

# Jack Lifton, Peter Clausi with Pini Althaus on the need for collaboration in the rare earths market

The Technology Metals Show hosts Jack Lifton and Peter Clausi talk to Pini Althaus, CEO and Director of USA Rare Earth, LLC about the challenges in the North American rare earths supply chain and the need for collaboration in the industry.

In this promo clip from the full interview available exclusively to subscribers of the **Technology Metals Show**, the panel discusses the Round Top Heavy Rare Earth and Critical Minerals Project in which USA Rare Earth has an option to earn and acquire an 80% interest from Texas Mineral Resources Corp. (OTCQB: TMRC). Pini discussed that the Round Top Deposit hosts 16 of the 17 rare earths with a high concentration of heavy rare earths, plus a significant amount of lithium. “We are projected to be the second-largest lithium producer in the US,” He said.

To access the complete interview subscribe to the **Technology Metals Show** and get exclusive access to member-only content through this exclusive site. Or [Log-In Here](#) for the latest conversations, debates, updates and interviews with the leaders, thought leaders and investors focused on issues relating to sustainability in the critical materials sector.

For more information on the **Technology Metals Show** email us at [info@technologymetals.com](mailto:info@technologymetals.com) or reach us direct at +1 (416) 546-9233.

# Why are uranium stocks booming?

Uranium stocks have been rising since November 2020 and are now very clearly in a strong bull run. We asked some of our InvestorIntel team members and experts about what's their view as to why uranium stocks are booming.

If we look at the two leading US listed uranium miners their stock prices are both **up around 150% over the past 3 months** (see chart below). Some of the other uranium miners such as Western Uranium & Vanadium Corp. (CSE: WUC | OTCQX: WSTRF) and Fission Uranium Corp. (TSX: FCU | OTCQX: FCUUF) have seen impressive gains around 70% over the past 3 months.

What is going on, asks InvestorIntel CEO Tracy Weslosky. This is extraordinarily. Something is up! The impeachment vote? War mongers? The Biden factor? What?

**Leading US uranium miners Energy Fuels Inc. (NYSE American: UUUU) and Ur-Energy Inc. (NYSE American: URG) are up about 150% the past 3 months**



Looking at the chart below we can see uranium prices have picked up a little but not enough to explain the uranium miners stock prices surging. So why?

### Uranium spot price 1 year history – Uranium prices started a new uptrend back in mid Nov. 2020



Source: Trading economics

Here are a few experts views sought this week by InvestorIntel:

Jack Lifton, host of The Technology Metals Show – “The USA imports 95% of the uranium it needs to operate its 25% of the worlds civilian nuclear reactors that provide almost 30% of American baseload (available at any time) electricity needs and accounts for more than half of all carbon free power generation in the USA. It’s imperative therefore that America produce uranium domestically for its security of supply of carbon free electric power. The US Congress has recognized this need and recently funded a program to buy domestic uranium.”

Peter Clausi – InvestorIntel Host, CBLT Inc. (TSXV: CBLT) CEO – “No matter where you are on the political spectrum, utilities and a nuclear fleet need uranium.”

Industry insider Fission Uranium President & COO Ross McElroy stated back in August 2020 – **“I think we are in the start of a bull market right now.** That’s happened because there’s been so many production shutdowns globally. All the major mines, even all the production in Canada has been shutdown. So, we know the **demand is there and it continues to grow, supply is constricting** and these are the things that are making the bottom of the bull market happen.”

Spot on Ross, you called it before most others.

