

# Summit to Address the Impact of the \$1.2 Trillion EV Market Demand by 2030 on the Critical Minerals Sector

written by Tracy Weslosky | November 1, 2022

***CMI Presents “The Race to Achieve a Critical Minerals Supply Chain ROW” at the Critical Minerals Summit on Wednesday, November 9th***

Toronto, October 31, 2022 – The [Critical Minerals Institute](#), which was founded for education, collaboration, and to provide professional opportunities to meet the critical minerals supply chain challenges, is pleased to announce the inaugural Critical Minerals Summit (CMS 2022) on Wednesday, November 9, 2022, at the historic [National Club](#) in Toronto, Canada from 9 AM to 4 PM EST.

“With automakers planning on spending nearly \$1.2 trillion by 2030,” says Critical Minerals Institute founder Tracy Weslosky, “it is equally as important to discuss not only where these battery materials are coming from and the technologies involved, but also where will we find the skilled professionals it requires.”

Themed ***The Race to Achieve a Critical Minerals Supply Chain***, the Chairman of the Critical Minerals Institute Jack Lifton will begin the event with opening remarks aptly titled ***Scalability, Why the EV Timelines Simply do not Work.***

Geoff Atkins, Founder of Cheetah Resources and previously Managing Director of Vital Metals who succeeded in bringing the Nechalacho rare earths mine into production will kick off the day with his keynote speech titled ***The Perfect Storm: Prioritizing the Demand Drivers Necessary for Mission Critical Minerals Supply Chain.***

A one-day, in person event, the Critical Minerals Summit is a bi-annual event designed to bring industry leaders and investors together to address scalability, resource and human capital needs, not only to meet the EV market demands, but to achieve the aggressive legislative timelines set around sustainability and climate change.

In the context of this theme, a special presentation designed by Prof. Saleem H. Ali, Ph.D., Chair, Department of Geography & Spatial Sciences, who is a Blue and Gold Distinguished Professor of Energy and the Environment from University of Delaware, will be presented during lunch. Author of a new book on environmental systems titled *How Natural Laws Define Human Life* (Oxford Univ. Press), his presentation will be followed by a Q&A style interview on the Global Critical Minerals Market with international expert and renowned market leader Constantine Karayannopoulos, President, CEO and Director of [Neo Performance Materials Inc.](#) (TSX: NEO).

Throughout the day, a series of 5 panels will be hosted by CMI Directors and the “Who’s Who” of international critical minerals experts, with leading industry CEOs participating as panelists. Highlights include the following panels:

- ***Securing the Capital to build a Supply Chain for the ROW.***
- ***The Extraction & Processing Timeline Advantage***
- ***Global Challenges in Advancing the Critical Minerals Supply Chain***

- ***Dealing with the Resource Challenge, the Critical Minerals Shortage.***
- ***The Power of Politics: Government Investment in the Critical Minerals Market***

In addition to the above, the CMI will have Ed Buie PhD, President & CEO, Coulometrics, LLC, speak on the paradox of producing graphite in North America and competing with China, along with special guest and Acting Consul-General, Greg Quinn from the British Consulate-General Toronto, who will address the key points from the recently released UK national critical minerals strategy.

The Critical Minerals Summit will be held at the historic [National Club](#) in Toronto from 9 AM to 4 PM EST. Space is strictly limited. For more information go to [CriticalMineralsInstitute.com](https://CriticalMineralsInstitute.com). To purchase a delegate pass, [click here](#).

**About the Critical Minerals Institute:** The [Critical Mineral Institute](#) (CMI) is an international organization for companies and professionals focused on battery materials, technology metals, defense metals, ESG technologies and practices, the general EV market, and the use of critical minerals for energy and alternative energy production. Offering an online site that features job opportunities that range from consulting roles to Advisory Board positions, the CMI offers a wide range of B2B service solutions. Also offering online and in-person events, the CMI is designed for education, collaboration, and to provide professional opportunities to meet the critical minerals supply chain challenges.



**Special Thanks to the following Critical Minerals Institute Corporate Sponsors:** [ACME Lithium Inc.](#), [American Rare Earths](#)

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# Market eyes Neo Performance Materials Constantine Karayannopoulos with, what's next?

written by InvestorNews | November 1, 2022

August is usually a slow time for business and news as it is the end of the summer holiday season in the Northern hemisphere, but this August has been a particularly busy time for [Neo Performance Materials Inc.](#)'s (TSX: NEO) management team, especially CEO Constantine Karayannopoulos.

