

# They're back – The Rare Earths Sequel Returns with a Vengeance.

A tidal wave of performance in today's rare earths market reminded me of the release of JAWS in 1975 – no one really saw this coming.

Here's a snapshot for you:

| ↕ Name   | ↕ Last Price | ↕ Change             | ↕ Volume | 52 Week Range<br>High [Low] | Market Cap |
|--|--------------|----------------------|----------|-----------------------------|------------|
| ▶  <b>LYSDY</b><br>LYNAS CORPORATION LTD            | \$2.145      | +\$0.425<br>+24.71%  | 817.5k   | \$1.92<br>[\$1.054]         | \$1.43B    |
| ▶  <b>ANLKY</b><br>ALKANE RES LTD                   | \$2.20       | +\$0.45<br>+25.71%   | 1.4k     | \$2.23<br>[\$1.29]          | \$111.34M  |
| ▶  <b>AVL</b><br>AVALON ADVANCED MATERIALS INC    | \$0.125      | +\$0.05<br>+66.67%   | 10.9M    | \$0.115<br>[\$0.045]        | \$34.79M   |
| ▶  <b>AVLNF</b><br>AVALON ADVANCED MATERIALS, INC | \$0.0925     | +\$0.0307<br>+49.68% | 2.6M     | \$0.0927<br>[\$0.0287]      | \$25.74M   |
| ▶  <b>REEMF</b><br>RARE ELEMENT RESOURCES LTD     | \$0.599      | +\$0.359<br>+149.58% | 4.5M     | \$0.265<br>[\$0.0301]       | \$47.68M   |
| ▶  <b>SMY</b><br>SEARCH MINERALS INC              | \$0.04       | +\$0.005<br>+14.29%  | 77.7k    | \$0.07<br>[\$0.03]          | \$7.29M    |
| ▶  <b>CRE</b><br>CRITICAL ELEMENTS CORP           | \$0.60       | +\$0.13<br>+27.66%   | 841.6k   | \$1.11<br>[\$0.39]          | \$95.18M   |
| ▶  <b>LL</b><br>CANADA RARE EARTH CORP            | \$0.095      | +\$0.025<br>+35.71%  | 3.1M     | \$0.09<br>[\$0.04]          | \$16.85M   |
| ▶  <b>UCU</b><br>UCORE RARE METALS INC            | \$0.23       | +\$0.075<br>+48.39%  | 2.4M     | \$0.25<br>[\$0.085]         | \$65.11M   |
| ▶  <b>NMI</b><br>NAMIBIA CRITICAL METALS INC      | \$0.24       | +\$0.09<br>+60.00%   | 179.9k   | \$0.46<br>[\$0.08]          | \$43.28M   |

The Pentagon news conference told us nothing new. We know we are dependent on the Chinese for rare earths but for some reason today's news spurred undeniable action worthy of action.

If you missed the Bloomberg story that got the market running, [click here](#)

I asked leaders in the rare earths industry to respond to this Bloomberg article. This CEO asked for anonymity and wrote: *"The silliness drums are beating. On the article (WSJ?) suggesting that Apple will be crippled as a result of a rare earth embargo: How can these idiots write nonsense like this? i-Phones are made in Donguan (By Foxconn from Chinese and Japanese components, including vibration motors (made by Nidec in Shenzhen with magnets made by Daido in Suzhou with powders made by us in Tianjin) and capacitors made by Murata in Kyoto with Dysprosium made in Jianyin...So how will an embargo of RE exports to the US hurt Apple again?"*

Another CEO wrote: *I believe the article summarizes the situation quite well. The threat of disruption appears to be ever closer to becoming a reality...am wondering if only oxides will be subject to the restriction, if implemented."* – Tracy Moore, Canada Rare Earth Corporation

Not to be outdone, Reuters just added their illustrious sizzle on the Pentagon press conference an hour ago, [click here](#)

Arguably experts ourselves in that we owned watched these mysterious metals go from being the source of being for a dirty dozen in 2009 to nearly 700 companies in less than 12-months flat, and then back down – to the original players in less than 3 years, we have a particular soft spot for what one of our editors (Jack Lifton) renamed the Technology Metals.

