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FAR EAST CAPITAL
The Mining Investment Experts

Weekly Commentary

5 November 2022 *Chart comments as at Friday's close.* Analyst : Warwick Grigor

Golden Camel plans to be Victoria's next gold producer

The large IMARC Conference was held in Sydney last week down at Darling Harbour. Previously, Melbourne was the host city but it has moved to Sydney due to the disruptive impact of greenies and protestors rioting and objecting to mining. The cost of security to the organisers is rumoured to have been in the order of $2.5m.

The Sydney show was a very different affair. The police presence was massive, and security was very tight with attendees having to show photo ID at least three times before getting in, but I didn't see one protester. What does that tell us about the perspective cities?

Golden Camel has all approvals and is set to go

Golden Camel (GCM) is an unlisted prospective gold producer based in the Heathcote region of Central Victoria. I may have mentioned it previously in the context that it is planning to build and commission a CIL gold treatment plant on the ML owned by Nagambie Resources, but it deserves coverage in its own right as well as being a strategic player in the region. Its ESG credentials promise both the best environmental practices for emission reduction, renewable power generation and the ability to significantly lower operating costs.

Experienced Management

GCM is headed by Nagambie-based Dean Pontin. He leads a team of experienced permitters, constructors and operators who have successfully delivered mining and processing projects both in Australia and overseas. The senior management has been involved in the exploration and development of projects in Victoria for over 25 years.

Approvals received and now financing

GCM has applied for, and received, government approvals to install a 300,000 tpa gold treatment plant. It is still an unlisted company and it intends to remain so until it has commissioned the treatment plant and established itself as a successful gold producer. It is not yet ready to decide whether to undertake an IPO or take the RTO route. Construction will commence once $20m of funding has been arranged, thereby enabling the project plant commissioning in late 2023. The expected capital cost of the plant is lower than usual due to the completed purchase and refurbishment of near-new second hand equipment.

Modest size initially, but growing

The operation will start on oxidised ore from the only permitted mine so far, being the Golden Camel mine. Located 80 km from the plant site, the 320,000 tonnes resource grading 2-2.5 gpt gold could produce 20-25,000 oz in its first year. Gold production could subsequently double with the installation of a sulphide ore treatment circuit in years 2-3.

Numerous ore sources will be available

GCM has six potential ore sources from its own ground that are expected to provide 13 years of ore feed, but that should be seen as indicative rather than definitive. Actual project life will vary with the scale of the plant, which will likely expand, and the number of "stranded" orebodies in the region owned by third parties in need of a treatment option. This is why the plant is described as a toll treatment plant in some of the documentation.

Further, GCM is limited about how much it can say about a number of its potential ore sources until they have been drilled again and brought into compliance with the modern JORC standards. One of these, called Shiraz, 65 km distant, looks like there could be 2 Mt of oxide ore at a grade of 2.0 gpt in the oxide zone and 1 Mt at 4.4 gpt in the sulphide zone. However, these numbers should be seen as Exploration Targets until they have been properly drilled.

Once a reserve is calculated on any particular location, the Company will be able to apply for a mining licence and a work plan. That regulatory process is expected to take 10-12 months based on GCM's previous permitting experience.

Expansion to come with a flotation circuit

While the CIL circuit will be a useful start to ore processing, the region is known for higher grade gold/stibnite orebodies beneath the oxide zones. GCM will be look to add a flotation circuit within 2-3 years of commencing production, as well as facilities to further process the resulting antimony/gold concentrates rather than selling to the Chinese smelters that would probably only pay around 60% of the antimony value and around 80% of the gold value. One possibility is the production of antimony trioxide which currently has a market value of around US$10,000 pt.

Dry-stacked tailing disposal plans will be of great green benefit

If the operation was being established in the WA goldfields it would be an easy option to back-fill the old open pits with tailings. However, the Victorians are rather more sensitive about their groundwater management. It is not likely to be an option in the Goulburn River Basin unless all metals are removed via flotation. So, Plan B is to establish a dry stacking alternative with zero water release.

This method involves using large, flat-lying Geotube cells measuring up to 60m x 18m, and 1.5m in height. These will be filled through openings in the top of the Geotubes with the tailings slurry from the CIL plant at a rate of 40 tph. Water will be drained through the geotextile skin of the bags onto a HDPE liner and then into a decant pond for re-use as process water. As each bag is filled and drained, they compact and consolidate to allow additional bags to be installed in another lift. Thus ground water is not affected and there is no risk of tailings dam wall failures.

