

# 121 Mining Conference London

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London mining season kicked off with the 121 Mining Conference at Houndsditch this week.

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A typical scene from the meeting area at 121 Mining Conference in London

## 121 Mining Conference London – 2025

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Sadly the buzz that was evident at a recent presentation when gold was riding the crest of the wave seems to have evaporated, despite gold remaining above \$4,000.

This is despite gold remaining above \$4,000, but below the heady \$4,300 level. As a result producing gold and silver mining stock prices have been hit hard, blowing the exuberance away in the process.

I had some good meeting and do feel that stock prices are due another rise as long as gold holds around the current level or moves higher.

Of the companies that I met, **Dolly Varden**, **Lahontan Gold**, and **Silver Storm** caught my attention and merit further review.

I recently added **Silver Storm** to the Tier 2 watchlist of developing companies, due to its offtake deal with Samsung, low market cap, and imminent production in Q1 or Q2 2026.

**Dolly Varden** have a quality management team, and will publish a new Mineral Resource Estimate in Q1 2026. They are also looking for potential acquisitions.

**Lahontan Gold** is a small cap early stage exploration play with a past producing open pit gold project, Santa Fe, located in the Walker Lane Trend in Nevada. Run by Kimberley Ann, who has enjoyed success in the past with a number of exploration companies.

Lahontan have other former producing open pit projects in the same trend, including Santa Fe West, and Moho. In addition there is a disseminated silver project.

The show itself, as I mentioned earlier, lacked the buzz I was expecting, due to prices having fallen back quite sharply from their highs despite gold being within 7% of its all-time high.

I noticed a few economy measures, such as no servers for the food, and the food selection had moved somewhat downmarket from previous shows.

My main complaint was the lack of seating given the wide open spaces in the concourse area. Surely they can provide a few more tables for people to sit and eat on?

All in all a good show, and I expect to make a couple of additions to my portfolio as a result of the meetings that I had.

[The live gold price can be found HERE](#)

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the City of London**

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Our audience is selected and invited individually to ensure interest and relevance for the presenting company.

Meetings are non deal, small group, highly focused and engaged, with a lively Q and A to follow the main

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We create awareness, and maintain interest in presenting companies by disseminating their future news to our entire investor group via email, social media, and our Monthly Review newsletter.

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## London 121 Conference Seemed Quiet

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I attended the London 121 Conference today after having to miss yesterday due to illness, and was surprised how quiet it seemed.

Given the recent strong run in producing gold stocks I expected a busier event.



### City Investors Circle – 121 Mining Conference, London

I attended the London 121 Conference today after having to miss yesterday due to illness, and was surprised how quiet it seemed.

Given the recent strong run in producing gold stocks I expected a busier event. I realise it was the second day, and they are often quieter, but it still seemed quiet to me.

Talking to some of the booth holders some complained about only having a few meetings today, but of course it's the quality of the meeting rather than the quantity that really counts of course.

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I managed to catch up with a few companies I have a shareholding in, and a couple of others that are on the watch

very closely list.

## I met with the following companies;

### **Astral Resources (ASX: AAR)**

Two projects in Western Australia. with nearly 1.5 million ounces of gold, oprn pit.

Well financed, with an experienced managaement team who have delivered before.

### **Angus Gold (TSX.V: GUS)**

Has some very prospective properties sandwiched between Wedome's Eagle River Mine and Mishi mine. A bit ealry stage but hunting for elephants in elephant country.

This is a story I have been following for a while and the company is on our tier 3 watchlist.

### **Barton Gold (ASX: BGD)**

Alex made another polished presentation, where he elucidated the plan moving forward. Essentially BArton have two distinct areas, an early stage production scenario with a permitted mill, and a longer term production and development story.

### **Lavras Gold (TSX.V: LGC)**

Based in southern Brazil, Lavras made a major gold discovery

at Fazenda do Posto.

The management team are experienced, and their Butia and Farenzo deposits are open to expansion. Tight share structure.

### **Thesis Gold (TSX.V: TAU)**

A company I invested in after a water cooler meeting a couple of years ago. CEO Ewen Webster is Scottish, and comes across as highly credible and honest.

Thesis are quietly growing their projects, working in a methodical way, nothing flash or promotional here.

### **Strikepoint Gold (TSX.V: SKP)**

A company I invested in last year after meeting them at PDAC. Nevada based exploration. After a decent drill hit, later follow up drilling disappointed, so the stock is now trading around 40% down on my investment price. They now have a new project, Hercules, also in Nevada, which they're looking to fund with another financing.

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And that was my day. Had I not been ill yesterday I would have had more meetings, but I managed to meet all the companies I wanted to meet.

I had to cancel **G Mining Ventures** so I could catch an earlier train home, but I'm meeting them in Zurich next week anyway.

I was extremely disappointed with **West Red Lake Gold Mines**, who cancelled a meeting at the last minute. No doubt I was bumped for a "bigger player".



I am a shareholder, and would have expected them to act in a more professional manner. I could have shared the slot, I've done that before and it works fine.

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The venue is fine, plenty of space and food and refreshments were plentiful.

I discovered a better way to travel there, by going to **Aldgate Tube Station**, and it's a four or five minute walk at the most. It's an easier route than trying to find your way from Liverpool Street, if you're not familiar with the city.

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