

CBLT's Clausi on Canadian cobalt and the rising battery demand for this critical metal

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June 4, 2018 – “Cobalt is a critical metal as you heard yesterday, as you have seen in the news. You know it is important when Elon Musk makes fun of it. He is downplaying the need for cobalt. Even the batteries made for Tesla by Panasonic need 4½ kilograms of cobalt per battery.” states Peter Clausi, President, CEO and Director of [CBLT Inc.](#) (TSXV: CBLT), in a recent presentation at the 7th Annual InvestorIntel Summit – Buds, Batteries & Blockchain 2018.

Peter Clausi: It is always nice to be here. This is my fourth year coming to this event. Last year it was all battery metals. I tell people I meet in the industry this is one of my favorite places to come to meet people, get new ideas and see how things work. We are in the business though of making money for our shareholders. We got into the cobalt space about 2 years ago pretty much ahead of many other people. The problem is the Canadian markets did not give us or indeed any of the cobalt juniors real value for the assets that we had. If we are not going to get real value that way we came up with a better plan to generate real value. The disclaimer, has anybody ever read a disclaimer? For this conversation we are only talking about our properties in Gowganda, which is part of the Cobalt Embayment, and one of our properties in Sudbury. We have other properties in Sudbury, British Columbia and Quebec, but this conversation is only about Gowganda and our MacTrack claims in Sudbury. In Gowganda we bought 5 assets in a portfolio. We paid \$114,000 for 5 assets; roughly \$50,000 in cash, the rest in stock. Went to

Australia at the end of January, met with bankers, investment bankers, miners, promoters, financiers and began to tell our story. Australia is far more advanced than Canada and decades ahead of the United States when it comes to the recognition of capitalizing upon critical metals. Cobalt is a critical metal as you heard yesterday, as you have seen in the news. You know it is important when Elon Musk makes fun of it. He is downplaying the need for cobalt. Even the batteries made for Tesla by Panasonic need $4\frac{1}{2}$ kilograms of cobalt per battery. We sold one asset. I like the dancing money. Sold one asset called Bloom Lake for \$50,000 cash and \$50,000 in stock. We had a lot of faith in that management team. That stock though has increased 700%. What we sold for \$100,000 we actually got \$400,000 of value out of for 1 asset. Remember we bought the whole portfolio for \$114,000. We then sold two other assets, again, dancing money, Corkill-Lawson and Farr for \$50,000 and \$87,000 in stock. As of this morning the stock was up over \$100,000. Again, this is one asset that is part of the portfolio of 5. Between this and the other company we are up over \$600,000. Not done yet. We then optioned off 2 of the remaining assets in Gowganda. For that, we have got more dancing money, \$20,000 for each option plus a minimum work commitment over the next year. We also get a 10% management fee. They being in Australia do not want to come to Canada to learn the system, learn the local geologist, the regional geologist, First Nations so they have asked us to run the program for them. For that we get an additional 10% management fee...to access the complete presentation, [click here](#)

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Cannabis and Blockchain, the CSE's record breaking year

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May 31, 2018 – “I am here to give you an update on the CSE. In a word we are busy. 2017, we were busy. It was a record year. We have had a record year almost every year, but this one exceeded all others. At the end of the year we had 35 companies with a market cap each of over \$100 million dollars. It was the first time that our companies collectively and there were about 310 on average last year I would say, that raised over a billion dollars in financing.” states Rob Cook, Senior Vice President of Market Development of the Canadian Securities Exchange, in a recent presentation at the 7th Annual InvestorIntel Summit – Buds, Batteries & Blockchain 2018.

Rob Cook: I am here to give you an update on the CSE. In a word we are busy. 2017, we were busy. It was a record year. We have had a record year almost every year, but this one exceeded all others. At the end of the year we had 35 companies with a market cap each of over \$100 million dollars. It was the first time that our companies collectively and there were about 310 on average last year I would say, that raised over a billion dollars in financing. Due to the volume of our trading, it was the first time that our 300 odd companies traded more on a couple of days in December more than all of the companies on the TSX Venture Exchange in each of volume, value and trades. We had a lot of trading. Here is our 5-year trading trend. I think it is fair to call this a hockey stick. There are not too many hockey sticks that you will see in a graph that are not projections. This one is historical. We are happy with that. You can see there is active trading, but is there liquidity? It is a small stock exchange. Most people seem to assume that there is

