

The Uranium Bull in the Room – Why the Excitement is Back

written by InvestorNews | June 23, 2022

In this InvestorIntel PDAC 2022 Panel on “The Uranium Bull in the Room”, host Tracy Weslosky is joined by [Energy Fuels Inc.](#)’s (NYSE American: UUUU | TSX: EFR) Vice President of Marketing and Corporate Development Curtis Moore, [Appia Rare Earths & Uranium Corp.](#)’s (CSE: API | OTCQX: APAAF) CEO and Director Tom Drivas, [Standard Uranium Ltd.](#)’s (TSXV: STND | OTCQB: STTDF) CEO and Chairman Jon Bey, and [U308 Corp.](#) (NEX: UWE.H) President, CEO and Director Dr. Richard Spencer.

In the video, which can also be viewed in full on the InvestorIntel YouTube channel ([click here](#)), Curtis Moore says that there was a lot of excitement at PDAC this year over uranium, with the spot price rising and nuclear power being an essential part of the world-wide commitment to carbon-free energy production. Dr Richard Spencer added that “you cannot get to net zero without nuclear” and that a “fundamental driver of the uranium space at the moment is the small modular reactors.”

Jon Bey points out that Canada is moving forward with plans for small modular reactors in several provinces, including Saskatchewan. “Isn’t it amazing the place where uranium is being mined is actually going to be powered by nuclear?”

The panel discusses how the Sprott Physical Uranium Trust has had an impact on the uranium market. Energy Fuels’ Curtis Moore observes that the Sprott fund “basically swept up a whole bunch of excess inventories that were floating around the market, being traded around and keeping the price depressed,” and has resulted now in “a nice uplift in the price.”

The drive to secure a domestic supply of uranium is also discussed, as well as the concerns about “Russia controlling about two-thirds of the world’s uranium resources.” Tom Drivas says that with current geopolitical uncertainties “even eastern European countries are looking to uranium outside of Russia.”

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

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About Energy Fuels Inc.

Energy Fuels is a leading U.S.-based uranium mining company, supplying U_3O_8 to major nuclear utilities. Energy Fuels also produces vanadium from certain of its projects, as market conditions warrant, and is ramping up commercial-scale production of rare earth element (“**REE**”) carbonate. Its corporate offices are in Lakewood, Colorado, near Denver, and all its assets and employees are in the United States. Energy Fuels holds three of America’s key uranium production centers: the White Mesa Mill in Utah, the Nichols Ranch in-situ recovery (“**ISR**”) Project in Wyoming, and the Alta Mesa ISR Project in Texas. The White Mesa Mill is the only conventional uranium mill operating in the U.S. today, has a licensed capacity of over 8 million pounds of U_3O_8 per year, and has the ability to recycle alternate feed materials from third parties, to produce vanadium when market conditions warrant, and to produce REE carbonate from various uranium-bearing ores. Energy Fuels is also evaluating the potential to recover medical isotopes for use in targeted alpha therapy cancer treatments. The Nichols Ranch ISR Project is on standby and has a licensed capacity of 2 million pounds of U_3O_8 per year. The Alta Mesa ISR Project is also on standby and has a licensed capacity of 1.5 million pounds of U_3O_8 per year. In addition to the above production

facilities, Energy Fuels also has one of the largest SK-1300/NI 43-101 compliant uranium resource portfolios in the U.S. and several uranium and uranium/vanadium mining projects on standby and in various stages of permitting and development.

To learn more about Energy Fuels Inc., [click here](#)

About Appia Rare Earths & Uranium Corp.

Appia is a Canadian publicly-listed company in the rare earth element and uranium sectors. The Company is currently focusing on delineating high-grade critical rare earth elements and gallium on the Alces Lake property, as well as exploring for high-grade uranium in the prolific Athabasca Basin on its Otherside, Loranger, North Wollaston, and Eastside properties. The Company holds the surface rights to exploration for 105,026 hectares (259,525 acres) in Saskatchewan. The Company also has a 100% interest in 12,545 hectares (31,000 acres), with rare earth element and uranium deposits over five mineralized zones in the Elliot Lake Camp, Ontario.

To learn more about Appia Rare Earths & Uranium Corp., [click here](#)

About Standard Uranium Ltd.

