

# Biden's US\$2T+ infrastructure plan should support strong copper demand and be a tailwind for Kodiak Copper

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The US\$2T+ Biden infrastructure plan announced today will be built on copper. The US\$2T+ plan includes [an additional US\\$400B of clean energy tax credits](#) which will give US wind and solar energy a huge tailwind in the years ahead. Other parts of the plan support Electric Vehicles (EVs) and rebuilding infrastructure. **All of which requires huge amounts of copper.**

For example, BHP says that [one wind turbine uses 4 tonnes of copper \(video link\)](#). President Biden announced yesterday that [the US will target to deploy 30 GW of offshore wind energy by 2030](#). This equates to roughly 3,000 wind turbines assuming an average of 10MW per turbine. 3,000 turbines mean 12,000 tonnes of copper (~26 million pounds) would be needed this decade just for new US offshore wind turbines. Now that is a huge amount of copper and potentially a lucrative business for copper miners given copper prices are now at ~US\$4/lb.

**Copper is on a bull run as the green energy boom takes off**



[Source](#)

Copper producer's stock prices are reflecting the higher copper prices from the past year. However, copper juniors that can grow their resource are not yet reflecting their full stock price potential. This means for investors with a 5-7 year time frame

‘successful’ copper juniors offer much greater reward, and of course greater risk. One junior with enormous upside potential is [Kodiak Copper Corp.](#) (TSXV: KDK | OTCQB: KDKCF) (‘Kodiak’).

Kodiak 100% own the MPD copper-gold porphyry property spread over their 9,733-hectare land package in British Columbia, Canada. I introduced Kodiak previously [here](#), so today I will focus on their latest progress and next steps.

## **Kodiak’s latest drill results**

On Feb. 8, 2021 Kodiak [announced](#) drill results from five further holes from their exploration program at their MPD copper-gold porphyry project. Following on from past great results with superb long copper-gold mineralization, Kodiak reported 213 m of 0.65% copper and 0.37 g/t Gold (1.00% CuEq) and 171 m of 0.62% Copper and 0.43 g/t Gold (1.03% CuEq), as well as other results.

Claudia Tornquist, President and CEO of Kodiak, [stated](#): “Once again, the Gate Zone has yielded impressive copper-gold numbers over significant widths. With only a small number of holes drilled so far, we have already intersected the newly discovered high-grade zone at Gate and the surrounding larger mineralized envelope over significant dimensions. **Over 90% of this kilometre-long target remains unexplored by Kodiak, with considerable discovery potential yet to be unlocked.**”

The key to understand about these drill results is the massive interval lengths as is typical of porphyry systems. This typically allows them to be mined at scale, despite the grades not being as high as some other smaller or underground copper projects.

## **Kodiak Copper MPD Project – Gate Zone drilling results**



## [Source](#)

### **Next steps for Kodiak**

Kodiak will continue exploring at MPD in 2021 with a fully funded, significantly larger program which includes up to 30,000 meters of drilling in several target areas, as well as further geophysical and geochemical surveying, prospecting and geotechnical studies.

### **Closing remarks**

The green energy boom is only just beginning to take off now and is set to have a superb decade ([green energy metals supercycle](#)) as countries all around the world shift from fossil fuels to cleaner renewable energy in order to meet their emissions targets. China and Europe will continue to lead, but with Biden in power, the US will start a rapid catch-up beginning today with the US\$2T+ US\$400B infrastructure plan (assumes Congress passes it). Copper prices have been surging over the past 6 months as the market identifies the strong demand drivers and limited available new copper supply.

For investors looking for a potentially higher risk/higher reward copper play it is hard to go past Kodiak Copper. Management is top tier with a track record of success. Kodiak has enormous potential as they continue to explore both their copper-gold porphyry MPD Property as well as their two other promising projects (The Mohave Copper-Molybdenum-Silver Porphyry Project in Arizona USA and the Kahuna Diamond Project in Canada).

On a market cap of just C\$59M for 3 quality exploration projects in safe locations, investors would be wise to take a look again at Kodiak Copper Corp..

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# Attracting attention through drill results, Kodiak Copper is positioned well for the green energy supercycle

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The copper sector is widely regarded as being one of the possible future winners from the green energy and electric vehicle (EV) revolution this decade. Just recently Goldman Sachs “proclaimed the dawn of [a new commodity supercycle](#)”, with copper as their number one commodity pick. A supercycle is not just a short upswing it is a decade or more long upswing caused usually by a significant demand surge. In the case of copper, the demand surge will come from solar energy, wind energy, and EVs.

For example, BHP says that [one wind turbine uses 4 tonnes of copper \(video link\)](#), which certainly is a lot of copper especially given copper currently trades at [US\\$7,396/tonne](#).