One friend called me today and said: *"I cannot believe that Company X traded millions of shares today!"*

My response was: *"I can. Because I remember when that same stock, now less than a quarter skyrocketed to nearly \$10."*

During our decade of following rare earths, we have learned that no one can ever agree if there are 15 or 17 rare earths. We have also learned that the companies that have the magnet metals such as neodymium, dysprosium or praseodymium they have an industry cult following. And then there are those who enjoy

the discussion of rare earth separation processes as an unquestionable sign of intellectual superiority, and finally if you want to sound really cool you should be able to sound impressed when a company touts that their rare earths have more “heavies” (heavy rare earth elements or HREEs) than “lights”.

At the end of the day, the facts are simple – the investors are hoarding to the technology metals today. The real question now – is will this interest in sustainability return tomorrow? We will see.

Here are some charts, we were watching today...

## Critical Elements Corp. (TSXV: CRE | OTCQX: CRECF)

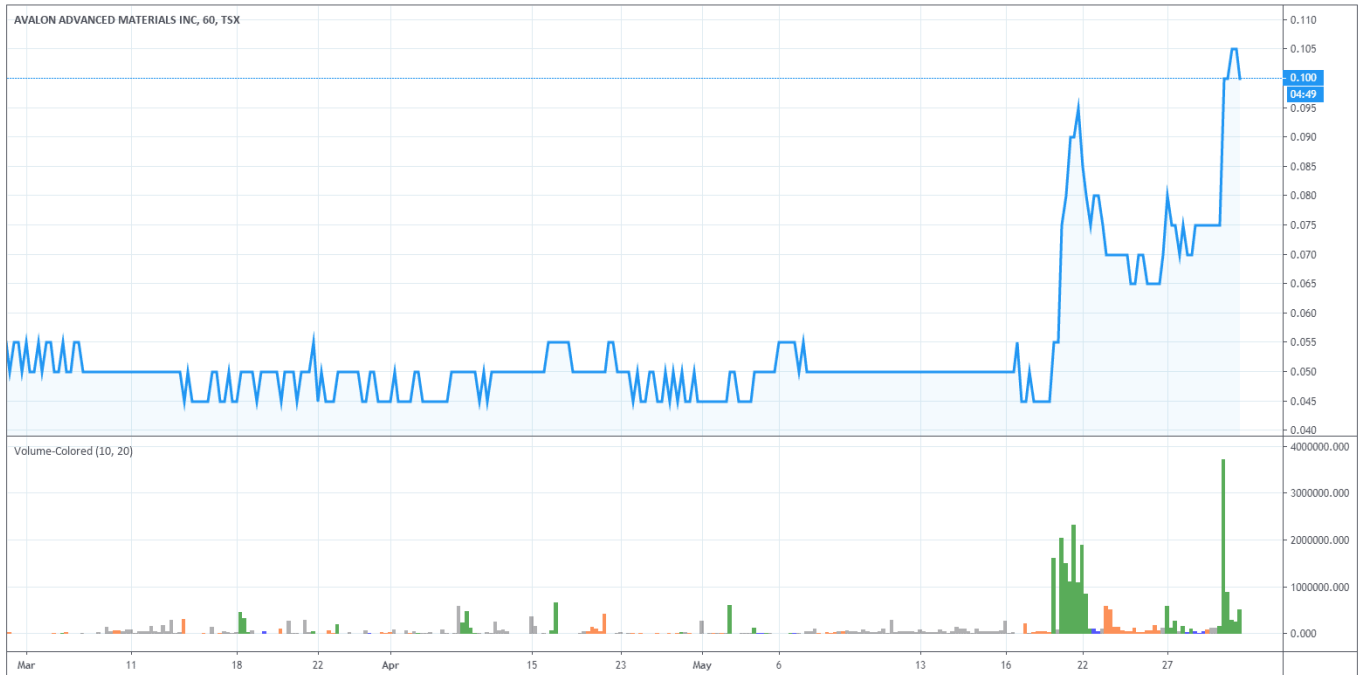
Sam\_M published on TradingView.com, May 29, 2019 18:15:05 UTC  
TSXV\_DLY:CRE, 60 0.550 ▲ +0.080 (+17.02%) O:0.540 H:0.550 L:0.530 C:0.550