Standard Uranium is a mineral resource exploration company based in Vancouver, British Columbia. Since its establishment, Standard Uranium has focused on the identification and development of prospective exploration stage uranium projects in the Athabasca Basin in Saskatchewan, Canada.

Standard Uranium's Davidson River Project, in the southwest part of the Athabasca Basin, Saskatchewan, is comprised of 21 mineral claims over 25,886 hectares. Davidson River is highly prospective for basement hosted uranium deposits yet remains

relatively untested by drilling despite its location along trend from recent high-grade uranium discoveries.

To learn more about Standard Uranium Ltd., [click here](#)

About U308 Corp.

U308 Corp. is focused on the development of the Berlin Deposit in Colombia. Apart from uranium for clean, nuclear energy, the Berlin Deposit contains battery commodities; nickel, phosphate and vanadium. Phosphate is a key component of lithium-ion ferro-phosphate (“LFP”) batteries that are being used by BYD, Tesla and a growing list of electric vehicle manufacturers. Nickel is a component of various lithium-ion batteries, while vanadium is the element used in vanadium redox flow batteries. Neodymium, one of the rare earth elements contained within the Berlin Deposit, is a key component of powerful magnets that are used to increase the efficiency of electric motors and in generators in wind turbines.

The Company’s mineral resource estimate for the Berlin Deposit was made in accordance with National Instrument 43-101. The preliminary economic assessment (“PEA”) on the Berlin Deposit showed positive economics and highlighted areas in which both operating, and capital costs could be reduced to enhance the economics of the deposit. Extensive metallurgical test work showed that revenue streams would be dominated by uranium, phosphate, nickel, vanadium and rare earth elements, of which only two were considered in the economic assessment.

A PEA is preliminary in nature, it includes inferred mineral resources that are considered too speculative geologically to have the economic considerations applied to them that would enable them to be categorized as mineral reserves, and there is no certainty that the preliminary economic assessment will be realized.

To learn more about U308 Corp., [click here](#)

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interview, please contact us at +1 416 792 8228 and/or email us direct at info@investorintel.com.

Leading critical materials CEOs discuss the rising world demand for copper, nickel and zinc

written by InvestorNews | June 23, 2022

In this InvestorIntel PDAC 2022 Panel on “Rising Demand for Critical Materials – Copper, Zinc & Nickel”, host Tracy Weslosky is joined by Claudia Tornquist, President, CEO, and Director of [Kodiak Copper Corp.](#) (TSXV: KDK | OTCQB: KDKCF), Fjordland Exploration Inc. (TSXV: FEX) President, CEO and Director James Tuer, Terry Lynch, CEO of [Power Nickel Inc.](#) (TSXV: PNPN | OTCQB: CMETF), and [Metallum Resources Inc.](#)’s (TSXV: MZN) President, CEO, and Director Kerem Usenmez to discuss the future of critical materials.

In the video, which can also be viewed in full on the InvestorIntel YouTube channel ([click here](#)), Kodiak Copper Corp. President and CEO Claudia Tornquist talks about copper’s “very big demand on the horizon driven by the green revolution energy transition”, including its increased use in EVs, and wind and solar power technologies. James Tuer, President and CEO of Fjordland Exploration Inc. discusses prolific and nickel-friendly jurisdictions, such as Manitoba and Labrador. The future demand for nickel will be driven by increasing world

urbanization and electrification, according to panelist Terry Lynch, CEO of Power Nickel Inc. World demand for zinc will also increase as a crucial battery metal and coating says Metallum Resources President and CEO, Kerem Usenmez.

While all members of the panel agree that demand for critical materials such as copper, nickel and zinc will continue to increase rapidly in the near future, they also caution that “we have to be cautious about prices getting ahead of the market right now” or be in danger that “it will tear down what we’re trying to build up.”

However, “we’re in the right spot right now,” says James Tuer of Fjordland Exploration, “because we know that even in an inflationary market these commodities are going to do well because they’re required for what the world is saying they want to do and where they want to go, so politically it’s going to push us in the right direction.”

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

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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. MPD has all the hallmarks of a large, multi-centered porphyry system. Kodiak has made the Gate Zone discovery of high-grade mineralization within a wide mineralized envelope, and MPD hosts several other targets with similar discovery potential. 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.

