Cape Town Conferences 2023 – Final Thoughts

Cape Town Conferences 2023

The 121 Mining Forum finished yesterday, and I spent some time at Indaba 2023 today before heading to the airport for a plane home a day earlier than the final day of Indaba for a quieter plane.

Some chance, it’s fully booked and people being bounced off.

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Some chance, it’s fully booked and people being bounced off! I appear to be lucky as sitting awaiting to depart currently.

So, two very different conferences in the same city at the same time, now owned by the same company, Hyve.

I much prefer the laid back 121 Forum with some meetings out in the sunshine under the tent, ice creams replacing coffee as a refreshement, and a general feeling of satisfction sitting in a lovely beeze.

The food and refreshments are high quality, the staff friendly and attentve, if Heineken ran mining conferences, this would be it.

For me 121 is the main focus, as it features junior mining companes that I might invest in, at their early stages where good news can bei,g significant value uplifts for shareholders.

I invest for the long term, and there were plenty of good stories here for me, including a couple listed in London.

Thor Explortions surprisd me as they are actually in

production mining gold in Nigeria, the first gold mine in the country. Yet I have never heard of them, nor their story! They clearly need to change their name to Thor Gold Mining or something similar to convery that they are actually in production, in my opinion.

Tietto are a compny I have been following for a while, and thy have just moved into production, and I am looking to add them to our watchlist as I like the additional exploration potential.

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Indaba

More of a trade show, with the few junior miners pushed into the BHP Xplor corner.

Security was good and staff were polite, but this isn't a show for me and one morning was enough to cover the few juniors there.

Limited space to sit and eat was the main criticism I had, it just didnt have enough interest for me.

Next year they should put all th ejuniors into 121 in my view, and run it for three days.

Wonderful to visit Cape Town for the lovely weather, and I return home disappointed I didn;t stay longer, and fully intend to next year.

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Cape Town 2023 – Conferences Are Busy

Cape Town 2023

The first major mining conferences of 2023, Indaba and 121 Mining Forums, both had busy first days in sunny Cape Town.

These conferences are very popular with fund managers and investors from London taking the opportunity to spend a few days away from the cold and rain in the UK, and this year is no exception.



Networking in a tent African style – 121 Cape Town

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Cape Town 2023 – 121 and

Indaba are both busy on the first day

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These conferences are very popular with fund managers and investors from London taking the opportunity to spend a few days away from the cold and rain in the UK, and this year is no exception.

I started at 121, a quick walk from my hotel, and was releived to see cold drinks and ice cream available early in the morning.



121 Mining entrance.

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After a couple of meetings I used the minibus shuttle to go do Indaba for the first time. As expected it’s a trade show and there were few company booths there, so I soon headed back to 121 for an afternoon of meetings, and I’m now studying the

companies more closely.

I found a couple I liked, and I have a few more to meet tomorrow, so I feel I will make some investments as a result of the show.

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Rustic style meeting booths at 121

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121 Mining Forum London – Day 2

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A much quieter day delegate wise, so less queuing for the food, and more to go around.

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



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

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121 Mining Forum London – Day 2

A much quieter day delegate wise, so less queuing for the food, and more to go around.

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

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121 Mining Forum London – Day 1

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A new venue for this year's 121 Mining Forum, in the far reaches of Houndsditch, greeted delegates at this year's forum.

One or two companies caught my eye, including one situated next to the coffee machine where a casual comment by me about the name of the location of their project lead to a impromptu presentation, and I liked what I heard.



121 Mining Forum London 2022

121 Mining Forum London – Day 1

A new venue for this year's 121 Mining Forum, in the far reaches of Houndsditch, greeted delegates at this year's forum.

The walk from Liverpool Street Station seemed shorter than it looked on the map, taking around ten minutes.

I have to admit I don't like the venue, and neither did many other people, in fact I did not hear anyone say they did! The organisers say it's larger than the GLC Building at Waterloo, but I don't think it's as big, never mind larger.

The main objection is there's no central area to network in, as there are a number of small areas spread around but no focal point, and it's hard to find people, whereas before the large central café area made it very easy as everyone headed

there between meetings.

Gripes about the venue aside, the morning was quite busy, and there was a positive vibrant atmosphere.

I had a mix of old and new companies on my meeting schedule, and one or two new companies caught my eye, including one situated next to the coffee machine where a casual comment by me about the name of the location of their project lead to a impromptu presenttion, and I liked what I heard.

That compny was **Thesis Gold (TSX.V: TAU),** and the presenter was their Scottish born CEO, Ewan Webster. Thesis are located in the "Golden Horseshoe" area of British Columbia, an area name I had not hear before and it seems they invented it! TAU have a tight share structure, $29 million working capital, and are funded through to the end of 2023.

Surpriingly for an early stage explorer, they have Sprott, ASA Merk, and Franklin Templeton on their share register.

Another company I liked was **Auteco Minerals, (ASX: AUT),** ASX listed but focused on the delightfully named Pickle Crow Gold Project, located in Ontario, Canada.

They have an experienced team, basically the board of BelleVue Gold (ASX), who have all achieved as a team before and are looking to repeat this in Canada. The next catalyst to look out for is a resource update in Q1 2023.

I also met **Bredda Head Lithium,** listed on AIM and the TSX.V, who have interesting lithium projects in the USA, in Nevada and Arizona. A nice story and looking undervalued compared to peers in my opinion. They have brines, pegmatite and clay projects, quite unusual to have all three.