**Here is how investors can track the uranium miners**

InvestorIntel readers can track the uranium sector at Uranium Watchlist”

**InvestorChannel’s uranium Watchlist – January 14, 2021**



**InvestorChannel's Watchlist**

- Mega Uranium Ltd. (MGA.TO) CAD 0.19 (15.63%)
- CanAlaska Uranium Ltd. (CVV.V) CAD 0.50 (13.64%)
- Fission Uranium Corp. (FCU.TO) CAD 0.43 (13.33%)
- Forum Energy Metals Corp. (FMC.V) CAD 0.27 (10.42%)
- GoviEx Uranium Inc. (GXU.V) CAD 0.27 (8.16%)
- Appia Energy Corp. (APAAF) USD 0.33 (8.07%)
- Denison Mines Corp. (DNN) USD 0.80 (8.07%)
- Plateau Energy Metals Inc. (PLU.V) CAD 0.45 (7.23%)
- Ur-Energy Inc. (URG) USD 1.19 (7.21%)
- Energy Fuels Inc. (UUUU) USD 4.22 (5.76%)
- Global Atomic Corporation (GLO.TO) CAD 1.65 (5.10%)
- Forsys Metals Corp. (FSY.TO) CAD 0.31 (5.08%)
- Uranium Energy Corp. (UEC) USD 1.85 (4.52%)
- Anfield Energy Inc. (AEC.V) CAD 0.12 (4.35%)

Source

Uranium stocks that we follow closely at InvestorIntel include:

- Appia Energy Corp. (CSE: API | OTCQB: APAAF)
- Energy Fuels Inc. (NYSE American: UUUU | TSX: EFR)
- Fission Uranium Corp. (TSX: FCU | OTCQX: FCUUF)
- Ur-Energy Inc. (NYSE American: URG | TSX: URE)
- Western Uranium & Vanadium Corp. (CSE: WUC | OTCQX: WSTRF)

### **Closing remarks**

My view is that the uranium stocks are booming the past 2 1/2 months as a result of the Biden victory. The market thinks Biden will support nuclear energy as a way of reaching his 100% carbon-free electricity target by 2035. If Biden's US\$2 trillion green infrastructure and jobs plan gets passed through the Senate during the course of 2021, then it looks like the uranium miners will have a tremendous decade ahead.

In any event I also hear what insiders have been saying for some time, and that is that uranium demand continues to grow as supply constricts. This is also a positive for the underlying fundamentals of the uranium bull market.

Happy to hear what InvestorIntel readers think in the comments section below. Also if you think the uranium miners bull run can be maintained.

### **Further reading**

- Aug. 11, 2020 – Fission Uranium's President on why the uranium bull market starts now
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# Lifton, Smith, Clausi and Ecclestone on the unique challenges and opportunities in the critical materials supply chain

The Technology Metals Show hosts Jack Lifton and Peter Clausi talk to Christopher Ecclestone, Principal and mining strategist at Hallgarten & Company, and Mitchell Smith, President & CEO of Global Energy Metals Corp. (TSXV: GEMC | OTCQB: GBLEF) about the critical materials supply chain and why it is different from the supply chain of any other metal.

Available exclusively to subscribers of the **Technology Metals Show**, the panel discusses why the recent General Motors announcement of a \$27 billion spend on electric and autonomous vehicles through 2025 is “a trend that we will see a lot more of” according to Mitchell Smith, one of the top influencers in the battery minerals sector, as more companies are looking for localized and ethical sources of cobalt, lithium, rare earths and other critical materials.

In this important discussion Jack Lifton explains the vital relationship between cobalt and copper and nickel mining. With cobalt as a by-product, he added, “unless there is copper and nickel mining, there won’t be any cobalt produced.”

Christopher highlighted the role and techniques for recycling as a source of critical materials, and challenges in securing a reliable supply chain for critical materials.

In the interview, the panel also spends some time discussing MP Materials’ Mountain Pass Mine, and why it illustrates the need for diversification in the rare earths supply chain.