Kodiak's founder and Chairman is Chris Taylor who is well-known for his 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](#)

About Fjordland Exploration Inc.

Fjordland Exploration Inc. is a mineral exploration company that is focused on the discovery of large-scale economic metal deposits in Canada.

In collaboration with Ivanhoe Electric Inc. and Commander Resources Ltd., Fjordland is exploring the SVB "Pants Lake Intrusive" target which is in a geologic setting analogous to the nearby nickel-cobalt-copper Voisey's Bay deposit. Fjordland has earned a 75% interest in the project.

Fjordland, as operator, has an agreement to acquire 100% of the Renzy nickel-project located near Maniwaki, Quebec. The project encompasses the former Renzy Mine where, during the period from 1969 to 1972, 716,000 short tons were mined with average grades of 0.70% nickel and 0.72% copper. Fjordland has staked additional claims to increase the size of the project to 530 sq. km.

As well, Fjordland has 2 copper-gold properties in the Quesnel Trough of central British Columbia, The West Milligan copper-gold project is a joint venture with Northwest Copper Corp. located within 4 km of Centerra's Mount Milligan copper-gold mine. The 103 sq. km. Witch copper-gold project is located another 35 km west of the Milligan mine.

To know more about Fjordland Exploration Inc., [click here](#)

About Power Nickel Inc.

Power Nickel is a Canadian junior exploration company focusing on high-potential copper, gold, and battery metal prospects in Canada and Chile.

On February 1, 2021, Power Nickel (then called Chilean Metals) completed the acquisition of its option to acquire up to 80% of the Nisk project from Critical Elements Lithium Corp. (CRE:TSXV)

The NISK property comprises a large land position (20 kilometers of strike length) with numerous high-grade intercepts. Power Nickel, formerly Chilean Metals is focused on confirming and expanding its current high-grade nickel-copper PGE mineralization historical resource by preparing a new Mineral Resource Estimate in accordance with NI 43-101, identifying additional high-grade mineralization, and developing a process to potentially produce nickel sulphates responsibly for batteries to be used in the electric vehicles industry.

Power Nickel (then called Chilean Metals) announced on June 8th, 2021 that an agreement has been made to complete the 100% acquisition of its Golden Ivan project in the heart of the Golden Triangle. The Golden Triangle has reported mineral resources (past production and current resources) in a total of 67 million ounces of gold, 569 million ounces of silver, and 27 billion pounds of copper. This property hosts two known mineral showings (gold ore and magee), and a portion of the past-producing Silverado mine, which was reportedly exploited between 1921 and 1939. These mineral showings are described to be Polymetallic veins that contain quantities of silver, lead, zinc, plus/minus gold, and plus/minus copper.

Power Nickel is the 100-per-cent owner of five properties comprising over 50,000 acres strategically located in the prolific iron-oxide-copper-gold belt of northern Chile. It also owns a 3-per-cent NSR royalty interest on any future production

from the Copaquire copper-molybdenum deposit, recently sold to a subsidiary of Teck resources Inc. Under the terms of the sale agreement, Teck has the right to acquire one-third of the 3-percent NSR for \$3-million at any time. The Copaquire property borders Teck's producing Quebrada Blanca copper mine in Chile's first region.

To know more about Power Nickel Inc., [click here](#)

About Metallum Resources Inc.

Metallum Resources owns 100% of the Superior Lake Zinc and Copper Project in Ontario, Canada. The Project ranks as the highest grade zinc project in North America with a resource of 2.35 Mt at 17.9% Zn, 0.9% Cu, 0.4 g/t Au and 34 g/t Ag.

The Company completed a positive Feasibility Study that highlights the Project will rank in the lowest quartile of operating costs (C1 costs – C\$0.44 / lb; AISC C\$0.51 / lb).

These low costs driven by the high grade of the Project drive robust economic returns. The majority of permits and licenses are in place allowing for a quick re-development following a Final investment Decision.