Announcements have been coming fast and furious. Let's start with the most surprising news first:

- [Hastings Technology Metals acquires a 22.1% shareholding in Neo Performance Materials](#) – August 26, 2022

On August 26th [Hastings Technology Metals Ltd](#) (ASX: HAS) announced it was [acquiring a 22.1% shareholding](#) in Neo Performance Materials by buying out most of the position of Oaktree Capital Management, L.P. (Oaktree) fund OPPS NPM SARL. Oaktree will sell 8,974,127 shares at C\$15/share. Prior to this OPPS held 9,878,155 shares. The funding comes from Wyloo Metals, a private Australian metals company formed by Andrew “Twiggy” Forrest, whose worth is reported at US\$17.5 billion. Wyloo will invest the money into Hastings who in turn will acquire the shares from the Oaktree subsidiary.

- [Neo Performance Materials Announces \\$67.5 Million Bought Deal Treasury Offering of Common Shares](#) – August 26, 2022

On the same day as the announcement of the share acquisition by Hastings, a bought deal was announced with Paradigm Capital being the lead underwriter. The deal was done at \$15/share. At the time of writing, Neo Performance Materials was trading at \$14.25. There are over 40 million shares outstanding so after this deal, there will be 45 million shares. According to the press release the funds will be used for “general corporate purposes including the expansion, maintenance of global assets and the pursuit of strategic growth opportunities around the globe.” Expansion of the operations in Estonia is likely one area for the usage of the funds. Having visited the plant over a decade ago it is a Soviet era plant which runs nitric acid to separate the rare earths. Neo Performance Materials’ two plants in China use hydrochloric acid. The nitric route is high initial capex as every component is made from stainless steel but has lower opex than the Chinese approach. At a capacity of 3,000 TPY of rare earths oxides the Greenland deposit would produce 750 TPY of Nd/Pr or about 2,500 tonnes of magnets. A nominal size.

- [Second quarter results with records for revenue, Operating income and adjusted EBITDA](#) – August 12, 2022

This is due to the high prices for the four key magnetic elements, Neodymium, Praseodymium, Terbium and Dysprosium, which hit prices not seen in the past decade. Since then, Nd and Pr have dropped about 50%, Tb 20% and Dy 35%, which means it will be a challenge for Q3 results to match Q2 numbers.

- [Neo Secures \\$75 Million Loan to Finance Expansion and Relocation Of Its Environmental Emissions Catalyst Business](#) – August 17, 2022

This financing came from Export Development Canada (EDC). The credit facility matures in 5 years and is available in 3 tranches of \$25 million. The funds will be used to relocate its rare earth plant in Zibo, Shandong province, China, to a nearby industrial park which will provide access to water treatment and waste/water recycling. This plant produces high value materials for automotive catalytic converters. The relocation is to expand capacity from 4,000 TPY REO to 5,000 TPY REO. Based on reported analysis for Baiyan Obo this expanded capacity will produce 370 tonnes of Nd/Pr oxide which would generate an additional 1,300 TPY of NdFeB magnets.

- [Hudson Resources and Neo Performance Materials Sign Agreement on The Sarfartoq Rare Earth Element Project in Greenland](#) – August 22, 2022

This is an interesting move by Neo as they only tried to go upstream into mining once before when they got involved in a tin mine in Brazil over a decade ago. The development of this project would provide a source for their plant in Estonia which

gets most of its raw material from Russia presently with the [balance from Energy Fuels Inc.](#) (NYSE American: UUUU | TSX: EFR) in the USA. The deal is a non-refundable deposit of \$250k. Once the Greenland government gives approval for transfer of the license to Neo or its special purpose entity, Neo will pay Hudson Resources an additional \$3.25 million. There are two projects in the deal. One is an REE project in SW Greenland and a nearby Nb/Ta. Deposit. The Neo plant in Estonia also produces high purity Nb and Ta metal as well as rare earths so there is synergy in this deal. The 2011 43-101 report on the REE project showed an indicated resource of 5.9 million tonnes at 1.8% rare earth oxide which translate to about 100,000 of rare earth oxides. It is an underground mine opportunity which will bring added cost to the mining process. Should Neo proceed with this acquisition it will need to develop a camp onsite and decide where to upgrade the ore prior to shipping a concentrate to Estonia – all challenges Canadian companies have dealt with for decades.

If Neo Performance Materials is an indicator for the rare earths sector, one can only wonder what's next.

