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Challenger plant – Courtesy of Barton Gold

	Barton Gold	**ASX: BGD**
	Stage	**Production, development**
	Metals	**Gold**
	Market Cap	**A$329 Million @A$1.33**
	Location	**South Australia**
	Website	**www.bartongold.com.au**

Comment

I have to admit, of all the stocks on my watchlist ,and in my current portfolio, Barton is my number one selection for having the most potential to create shareholder value in 2026.

The company has a strong management team that are quietly achieving their objectives moving towards the first phase of a two phase production schedule.

They are refurbishing an existing mill for a small capex, and are looking to commence gold production at the end of 2026, or the beginning of 2027.

For that reason, provided the gold price remains high around

current levels, or higher of course, I see Barton climbing towards the production peak on the Lassonde Curve later this year.

Phase 2 production is three years away, when the company hope to produce 150,000 ounces of gold production per annum, which will produce a massive profit if the gold price remains high.

Management own 21% of the stock, and institutions 36%, a good sign of confidence in the project and management.

Management visit Europe frequently, I meet CEO Alex Scanlon whenever he comes, he's very communicative, which is another tick in the box for my personal criteria.

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Barton is an active company and management are targeting 150,000 Oz gold production annually in the future.

The company are entering a two phase production plan, with a first stage due to enter production late 2026, early 2027. I personally always allow for some slippage in the timeline as mining is a complicated business.

The mill is fully permitted, and therefore I don't expect too many challenges for the restart.

Phase 1

Involves reprocessing historic tailings, which provides a low cost entry to production. I like tailings projects, the hard work has already been done, they sit on surface, not in the ground, and new technology makes it possible to produce from what's left over from their original processing.

Highlights

A *DFS* is due in March 2026.

Mill commissioning, and phase 1 operations are due to commence at the end of 2026.

Capex A$26 million.

Mill capacity will be between 600 and 650 ktpa.

Future Plans

Barton's long term target after phase 2 is initiated is to produce 250,000 ounces of gold per annum.

Phase 1 production is designed to give Barton a chance to earn early cashflow as the longer term plans develop.

The latest Barton Gold Corporate presentation can be viewed HERE

In conclusion, I believe Barton Gold will deliver, the risk

level looks at the lower end of the scale, being a tailings project to be processed at a refurbished mill, with low capex.

One to watch during 2026, especially as production startup approaches, as I expect the normal Lassonde Curve rules of shareholder value creation to apply as production approaches.

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The live Barton Gold share price and chart can be found HERE

To View Barton Gold's' historical news, please click here

The live gold price can be found HERE

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Disclosure

At the time of writing the author holds shares in Barton Gold.

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