**Copper is essential for the green energy revolution, used in solar, wind, and EVs**



Source: [Kodiak Copper investor presentation](#)

[Kodiak Copper Corp.](#) (TSXV: KDK) 100% own the very large (9,733-hectare land package) MPD copper-gold porphyry property in a proven, mineral producing belt, in British Columbia (BC), Canada. For those that are new to Kodiak Copper, the Company

amalgamated 3 projects into one – Man, Prime, Dillard – hence the name MPD. Management is top tier with a great track record of success. What's most exciting is their safe location and potential for a large scale copper-gold project, just as we enter the decade of renewables (solar, wind) and EVs taking massive market share.

**The MPD Property has road access and is close to nearby power, towns, and other mines**



Source: [Kodiak Copper investor presentation](#)

The MPD Property has numerous showings of copper and gold confirmed across a large, 10km<sup>2</sup> area. Drill results point toward the potential for a large copper-gold porphyry system. There is mineralization from at or near surface to as deep as ~800 meters with huge potential exploration upside across the property.

Last [September 3rd, 2020](#) Kodiak Copper announced [drill/assay results](#) which were 'spectacular' in my opinion. The results included a massive [282 m of 0.70% copper and 0.49 g/t gold \(1.16% CuEq\)](#). Due to this, the stock raced up from C\$0.50 on August 24th to C\$2.80 as of September 28th for a 460% increase. The good news for new investors is the hype in the stock price has since settled down, with the price now back at C\$1.64 and trading on a market cap of just C\$66 million, despite plenty of further good news since then.

Kodiak Copper has continued to produce very strong drill results such as:

- MPD-20-004: [535.1 m of 0.49% Copper and 0.29 g/t Gold \(0.76% CuEq\\*\)](#) between 201.9 and 737.0 metres down hole, with a higher grade core (282 metres of 0.70% copper, 0.49

g/t gold).

- MPD-20-005: [515.8 m of 0.41% Copper, 0.22 g/t Gold and 1.50 g/t silver](#) (0.63% CuEq\*) from 223.5 to 739.3 metres down hole, with a higher grade core (192 metres of 0.74% Copper and 0.48 g/t Gold).

## Cross-sectional summary of drill results at the MPD Project – Gate Zone



### [Source](#)

Looking ahead Kodiak Copper [states](#): “The Company has just completed a successful 2020 drill campaign that resulted in **a transformative discovery of a high-grade central core within a broader, well-developed copper-gold porphyry system** at the Gate Zone. Kodiak will continue exploring at MPD in early 2021 with a fully funded, significantly larger program. Plans include up to 30,000 meters of drilling in several target areas, as well as further geophysical and geochemical surveying, prospecting and geotechnical studies.”

It should also be mentioned that in the next few weeks the final assay results from the 2020 drill program are due which will be most interesting to see.

## Closing remarks

I agree with Goldman Sachs that we are likely entering a green energy and EV commodities supercycle this decade. Battery metals (lithium, cobalt, graphite, nickel), key rare earths, and copper are likely to be the big winners.

Investors can look to position themselves ahead of the supercycle by buying into quality and promising junior miners now. Kodiak Copper is still a junior but they have plenty of

potential with a possible large sized copper-gold porphyry deposit in BC Canada and the right management to deliver. They also have two other promising projects – The Mohave Copper-Molybdenum-Silver Porphyry Project in Arizona USA, and the Kahuna Diamond Project in Canada. One to follow for sure.

Further reading and viewing:

- [Kodiak Copper – Annual Investor Letter](#)
  - [Claudia Tornquist on Kodiak's MPD Copper-Gold Porphyry Project and new shareholder \(video\)](#)
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# Claudia Tornquist on Kodiak's MPD Copper-Gold Porphyry Project and new shareholder

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In a recent InvestorIntel interview, Peter Clausi speaks with Claudia Tornquist, President, CEO, and Director of [Kodiak Copper Corp.](#) (TSXV: KDK) about Kodiak's copper-gold porphyry system discovery at the MPD project and attracting Teck Resources Limited (NYSE: TECK | TSX: TECK.A | TSX: TECK.B) as a significant shareholder.

In this InvestorIntel interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel Channel](#)), Claudia went on to say, "The company is focused on copper and last year made a very nice discovery very early on." She continued, "We have certainly had some interesting gold values in our discovery holes. That is obviously encouraging as gold

can be a big contributor to the economics in a porphyry mine.”

Kodiak recently attracted Teck Resources Limited (NYSE: TECK | TSX: TECK.A | TSX: TECK.B) as a significant shareholder. “That is a great vote of confidence in our project and company,” Claudia commented. She also provided an update on the Mohave copper porphyry project in Arizona’s copper belt “in the vicinity of a large copper porphyry mine.”