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## Avalon Advanced Materials Inc. (TSX: AVL | OTCQB: AVLNF)

Sam\_M published on TradingView.com, May 29, 2019 18:25:11 UTC  
TSX\_DLY:AVI, 60 0.100 ▲ +0.025 (+33.33%) O:0.100 H:0.105 L:0.100 C:0.100



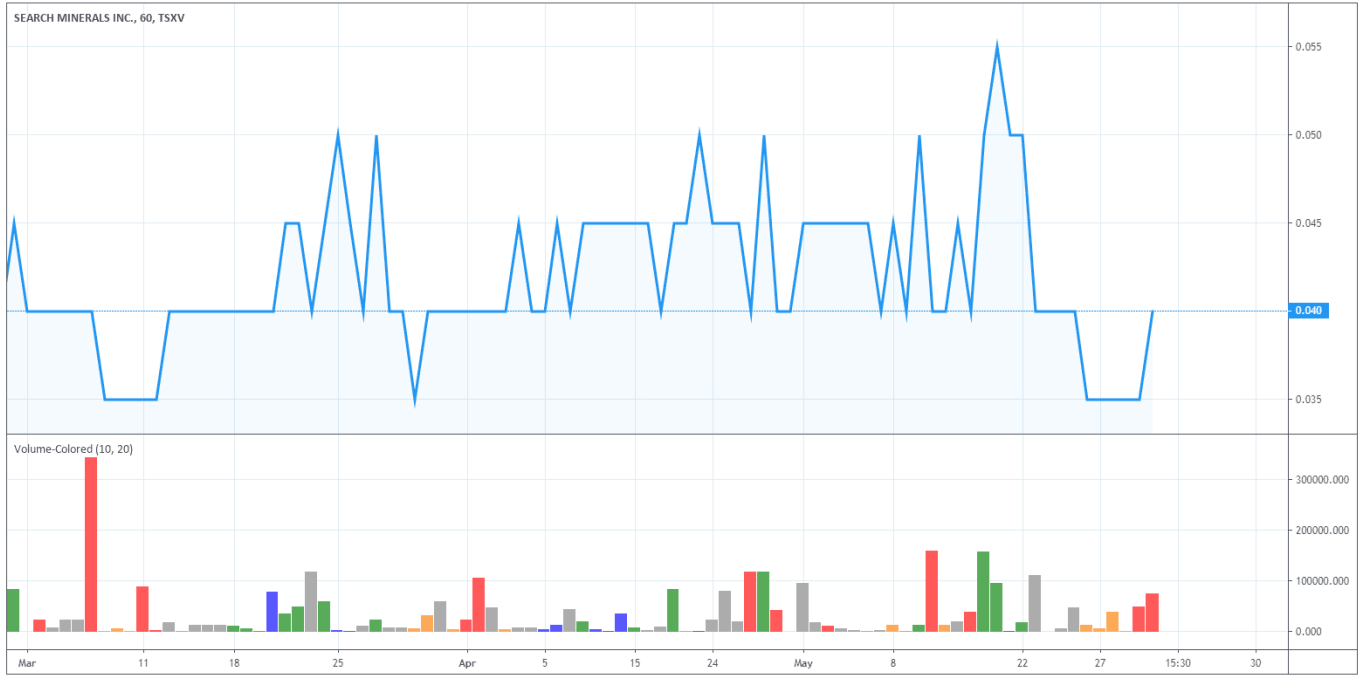
## Alkane Resources Limited (ASX: ALK | OTCQX: ANLKY)

Sam\_M published on TradingView.com, May 29, 2019 18:37:18 UTC  
ASX\_DLY:ALK, 60 0.320 ▲ +0.035 (+12.28%) O:0.315 H:0.330 L:0.305 C:0.320