going to be less liquidity on the CSE than on other stock exchanges that have a much bigger list. Turnover is a measure of liquidity. It is one that is easy to find. You take the value of the trading of all the shares and you divide that by the market cap of the companies whose shares you are trading. This is a monthly slide. I think you can guess that the red line is the CSE because it is the highest on the slide. I may not be showing it to you if it was not, right? The black line is the TSX and it is a more stable trading environment partly because it is larger, partly because it is large cap stocks. Typically it runs 4% to 5% a month turnover in trading. Our peak was over 30% in December. Yes, that was powered largely by cannabis. Some people claimed it was all cannabis. It is not true. It is only about 90%. It has obviously come off quite a bit since then, but in March our turnover was 13% compared with 5% on the other exchanges in Canada. We are not actually showing this to tell you that our market is more liquid than their market. What we have always told people is that the stock exchange does not give you liquidity. Liquidity is a function of investors' interest in trading the securities that are listed on your exchange. Obviously there was a lot of investor interest. All of the investors in our marketplace are part of the Canadian capital markets so we have the same dealers, the same investors. We do have different companies. That was a very big year for us. This slide shows growth in listings on the CSE. It goes back to 2007...to access the complete presentation, [click here](#)

Don Bubar on Avalon's strategic approach to lithium production

written by InvestorNews | June 4, 2018

May 30, 2018 – “I have been running Avalon as a publicly traded company in this specialty metals and minerals space for over 20 years now and have seen quite an evolution in the space from when I first started with our lithium project where these were basically little known, little appreciated and very poorly understood emerging commodities to where we are now where this is becoming quite an important subsector of the mineral industry, particularly with this whole evolution of the battery industry, energy storage technology, electric vehicles is creating this whole new demand that we never saw” starts Don Bubar, President, CEO and Director of [Avalon Advanced Materials Inc.](#) (TSX: AVL | OTCQX: AVLNF), in a recent presentation at the 7th Annual InvestorIntel Summit – Buds, Batteries & Blockchain 2018.

Don Bubar: Believe it or not I have been running Avalon as a publicly traded company in this specialty metals and minerals space for over 20 years now actually and have seen quite an evolution in the space from when I first started with our lithium project where these were basically little known, little appreciated and very poorly understood emerging commodities to where we are now where this is becoming quite an important subsector of the mineral industry, particularly with this whole evolution of the battery industry, energy storage technology, electric vehicles is creating this whole new demand that we never saw. We could perhaps see coming in the distant future 20 years ago, but it is definitely upon us now. It has changed the

game in some very dramatic ways. I think it is time that this subsector of the mineral industry really look at how it wants to brand itself because it is such a different sector of the mineral industry. We refer to these as commodities, but they are really not commodities in the traditional sense of the term. They do not trade on commodity exchanges. They are really highly refined chemical products that you need to produce for specific applications in the marketplace. There is a lot of new terminology starting to emerge on this. InvestorIntel uses technology metals. I hear energy metals being used quite a bit now; advanced materials; cleantech materials, that is one I kind of like. I think we should all think about how we want to brand this industry to really differentiate it from the traditional mining industry, which is very, very different in terms of the risk factors and so that we do not confuse investors about what those risks in the business are. Let us face it most traditional mining investors just are commodity price speculators at the end of the day whereas in this industry it is more about the growth opportunities that these emerging commodities are presenting to investors. I say, now that I am hearing the blockchain developers and Bitcoin developers adopting the word mining, I say they can have it. They are the miners now. We are going to be cleantech producers, cleantech materials producers. There is your reminder on forward looking information. As I said, we have been around for 20 years now. I am a veteran of this technology metals space. As a result of that we have done many, many equity financings over the years. We have some 20,000 to 25,000 shareholders all over. Since the rare earth bubble burst there are few years ago we have seen a big turnover in our shareholder base, which has kind of depressed our valuation. On the other hand, we do have a very large audience out there that follows us around the world. Once we get some traction on one of these projects we are working on we should be able to really build on that solid base. Another thing that differentiates Avalon, in

addition to the commodities we focus on over the years, is we embrace sustainability as core to our business...to access the complete presentation, [click here](#)

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Northern Graphite Greg Bowes InvestorIntel Summit Presentation

written by InvestorNews | June 4, 2018

May 30, 2018 – “Why should you be interested in graphite? As I mentioned earlier, graphite is the anode material in lithium-ion batteries. That is a \$20 billion dollar a year business that is growing at over 20% a year. That chart is historical. That is not a forecast.” states Gregory Bowes, CEO and Director of [Northern Graphite Corp.](#) (TSXV: NGC | OTCQX: NGPHF), in a recent presentation at the 7th Annual InvestorIntel Summit – Buds, Batteries & Blockchain 2018.

Gregory Bowes: Northern Graphite is a company that is based in Ottawa, Canada. We have about 65 million shares outstanding. We consider that we have the best new graphite project. I am sure everybody says that so my job today is to convince you why it actually might be true in our case. It starts with location. If any of you want to do a site visit you can jump in a car and you would be there in 4½ hours. It is between North Bay and Ottawa, off the Trans-Canada Highway. It has a reasonable capital cost.