To learn more about Metallum Resources Inc., [click here](#)

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Peter Cashin of Imperial

Mining talks about scandium's importance and the need for domestic supply

written by InvestorNews | June 23, 2022

In this InvestorIntel interview with host Byron W King during PDAC 2022, [Imperial Mining Group Ltd.](#) (TSXV: IPG | OTCQB: IMPNF) President and CEO Peter Cashin talks about the growing recognition and demand for scandium in specialized manufacturing, and the need for securing a reliable domestic supply.

In the interview, which can also be viewed in full on the InvestorIntel YouTube channel ([click here](#)), Peter describes the importance of scandium as an industrial metal: "As an alloy agent for aluminum in very, very small quantities of 0.2 to 0.4 percent you can increase the the mechanical properties of the alloy by 800%." Peter also talks about the importance of scandium, used in defense, aerospace and automotive industries where strong, lightweight, heat and corrosion resistant metals are needed.

Peter goes on to say that only 35 tons of scandium are produced a year, mostly by Russia and China, but Imperial Mining – which just published a new PEA on its Crater Lake TG Zone Scandium-Rare Earth Element (Sc-REE) deposit – is located in Quebec, Canada. "We know that the consumers both in the the military establishment, the automotive industry and the aerospace industry have been looking for this stuff... and our intention is to produce and develop this thing to production to be able to satisfy the western and certainly North American manufacturing market."

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

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About Imperial Mining Group Ltd.

Imperial is a Canadian mineral exploration and development company focused on the advancement of its technology metals projects in Québec. Imperial is publicly listed on the TSX Venture Exchange as "IPG" and on the OTCQB Exchange as "IMPNF" and is led by an experienced team of mineral exploration and development professionals with a strong track record of mineral deposit discovery in numerous metal commodities.

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Peter Cashin on the “earth shattering” PEA for Imperial Mining's Crater Lake Scandium-REE deposit

written by InvestorNews | June 23, 2022

In this InvestorIntel interview with host Tracy Weslosky during PDAC 2022, [Imperial Mining Group Ltd.](https://www.imperialmining.com) (TSXV: IPG | OTCQB: IMPNF) President and CEO Peter Cashin talks about the company's recent PEA announcement, which confirms that its Crater Lake TG Zone

Scandium-Rare Earth Element (Sc-REE) deposit has “the potential to be a long-term provider of critical Scandium and magnet Rare Earths to world markets.”

In the interview, which can also be viewed in full on the InvestorIntel YouTube channel ([click here](#)), Peter discusses how with the new PEA “people will look at the financial metrics of this project, and they they stand up against any project that’s out there currently.” He talks about the results of the new PEA, which include a pre-tax net present value (NPV) of \$2.97 billion with a pre-tax internal rate of return (IRR) of 42.9%, with annual net revenues averaging \$608 million from the sale of high-purity scandium oxide (Sc2O3), scandium-aluminum Master alloy (ScAl) and rare earth element (REE) hydroxide concentrate, and a pre-tax capital payback of 2.5 years from the start of production.

Peter also talks about the importance of scandium, used in defense, aerospace and automotive industries where strong, lightweight metals are required, and when added to other metals in small amounts it makes them heat and corrosion resistant. Its lightness makes it an attractive “green” metal reducing vehicle weight for lower fuel consumption. “What we’ll ultimately end up doing is significantly reducing the carbon footprint of most manufactured platforms they have right now.”

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

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Venture Exchange as “IPG” and on the OTCQB Exchange as “IMPNF” and is led by an experienced team of mineral exploration and development professionals with a strong track record of mineral deposit discovery in numerous metal commodities.

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Mark Chalmers and Constantine Karayannopoulos on working together to supply rare earths magnets

written by InvestorNews | June 23, 2022

In this InvestorIntel PDAC 2022 Panel on “Rare Earths, Sustainability & Meeting the EV Market Demand”, host Tracy Weslosky is joined by [Energy Fuels Inc.](#) (NYSE American: UUUU | TSX: EFR) President and CEO Mark Chalmers and [Neo Performance Materials Inc.](#) (TSX: NEO) President, CEO and Director Constantine Karayannopoulos, to talk about their unique business relationship and the challenges and opportunities of getting rare earths magnets to market.

In the interview, which can also be viewed in full on the InvestorIntel YouTube channel ([click here](#)), Mark talks about the unique relationship between Energy Fuels and Neo Performance Materials to integrate the rare earths process and meet the increasing world demand for providers of EV materials from

outside of China. Constantine describes the moment when he and Mark “realized that between the two of us we had all the pieces of the puzzle and that we could put together a very full supply chain.”

