121 Mining Forum London – Day 2

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121 Mining Forum, Houndsditch, London. Two of our watchlist companies had booths side by side.

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I had a quick chat with one of the organisers, and expressed my dislike of the venue, due to the lack of a networking area. He insists it's bigger that the former GLC Building, but I'm not convinced personally.

He accepted they had no real defined area for meeting up, with the focal point at the entrance lacking tables and chairs, so hopefully they will think about that if they return, which I guess they will.

I did find that Aldgate tube station was fairly close, around a five minute walk away, so I will be using that in the future.

I met quite a few companies I liked today, with ***Japan Gold***, ***Rumble Resources***, and ***Stavely Minerals*** impressing me the most, although there were other good stories.

I have met *John Proust, CEO of **Japan Gold*** **(TSX.V: JG)** several times on Zoom meetings, but never in real life until today. I have always liked the story, but it has now progressed to a new level.

They have around 30 projects in Japan, a number which I always thought was too many for them to handle, although I was aware they were in discussions with Barrick and Newmont about JVs on some projects.

Now things have progressed and Barrick have entered JV's on six projects, and Newmont two. In addition, they are in discussions with other companies over 9 other JV's. They also own one project 100%, where they are drilling with a view to proving a resource that will be JV'd at a later date.

There's so much going on at Japan Gold and they will generate copious newsflow going forward, and I am adding them to the Watchlist.

***Rumble Resources* (ASX: RTR)** are already on the Watchlist, and another company I met in person for the first time. They have a significant zinc deposit in Western Australia, at Earaheedy, which is shallow, and has the potential to become a super giant world class zinc deposit.

Management have achieved a lot in a short timeframe here, and with zinc having so many uses in the EV industry, Rumble seem ready to capitalise on that, or be bought out by someone with deep pockets looking for guaranteed supply.

In addition. Rumble may spin out their non core projects into a newco to be SSX listed with shares dividended to shareholders on the register. They are also potentially looking to sell the Western Queen gold project.

Staveley Minerals (ASX: SVY) have a copper gold project in Victoria State, Australia, where they are using some clever geological methods to chase after a porphyry copper zone.

I liked this story because of the way they are using geology, and management experience as they were formerly in charge of Integra Mining until they were bought out.

I also met **Karora Resources**, where everything is back on track after a wobble earlier this year due to covid related staff shortages. Production is due to increase in 2023, and then in 2024 a new nickel zone will add to the existing gold production.

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If you need clarification of any information contained in this note, or have any questions, I will be delighted to assist – Please email andrew@city-investors-circle.com

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Disclosure

At the time of writing the author holds shares in **Karora *Resources***.

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