# Mines and Money London 2025

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

I found few companies of genuine interest in the show this year, but there were a couple of gems that merit further review and are potential investments.

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.

I found few companies of genuine interest in the show this year, but there were a couple of gems that merit further review and are potential investments.

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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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# Mining Review 8th December 2024

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Mines and Money London was a fairly lively conference, but with few companies that excited me.

Westgold announced an increased resource, and Calibre Mining denied an announcement by Condor Gold.

Mines and Money London- The magnificent Business Design Centre, at Islington.

## Mining Review 8th December 2024

Mines and Money London was a fairly lively conference, but with few companies that excited me.

I guess I've attended too many conferences and become too aware of the slim chances of companies starting exploration in moose pasture in the back of beyond in the Yukon or Alaska becoming mines in the future.

Those type of companies dominate most mining events these days, with producers and late stage development companies funded through to production being in the minority.

I did like **Exploits Discovery** as a nearology play to New Found Gold in Newfoundland. I also liked **Awale Resources,** and **Scottie Resources**, and I am going to research further before making any invesment decisions.

Borealis Mining enters the Hall of Shame for their non show

for an arranged meeting with no apology. Apalling behaviour and a total lack of professionalism.

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Canadian tax loss selling is occuring so there should be at least another week of opportunity before prices might start to rise again, if not longer.

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In this week's news **Westgold** announced an increased resource, and **Calibre Mining** denied an announcement by Condor Gold regarding bidding for their asset in Nicaragua.

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*All this week's news from our watchlist companies can be viewed by clicking the links below*

**West Red Lake Gold Mines Madsen Mine Update**

**Mines and Money Day 2 Review**

**Westgold Doubles Bluebird South Junction Ore Reserve 107%**

**Mines and Money Day 1 Review**

**London Mines and Money Conference Starts Today**

**Calibre Mining Responds to Condor Gold Announcement**

**Gold Road to Benefit from Northern Star Acquisition of De Grey Mining**

**Mining Review 1st December 2024**

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Click here for all company news archives

## Market Data

## Weekly Price Changes

## (US$ unless stated)

| Metal Prices | Price | Weekly % change |
|---|---|---|
| Gold price in UK £ | 2069 | -0.67% |
| Gold | 2633 | -0.34% |
| Silver | 31 | 2.28% |
| Palladium | 965.6 | -1.51% |
| Platinum | 933.8 | -0.32% |
| Rhodium | 4575 | -3.17% |
| Copper | 4.07 | 0.74% |
| Nickel | 7.15 | 0.56% |
| Zinc | 1.41 | 0.00% |
| Tin | 13.09 | 2.83% |
| Cobalt | 10.91 | -6.59% |
| Manganese | 2.9 | 0.00% |
| Lithium | 10124 | -2.34% |
| Uranium | 77.2 | 0.13% |
| Iron Ore | 104.6 | 0.00% |
| Coking Coal | 205 | 0.49% |
| Thermal coal | 123.5 | -10.51% |
| | | |
| | | |
| **Metal ETFs** | **Price** | **Weekly % change** |

| | | |
|---|---|---|
| GLD | 242.95 | -1.07% |
| GDX | 36.82 | -2.23% |
| GDXJ | 47.31 | -0.78% |
| Sil | 38.39 | 5.67% |
| SILJ | 11.79 | -0.59% |
| GOEX (PCX) | 32.88 | 1.61% |
| URA | 31.8 | -1.70% |
| COPX | 41.98 | -1.52% |
| HUI | 286.28 | -4.92% |
| Gold / Silver ratio | 84.94 | -1.93% |
| 10 yr Tbond (TNX) | 4.15 | -0.72% |
| 2 yr T bond US2Y | 4.11 | -1.20% |
| US index (DXY) | 105.97 | 0.18% |
| SPJXGD | 56.53 | -0.07% |

# Click HERE for live Spot Metal Prices

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# Mining Review 4th December 2022

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London mining week wasn't as busy as previous years and there wasn't a 'buzz' this year, but companies still came.

American Creek, Calidus Resources, and Rokmaster Resources made news this week.

Mines and Money 2022 – The magnificent Business Design Centre, at Islington.