## Search Minerals Inc. (TSXV: SMY)

Sam\_M published on TradingView.com, May 29, 2019 18:32:43 UTC  
TSXV\_DLY:SMY, 60 0.040 ▲ +0.005 (+14.29%) O:0.040 H:0.040 L:0.040 C:0.040



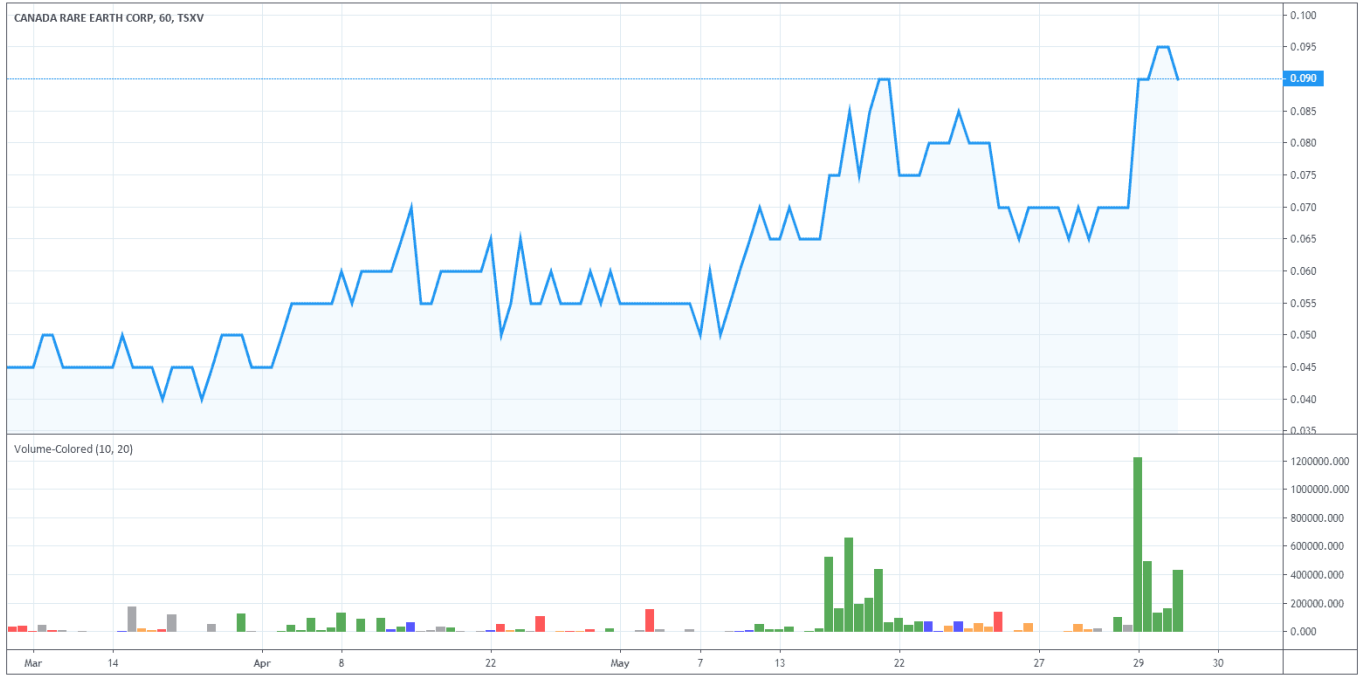
## Lynas Corporation Limited. (ASX: LYC)

Sam\_M published on TradingView.com, May 29, 2019 18:42:19 UTC  
ASX\_DLY:LYC, 60 2.76 ▲ +0.37 (+15.48%) O:2.72 H:2.78 L:2.71 C:2.77