It has a realistic production target relative to the size of the market. It is the highest percentage of the more valuable large flake production. It has the lowest marketing risk of any new project. It has the highest margin and the best economics. It is not a junior exploration story. We have a full feasibility study and we have our major environmental permit. The next step is \$100 million dollars Canadian and building a mine. We have developed a patent pending battery material technology, which I will tell you a little bit more about, which converts that graphite mine concentrate or helps convert it into the anode material for lithium-ion batteries. Why should you be interested in graphite? As I mentioned earlier, graphite is the anode material in lithium-ion batteries. That is a \$20 billion dollar a year business that is growing at over 20% a year. That chart is historical. That is not a forecast. As usual the best investment advice comes from looking around you. We all know the proliferation of personal devices, cameras, cell phones, laptops. All of that market is driven by lithium-ion batteries. This is lithium-ion battery manufacturing capacity that is in the pipeline. It is set to quadruple by 2021. If that happens we are adding 300 gigawatt hours of production capacity. You can see at the bottom that would require a doubling of annual graphite production. Even if these plants were only to operate at 20% or 30% or 40% of capacity due to lower than expected growth in EVs, you would still need multiple new graphite mines. This is a little bit of a comparison. The three main battery minerals are graphite, lithium and cobalt, obviously. The different in the graphite market you can see it is quite a bit bigger than the other two. In terms of battery demand, it still has not got to where the other two are yet. That is one of the reasons that the graphite price has not performed as well, nearly as well, as lithium and cobalt. The interesting story is that if you add 100 gigawatt hours of battery manufacturing capacity or demand, you are looking at 160% increase in graphite

demand so there is much greater leverage there than there is in the other two minerals. That leverage comes from two factors that people do not often consider. You talk about how much lithium you need and how much graphite you need in a battery...to access the complete presentation, [click here](#)

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Farquharson on being the only near-term permitted primary cobalt company in the United States

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May 25, 2018 – “I am the President and CEO of eCobalt, the only near-term permitted primary cobalt company in the United States. By primary it means that our primary project has a native metal of high-grade cobalt. This differs from most of the deposits in the world which contain cobalt as byproducts, such as copper and nickel and usually fairly low grades.” states Paul Farquharson, President & CEO of eCobalt Solutions Inc. (TSX: ECS | OTCQX: ECSIF), in a recent presentation at the 7th Annual InvestorIntel Summit – Buds, Batteries & Blockchain 2018.

Paul Farquharson: When Tracy asked me to do the opening keynote for this conference, Buds, Batteries and Blockchains Conference, I thought to myself, what on earth do these three things have to

do with one another? It became a lively debate around our office here and a discussion. We considered what unifies these three sectors. This is what we came to think about, they all represent a fundamental shift in society today being driven by innovation and technology across sectors, economic opportunity, consumer demand for change, corporate social responsibility and government action. An analyst at CRU, one of the most foremost business intelligent firms in the world has likened the shift we are seeing from internal combustion engines to electric vehicles to the same type of seismic shift that we saw when we went from horse and buggy to internal combustion engines in the 1900s. Some of us, like myself, were around then, most of you guys were not. The same type of groundbreaking shift is also occurring in cannabis with a wide range of implications, legal, economic and social and in blockchain, a term so new that it was just added to the Webster Dictionary on March the 5th of this year. I am the President and CEO of eCobalt, the only near-term permitted primary cobalt company in the United States. By primary it means that our primary project has a native metal of high-grade cobalt. This differs from most of the deposits in the world which contain cobalt as byproducts, such as copper and nickel and usually fairly low grades. Your DRC production is copper-cobalt. It depends on the copper price for production; the nickel-cobalt production, Russian, Cuban, Sudbury, our project, primary cobalt. I have been with the company since 1992. That was even before we had the Ram deposit staked. I have been with the company all along as we advanced the project from early-stage greenfields exploration to where we are today. As I like to say, we are a 25-year overnight success. As I met some people there this morning, it is tenacity. You have to stay with this. You have to go through cycles. It takes a long time to bring these projects into production. In all those years I can generally say that I have never seen a market for cobalt as we have today. During the last cycle when eCobalt, then Formation

Metals, was starting construction in 2012 we were planning to produce a super alloy grade cobalt metal used in wind turbines as a hardening agent and in jet engines. Approximately 400 pounds of cobalt is used in an average jet engine and it allows them to burn hotter so that they are much more fuel efficient. This market on its own, the super alloy grade market, is expected to double by 2020. The current cobalt market however is fundamentally different to what it was then. For that reason I believe it is here to stay. What is driving this fundamental change? The market for electric vehicles and renewable energy...to access the complete presentation, [click here](#)