## Mining Review 4th December 2022

London mining week wasn't as busy as previous years and there wasn't a 'buzz' this year, but companies still come.

The annual Mines and Money show at Islington was sparsely attended compared to previous years, but companies still fly in from Australia and Canada to participate. Some have been in Europe for three weeks attending various conferences in Frankfurt, Zurich, and Geneva.

**Companies on our watchlist in the news**

**American Creek, Calidus Resources**, and **Rokmaster Resources** made news this week.

**Rokmaster Resources Reported a Strong Drill Intercept**

**American Creek Intersected a Gold-Copper Porphyry**

**Calidus Resources made a Significant Gold Discovery**

**Mining Review 27th November 2022**

**Market Data**

**Weekly price changes**

**(All prices in US$ unless stated)**

# Metal Prices

| | | |
|---|---|---|
| Gold price in UK £ | 1463 | +0.76% |
| Gold | 1798 | +2.45% |
| Silver | 23.17 | +7.07% |
| Palladium | 1905 | +2.64% |
| Platinum | 1020 | +3.34% |
| Rhodium | 13290 | 0.00% |
| Copper | 3.73 | +3.04% |
| Nickel | 12.22 | +2.95% |
| Zinc | 1.39 | +5.30% |
| Tin | 10.48 | +2.95% |

| | | |
|---|---|---|
| Cobalt | 23.57 | +1.38% |
| Manganese | 3.33 | +3.42% |
| Lithium | 79483 | +1.18% |
| Uranium | 49.8 | -1.09% |
| Iron Ore | 102.2 | +7.35% |
| Coking Coal | 272 | +9.68% |
| Thermal coal | 376.5 | +5.46% |
| Magnesium | 3324 | -2.58% |

## Metal ETF’s

| | | |
|---|---|---|
| GDX | 29.92 | 5.20% |
| GDXJ | 37.22 | 5.65% |
| Sil | 29.5 | 3.69% |
| SILJ | 11.21 | 4.57% |
| GOEX (PCX) | 25.95 | 6.57% |
| GLD | 167.26 | 2.48% |
| COPX | 36.94 | 6.52% |

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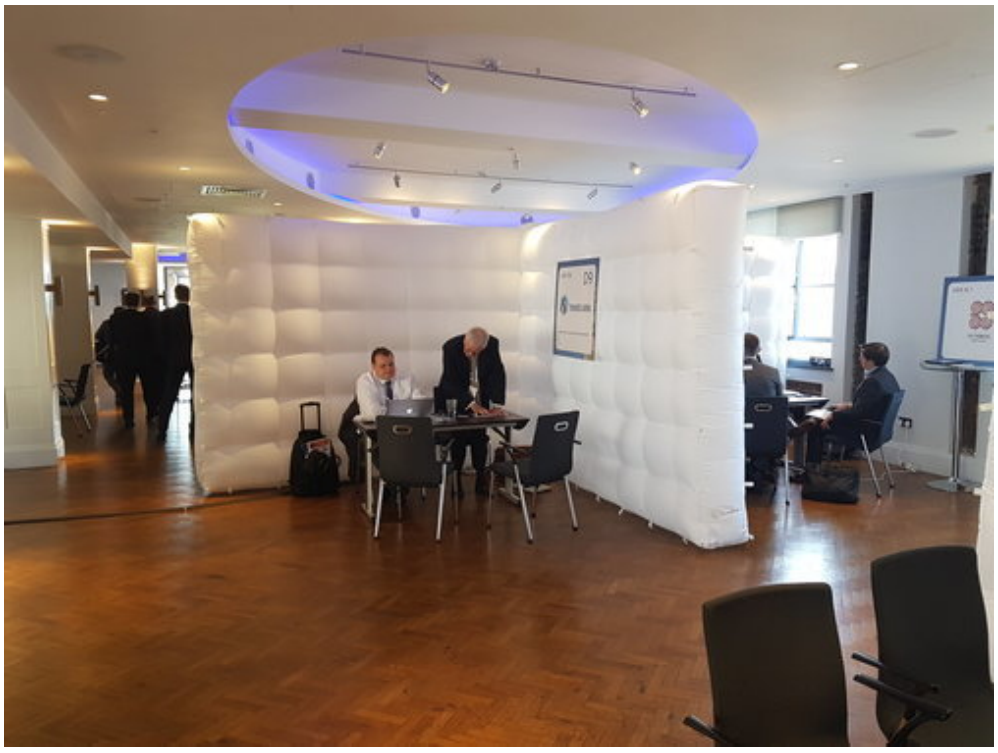
# London Mining Conference

