PDAC 2024 Day 3

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There were certain hotspots where a group of booths were very busy, but elsewhere foot traffic was slow to non existant. One booth owner I seak to said she was going to try and move to adifferent are next year as her aisle was so quiet.

The one consistency of PDAC is that booth allocations are the same year after year, so if you go on a regular basis it's easy to find the booths of the companies you're interested in.

It will be interesting to see if my friend's booth switch request is granted next year or not.

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The third day, Tuesday, was my final day, as the Wednesay half day is not worth attending, with few CEOs on thr stands early doors after the heavy festivities the night before, and the plane home is rammed.

In all honesty I think two days is just about right for the show, it takes a hard toll on feet and legs, and, unless you have an interest in very eary stage juniors desperate to raise finance, the number of companies with a decent market cap, and an advanced project that could be of interest can be quite low.

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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.

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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PDAC 2024 Day 2

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What a difference a day makes in the mining world!

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PDAC 2024 Day 2

What a difference a day makes in the mining world!

The doom and gloom from yesterday was replaced by optimism as the price of gold soared around $50 to close at $2116.

The mood in the show was clearly positive, and you could sense the relief in the air as the news spread and many people were checking the latest gold price on their phones all day.

Sadly for many companies in the show the recod high gold price will make little difference. They are, of course, the greenfield explorers trying to establish an exploration programme with little to no cash and a hostile market to attemp to finance in.

One aspect of the show thay has become apparent this year is it's mainly full of early stage explorers, and has few late stage developemnt companies and even ferer producers.

In the current market that makes for a lot of quiet booths, and the all too familiar sight of bootholderrs staring at their phones.

I chatted to a few of the UL contingent today, **Cornish Metals** being an interesting chat following their news release today.

Other UK based companies I had a chat to included **Conroy Gold,** and **Southern Cross.**

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PDAC 2024 Day 1

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A quiet opening day to PDAC 2024, and the whole show lacked the usual excitement and vibrancy in my opinion.

Booth holders were bemoaning the lack of investors attending, and that they were mainly meeting service providers and people seeking opportunities.



PDAC 2024 Day 1

It was a quiet opening day to PDAC 2024, for me anyway.

I normally have a feeling of excitement as I descend the escalators on the opening morning, a feeling that I am going

to find new and highly investable companies and opportunities, but not this year.

With the markets for mining stocks so beaten up it's no surprise the usual interest is not there, and the whole atmosphere at the show lacked the usual excitement and vibrancy in my opinion.

Booth holders were bemoaning the lack of investors attending, and that they were mainly meeting service providers and people seeking opportunities.

One reason for the seeming lack of numbers may be that the organisers now charge an entrance fee, whereas before it was free to enter. This rules out the casual local visitors wandering around looking for free pens and baseball caps I guess, and would account for some drop in the numbers.

One difference I noticed from previous years is that I am not hearing the expression "we are so undervalued", which has been replaced almost universally by "this crazy market".

Today, Monday, is professionals day, where Bay Street and the suits arrive, so it should be busier, but will it be more vibrant?

I doubt it, but we shall see.

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