Constantine goes on to discuss how Neo Performance Materials works with Energy Fuels in Utah, which “takes out the uranium for the uranium business for his customers and recovers the rare earths in a way that works for us,” separating the rare earth elements, turning them into metals alloys and finally the magnets needed by the EV industry.

Mark says that the relationship between the two companies work not only because they each have something that the other needs, but because “we are doers, not promoters. We’re trying to accomplish big things by actually doing it on the ground.” With increasing demand from European EV automakers, Mark goes on to say “we’re looking at being a world significant integrated supplier of rare earth products from the beginning to the end.”

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About Energy Fuels Inc.:

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(“**ISR**”) Project in Wyoming, and the Alta Mesa ISR Project in Texas. The White Mesa Mill is the only conventional uranium mill operating in the U.S. today, has a licensed capacity of over 8 million pounds of U_3O_8 per year, and has the ability to recycle alternate feed materials from third parties, to produce vanadium when market conditions warrant, and to produce REE carbonate from various uranium-bearing ores. Energy Fuels is also evaluating the potential to recover medical isotopes for use in targeted alpha therapy cancer treatments. The Nichols Ranch ISR Project is on standby and has a licensed capacity of 2 million pounds of U_3O_8 per year. The Alta Mesa ISR Project is also on standby and has a licensed capacity of 1.5 million pounds of U_3O_8 per year. In addition to the above production facilities, Energy Fuels also has one of the largest SK-1300/NI 43-101 compliant uranium resource portfolios in the U.S. and several uranium and uranium/vanadium mining projects on standby and in various stages of permitting and development.

To learn more about Energy Fuels Inc., [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 facilities and offices across 10 countries: Japan, China, Thailand, Estonia, Singapore, Germany,

United Kingdom, Canada, United States, and South Korea.

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

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Industry experts talk about silver's bright future on InvestorIntel's PDAC 2022 Panel Series

written by InvestorNews | June 23, 2022

In this InvestorIntel PDAC 2022 Panel on “Silver, The Technology Metal & Market”, host Chris Thompson is joined by Critical Minerals Corner co-host & InvestorIntel columnist Byron W King, [Silver Bullet Mines Corp.](#)'s (TSXV: SBMI) VP Capital Markets and Director Peter Clausi, [Bald Eagle Gold Corp.](#)'s (TSXV: BIG) CEO and Director Chris Paul, and [Volcanic Gold Mines Inc.](#)'s (TSXV: VG) Founder, Director, President and CEO Simon Ridgway, to talk about the past and future importance of silver as both an investment and industrial metal.

In the video, which can also be viewed in full on the InvestorIntel YouTube channel ([click here](#)), Byron W King leads off with the observation that “just as there's not enough copper in the world to run all the wires, there's not enough silver in the world for all the electronics that the world has planned for itself.” Chris Paul, CEO of Bald Eagle Gold says that there is a “dash for cash” right now, but “investors looking for more leverage are going to look at silver which typically will

outperform gold in times like this.”

Silver Bullet Mines’ Peter Clausi discusses how the market has disconnected from traditional gold-silver price ratios. Simon Ridgway of Volcanic Gold Mines sees this as an opportunity creating “a better upside in silver than everything gold”, because “silver is also now not just an investment metal but it’s a battery metal so to speak, so I think there’s a better upside in silver than there is in gold. You can see silver doubling – you can’t see gold double.”

The panel also discusses the current state of silver exploration and discoveries, and the challenges facing silver companies including working in silver-rich jurisdictions, ESG, and forging good relationships with local populations.

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

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About Bald Eagle Gold Corp.

Bald Eagle Gold Corp. is a junior mining company focused on the exploration and development of the Hercules Silver Project, northwest of Cambridge, Idaho. The Company’s management team brings extensive and successful international experience with a focus on identifying and acquiring prospective and under-explored precious metals properties worldwide. The board of directors have an established track record of creating significant returns for investors and have demonstrated access to capital to advance the development of assets.

To learn more about Bald Eagle Gold Corp., [click here](#)

About Silver Bullet Mines Corp.