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## Neo Performance Materials and Uranium Sector Leads this Week-in-Review...

written by Tracy Weslosky | November 1, 2022

*“US Futures are down across the board, with no new economic data or major earnings expected. Investors are looking to the*

*August jobs report, scheduled for Friday, as they weigh up how big a rate hike could be coming from the Fed in September.*

*Last week saw equity markets close the last week on a down note, as all three major U.S. indexes sold off sharply for their worst closes in months after Federal Reserve Chairman Jerome Powell said the central bank would continue fighting inflation with rate increases. Don't expect much in the way of a reprieve in early trading as we get the day under way." – Kevin Thomsen, Morning Chatter for August 29, 2022*

Friday was an intense day of speculation and discussion in the rare earths sector. With breaking news early AM with [Agreement to acquire strategic shareholding in Neo Performance Materials and cornerstone investment in Hastings by Wyloo Metals](#), Christopher Ecclestone put out a piece on InvestorIntel titled [Neo Performance and Hastings – Will Wonders Never Cease?](#) – that was followed later that day, with a second announcement [Neo Performance Materials Announces \\$67.5 Million Bought Deal Treasury Offering of Common Shares.](#)

Allow me to remind you that Constantine Karayannopoulos will be the luncheon speaker at the [Critical Minerals Institute](#)'s summit scheduled for Wednesday, November 9, 2022.

This morning, we see indicators that the uranium sector has interest, we coincidentally have a headline story written by Jack Lifton titled [Are we slaves to Russian uranium processing?](#) It seems we are in the right place at the right time as we start out the InvestorTalk.com schedule this week with 2 uranium companies... followed by an antimony story on Thursday.

[InvestorTalk.com](#) line-up for this week:

▪ 9-9:20 AM EST, Tuesday, August 30, 2022 – InvestorTalk.com



with John Cash from **Ur-Energy Inc.** (NYSE American: URG | TSX: URE), [click here to register](#)

- 9-9:20 AM EST, Wednesday, August 31, 2022 – InvestorTalk.com with Dev Randhawa from **Fission 3.0 Corp.** (TSXV: FUU | OTCQB: FISOF), [click here to register](#)
- 9-9:20 AM EST, Thursday, September 1, 2022 – InvestorTalk.com with Christopher Ecclestone from **Molten Metals Corp.** (CSE: MOLT), [click here to register](#)

Now for some highlights from the Week-in-Review for the week of August 22-26, 2022 –

**The Top 10 Trending Columns on InvestorIntel.com for the last 30-days include:**

1. [Nano One's cathode materials are inventing the zero-emission battery future](#)
2. [Announcing the Launch of the Critical Minerals Institute for Companies and Experts Focused on Electric Vehicles, Green Energy and Secure Supply Chains](#)
3. [The King of Tin is Alphamin](#)
4. [Rare earths expert Alastair Neill on Vital Metals](#)
5. [Lynas Bets \\$500 Million on Rare Earths Market Expansion](#)
6. [Zentek sets its sights on treating skin conditions as it expands potential uses for its ZenGUARD graphene coating](#)
7. [Eye on the price of uranium, Cameco brings crown jewel back into production and Ur-Energy is set to go.](#)
8. [Molybdenum – securing a domestic supply of the vital but underappreciated mineral](#)
9. [A titan of titanium – with a big HAMR](#)
10. [Valeo Pharma's Steve Saviuk talks about the US\\$40M non-dilutive financing from Sagard Healthcare Partners](#)

**InvestorIntel Columns to REVIEW:**

- August 26, 2022 – [Neo Performance and Hastings – Will Wonders Never Cease?](#)
- August 25, 2022 – [The Dean's List – Part 6: What cobalt companies could benefit from Canada's commitment to critical minerals?](#)
- August 24, 2022 – [dynaCERT puts its carbon emission reduction technology to the test](#)
- August 23, 2022 – [Mining our way to the Green Revolution](#)
- August 22, 2022 – [Musk Twitter Deal, Predatory Short Selling Takes a Hit and Rethinking Greenland Rare Earths in this Week-in-Review...](#)
- August 22, 2022 – [Greenwashing – It's not easy pretending to be green](#)

