

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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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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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](#)

Jack Lifton with Geoff Atkins on Vital Metals' expected 2021 rare earths production start at Nechalacho

The Technology Metals Show host Jack Lifton talks with Geoff Atkins, Managing Director of Vital Metals Limited (ASX: VML), about Vital Metals' planned production at its Nechalacho rare earths project in Canada. "In terms of the time frame, we are currently working on a schedule to commence production next year," Geoff said.

In the interview Geoff provided an update on Vital Metal's offtake agreements and business model. Vital Metals has a management team with experience in building and operating rare earth plants. He also explained what the company is doing to ensure reduced capital cost and time to market.

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Canadian Rare Earth Element Network Chair on building a domestic supply chain

The Technology Metals Show host Jack Lifton talks with Ian London, Chair of Canadian Rare Earth Element Network (CREEN), about CREEN's collaborative network designed to accelerate the creation of a rare earths supply chain in Canada. The network brings together mineral exploration companies, academics, commercial and government laboratories, service providers and government representatives.

"It is a big industry, it is a long supply chain," Ian said. "We all have expertise but if we don't bring it together, we can't pull this together."

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The Rare Earths War

Technology Metals Show host Tracy Weslosky moderates a timely discussion on how China poses a serious threat to the rare

earths supply chain security of the United States, talking to international rare earths expert Jack Lifton and the Editor of "The Rare Metals War" Guillaume Pitron. Guillaume observed that Donald Trump as the President has been tackling the rare earths supply chain issue like no one ever done in this role. He added, "If he is re-elected, I believe, that is going to impact in a good way the US production of rare earth minerals and rare earth metals."

Jack agreed with Guillaume and added, "Trump is the first president to refocus on globalization, and he is trying to de-globalize critical materials for the security of the United States." Highlighting the seriousness of the rare earths supply chain problem, Jack said that Shin-Etsu and Hitachi, two large Japanese companies that supply rare earth magnets to the US military, have most of their production in China.

Jack also revealed that China recently announced that they would cut off Northrop Grumman, an American defense technology company, from all Chinese rare earth materials. "What Americans don't seem to be paying attention to," Jack continued, "is Grumman is the producer of the F-35 fighter plane, the greatest air superiority weapon in history. Grumman needs those rare earths to build those planes. This is going to bring real pressure on the defense department."

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The Rare Earths Market in Review – June 2020

“I think Energy Fuels is serious about going into the rare earths business. What I was told is that they are going to begin by selecting a rare earths mineral produced in the United States...” States critical materials expert Jack Lifton, in an interview with the Technology Metals Show hostess Tracy Weslosky.

In the interview Tracy and Jack discussed some of the major news in the rare earths space for the month of June. Jack also commented on Lynas and shared his view on Alkane’s plan to demerge their poly-metallic and rare earths holding company Australian Strategic Materials Limited (ASM).

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