

# London 121 Conference Seemed Quiet

## City Investors Circle.

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## 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.



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, open pit.

Well financed, with an experienced management 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 early 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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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 presentation.

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## **Disclosure**

**At the time of writing the author holds shares in Westgold.**

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