#### **ii8 System News Releases for the Week in Review for August 22-26, 2022:**

- August 26, 2022 – [West Red Lake Gold Closes \\$4,100,000 Flow Through Financing](#)
- August 26, 2022 – [Neo Performance Materials Announces \\$67.5 Million Bought Deal Treasury Offering of Common Shares](#)
- August 26, 2022 – [Agreement to acquire strategic shareholding in Neo Performance Materials and cornerstone investment in Hastings by Wyloo Metals](#)
- August 25, 2022 – [Awakn Life Sciences Signs Agreement with a Leading Drug Development Company to Deepen IP Moat for Its Lead Program](#)
- August 25, 2022 – [Rackla Metals focuses on Tombstone intrusive related gold](#)
- August 25, 2022 – [dynaCERT Advances its Verified Carbon Standard Application with Verra](#)
- August 25, 2022 – [Completion of Institutional Placement](#)
- August 24, 2022 – [Westward Gold Completes Turquoise Canyon](#)

### Anniversary Payment

- August 24, 2022 – Molten Metals Corp. Announces Formation of Strategic Advisory Board
  - August 24, 2022 – Bald Eagle Announces Exchange Approval for Name Change to Hercules Silver Corp. and Provides Exploration Update
  - August 23, 2022 – Molten Metals Samples 39.4% Antimony (Sb) and 9.69g/t Au, at Tienesgrund, Slovakia
  - August 23, 2022 – TrustBIX Inc. Announces June 30, 2022 Third Quarter Financial Results
  - August 23, 2022 – Auxico Signs Offtake Agreement for Tin Concentrate from the Massangana Tin Tailings Project in Brazil
  - August 23, 2022 – DOE Funds Next-Generation Rare Earths Processing Research Collaboration
  - August 23, 2022 – Silver Bullet Mines Corp. Updates on Washington Mine in Idaho
  - August 23, 2022 – Nano One Receives C\$1.8M towards SDTC Milestone 4 and Granted 2 Patents
  - August 22, 2022 – Hemostemix Announces Closing of UNIT Private Placement
  - August 22, 2022 – Hudson Resources And Neo Performance Materials Sign Agreement On The Sarfartoq Rare Earth Element Project In Greenland
  - August 22, 2022 – dynaCERT to Equip the City of Timmins with Winterized Carbon Emission Reduction Technology
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# InvestorIntel is digging for stories at PDAC 2022

written by Stephen Lautens | November 1, 2022

PDAC 2022 is underway, and InvestorIntel is one of the media sponsors at the world's largest mining and exploration convention. We are busy looking for new stories and meeting old friends at the first in-person PDAC since 2020.

Monday through Wednesday (June 13-15), InvestorIntel is conducting exclusive interviews with industry leaders, presidents and CEOs of some of the most interesting silver, gold, rare earths, uranium and other critical materials companies.

On Monday our first panel was **Rare Earths, Sustainability & Meeting the EV Market Demand** hosted by InvestorIntel CEO and Founder Tracy Weslosky with panelists Mark Chalmers, President and CEO of [Energy Fuels Inc.](#) (NYSE American: UUUU | TSX: EFR) and Constantine Karayannopoulos, President, CEO and Director of [Neo Performance Materials Inc.](#) (TSX: NEO).

Our next panel discussion was hosted by Chris Thompson of [eResearch](#) on **Silver, The Technology Metal & Market** with Byron W. King, InvestorIntel columnist, [Bald Eagle Gold Corp.](#)'s (TSXV: BIG) CEO Chris Paul, [Silver Bullet Mines Corp.](#)'s (TSXV: SBMI) VP Capital Markets and Director Peter Clausi, and Simon Ridgway, Founder, Director, President and CEO of [Volcanic Gold Mines Inc.](#) (TSXV: VG).

To finish off Monday's schedule, InvestorIntel columnist and renowned critical materials expert Byron W. King, led a panel discussion on **Building the EV Material Supply Chain** with [Appia Rare Earths & Uranium Corp.](#)'s (CSE: API | OTCQB: APAAF)

President Frederick Kozak, [Search Minerals Inc.](#)'s (TSXV: SMY | OTCQB: SHCMF) President, CEO, and Director Greg Andrews, [Avalon Advanced Materials Inc.](#)'s (TSX: AVL | OTCQB: AVLNF) President, CEO and Director, Don Bubar, and [Vital Metals Limited](#)'s (ASX: VML | OTCQB: VTMXF) Managing Director, Geoff Atkins.

If you are at PDAC, be sure to visit the InvestorIntel media studio on Level 700.