# Fortnight Begins

**London Mining Conference Fortnight Begins**

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

# London Mining Conference Fortnight Begins

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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# London Mining Conferences are Becoming Identical

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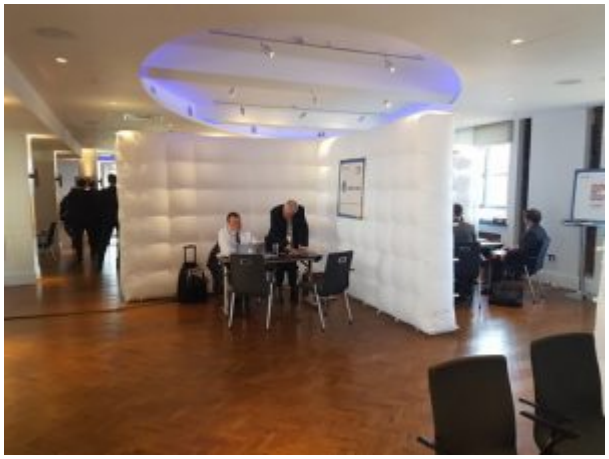
This week I attended the Mines and Money Conference in London. Normally this would be at the Design Centre, Islington, but this year the venue has changed.

It was held in the former GLC County Hall building alongside Waterloo station, the same venue in fact as the 121 mining conferences, on the same floor even. The similarities didn't end there either.  {…}



## London Mining Conferences are

# Becoming Identical s Rivals use the Same Venue

### City Investors Circle – London mining conferences

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It was held in the former GLC County Hall building alongside Waterloo station, the same venue in fact as the 121 mining conferences, on the same floor even. The similarities didn't end there either.

The registration area was set up the same, the coffee refreshment area as well, and the only slight difference is the luncheon buffet was not as plentiful or lavish as the 121 conferences.

Lunch was served in those clever compartmentalised boxes also used for the 121 events, and the food was pretty much the same.

Everything was so similar that it was easy to believe one was actually at the 121 conference!

The only small difference was the reduced number of delegates compared to the other show, Mines and Money did seem a little quiet, and there were less booths.

Having said all that I preferred the reduced number of people, it was more relaxed and less hectic compared to 121.

When it first started the 121 format of 121 meetings in booths was a new concept for UK mining shows, although it was

pioneered, I believe, by the Denver Gold Group for their Swiss and US shows many years ago.

We have now arrived at the point where the Denver Gold Group, 121, and Mines and Money are all using the same format, so one wonders who will break ranks and design something mold breaking?

In the meantime, the Global Mining Finance Summer Conference is about to run in London. This runs in the old traditional way of having a few speaker and corporate presentations, brief Q and A's, and vibrant networking sessions.

Nice to still have a traditional mining conference, that's a bit different, even if it's only because they have not copied someone else's idea.

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# Mines and Money Conference hit by Covid Variant

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The London Mines and Money conference opened today in Islington, and was clearly suffering the effects of the new covid scare, as around a dozen booths were empty, and the audience was sparse, compared to first days in recent years.

I feel for the organisers as a couple of weeks ago everything looked good for the show. […]

# The London Mines and Money show suffers because of covid.

The London Mines and Money conference opened today in Islington, and was clearly suffering the effects of the new covid scare, as around a dozen booths were empty, and the audience was sparse, compared to first days in recent years.

I feel for the organisers as a couple of weeks ago everything looked good for the show, as they had more companies than usual, and less service providers.

They have taken covid measures in the catering, and I chose a very tired looking lump of lasagne in a cardboard pot, instead of the very watery looking fish curry. Not great but better than nothing.

The one plus point was that the coffee stations were open all day, rather than in small time slots, ensuring there was no rush, a very sensible move in my opinion.

As an event organiser myself I can testify to the pressure of trying to arrange an event where you hope that people will attend, and it’s really stressful. Mines and Money have been really unlucky that the new variant arrived just before their show.

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