

We need to take a hard look at the Availability of Critical Minerals

written by Jack Lifton | January 20, 2023

Faith is accepting something as true that you can't prove or disprove. But anthropogenic climate impact enthusiasts rise from faith to fanaticism, because they refuse to even contemplate disproof.

A few years, or even a few centuries of non-reproducible, and therefore non-verifiable, temperature data, accepted on faith even though it cannot be repeated or verified, can be used to model a system, but not to prove that it accurately describes the future of the system. Any model must use only verifiable data collected, and the model must be tested successfully and repeatedly giving the same results each time in order to represent a true model of nature.

Most scientists until just a century ago believed that atoms were only a descriptive model designed by men to simulate the real world by reducing observable phenomena to entities whose properties could be treated as mechanical objects and the motions of which could be calculated by the as then developed mathematical systems of the calculus and statistics.

The properties of gases could be described and analyzed this way, but only by very few men who had mastered the mathematics and Newtonian dynamics, and this was done in successive additions to conceptual schemes until the systems broke down in contradictions. Thus the atom of antiquity became the atom of Dalton, then of Mendeleev, then of Rutherford, Bohr and Moseley, and beyond. We call the practical workers with atoms and their

combination “chemists.” Today we accept their conclusions as true if and only if their equally qualified companions agree with them. We call this validation, “peer review.”

For several centuries now students of nature have first mastered the work of those great minds that went before them and then spent most of their lives teaching others to do the same thing. A few of them go on to expand our knowledge and understanding of the world, and the great engineers sometimes work out how to devise uses derived from that understanding, so that even ordinary people could master in their daily lives devices such as the telephone, radio, television, the personal computer, the personal mobile phone, the automobile, the airplane, and so on.

Scientists and engineers rarely begin a project by examining the availability of critical materials necessary for the mass production of a technological device. They only want to prove a concept, either that the science allows the technology to function or that the device can be manufactured or mass produced at a cost the consumer or industrial buyer can afford.

Journalists and politicians and most bureaucrats and academics today are simply not specifically well educated enough to judge the availability of critical materials. Nor are they clever enough, generally, to know who to ask if a natural resource can be produced in sufficient quantity, economically, to support a mass produced technology.

The mineral abundance data is out there. We have extensive surveys of the mineralogical makeup and concentration of most discoveries of critical minerals that have been made, but for some reasons, more and more I believe, “political reasons,” policy makers do not want to ask whether we have access to sufficient economically recoverable mineral deposits, or if there is economic processing capability and capacity to put them

into end-user form.

Those who tell us that we must change the world to survive or face extinction have been around for a long time. But rarely have they had the ability to destroy our civilization through mandating very bad choices.

The critical minerals for the technologies to reduce the emissions of carbon dioxide by changing the way we produce and use electrical energy are not infinite in supply. Mines are not organic; they live and die when the grade (concentration) of the mineral falls below human technology's ability to produce it economically.

We can moderate our use of fossil fuels, but there are no technologies known or plausible that can replace them.

We need to take a hard look at what we're doing to our energy economy and how we can balance energy reality with energy fantasy. Critical minerals drive the ability of our society to manufacture the technologies for alternate production and use of electrical energy. Their availability is a very big part of that. It's time we took a very hard, informed by experience and data, look at it before we waste all of the time and effort it took to achieve a low-cost energy economy.

**Justin Cochrane on Carbon
Streaming's carbon credit**

streams and investment pipeline and uplisting to NASDAQ

written by InvestorNews | January 20, 2023

In a recent InvestorIntel interview, Tracy Weslosky spoke with Justin Cochrane about [Carbon Streaming Corporation's](#) (NEO: NETZ | OTCQB: OFSTF) focus on acquiring its high-quality portfolio of carbon credit streams and investments. Expanding on their [2022 strategic objectives](#), Justin touches on Carbon Streaming's \$200 million near-term potential pipeline of opportunities over the next 12-months "out of a total pipeline of [\\$700 million](#)."

In this InvestorIntel interview, which may also be viewed on the InvestorIntel YouTube channel ([click here to subscribe](#)), Justin highlights plans to list Carbon Streaming on [NASDAQ](#). Highlighting the growing interest in ESG directed investments, an increased focus on companies to reduce their carbon footprint, Justin explains how Carbon Streaming invests capital through carbon credit streaming arrangements with project developers and owners to accelerate the creation of carbon offset projects by bringing capital to projects that might not otherwise be developed.