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# Constantine Karyannopoulos on Neo Performance Materials' banner sales and profits in 2021

written by InvestorNews | November 1, 2022

In a recent InvestorIntel interview with Tracy Weslosky, [Neo Performance Materials Inc.](#)'s (TSX: NEO) President, CEO and Director Constantine Karayannopoulos detailed Neo Performance's dramatic rise in revenues and profits in 2021, the highest profits in the consistently profitable company's history. He then outlined his plans for Neo to maintain and continue an upward revenue and profits trajectory. Constantine also said that Neo's gold medal winning ESG audit for its (European) Estonian operations would be a goal for all of its worldwide operations.

The discussion also covered the variety of Neo's products and their uses and markets not only in rare earths but also in other

critical technology metals, including gallium, niobium, and tantalum for the electronics and specialty alloys industries.

Constantine pointed out that Neo Performance Materials is the most vertically integrated rare earths products manufacturer in the world outside of China, and one of only two niobium and tantalum processors in Europe. It is the only commercial separator of rare earths in Europe. All of its products are in high demand by the OEM automotive industry and the OEM semiconductor industry. Neo, he also said, is the leading manufacturer of bonded-type rare earth permanent magnets in the world, and their use in the OEM automotive industry is rapidly expanding.

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

### **About Neo Performance Materials Inc.**

Neo manufactures the building blocks of many modern technologies that enhance efficiency and sustainability. Neo's advanced industrial materials – magnetic powders and magnets, specialty chemicals, metals, and alloys – are critical to the performance of many everyday products and emerging technologies. Neo's products help to deliver the technologies of tomorrow to consumers today. The business of Neo is organized along three segments: Magnequench, Chemicals & Oxides and Rare Metals. Neo is headquartered in Toronto, Ontario, Canada; with corporate offices in Greenwood Village, Colorado, US; Singapore; and Beijing, China. Neo operates globally with sales, research and development, and production across 10 countries, being Japan, China, Thailand, Estonia, Singapore, Germany, United Kingdom, Canada, United States, and South Korea.

To learn more about Neo Performance Materials Inc., [click here](#)

**Disclaimer:** *Neo Performance Materials Inc. is an advertorial*

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This interview, which was produced by InvestorIntel Corp., (IIC), does not contain, nor does it purport to contain, a summary of all the material information concerning the “Company” being interviewed. IIC offers no representations or warranties that any of the information contained in this interview is accurate or complete.

This presentation may contain “forward-looking statements” within the meaning of applicable Canadian securities legislation. Forward-looking statements are based on the opinions and assumptions of the management of the Company as of the date made. They are inherently susceptible to uncertainty and other factors that could cause actual events/results to differ materially from these forward-looking statements. Additional risks and uncertainties, including those that the Company does not know about now or that it currently deems immaterial, may also adversely affect the Company’s business or any investment therein.

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](mailto:info@investorintel.com).

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# Constantine Karayannopoulos, Jack Lifton and Byron W. King on the synergies between the global rare earths' supply and the real-world markets

written by InvestorNews | November 1, 2022

In this episode of **Critical Minerals Corner**, Jack Lifton and Critical Minerals Corner Co-Host & InvestorIntel Columnist Byron W. King are joined by Constantine Karayannopoulos, President, CEO and Director of [Neo Performance Materials Inc.](#) (TSX: NEO). Constantine describes the real state of the rare earth mining, refining, and end-use product industry, outside of China, as it exists and operates today, from the perspective of the largest non-Chinese owned vertically integrated, beyond the mine, rare earth products producer in the world. Questions from Jack and Byron lead Constantine to describe and differentiate today's European and North American markets with regard to their sizes, existing supplies and suppliers, and their futures as he sees them.

Although Neo Performance Materials is a Canadian company, headquartered in Toronto, it produces and sells rare earth product lines within China, Europe, SE Asia, and North America. Jack points out that this makes Constantine Karayannopoulos a uniquely qualified expert to analyze the global rare earths' products' markets. And surmises that those watching may learn a great deal in this conversation about the synergies between rare



earths' supply and the real-world markets.

To access the complete episode of this Critical Minerals Corner discussion, [click here](#)

### **About Neo Performance Materials Inc.**

Neo manufactures the building blocks of many modern technologies that enhance efficiency and sustainability. Neo's advanced industrial materials – magnetic powders and magnets, specialty chemicals, metals, and alloys – are critical to the performance of many everyday products and emerging technologies. Neo's products help to deliver the technologies of tomorrow to consumers today. The business of Neo is organized along three segments: Magnequench, Chemicals & Oxides and Rare Metals. Neo is headquartered in Toronto, Ontario, Canada; with corporate offices in Greenwood Village, Colorado, US; Singapore; and Beijing, China. Neo operates globally with sales, research and development, and production across 10 countries, being Japan, China, Thailand, Estonia, Singapore, Germany, United Kingdom, Canada, United States, and South Korea.