Silver production is imminent at Silver Bullet's Buckeye Silver Mine, in Arizona. Only 63M shares outstanding, with 29M in escrow. The company owns its own mill, giving it great control over its costs.

To learn more about Silver Bullet Mines Corp., [click here](#)

About Volcanic Gold Mines Inc.

Volcanic brings together an experienced and successful mining, exploration and capital markets team focused on building multi-million-ounce gold and silver resources in underexplored countries. Through the strategic acquisition of mineral properties with demonstrated potential for hosting gold and silver resources, and by undertaking effective exploration and drill programs, Volcanic intends to become a leading gold-silver company.

To learn more about Volcanic Gold Mines Inc., [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.

Byron W King says it is time for investors to get back to real things like copper and

gold

written by InvestorNews | June 23, 2022

In this InvestorIntel interview with host Tracy Weslosky, Critical Minerals Corner co-host & InvestorIntel columnist Byron W King talks about the investor market moving away from crypto and other “vaporware”, and getting back to basics at PDAC 2022.

In the interview, which can also be viewed in full on the InvestorIntel YouTube channel ([click here](#)), Byron says the number one commodity and investment in the coming years is copper as the the world’s most vital material. He also discusses a resurgence of gold in an increasingly uncertain world and the enduring appeal of gold projects in “classic old mining districts.” Byron also talks about some of the companies he visited with on the floor of PDAC 2022, including Kodiak Copper Corp. and Barrick Gold Corporation.

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

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We’re Back – PDAC mood positive in spite of sagging market

written by Stephen Lautens | June 23, 2022

After an absence of more than two years, PDAC was back this

week. Even lingering Covid concerns and soft markets couldn't dull the enthusiasm at the world's largest mining and investor trade show back in person for the first time since 2020.

Attendance was down from pre-pandemic highs with the official count placing this year at almost 17,500 visitors (compared to in-person 23,000 attendees in 2020), but you wouldn't have known it from the first day's crush at registration. Either surprised or out of practice, PDAC officials struggled to sign in thousands of people who showed up on the opening day. At one point police shut the outer doors to the Metro Convention Centre because the registration floor was over the safe capacity. Once inside there was still an over half hour wait for pre-registered attendees to get their badges. But miners and investors are by necessity a patient lot, and none of the first day's initial delays dampened the enthusiasm of being back in person.

For years the industry and investors have tried to judge market sentiment for the coming year by the "mood on the floor". The mood at PDAC 2022 was decidedly upbeat and enthusiastic, even as the S&P/TSX and the Venture Composite Indexes dropped between Monday and Wednesday as people were packing up their booths. The buoyant mood might have been the result of the joy of seeing people again, but there was a genuine feeling of optimism for the gold, nickel, silver and critical materials sectors, especially among the large number of companies who had secured financing this spring for continued exploration and development in 2022.

As a PDAC media sponsor, InvestorIntel found a number of old favorites and hidden gems on the trade show floor, some of which we will be bringing to the attention of our readers in the next few weeks. Some companies have been quietly expanding and developing their projects during Covid and now deserve a wider audience.



The InvestorIntel PDAC Panel Series: “The Uranium Bull in the Room” with moderator Tracy Weslosky and panelists Dr. Richard Spencer from U308 Corp., Tom Drivas from Appia Rare Earths and Uranium, Curtis Moore from Energy Fuels, and Jon Bey from Standard Uranium.

We also took the opportunity to catch up with some leading CEOs and industry experts for an update and analysis on markets, commodities and progress on properties. These informative panel discussions will be available as videos next week on InvestorIntel.com and our [YouTube channel](#).

If the energy and enthusiasm (not to mention the packed hospitality suites) of PDAC 2022 is any indicator, market sentiment is extremely high for a good second half of this year. It's not a very scientific measurement, but at this point, we'll take it.

Generation Mining looks to knock Russia off its palladium pedestal

written by InvestorNews | June 23, 2022

I had the good fortune of being able to spend a few hours at the [Prospectors & Developers Association of Canada](#) (PDAC) Convention in Toronto on Monday before flying back home to Calgary. If you've ever been to PDAC you know a few hours is definitely not enough time to do justice to one of the world's premier mineral

exploration and mining conventions. However, I was able to stroll through the whole place and at least have a look at all the exhibitors. One booth jumped out at me as being unique in that it was promoting the company's palladium-copper project. I may have missed any others, but that was the only booth I saw with that combination. That was enough to make it the one booth I stopped at to have a quick chat about what was going on and I'm glad I did.