I met up for an update with **O3 Mining (TSX.V: Olll)**, who are concerned that their low share price may make them vulnerable

to a cheeky bid. They have some quality assets within a short distance form the Canadian Malartic Mine in Val d'or, Quebec.

Finally I met with **Maple Gold (TSX.V: MGM)** who are well funded with a JV partner in Agnico Eagle, and are looking a bit tempting at the current low share price. I did hear an interesting rumour elsewhere that maybe they might be looking at **Cartier's (TSX.V: ECR)** Chimo property.

Day 1 is done, six more meetings tomorrow and it's all over for me.

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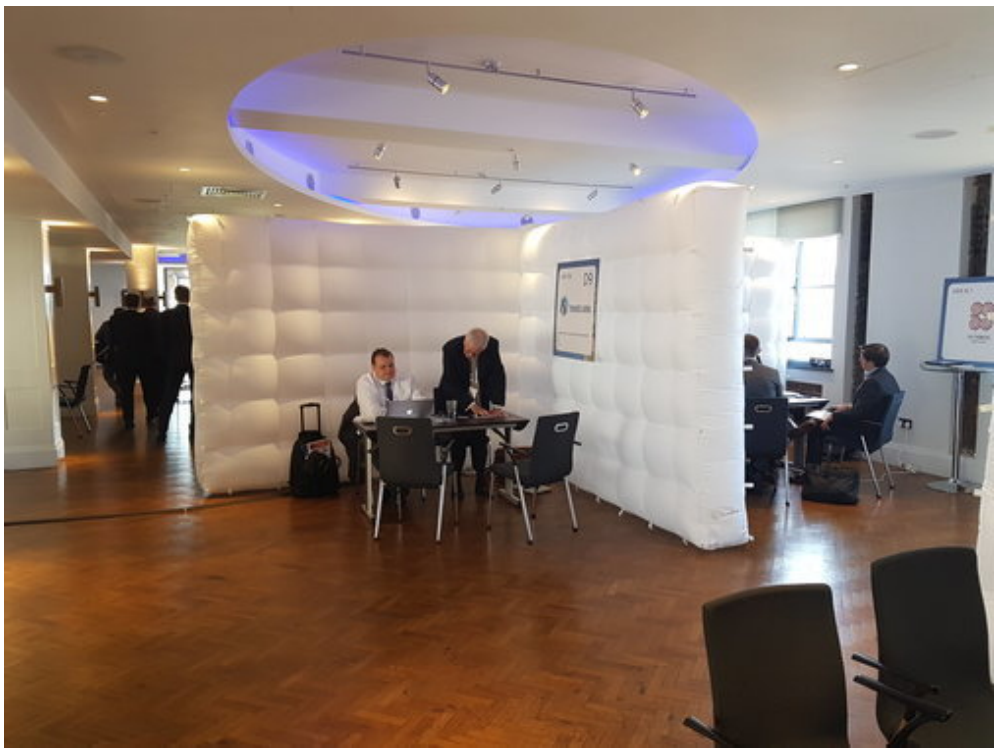
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London Mining Conference Fortnight Begins

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The last two weeks of November are here and that signals the start of a busy fortnight of mining conferences in London.

This year we have three major conferences, starting today with the 121 Conference in it’s new venue of Houndsditch, somewhere near Aldgate.



A typical booth at the 121 Mining Conference, London

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The last two weeks of November are here and that signals the start of a busy fortnight of mining conferences in London.

This year we have three major conferences, starting today with the **121 Conference** in it's new venue of Houndsditch, somewhere near Aldgate,

This venue is not so easy for me to get to, I much preferred the former GLC Building at the side of Waterloo Station. I'm not sure why they changed as the venue size was well suited to

the number of booths. There are a few more companies this year so maybe they outgrew the old venue?

Next week we have the **Mines and Money Conference,** in its traditional venue of the Design Centre at Islington. It's an OK venue I guess, not my favourite by a long way, a lot of walking up and down stairs, and the toilets can leave something to be desired.

It can be a cold and daunting walk from Angel tube station to the Design Centre on a chilly winter's day, so I'm hoping the current mild weather holds for another 12 days or so.

This conference is also boasting of a high number of companies attending, more than 121, although it remains to be seen if they all turn up of course.

The **Tin Conference** rounds off the mining fortnight, and is a one day confererence in the traditional mining conference mode of presentations to the audience, like the **Global Mining Finance Conferences** also held in London each year.

It's interesting that despite the markets being down. and in particular the mining sector where prices have really been in a downward trend from raound 18 months ago, there are so many companies attending these conferences.

It begs the question as to whether they're coming to create awareness or because they're desperate to attract some investor interest?

I have a feeling many are coming because they feel they need to attract investors, especially if funds are low and they will be needing a placing at sometime in the future.

As an investor, I'm wary of companies that are nor currently well funded as dilution at lower levels is exremely painful and results in new investors getting in at a lower level at the expense of existing investors that bught at higher prices.

The real question is will investors who have had an awful year turn out in their numbers for these conferences, or will they stay away? I heard Germany was quiet for their two shows last week, and they're normally busy, so will London follow suit?

I'll let you know after tomorrow, the last 121 Conference in May was quiet, by previous standards, but they did follow Mines and Money then, whereas they're first this time.

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