

Justin Cochrane on Carbon Streaming's carbon credit streams and investment pipeline and uplisting to NASDAQ

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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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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

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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

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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.

Carbon Streaming offers ESG investors exposure to the carbon credits market

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Environmental, Social, and Governance (“ESG”) investing has become a key theme this decade as companies and governments face greater scrutiny on their behavior by investors. One key part of ESG investing is the environment, and in particular, carbon credit trading.

A ‘[carbon credit](#)’ (also called ‘carbon offset’ or ‘emission credit/offset’) is a term for any tradable certificate or permit representing “the right to emit one tonne of carbon dioxide or the equivalent amount of a different greenhouse gas”. Essentially corporations, governments and individuals purchase carbon credits to offset their emissions from other companies that have earned credits from the government for reducing CO2 emissions. One well-known example of carbon credit trading occurred with Fiat Chrysler purchasing about [US\\$2.4 billion](#) worth of carbon credits from EV manufacturer Tesla from 2019 through 2021.

It is quite clear that carbon credit trading is rapidly growing to be a large industry in itself. Over 1,500 companies have announced plans to be “net-zero” by 2050 or sooner. Carbon credits are anticipated to be integral to meet these goals,

especially in hard to abate sectors such as oil, aviation, steel and cement. Even better is that retail investors can now invest in a carbon credit streaming business.

Today's company is a listed company that offers a way for investors to invest into the growth of the carbon credit market. They act like an investment vehicle purchasing carbon credit revenue streams in return for an upfront payment. If the value of the carbon credits goes up or can be sold later at a profit then the stream becomes more valuable, thereby potentially boosting the value of the carbon streaming company. Revenues and profits will also depend on the quality and return on investment ("ROI") of the streaming deals that are made.

How carbon emission trading works and the market size (US\$261 billion in 2020) currently dominated by Europe



Source: [Carbon Streaming Corporation investor presentation](#)

[Carbon Streaming Corporation](#) (NEO: NETZ) ("Carbon Streaming") is an ESG principled investment vehicle offering investors exposure to carbon credits. Carbon Streaming is [among the first publicly traded](#) carbon offset investment companies on any exchange in the world. Carbon Streaming listed on Canada's NEO exchange on [July 26, 2021](#), the Frankfurt Stock Exchange on [July 30, 2021](#) and [intends to list on a U.S. stock exchange](#), such as NASDAQ or the New York Stock Exchange, prior to the end of the year.

Carbon Streaming's business model is to focus on acquiring, managing and growing a high-quality and diversified portfolio of investments in projects/companies that generate or are actively involved, directly or indirectly, with carbon credits.

The Company [states](#): "Carbon Streaming is actively pursuing

streaming arrangements with individuals, companies and governments to stream carbon credits from their assets or properties. We intend **to provide investors with a diversified portfolio of carbon credit streams for long-term appreciation without the operational risk.** We intend to participate in both the voluntary and compliance carbon markets, and also may make investments related to carbon credits.”

Carbon Streaming has sourced a potential deal pipeline of over US\$585 million with its near-term pipeline valued at approximately US\$165 million at target IRRs of 15%+.

Carbon Streaming Corporation near term opportunity pipeline



Source: [Carbon Streaming Corporation investor presentation](#)

In recent news on August 3, 2021, Carbon Streaming [announced](#) a Carbon Credit Stream Agreement on the Rimba Raya Biodiversity Reserve (a 64,500-hectare peat forest in Central Kalimantan, Indonesia) and Strategic Partnership with Infinite-EARTH Founders. The Rimba Raya Project, for which InfiniteEARTH has exclusive carbon and marketing rights, is expected to create over 70 million credits over its remaining 20-year crediting period (approximately 3.5 million carbon credits per annum).

Carbon Streaming has now [closed](#) the above agreement paying an upfront cash investment of US\$26.3 million consisting of US\$22.3 million for the Carbon Stream with InfiniteEARTH and US\$4.0 million for the strategic alliance agreement with the Founders (for consulting services, carbon project advisory, carbon credit marketing and sales). In return Carbon Streaming [will receive](#):

“InfiniteEARTH will deliver 100% of the carbon credits created by the Rimba Raya Project, expected to be 70 million credits

over the next 20 years, less up to 635,000 carbon credits per annum which are already committed to previous buyers. **For the first four years, the amounts delivered under the Carbon Stream include 1,000,000 carbon credits per annum at a pre-agreed gross sale price of US\$8.50.....”**

InfiniteEARTH is a Hong Kong-based project development company that develops and manages conservation land banks and provides environmental offsets and corporate social responsibility (CSR) solutions to companies across the globe. The full details of the deal can be viewed [here](#).

Governments have pledged to reduce carbon emissions but as shown on the graph there is still a long way to go



Source: [Carbon Streaming Corporation investor presentation](#)

Closing remarks

Carbon credits is already a large business in Europe and it is likely to accelerate globally as governments get tougher on CO2 emissions and investors demand strong ESG efforts from companies. For investors that want to focus on ESG or simply invest money towards supporting carbon credits and hence the environment, then consider Carbon Streaming Corporation.