To watch the full interview, [click here](#)

About Carbon Streaming Corporation:

Carbon Streaming is a unique ESG principled company offering investors exposure to carbon credits, a key instrument used by both governments and corporations to achieve their carbon neutral and net-zero climate goals. Our business model is focused on acquiring, managing and growing a high-quality and

diversified portfolio of investments in projects and/or companies that generate or are actively involved, directly or indirectly, with voluntary and/or compliance carbon credits.

The Company invests capital through carbon credit streaming arrangements with project developers and owners to accelerate the creation of carbon offset projects by bringing capital to projects that might not otherwise be developed. Many of these projects will have significant social and economic co-benefits in addition to their carbon reduction or removal potential.

To learn more about Carbon Streaming Corporation, [click here](#)

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Any projections given are principally intended for use as

objectives and are not intended, and should not be taken, as assurances that the projected results will be obtained by the Company. The assumptions used may not prove to be accurate and a potential decline in the Company's financial condition or results of operations may negatively impact the value of its securities. Prospective investors are urged to review the Company's profile on [Sedar.com](https://www.sedar.com) and to carry out independent investigations in order to determine their interest in investing in the Company.

If you have any questions surrounding the content of this interview, please contact us at +1 416 792 8228 and/or email us direct at info@investorintel.com.

Chris Thompson with Justin Cochrane on Carbon Streaming's first Blue Carbon Credit Project

written by InvestorNews | January 20, 2023

In a recent InvestorIntel interview, Chris Thompson spoke with Justin Cochrane, Founder, Director and CEO of [Carbon Streaming Corporation](https://www.carbonstreaming.com) (NEO: NETZ | OTCQB: OFSTF) about Carbon Streaming's first [blue carbon credit project](#) with MarVivo in Magdalena Bay, Mexico.

In this InvestorIntel interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel](#)

[Channel](#)), Justin explained how the MarVivo Blue Carbon Conservation Project will not only protect mangrove forests but will also protect the marine ecosystem around the mangroves. He went on to provide [an update](#) on Carbon Streaming's Cerrado Biome Project aimed at protecting native forests and grasslands in the Cerrado biome. Highlighting the strong demand for ESG themed investments, Justin explained how Carbon Streaming is well positioned to benefit from the rising carbon credit prices.

To watch the full interview, [click here](#)

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Carbon Streaming is cashed up and ready to save the world

written by InvestorNews | January 20, 2023

You may have heard numerous companies around the world talking about setting net-zero carbon emissions goals, in fact over 1,500 companies have announced plans to be carbon net-zero by 2050 or sooner. But how will they get to net-zero? In the interim, the plan is to offset the carbon they put into the atmosphere by buying carbon credits. A carbon credit represents one tonne of carbon dioxide or the carbon dioxide equivalent of another greenhouse gas (defined by the amount of heat it traps in the atmosphere) that is prevented from entering into or being absorbed from the atmosphere. Carbon credits are anticipated to be integral to meet global net-zero goals, especially in hard-to-abate sectors such as oil, aviation, steel and cement.

No matter how you slice it, the carbon credit world is big now and destined to get a lot bigger. The estimated size of the compliance/regulated market was US\$261 billion in 2020, a five-fold increase from 2017. The voluntary carbon market was a much more modest US\$473 million in 2020, although UN Special Envoy for Climate Action, Mark Carney, the former Governor of the Bank of England, has said that the voluntary market “needs to be \$50-100 billion per annum.” And that’s where [Carbon Streaming Corporation](#) (NEO: NETZ) comes to the rescue, so to speak. Carbon Streaming is a unique, ESG principled, investment vehicle offering investors exposure to carbon credits. Its stated business model is to focus on acquiring, managing and growing a high-quality, diversified portfolio of investments in projects and/or companies that generate or are actively involved with carbon credits. The Company invests capital through carbon credit streaming arrangements, with project developers and

owners, to accelerate the creation of carbon offset projects by bringing capital to projects that might not otherwise be developed.

Carbon Streaming has been raising capital and signing up projects to build up an inventory of carbon credits. In fact, in July the Company was able to [raise an impressive US\\$104.9 million](#) based on the momentum they had been gaining over the first half of 2021. The latest information from the website shows the Company has a near term opportunity pipeline of 16 projects around the world totaling roughly US\$200 million in investments. Longer term the deal pipeline is over US\$700 million and the best part is, the target IRR for these projects is greater than 15%.