The ability to store carbon in the tailings contained in these bags, and sell carbon credits, adds another useful green dimension.

Strong green credential with solar and biogas.

The mining sector in Victoria currently pays up to 40¢/kWh when purchasing electricity from the grid, and regular supply is becoming more problematic. GCM is intending to generate as much of its own power as possible from biogas and solar facilities that can reduce the cost to < 10¢/kWh.

The CIL plant will commence with grid and diesel power sources while at the same time it will develop a 5 WM solar farm. By the time the flotation circuit is introduced, in years 2-3, it proposes to to operate a 1.5 MW biogas facility that will supply base-load power using green waste supplied by the neighbouring councils. To reduce emissions and costs, an electrified trucking fleet will be able to utilise the cheap renewable power sources to charge their batteries. This fleet will be used to provide low cost, low emission ore haulage from the mines to the toll treatment facility.

The Bottom Line

GCM is not planning to waste money on excessive capex with a $20m starting budget to get to commissioning. Cash costs are forecast to be about US$1,200/oz, at the initial rate of production. Thus there is nothing wrong with the economics.

Normally I like to give an indication of whether a company's share price is good value or not, but here it is not necessary. You can't buy the shares on the ASX. I am showing Golden Camel as an interesting, up and coming development that is coincidently at the cutting edge of environmentally friendly methodologies.

Golden Camel is one of the pieces of the jigsaw puzzle in the Fosterville-Costerfield region and promises to be a strategic player, in it own right or in connection with other companies. It has recognised, and availed itself, of Nagambie Resources' mine site in order to fast track the development of the next Victorian gold mine. That is a clue in itself as to what to expect going forward. Its motto is "*Monetizing Mineralisation in Months, Not Years and Decades*".

Disclosure: Interests associated with the author own shares in Nagambie Resources, and the author is a director.

Barton Gold (BDG) - focused gold explorer with access to a treatment plant in South Australia

When you have been around the market as long as I have you experience repeated episodes of déjà vu. The same projects come around in every cycle, frequently with different management with different perspectives. It is tempting to be dismissive or at least cynical as you hear why this time around it is going to be different. Nevertheless, you still have to assess the ability of the new management, the changes in economics with up to date commodity prices, and any revised geological interpretations. The latest shuffling of the pack could result in a company being dealt a better hand.

It is from this perspective that I observed Barton Gold as a new company with an old project, the Challenger Gold Mine, located 740 km NW of Adelaide in the Gawler Craton. Challenger was discovered by Dominion Mining in 1995, with the discovery being credited to a calcrete sampling technique. However, more recent thinking suggests that the discovery was more coincidental with a single high grade gold value than a systematic program of calcite sampling.

Building ounces before considering production

Barton is not considering a restart of mining operations at this juncture, even though it has a 650,000 tpa treatment plant on care and maintenance. Rather, it believes that a stronger focus on regional exploration and a reinterpretation of the geology could lead to the discovery of a substantially larger resource base. It could then be monetised with minimum capital expenditure owing to the Challenger mill being available for restart at the appropriate juncture.

However, note that this is a regional play that takes into account leases around the Challenger mill, the Tarcoola licences around the historical Perseverance Mine some 130 km to the SE, and the Tunkillia project another 70 km further SE.

Looking for Tarcoola for higher grades

Tarcoola has traditionally been higher grade, averaging 3.8 gpt for WPG Resources in 2018, from a pit that went to 70m at the deepest point. There will be more gold around and beneath the pit, perhaps 50-200,000 oz, but there is believed to be significant upside in the strike extensions of the mineralisation over a 14 km long trend. Barton has identified more than 12 crosscutting structures that it will start to drill test in 2023. Success in the drilling could lead to a restart of the mill, at a capital cost in the order of $5m.

Larger tonnage, low grade targets at Tunkillia

Tunkillia was the type of discovery that caused a lot of excitement when Helix Resources reported a very long, low grade intercept in the early noughties. Back then Helix was talking about establishing a 50-70,000 oz p.a. gold mine on a resource base of 770,000 oz at 2.2 gpt. However, that did not eventuate, and nothing much happened, other than additional exploration.