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

### **About Kodiak Copper Corp.**

Kodiak is focused on its 100% owned copper porphyry projects in Canada and the USA. The Company’s most advanced asset is the MPD copper-gold porphyry project in the prolific Quesnel Trough in south-central British Columbia, Canada, where the Company made a discovery of high-grade mineralization within a wide mineralized envelope in 2020. Kodiak also holds the Mohave copper-molybdenum-silver porphyry project in Arizona, USA, near the world-class Bagdad mine. Kodiak’s porphyry projects have both been historically drilled and present known mineral discoveries with the potential to hold large-scale deposits.

The Company also holds the advanced-stage Kahuna diamond project in Nunavut, Canada. Kahuna hosts a high-grade, near surface inferred diamond resource and numerous kimberlite pipe targets.

Kodiak’s founder and Chairman is Chris Taylor who is well-known for his gold discovery success with Great Bear Resources. Kodiak is also part of Discovery Group led by John Robins, one of the most successful mining entrepreneurs in Canada.

To learn more about Kodiak Copper Corp., [click here](#)

***Disclaimer:*** Kodiak Copper Corp. is an advertorial member of InvestorIntel Corp.



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# Kodiak Copper proves that what shareholders want is leadership, copper – and gold

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On September 14 it was [announced](#) that Teck Resources has agreed to make a strategic investment of a 9.9% interest in Kodiak Copper (TSXV: KDK) ('Kodiak'), at C\$1.95 per share raising C\$10.5m.

Add in drill results on [September 3rd](#) that included [282 m of 0.70% copper and 0.49 g/t gold \(1.16% CuEq\)](#) at Kodiak's advanced MPD copper-gold porphyry project in British Columbia, shareholders have responded positively. In fact, **Kodiak Copper's stock price has risen from C\$0.50 on August 24th to C\$2.80 as of September 28th for a 460% increase in the last month.**



## [Source](#)

Today I take a deeper look at Kodiak's MPD porphyry project. As most resource investors know copper porphyry projects can be enormous in size and contain valuable by-products (gold, silver, molybdenum) which can make them economical even at lower grades than other projects.

## **MPD Copper-Gold Porphyry Project**

The MPD Project is located in the prolific Quesnel Trough in southern British Columbia, Canada. Kodiak amalgamated 3 projects

into one – Man, Prime, Dillard – hence the name MPD. The region is mining friendly with good access to infrastructure.

### The MPD Project has road access and is close to infrastructure



#### [Source](#)

Previous drilling by Newmont Corporation and Rio Tinto was focused on depths up to 200 meters below the surface. Kodiak's strategy is to use modern mining methods and to drill deeper. So far it is paying off. In November 2019, Kodiak (then known as Dunnedin Ventures) started its first drill campaign at MPD and discovered the Gate Zone, including several promising drill results that followed. The key was they were drilling deeper than before. The January 2020 [announcement](#) included the following:

- **"The new discovery underlies a large copper-in-soil anomaly with over one kilometre of strike** at the 'Prime' area of the project. Over 100 historical drill holes containing copper and gold mineralization define **a large, likely multi-centre porphyry system across 10 square kilometres of the MPD project.**
- The Gate Zone includes intervals of higher grade copper-gold within a broad lower grade interval, with mineralization present from **near surface to a vertical depth of 800 metres**, and remains open at depth.
- Higher grade intervals include: 74.9 metres of 0.54% CuEq (0.43% copper and 0.11 g/t gold) from 297.0 metres to 371.9 metres. 102.0 metres of 0.68% CuEq (0.53% copper and 0.16 g/t gold) from 404.9 metres to 507.0 metres.
- Broad moderate grade intervals include: 763.6 metres of 0.28% CuEq (0.21% copper and 0.07 g/t gold) from 52.3 metres to 816.0 metres (entire bedrock drill hole length).

340.7 metres of 0.42% CuEq (0.33% copper and 0.09 g/t gold) from 219.0 metres to 559.7 metres.”

Combining this with the September 2020 result of 282 m of 0.70% copper and 0.49 g/t gold (1.16% CuEq), with further assays results pending, and further drilling in 2020; you can start to see why investors (including mining giant Teck Resources) are getting excited.

**Kodiak Copper’s MPD project historic drill results, strong discovery potential at depths below 200m**



[Source](#)

### **Closing remarks**

Kodiak Copper was founded by Chris Taylor who is well-known for his gold discovery success with Great Bear Resources, Kodiak is lead by President, CEO and Director Claudia Tornquist, the former General Manager at Rio Tinto. Kodiak is also part of the Discovery Group led by one of the most successful mining entrepreneurs in Canada John Robins and added to this, we now have Teck Resources (market cap US\$7.4b) taking a 9.9% interest.

More assay results (drill hole MPD-20-005) are due out soon and then there will be further drill results in Q4, 2020. With a current market cap of C\$102m means, Kodiak now has plenty of cash and plans to drill their US located Mohave porphyry project next.