## Canada Rare Earth Corp. (TSXV: LL)

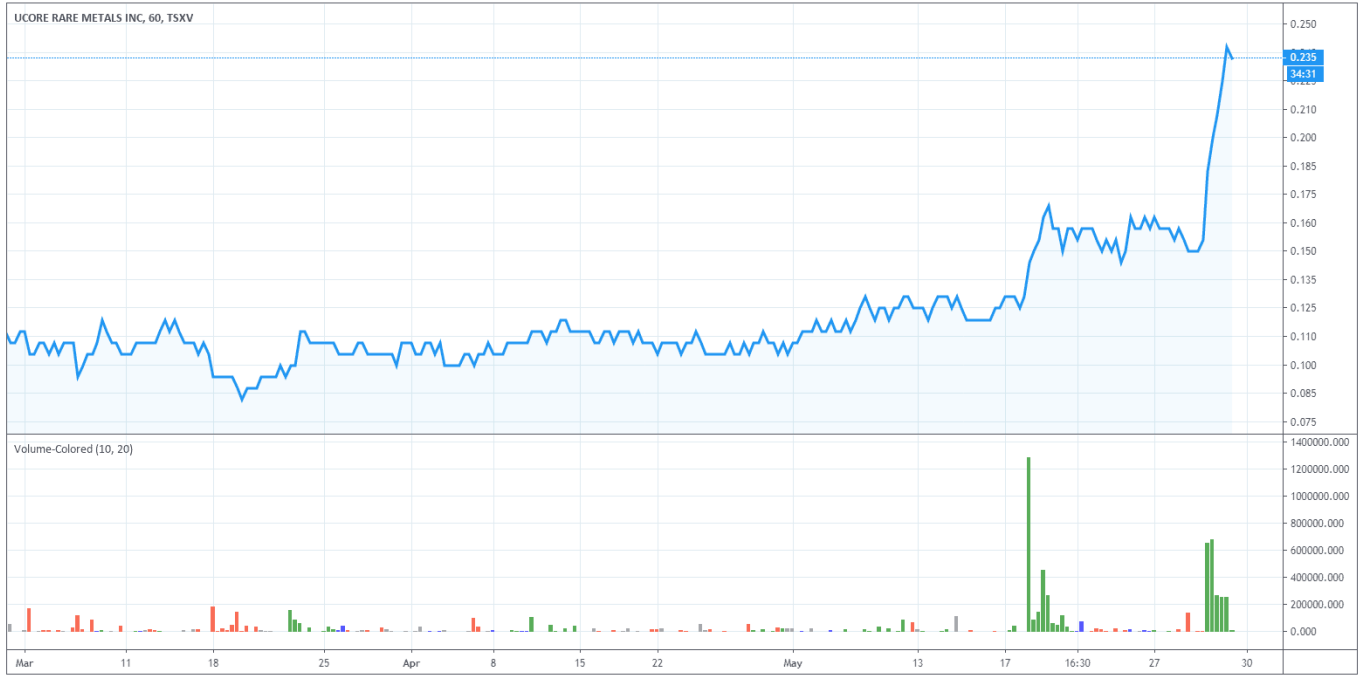
Sam M published on TradingView.com, May 29, 2019 18:46:50 UTC  
TSXV\_DLY:LL, 60 0.090 ▲ +0.020 (+28.57%) O:0.095 H:0.095 L:0.085 C:0.090



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**Ucore Rare Metals Inc. (TSXV: UCU)**

Sam M published on TradingView.com, May 29, 2019 18:55:30 UTC  
TSXV\_DLY:UCU, 60 0.235 ▲ +0.080 (+51.61%) O:0.240 H:0.240 L:0.230 C:0.235



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**Northern Minerals Ltd. (ASX: NTU)**

Sam: M published on TradingView.com, May 29, 2019 18:59:19 UTC  
ASX\_DLY:NTU, 60 0.073 ▲ +0.006 (+8.96%) O:0.071 H:0.073 L:0.071 C:0.073



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**Arafura Resources Limited. (ASX: ARU)**



Sam M published on TradingView.com, May 29, 2019 19:02:31 UTC  
ASX\_DLY:ARU, 60 0.086 ▲ +0.016 (+22.86%) O:0.082 H:0.087 L:0.080 C:0.086



## Texas Minerals Resources Corp. (OTCQB: TMRC)

Sam\_M published on TradingView.com, May 29, 2019 19:20:31 UTC  
OTC\_DLY:TMRC, 60 0.3510 ▲ +0.1010 (+40.4%) O:0.3650 H:0.3750 L:0.3510 C:0.3510



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