Fast forward to today and we see that Barton now owns 100% of Tunkillia, with its 26 Mt at 1.15 gpt for 965,000 oz. Barton is optimistic that with the higher gold price regime, and further exploration success, there is potential for enough ore to supply a 1-2 Mtpa size mill. A grade of 1 gpt can be very profitable on today's economics, as demonstrated by Capricorn Metals at its Karlawinda Gold Mine in WA. So, Barton has completed a reinterpretation of the geology and it is now set on finding more gold with 12,000m of drilling planned over the next few months.

The Bottom Line

Barton is modestly priced with a market capitalisation of $24.5m, at a 14¢ share price. Cash was $10.3m at 30 September. That means there is a price tag of only $14.5m on a million ounces of gold and an idle treatment plant.

Barton offers great leverage to the commercialisation of any additional ounces that it may find, at either Tarcoola or Tunkillia. The capex for a restart of the Challenger mill will be very easier, while a large, new plant for Tunkillia will be more complicated.

We can see excellent speculative value in the share price at these levels. Watch for upcoming drill results and resource upgrades in 2023 that will provide better colour. This could be a serious gold producer in the making.

For those who want to know the history

The operation commenced as an open pit mine in 2002, and went underground in 2005. The mine typically produced at a rate of 80-110,000 oz p.a. over the years from 2005 to 2014, at grades of 7.5-9.5 gpt in the first four years in that period, dropping to 4-5 gpt thereafter. Thus it started off as a good mine, but tapered off in the later years.

In 2010, Kingsgate Resources paid a hefty $376m for the operation as it was looking for a project to balance the Chatree Gold Mine in Thailand. This coincided with a drop in grades and a dramatic escalation of cash operating costs in the subsequent years. Just after celebrating the millionth oz gold production milestone at Challenger in 2015, Kingsgate announced a deal to sell the project to WPG resources and PYBAR for a “knock-down’ price.

WPG Resources had been very successful with the sale of its iron ore assets in 2011, for $320m, but its luck ran out when it later purchased the Challenger project in a 50:50 JV deal with the PYBAR Group, then moving to 100% ownership in August 2016. After what appeared to be a successful restart of operations, the project suffered from a number of problems that included lower than expected grades, equipment failure and manpower issues. Notwithstanding a number of initiatives designed to turn the project around, WPG appointed administrators, then receivers and managers in 2018. Challenger was subsequently acquired by Barton.

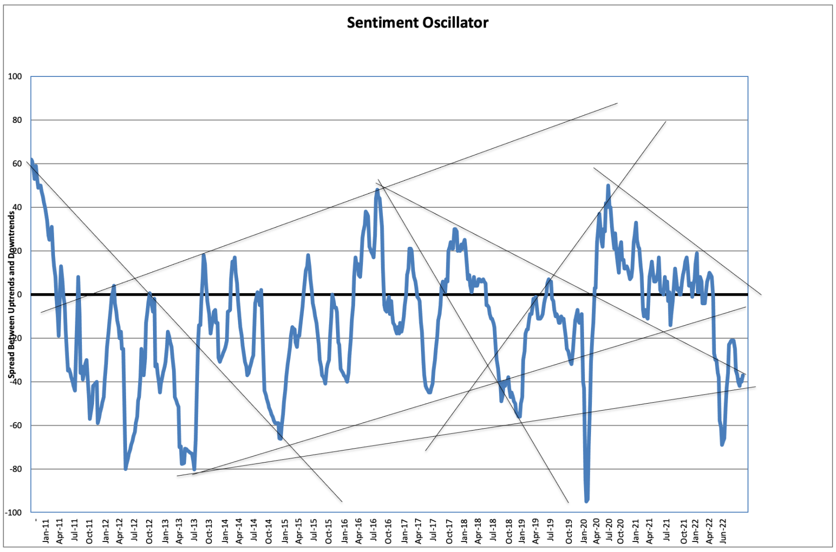
Barton is not considering a restart of mining operations at this juncture. It believes that a stronger focus on exploration and a reinterpretation of the geology could lead to the discovery of a multi-million ounce resource that could be monetised with minimum capital expenditure owing to the Challenger mill, currently on care and maintenance, being available for restart at the appropriate juncture - but first it has to find more gold.

WA1 was on a wild ride last week

WA1 exploded from a price of 13.5¢ on the 25th October to hit a high of $2.20 last Thursday, closing the week at $1.76. Why? It was all about carbonates, niobium and rare earths.

