Mines and Money London 2025

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Mines and Money London 2025



Mines and Money / Resourcing Tomorrow – London 2025

The conference returned to the Design Centre at Islington once again, its home for a good number of years, and a decent venue to be fair.

It's now called **Resourcing Tomorrow** which is a name I don't like, because gold companies are not resourcing anything, they are producing precious metals for investment. **Mines and Money** was so much better and did what it said on the side of the tin, in my opinion.

I always enjoy the show as it's an opportunity to catch up with fellow investors as much as meet new companies.

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I would like to make a comment on the food served today. In previous years its not always been the best, and I remember fondly the mounds of sandwiches piled untidily upon one another from a few years ago! But at least it filled your stomach!

This year’s offering is pictured below, and was served in what one might describe as a large thimble. It was akin to a large canapé.



Needless to say this didn’t begin to address the lunchtime hunger, and I noticed people returning and picking up several, so I joined them. There were three choices, the salmon shown above, chilli, and tofu.

This should be awarded the Guinness Book of Records smallest meal in history awards, it would satisfy a sparrow.

I know we should be grateful for the complimentary food, but please give me a sandwich that at least fills a gap.

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Companies I met today

I had six meetings today, and there was something to like about all of them, as I screen companies prior to arranging meetings with them to ensure they're relevant to my current criteria.

My favourite meeting was with;

Dakota Gold

Dakota Gold is a South Dakota-based gold exploration and development company focused on revitalizing the historic Homestake Mining District in the Black Hills.

Projects include the Richmond Hill Oxide Heap Leach Gold Project and the Maitland Gold Project, with plans for commercial production as early as 2029. The company trades on the NYSE.

The company is run by Robert Quartermain, a mining veteran with previous successes with Silver Standard (SSR Mining), and Pretium.

Historians will recall that Homestake Mining was the big winner when stocks crashed in the US markets in 1929. This is a good district to mine gold in.

Other meetings I had today included,

Impact Minerals

I hold this ASX listed stock, focused on high purity alumina production in Western Australia. 2026 will be the year we find out if the chemical process they are championing works, and if it does I expect the stock to rerate.

Mineros SA

A 50 year old company, a rarity on the mining world.

Projects in Colombia and Nicaragua. Dredge mining.

They rely on artisanal miners bringing ore to be processed, which is not a certain amount, so not an investment for me currently, although the CEO appeared highly competent.

Aston Bay

Small cap, but interesting as they have a 20% free carry to BFS with ASX listed American West Metals. Capex is low at $50 million. Mining by 2028.

Nexgen

Goldboro project in Nova Scotia, Canada. Appian has a 2.9 NSR, and has a LOI for $75 million. Production likely in 2029.

Panther Metals

Listed on AIM, and listing on the CSE in Canada soon.

Interesting tailings project in Canada, including **gold, silver, gallium, and indium.**

Directors have recently bought around £132,000 of stock in the market at the full market price, which is impressive and shows confidence in their own ability to create shareholder value.

So, a small group of quality companies , but I prefer quality to quantity, so I’m happy with the meetings that i had.

I plan to invest in Dakota Gold and may take a small stake in

Panther Metals because I like the management and they recently invested at full market prices.

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The live gold price can be found HERE

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

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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