[Source](#)

The value proposition at Carbon Streaming is three fold:

1. Enter into streaming agreements with individuals, companies, and governments to stream carbon credits from their asset or property that can be sold in either the voluntary or in the compliance markets;
2. Purchase carbon credits in the voluntary and compliance markets for long-term price appreciation with selective trading as opportunities arise; and
3. Invest in or acquire companies, assets or properties involved in the origination, generation, monitoring or management of carbon credits (in other words M&A).

Strategy #1 is pretty straight forward, you simply sell your earned carbon credits to whatever market is willing to pay the most. Strategy #3 is probably similar to almost every publicly traded company on the planet. However, strategy #2 intrigues me

the most from an upside potential. Having spent plenty of time in the trenches of commodity trading, I know that being long a commodity that is in demand can be very lucrative. If you are of the opinion that demand for carbon credits is potentially going to grow faster than supply, then having an enormous pipeline of carbon credits coming on stream (targeting 100 million per annum by 2025), can be a very good thing. A modest price swing can create huge leverage. Just look at natural gas prices over the last 4 months as an example for a much more than modest price swing.

The carbon emission contract that trades on the Intercontinental Exchange (ICE) known as EUAs (European Union Allowance) has a 52 week trading range of €23 to just under €66 on a per tonne of CO₂ equivalent basis. If you have an inventory of 100 million of annual credits being generated each year, imagine if you keep 5% to float with the spot price (preferably with a floor in place to assure breakeven). A \$5 move could add \$25 million to your top line. That's why I think Carbon Streaming could be in the right place at the right time, depending on how they manage their "selective trading".

Upon the exercise of the special warrants issued to raise the above noted US\$105 million, the Company will have roughly 231 million shares outstanding. Based on yesterday's close of \$2.38 that puts the market cap at \$550 million with approximately \$141 million (US\$112) in cash at the end of August. Back of the envelope math suggests that with 20 million in carbon credits by year end, that could generate roughly \$1.7 billion (US\$1.36 billion) in top line revenue based on yesterday's EUA close of €59. I don't know what carbon price assumption Carbon Streaming is using to calculate their 15%+ IRR but it might be worth digging a little deeper to find out.

Justin Cochrane from Carbon Streaming with Chris Thompson on accessing the capital markets to help fight climate change

written by InvestorNews | January 20, 2023

In a recent InvestorIntel interview, Chris Thompson spoke with Justin Cochrane, President, CEO and Director of [Carbon Streaming Corporation](#) (NEO: NETZ) about the renewed interest in the carbon market and how Carbon Streaming is accessing and leveraging the capital markets to help fight climate change.

In this InvestorIntel interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel Channel](#)), Cochrane highlighted the rising carbon credit prices driven by global warming and climate change awareness and added that Carbon Streaming Corporation invests directly into carbon projects around the world, which are either removing carbon from the atmosphere or avoiding the emission of carbon into the atmosphere in exchange for the carbon credits that they're generating. Justin also provided an update on Carbon Streaming's recent private placement which had participants from 78 different countries.

To watch the full interview, [click here](#)

About Carbon Streaming Corporation:

Carbon Streaming is a unique ESG principled investment vehicle offering investors exposure to the carbon credits market, a key instrument used by both governments and corporations to achieve their carbon neutral and net-zero climate goals. The company's business model is focused on acquiring, managing and growing a high-quality and diversified portfolio of investments in projects and/or companies that generate or are actively involved, directly or indirectly, with voluntary, and/or compliance, carbon credits.

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Carbon Streaming's Justin Cochrane on offering ESG investors exposure to the carbon credit market

written by InvestorNews | January 20, 2023

In a recent InvestorIntel interview, Tracy Weslosky speaks with Justin Cochrane, President, CEO and Director of [Carbon Streaming Corporation](https://www.carbonstreaming.com) (OTC: MXVDF) about the carbon credit market and

accelerating global initiatives to reduce emissions of greenhouse gases.

In this InvestorIntel interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel Channel](#)), Justin went on to explain how the carbon credit market works and how “Carbon Streaming is taking a proven business model in royalty and stream financing and applying it to the carbon credit world.” With almost half of S&P 500s pricing carbon into their investment decisions, Justin said that carbon credit is a key part of the future. He added that Carbon Streaming invests to accelerate the development of carbon credit projects around the world. With Osisko Gold Royalties Ltd. (NYSE: OR | TSX: OR) as one of the largest shareholders, Justin said that Carbon Streaming is one of the few public companies focused on carbon space providing ESG investors exposure to the carbon market.

To watch the full interview, [click here](#)

About Carbon Streaming Corporation:

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