To learn more about Neo Performance Materials Inc., [click here](#)

***Disclaimer:*** *Neo Performance Materials Inc. is an advertorial member of InvestorIntel Corp.*

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legislation. Forward-looking statements are based on the opinions and assumptions of the management of the Company as of the date made. They are inherently susceptible to uncertainty and other factors that could cause actual events/results to differ materially from these forward-looking statements. Additional risks and uncertainties, including those that the Company does not know about now or that it currently deems immaterial, may also adversely affect the Company's business or any investment therein.

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](mailto:info@investorintel.com).

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**In 2022 Neo Lithium  
Shareholders prospered, and**

# Neo Performance Materials is in the spotlight

written by InvestorNews | November 1, 2022

[Neo Lithium Corp.](#) (TSXV: NLC | OTCQX: NTTHF) was one of the standout performers in 2021 delivering a return to investors of 219%, a [5.35x gain](#) for those investors lucky enough to have bought in at the IPO on July 20, 2016 at C\$1.20 per share. Neo Lithium is now trading at C\$6.42 with the [Zijin Mining takeover offer](#) at C\$6.50 a share having recently been [approved](#) by Neo Lithium shareholders.

Today's article gives an update on Neo Lithium and mentions another company that has several things in common with Neo Lithium, meaning it could be the next success story.

## An update on Neo Lithium

As announced on December 10, 2021 [Neo Lithium shareholders approved the arrangement](#) effectively selling their shares in Neo Lithium to China's Zijin Mining Group at C\$6.50 a share. 91.42% of shareholder votes were in favour of the transaction. The announcement stated: "Subject to obtaining all required approvals and satisfying all required conditions, the Transaction is expected to close in the first quarter of 2022....Following closing of the Transaction, the Common Shares will be de-listed from the TSX Venture Exchange." There is the option for investors to buy into China copper-gold miner [Zijin Mining Group](#) (SHA: 601899) (HK: 2899) if they wish to still have exposure to Neo Lithium's prized 3Q Project, whose Environmental Impact Assessment (EIA) was [recently approved](#) by the Catamarca Government in Argentina.

Effectively this ends the story for investors in Neo Lithium.

But there is a another 'Neo' to consider.

### **Neo Performance Materials Inc. (TSX: NEO) – The next 'Neo'**

While there is no doubt that Neo Lithium President & CEO, [Dr. Waldo Perez](#), (who also discovered Lithium Americas Cauchari Project) and its CFO, [Carlos Vincens](#), played a huge role in the success of Neo Lithium, there is another person of interest. And that is Neo Lithium Chairman [Constantine Karayannopoulos](#), who served on the Neo Lithium Board from February 9, 2016. He is also the President and Chief Executive Officer of [Neo Performance Materials Inc.](#) (TSX: NEO). Neo Performance Materials returned shareholders a 49% gain in 2021 and offers investors a similar early stage (to get in) opportunity, albeit this time in rare earths processing and permanent magnets materials.

For investors who believe success breeds success (as I do), and who look to follow star performers then I suggest you take a closer look at Neo Performance Materials. The Company is unique in the way it is positioning itself as the only non-Chinese processor of rare earth materials into separated rare earth chemicals that are then used internally to produce rare earth fine chemicals, metals, alloys, and "bonded" rare earth permanent magnets. You can read more about Neo Performance Materials in my linked article below.

- [Neo Performance Materials looks to expand capacity as it rides the tailwind of growing rare earth permanent magnet demand](#)

In the above article global rare earths expert Jack Lifton quotes his view on Neo Performance Materials stating:

*"Neo Performance Materials is today, the only Western company that is vertically integrated with the capability and commercial scale capacity to separate the rare earths, manufacture rare*

*earth metals and alloys, and manufacture rare earth permanent magnets. It is the non-Chinese model for any venture seeking to enter or assemble a total rare earths permanent magnet supply chain."*

## **Closing remarks**

The story on Neo Lithium is now closing with the successful takeover by Zijin Mining now in its final stages. Investors who were in early, since the IPO, made a very nice 5.35x gain, and in some cases even more if they followed me buying at the 2019 low around C\$0.58 (see my article [here](#)) and selling recently above C\$6.40 for a 11x gain.

