF) a company well known to InvestorIntel, and the American rare earths supplier USA Rare Earth LLC. One has to wonder about the thinking behind choosing these targets if this is a co-ordinated campaign. Attacking them is hardly going to ensure Chinese dominance in the rare earths space, which makes the whole Chinese conspiracy theory fall apart.

"Cui bono?" – Who benefits? That was the question Roman judge Lucius Cassius asked in difficult cases. The benefit to China is negligible to non-existent. The West will continue to search for domestic rare earths and develop processing facilities. Will some company, analyst or investor group benefit from an attempt at bad press or stock slippage? Or is it a social media campaign by a handful unhappy activists groups that jump on an anti-mining bandwagon that ultimately goes nowhere, even with a couple of half-hearted contributions from China?

And unless you think that I am naïve, I worked on Chinese projects with Chinese partners for over a decade. China has – to say the least – a unique way of doing business. We have seen them attempt to exert influence to gain economic advantage around the world, however I have seen Connecticut hedge funds do the same and worse. But these kinds of campaigns out of China – like the brutal one to release Meng Wanzhou, the CFO for Chinese telecom giant Huawei, that included taking Canadian hostages in addition to a social media campaign – are waged skillfully and with a purpose. It is hard to see any of that skill or purpose in this case.

Byron King's Angle to the Tax Loss Selling Season Blues

written by InvestorNews | November 6, 2023
"It was the best of times, it was the worst of times, it was the age of wisdom, it was the age of foolishness."

Apologies to the ghost of Charles Dickens for borrowing the first line from his 1859 historical novel, *A Tale of Two Cities*. It's about the French Revolution, but that same sentiment pertains to our current era, and certainly how stock markets reflect (or mis-reflect) the economy.

Dickens highlighted political and social contrasts and contradictions. Sophisticated London versus revolutionary Paris. Plus, how science and reason were gaining traction across the world, while in another human dimension passion and bloody craziness were the rule.

Dickens and his *Two Cities* cross my mind every year around this time, in late November and the first couple of weeks of December. Predictable as phases of the moon, there's always an annual market sell-down known as "tax loss selling season."

We definitely see this phenomenon in mining shares, and if you've been around for even a short while you know the drill.

Towards the end of the year many investors, funds, etc. sell mining shares that have done well, to book gains in the winners. Then they sell shares in different companies to book losses. The idea is to rebalance portfolios, take money off the table and absorb losses as a tax shelter.

You want contrasts and contradictions? The best of times and worst of times? Voila!

On the one hand, a long list of wonderful companies bleeds red on the screen, based on share price declines. Ugh, you think. What a takedown.

Yet if you follow many of these declining plays, the back-stories have never been better. Great assets, experienced and savvy technical teams, strong management, money in the bank. Yet people are hitting the sell-button and share prices are sliding.

Well, there's another way to look at it too. If you follow the right kinds of companies and know the stories – assets, capabilities, management – you can find bargain basement plays.

The idea is to shop now and pick up discounted shares. Then ride the gains that typically come with the new year, aka the

"January effect."

For example, look at a large, well-run company like **Agnico Eagle Mines Limited** (NYSE: AEM | TSX: AEM), with a market cap of $11.8 billion. It's a solid gold mining play for any long-term investor. The company has no serious problems in any news.

Yet in just the past month the Agnico share price has slipped from over $57 to the $47 range. That's definitely not reflective of the company, its assets or people. It's just sellers taking money off the table towards the end of 2021. Yet by about March 2022 that $10 down-move will more than likely be fully restored and then some.

Agnico is a buy just now.

Or look at a much smaller company like **Group Ten Metals Inc.** (TSX.V: PGE | OTCQB: PGEZF), an early-stage explorer with a market cap of a mere $45 million. It controls a vast spread of mineral claims in the legendary Stillwater district of Montana, adjacent to mighty **Sibanye-Stillwater Ltd.** (NYSE: SBSW), with a market cap of $8.9 billion.

Group Ten has identified significant nickel, copper and platinum group metals (including rhodium), along with cobalt, chrome and gold. The company just released a very solid resource estimate, with one version summing up to over 6 million ounces of "palladium equivalent," leading to a nice uptick in share price back in October.

Yet in the past month, Group Ten shares have drifted down by about 25%. And that's despite the fact that almost none of the drilling results from the 2021 field season have yet been reported. The company expects to release additional mineralogical (good) news in January and February, which will likely strengthen the share price.

Another buy. W company with great assets, a strong technical and management team, money in the bank, and phenomenal location in mining-friendly Montana, smack next to a multibillion-dollar giant. And just now, in early December, the shares are on discount.

Or how about two other, underappreciated rare earth (RE, REEs, Rare Earths, Critical Material) companies, currently in similar sell-down territory, namely **Defense Metals Corp.** (TSXV: DEFN | OTCQB: DFMTF) and **Appia Rare Earths & Uranium Corp.** (CSE: API | OTCQB: APAAF).

Defense Metals is working on a large project in British Columbia involving a rock type called "carbonatite," which in this case is filled with high grade RE mineralization. After three field seasons (2019 – 2021), Defense has a good handle on the deposit. Management just released a splendid preliminary economic analysis that shows excellent numbers in terms of tonnes/grade, value, return on investment, etc.

Yet shares are down about 25% in the past month, while the company has yet to release results from the 2021 drilling program. If you follow the RE space, here's a bargain buy.

And Appia is working on another, very extensive RE deposit in northern Saskatchewan. It's based on a mineral called "monazite," in high demand across the world for rare earth minerals.

Indeed, Appia's deposit may be among the highest-grade monazite plays anywhere, certainly in North America and competitive with the best plays elsewhere in the world. The ore body is near-surface as well, which simplifies the mining angle. And the company has an arrangement with uranium processors in Saskatchewan to deal with any issues of radionuclides in the ore.

Yet despite this setup, shares are down over 40% in recent weeks. Another bargain play, now on sale at year end.

With all the companies above, from big Agnico to much smaller Group Ten, Defense Metals and Appia Rare Earths and Uranium, we are looking at temporary, seasonal selloffs. For long-term investors, the shares are a bargain. Even for traders who are looking to buy now and sell into the new year, it's a setup for a gain.

In other words, we have a relatively short window in early December to buy into any number of beaten-down plays. Or to turn Charles Dickens around and take a more upbeat view of the opportunity which is right in front of you, "It is the worst of times, yet also the best of times."

That's all for now… Thank you for reading.