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## **The Technology Metals Show with Neo Lithium's Waldo Perez on the state of the lithium market**

Technology Metals Show hosts Jack Lifton and Peter Clausi interview Waldo Perez, President, CEO and Director of Neo Lithium Corp. (TSXV: NLC | OTCQX: NTTHF) on the state of the lithium market. "When it comes to lithium there are two places and two sources." Waldo started. "First is the Puna plateau which is Chile, Bolivia and Argentina for brine resources. 60% of the lithium of the planet is located in an area that covers this plateau." He continued, "The other source is a mineral called spodumene. This mineral is more common in the planet but the best spodumene is found in Australia."

In this interview, which may also be viewed on YouTube ([click here to subscribe to the InvestorIntel Channel](#)), Waldo went on to say that CATL – largest battery producer in the world, is a strategic investor in Neo Lithium. He explained that Neo

Lithium's Tres Quebradas (3Q) Lithium Project was selected by CATL because it is the highest grade undeveloped project in the world and has low OPEX and CAPEX. The project has 50% IRR and payback of less than 2 years. To watch the full interview, [click here](#)

### **About Neo Lithium Corp.**

Neo Lithium Corp. has quickly become a prominent new name in lithium brine exploration by virtue of its high quality 3Q Project and experienced team. Neo Lithium is rapidly advancing its recently discovered 3Q Project – a unique high-grade lithium brine lake and salar complex in Latin America's "Lithium Triangle". The 3Q Project is located in the Catamarca Province, the largest lithium producing area in Argentina covering approximately 35,000 ha including a salar complex of approximately 16,000 ha.

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

***Disclaimer:** Neo Lithium Corp. is an advertorial member of InvestorIntel Corp.*

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## **Jack Lifton on President Trump's Executive Order on Critical Minerals**

The Technology Metals Show host Peter Clausi talks with international rare earths expert Jack Lifton about President Trump's Executive Order on addressing the threat to the domestic supply chain from reliance on critical minerals from foreign adversaries. "This is the first time I have seen an



Executive Order in this arena,” Jack said, “that actually looks like it might generate some progress towards the goal of securing a critical minerals supply chain for the United States.”

In the interview Jack also talked about uranium and why copper should also be included in the U.S. Geological Survey’s critical minerals list. He also provided an update on the rare earths supply chain in the United States.

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## **Jack Lifton with Tom Drivas on the Saskatchewan Research Council’s Rare Earths Processing Facility**

InvestorIntel’s Tracy Weslosky moderates a discussion with the Technology Metals Show host Jack Lifton and Appia Energy Corp.’s (CSE: API | OTCQB: APAAF) CEO, President and Director Tom Drivas on the Saskatchewan Research Council’s (SRC) plans to develop a “first-of-its-kind” Rare Earth Processing

Facility in Saskatchewan, Canada.

In an InvestorIntel interview that can also be viewed on our InvestorIntel YouTube channel, Jack started, “This is the first time it has been done in North America,” he continued, “The Canadian companies that are associated with the SRC are going to be the leading companies in Canada in the rare earths space.”

Tom went on to say that Appia has a high-grade rare earths project in Saskatchewan. “Having a rare earths processing plant in Saskatchewan, in the same area where we are and in the same jurisdiction, is a game changer,” he added. Tom also explained how the processing facility is going to benefit Appia Energy and its shareholder.

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

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

*Disclaimer: Appia Energy Corp. is an advertorial member of InvestorIntel Corp.*

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## **Invitation for Trump to join Lifton on the Technology Metals Show to discuss the Critical Materials Executive Order issued yesterday**

This morning I raced through Fallon, Kimmel, Corden and Colbert as I do every morning with a cup of coffee. The idea?

Hit the ground running having enjoyed the late-night talk show hosts translations of the news events from the day before...

Henry Weingarten doesn't understand why I cannot commit to a follow up interview, he's right – we need one. After all, in our last interview he forecasted everything from who will win the Presidential election to a bullish graphite, gold and media market this Fall. Undoubtedly we would all like to know what percentage of forecasts he is making on our capital markets that are right and which ones are wrong. Alright, we will get this done and live by next week.