Looking ahead I see some similarities between Neo Lithium and Neo Performance Materials. Both have top quality management and Constantine Karayannopoulos is involved in both. Both companies are leaders in their field, noting Neo Lithium in lithium and Neo Performance Materials in rare earths processing and production of valuable rare earth based end products. Finally, both are beneficiaries of the EV boom and the demand for EV related metals such as lithium and the rare earths, NdPr.

They say follow the money and that is true, but better still is to follow successful top tier management, especially if they have the tailwind of a winning trend.

In 2022 we say farewell to Neo Lithium and hello to Neo Performance Materials. It should be another great year for those companies related to the electric vehicle boom.

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# Jack Lifton and Constantine Karayannopoulos discuss the non-Chinese rare earths' markets

written by InvestorNews | November 1, 2022

In a recent InvestorIntel interview, Jack Lifton spoke with Constantine Karayannopoulos, President, CEO and Director of [Neo Performance Materials Inc.](#) (TSX: NEO) about the current rare earths supply and demand situation outside of China.

In this InvestorIntel interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel Channel](#)), Constantine highlighted that the growth in rare earths demand in Europe is primarily driven by the burgeoning growth there in green technology applications such as electric vehicles (EV) and wind power. He continued by saying that although automakers in Europe are setting the goals of having 50% of their rare earths supply chain located within Europe by 2025, there are not enough rare earths produced to satisfy the EV demand, securely, outside of China, at this time. As the owner of the only operating commercial sized rare earth separation facility in Europe, Constantine explained how Neo Performance is very well positioned to capitalize on the opportunity.

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

## About Neo Performance Materials Inc.

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chemicals, metals, and alloys – are critical to the performance of many everyday products and emerging technologies. Neo's products help to deliver the technologies of tomorrow to consumers today. The business of Neo is organized along three segments: Magnequench, Chemicals & Oxides and Rare Metals. Neo is headquartered in Toronto, Ontario, Canada; with corporate offices in Greenwood Village, Colorado, US; Singapore; and Beijing, China. Neo operates globally with sales and production across 10 countries, Japan, China, Thailand, Estonia, Singapore, Germany, the United Kingdom, Canada, the United States, and South Korea.

To learn more about Neo Performance Materials Inc., [click here.](#)

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# Neo Performance's Constantine Karayannopoulos on the growth opportunities for rare earths in the EV market

written by InvestorNews | November 1, 2022

In a recent InvestorIntel interview, Tracy Weslosky spoke with Constantine Karayannopoulos, President, CEO and Director of [Neo Performance Materials Inc.](https://www.neo-performance.com) (TSX: NEO) about joining the UN Global Compact to promote sustainability and about the 'massive' growth opportunities in the rare earths space.

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



Karayannopoulos highlighted the lack of sufficient supply of rare earths, lithium, and other critical materials required by the energy transition and electric vehicle (EV) revolution. In addition to being the only company in the world operating dual supply chains inside and outside of China for rare earths and rare earth based advanced materials, Neo also owns the only operating commercial rare earth separation facility in Europe, which allows it to have a significant footprint in the fast-growing European EV market. With its presence in 10 countries, Constantine explained that Neo Performance is well-positioned to capture growth in the electric vehicle supply chain in Europe and eventually in North America.

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

### **About Neo Performance Materials Inc.**

Neo manufactures the building blocks of many modern technologies that enhance efficiency and sustainability. Neo's advanced industrial materials – magnetic powders and magnets, specialty chemicals, metals, and alloys – are critical to the performance of many everyday products and emerging technologies. Neo's products help to deliver the technologies of tomorrow to consumers today. The business of Neo is organized along three segments: Magnequench, Chemicals & Oxides and Rare Metals. Neo is headquartered in Toronto, Ontario, Canada; with corporate offices in Greenwood Village, Colorado, US; Singapore; and Beijing, China. Neo operates globally with sales and production across 10 countries, Japan, China, Thailand, Estonia, Singapore, Germany, the United Kingdom, Canada, the United States, and South Korea.

To learn more about Neo Performance Materials Inc., [click here](#).

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# Neo Performance Materials becomes the West's First Profitable Total Rare Earths' Supply Chain Company

written by InvestorNews | November 1, 2022

Investors love companies that under promise and over deliver. Today's company is a classic example as it continues to grow its highly valuable global advanced materials business that includes rare earth alloy powders and magnets.