The company with this somewhat unique asset is [Generation Mining Limited](#) (TSX: GENM | OTCQB: GENMF) (Gen Mining), who's focus is the development of the [Marathon Project](#), a large platinum group metal mineral deposit in Northwestern Ontario. The Marathon property covers a land package of approximately 22,000 hectares, or 220 square kilometres. It contains reserves of 2,342 million oz Pd, 532 million lbs Cu, and 756 million oz Pt which are listed as minerals considered critical for the sustainable economic success of Canada and its allies, as set out in the Canadian Minerals and Metals Plan. Generation Mining owns a 100% interest in the Marathon Project which is literally surrounded by gold mines with Barrick Gold's Hemlo mine the closest, just a few miles due East.



Source: Generation Mining [Corporate Presentation](#)

The other reason I was intrigued by this company is that the world's largest producer of palladium is Russia's Norilsk Nickel which contributes to Russia's total annual palladium output of 76,000 kilograms making it the second largest producing country in the world. South Africa is the country with the most palladium production at 80,000 kilograms/annum but after Russia comes Canada at a distant #3 with 17,000 kilograms and the U.S. at 14,000 kilograms. I'm reasonably confident that sanctions on Russia, its Oligarchs and its companies are likely to be with us

for a while, making for a potentially large hole in the supply of this particular metal.

The good news, at least for North American consumers of palladium, is that Generation Mining is well on its way to being a producer, with mine construction expected to begin in 2023. A [March, 2021 Feasibility Study](#) for the Marathon Project estimated that at US\$1,725/oz palladium, and US\$3.20/lb copper, Marathon's Net Present Value (at 6% discount rate) is approximately C\$1.07 billion with a payback of 2.3 years and an IRR of 30%. Up front capital costs were estimated at C\$665 million, net of equipment financing and pre-completion operating costs and revenues. The mine would produce an estimated 245,000 palladium equivalent ounces per year over a 13-year mine life at an all-in sustaining cost (AISC) of US\$809 per palladium-equivalent ounce.

Since the Feasibility Study, the Company has been working on financing and approvals in order to achieve its goal of starting construction in 2023. In December, 2021 Generation Mining announced it had secured a [C\\$240 million streaming deal](#) with [Wheaton Precious Metals Corp.](#) (TSX: WPM | NYSE: WPM). Wheaton will pay Generation Mining C\$40 million on an early deposit basis prior to construction to be used for development of the Marathon Project, with the remainder payable in four staged installments during construction, subject to various customary conditions being satisfied. The first C\$20 million was received on March 31, 2022. The Company provided an update on June 8, 2022 on [Phase II of project financing](#). Phase II involves the access to medium term financing with the initial stage being a request for proposal (RFP) process for the balance of the project financing. The RFP process has resulted in strong initial non-binding expressions of interest with the total potential committed capital being well in excess of US\$1 billion among several interested parties. It is estimated that the project can carry approximately US\$400 million in senior debt

based on the Company's Feasibility Study. Additionally, Export Development Canada (EDC) has provided an expression of interest to provide potential project financing of up to US\$200 million.

In May of this year, Generation Mining announced it had [completed the Public Hearings](#) conducted by the Joint Review Panel on the Environmental Impact Statement of the Marathon Palladium-Copper Project. The Project requires environmental assessment approvals from both federal and provincial governments. The Panel will complete and publicly release a recommendation report within 90 days. Once the report is published, the federal and provincial Ministers will make the final approval decision on the Project's environmental assessment within 120 days.

The next few months could be transformational for Generation Mining as it looks to make the move from explorer to producer. The streaming deal and possible debt financing could make the project capital requirements relatively non-dilutive for equity shareholders, and with a market cap of just under C\$110 million and a C\$1 billion NPV project that could add 25% to Canada's overall palladium production, this could make for some pretty good leverage if the market re-rates this company to something similar to its peers.