Reviewing the emails, Russell Fryer of Critical Metals PLC (LON: CRTM) alerted many of this AM to the Executive Order on Addressing the Threat to the Domestic Supply Chain from Reliance on Critical Minerals from Foreign Adversaries that was published on the White House site yesterday.

Russell adds in his email: "The use of the term 'foreign adversaries' is quite a strong phrase, designed and inserted to call out China..." He then adds his summary points of interest:

1. the United States develops secure critical minerals supply chains that do not depend on resources or processing from foreign adversaries. (i.e. China)
2. the United States develops globally competitive, substantial, and resilient domestic commercial supply chain capabilities for critical minerals mining and processing.
3. reduce the vulnerability of the United States to the disruption of critical mineral supply chains through cooperation and coordination with partners and allies, including the private sector
4. build resilient critical mineral supply chains, including through initiatives to help allies build reliable critical mineral supply chains within their own territories

OK, thanks Russell and kudos on listing Critical Metals PLC in London earlier this week, we are all watching to see what you do next.

**Now Trump?** While the content of this Executive Order is unquestionably of great interest to me and my associates in this sector, why wasn't Trump busy investing in how to clean up his post debate mess is of great interest to me. Experts tell me that the positive he is doing for critical materials will continue no matter who becomes President this Fall, but it does makes it hard to communicate what I deem to be a very positive action on his behalf when he is **not** behaving like a gentleman.

For the record, talkative is fine. After all, rare earths' experts are exceptionally talkative...

In fact, I was speaking with Jack Lifton earlier this last week and asked him about a new editorial candidate for InvestorIntel to do a regular column on our sector, and his response to one candidate was "he's good, but if you ask him the time, he will give you the history of how time was created."

My point? Give us Trump for the Technology Metals Show and I will have no challenge being the moderator with Jack Lifton as I am used to strong driven communicators with passionate positions on why we should all be buying their stock. On that note I would like to personally extend an invitation for President Trump to be on the Technology Metals Show and have Jack Lifton interview him on this Executive Order?

Now why will this work? It will work, because we are all on the same side here...when it comes to our North American issues around sustainability, we all agree. No one should ever be solely reliant on one nation for all of our Technology Metals.

See a theme here?

Before I change the point here, yes, I do plan on asking Ron Wortel to write a piece on this order ASAP. Why Ron? Well in a conversation with Ron yesterday in discussions about him taking on a regular moderator role of a critical materials editorial board (this clever idea was suggested to me by Jeff Green and his team at J.A. Green & Company last week). Ron was discussing his history in rare earths, and you know what? I think he can do it and do it well. Ron's style is understated and many of us enjoy reading well done text that is written by knowledgeable professionals that understand the business...you will of course tell me what you think – you always do.

Alright, I am running to go assist Raj Shah on putting together a Top 20 InvestorChannel Watchlist of graphite companies today. Would like to thank Julie Pacquet of Nouveau Monde Graphite Inc. (TSXV: NOU | OTCQX: NMGRF) for being the catalyst of this idea.

On a final note I am going to start calling out 'flags on the field' of the capital markets and today I would like to highlight an analyst who did what I deemed a 'smackdown' on another rare earths company in an eblast I received yesterday. Let me add, I have grown weary of advising him that his content is not my friend and have been unsuccessfully and getting off of his darn list, but hey this is simple.

How can you call out other critical material company when you sit on Boards and are presently raising funds for your own company (in the same sector of course)? When are we as investors simply going to build a wall for you and insist that you not climb over it? Consider this my brick, and as I have told you before – why can you not just market yourself without tearing someone else down, especially when you do not know what is going on.

It seems we have analysts that could use a brush up on professional behavior as well.

Enjoy your day, we will get Mr Weingarten set up for an interview, finish the InvestorChannel Graphite Watchlist, and attempt to get the news release written on the new Investor Talks video meeting series and in your inbox by Friday afternoon.

If you would like to subscribe to Investor Talks, [click here](#)