[Neo Performance Materials Inc.](#) (TSX: NEO) ("Neo") is a profitable processor and manufacturer of advanced industrial materials including rare earth metals, alloys, and "bonded" rare earth permanent magnets, specialty chemicals, technology metals, and alloys. These are all critical to the performance of many everyday products and emerging technologies such as the high-powered magnets used in electric vehicles and in direct drive wind turbine electric generators. Neo operates globally with sales and production across 10 countries including Japan, China, Thailand, Estonia, Singapore, Germany, the United Kingdom, Canada, the United States, and South Korea.

Neo is the only company in the world that operates dual supply chains inside and outside of China for rare earths, rare earths separation and the commercial production of rare earths advanced materials. Neo owns and operates the only operating commercial rare earth separation facility in Europe.

Furthermore, Neo's [Magnequench](#) unit is the global leader in bonded neodymium-iron-boron (NdFeB) alloy powder based magnets and their applications. Its powders and magnets are used in high-performance components for the OEM automotive, factory automation, high-efficiency motors, residential appliances, and in many other applications.

**Neo Performance Materials global operations that manufacture advanced materials that incorporate rare earths and other rare element metals**



Source: [Company presentation](#)

**Establishing a new Western rare earths supply chain incorporating USA and Europe**

As a reminder, in July 2021 Neo announced the commencement of commercial shipments of mixed rare earth carbonates produced from monazite from which the uranium and thorium had been removed by [Energy Fuels Inc.](#) (NYSE American: UUUU | TSX: EFR) in the USA, to Neo's rare earth separations facility in Estonia, Europe. This first shipment was a landmark for establishing a [new non-Chinese Western rare earths supply chain](#). Energy Fuels has been sourcing ore from third parties such as from Chemours' (NYSE: CC) heavy minerals sands operations in Georgia, USA; then processing the monazite residue at their White Mesa Mill in Utah, USA, to extract the rare earths, remove the radioactive elements, and then process the rare earths into a solid mixed carbonate form ready for delivery, in this case, to Neo's operation in Estonia according to its specification. The news [stated](#):

"This new supply chain will initially produce rare earth products from monazite that is processed into mixed RE Carbonate

at Energy Fuels' Mill in Utah. This RE Carbonate is then further processed by Neo at its Silmet rare earth processing facility in Sillamäe, Estonia ("Silmet") into separated rare earth oxides and other value-added rare earth compounds. Neo is the only commercial producer of separated rare earth oxides in Europe."

Neo's CEO, Constantine Karayannopoulos, [stated](#): "This innovative U.S.-to-Europe supply chain will supplement Neo's existing rare earth supply from our long-time Russian supplier. It will enable Neo to expand value-added rare earth production in Estonia to meet growing demand in Europe for these materials."

### **Neo's financials keep getting stronger**

As announced on August 12, 2021, Neo produced another stellar [financial result in Q2, 2021](#). Highlights included production volumes increasing 59.6% YoY, revenue reaching US\$135.1 million and up 99.5% YoY, adjusted EBITDA of US\$22.2 million massively up YoY (an increase of \$21.0 million), and adjusted net income of US\$14.1 million, or US\$0.37 per share. The chart below highlights the financial improvement in Neo's financials over the past year.

### **Neo's consolidated revenue and adjusted EBITDA keep rising due to a very strong operational performance**



### **Neo's revenue by segment and geography is led by Magnequench and China**



Source: [Company presentation](#)

Neo's CEO, Constantine Karayannopoulos, [stated](#): "We had an outstanding second quarter that exceeded our expectations, with

record revenue and robust profitability, while our plants operated at near-record output.....With the organic growth we are seeing across all business units, the significant macro tailwinds boosting the entire rare earths sector, and a number of strategic growth opportunities on the radar screen, we remain confident in the sustainability of our long term vision and growth strategy.”

Looking ahead to the rest of the calendar year 2021 analyst’s forecasts remain strong with CY2021 revenue forecast at [US\\$503 million](#), net income US\$39 million, and 7.82% net profit margin. These estimates may soon need to be increased given Neo has already achieved US\$266 million in H1 2021. In terms of multiples, they are also appealing with Neo trading on a 2021 PE of [16.7x](#) and an EV/Revenue multiple of [0.92x](#).

### **Closing remarks**

Neo is currently riding a wave of demand for its advanced materials as we move to a greener economy, especially for the high-value rare earth alloy powders and magnets made with neodymium. These magnets are key to achieving greater power and efficiency from electric motors, the demand for which in the large drive motors for electric vehicles is surging.

Neo Performance Materials trades on a market cap of C\$670 million and a very reasonable 16.7x PE. One to definitely consider.