Fresh From Toronto: Three Mexican Beauties

written by InvestorNews | June 23, 2022

Don't know the reason, stayed here all season

*Nothing to show but this brand new tattoo
But it's a real beauty, a Mexican cutie
How it got here, I haven't a clue..." – Jimmy Buffet,
Margaritaville*

No, I wasn't down on the beach in Mexico with Jimmy Buffet, nor did I get a new tattoo. But I did spend four days in Toronto at PDAC – the largest mining conference in the world, sponsored by the Prospectors & Developers Association of Canada.

This was the first PDAC conference in over two years, since March 2020. After that (I'm sure you recall!), much of the world shut down for Covid. But now it's all getting back on track and this year's event was one for the record books. For example, there were lots of people – so many that the Toronto Police were outside for crowd control.

Much happened in Toronto this past week, but I'll skip the vignettes and nail down on the main point.

After a period of not being able to travel, visit sites, keep up to date with things, etc., at PDAC I reconnected with three great Mexican mining plays, and each one is a "real beauty" per the Buffet approach.

One is an up-and-running producer that mines ore and makes money. One is a prospect generator that's doing quite well in the search for copper, silver and gold. And the third is a promising silver explorer, working in classic silver country.

Here's a summary:

The producer is [Avino Silver & Gold Mines Ltd.](#) (NYSE American: **ASM | TSX: ASM**) (**Avino**). The company works near Durango, in a silver district that dates back to the mid-1500s (yes, almost 500 years!). Spanish conquistadores found silver, and successors

mined the area for several centuries. The silver made Durango quite a wealthy venue for a time.

Since 1968, Avino has been taking the old Spanish and Mexican mines even deeper, into richer and richer ore bodies. I visited the site a while back, and in one excursion to the 800-foot level, I saw a massive face of near-pure sphalerite (ZnS) – zinc sulfide. This is just some of what comes out of the lifts, other ores bearing lead, silver and gold.

Like many companies, Avino was forced to slow down during Covid, but it's now firing back up to a hot pace. It sells high-quality metal concentrates into a strong market – one key buyer is Korean giant Samsung. Now, Avino is on a growth track, and whatever happens with the rest of the stock market – crashing lately, you may have noticed – this “beauty” is positioned to move ahead and do well through the turmoil and out into the other side.

The next “beauty” is [Riverside Resources Inc.](#) (TSXV: RRI | OTCQB: RVSDF), a company that has been working in the northern state of Sonora for 20 and more years. Over time, Riverside has accumulated a large portfolio of mineral claims. Its business model is to team up with third parties to spend what management likes to call “other people’s money” on exploration and early-stage development.

Right now, the strong suit for Riverside is its relationship with mining giant BHP. That is, BHP is funding a major effort by Riverside to identify large-scale copper plays in Mexico. In this regard, BHP pays the overhead while Riverside works through its list of exploration prospects to match geologic potential to what BHP wants to see.

There's serious upside from the fact that Riverside has already identified a good number of copper deposits that may suit BHP,

as well as other deposits that are not exactly a BHP-match, yet still hold great upside for other development by other companies down the line.

In a world of future high demand and fading supply for critical minerals, Riverside is positioned to shine.

The final “beauty” on the list is a silver exploration play called [Minaurum Gold, Inc.](#) (TSXV: MGG | OTCQX: MMRGF). And yes, the name says gold but the exploration focus is definitely silver.

Minaurum works around the town of Alamos, in southern Sonora. This too is an old silver district from Spanish days, when miners pulled native silver – elemental “wire silver” – out of massive veins near the surface. In fact, there was a Spanish mint there for quite a while, which coined silver currency for use across old Mexico and the Spanish empire.

Old-style mining could only go so deep, though. And today we know that there’s a massive complex of mineralized rock remaining to be explored. It all lies beneath a vast, ancient, caldera-collapse volcano, with extensive “ring dikes” spreading outwards in all directions.

I’ve visited the site, and while it’s quite rugged it is also a promising exploration locale. Minaurum has released strong drilling results to date, with more to come. And again, in a world of monetary turmoil and looming shortages of critical metals – silver among them – this “beauty” deserves a good, hard look.

That’s all for now. Best wishes to everyone as we all navigate the [current market and monetary rough seas](#).

Byron W. King