On the 26th October, WA1 announced the discovery of a mineralised carbonate at its West Arunta Project in the NT. Just looking at the release, we see a 54m interval at 0.62% Nb_2O_5, 0.18% TREO[2] and 3.85% P_2O_5 from a depth of 162m down hole.

It is technically legitimate to call this a discovery hole, but where to from here? More assays are awaited from the seven hole program and these will provide valuable follow-up information. The fact that it is a carbonatite is definitely encouraging but remember that the discovery is just the first step of what could be a long process of exploration and evaluation. Whether or not the share price can be maintained at these high levels remains to be seen. The speculative market is still weak, but as we have said previously, that doesn’t stop the shooting stars.



Sentiment Oscillator: Sentiment was essentially steady over the week as the support line of the Sentiment Oscillator continued to hold. There were 16% (17%) of the charts in uptrend and 53% (57%) in downtrend on Friday’s close.

Detailed Chart Comments

NB. Only the bold comments have been updated. Comments in grey type are from previous weeks and will be less relevant. Please note that this list is a cross section of the market. It IS NOT a list of recommendations.

Indices	Code		Trend Comment	
All Ordinaries	XAO		hitting resistance line	
Metals and Mining	XMM		turned down at resistance line	
Energy	XEJ		near highs	
Information Technology	XIJ		down	
Stocks	**Code**		**Trend Comment (updated comments in bold)**	**Main Interest**
A-Cap Energy	ACB		breached support	uranium
Alpha HPA	A4N		down	HPA
Adriatic Resources	ADT		testing resistance line	zinc, polymetallic
Advance Metals (was Pacific American)	AVM		down	coal, gold exploration
Alkane Resources	ALK		testing downtrend	gold
Alicanto Minerals	AQI		new low	base metals, silver, gold
Altech Chemical	ATC		strongly higher	HPA, anodes
Anteotech	ADO		new low	silicon anodes, biotech
Alto Metals	AME		at resistance	gold exploration
American Rare Earths	ARR		down	rare earths
Antilles Gold	AAU		new low	gold
Arafura Resources	ARU		good bounce	rare earths
Ardea Resources	ARL		testing support	nickel
Aurelia Metals	AMI		new low	gold + base metals
Australian Potash	APC		down	potash
Australian Rare Earths	AR3		at lows	rare earths
Auteco Minerals	AUT		breached steepest downtrend	gold exploration
Arizona Lithium	AZL		failed at resistance line	lithium
Azure Minerals	AZS		rising again	nickel exploration
BHP	BHP		testing resistance line	diversified, iron ore
Beach Energy	BPT		uptrend breached	oil and gas
Bellevue Gold	BGL		breached downtrend	gold exploration
Benz Mining	BNZ		new uptrend commenced	gold
Black Cat Syndicate	BC8		down	gold
Blue Star Helium	BNL		sideways through downtrend	gas, helium
BMG Resources	BMG		down	gold exploration
Boab Metals	BML		failed at resistance line	silver/lead
Breaker Resources	BRB		stronger	gold exploration
Buru Energy	BRU		gently lower	oil
Calidus Resources	CAI		new low	gold
Capricorn Metals	CMM		back into downtrend	gold
Caravel Minerals	CVV		at resistance	copper
Castile Resources	CST		down	gold/copper/cobalt
Celsius Resources	CLA		sideways at lows	copper

Chalice Mining	CHN		down	nickel, copper, PGMs, gold exploration
Chesser Resources	CHZ		new low	gold exploration
Cobalt Blue	COB		testing uptrend	cobalt
Cyprium Metals	CYM		new low	copper
Dateline	DTR		down	rare earths
De Grey	DEG		good recovery	gold
E2 Metals	E2M		breached new uptrend	gold exploration
Ecograf	EGR		falling again	graphite
Element 25	E25		new uptrend commenced	manganese
Emerald Resources	EMR		trying to recapture uptrend	gold
Empire Energy	EEG		down	gas
Euro Manganese	EMN		down	manganese
Evolution Mining	EVN		testing downtrend	gold
Firefinch	FFX		suspended	gold
First Graphene	FGR		breached downtrend	graphene
Fortescue Metals	FMG		failed at resistance line	iron ore
FYI Resources	FYI		sideways through downtrend	HPA
Galena Mining	G1A		breached steepest downtrend	lead
Galilee Energy	GLL		sideways	oil and gas, CBM
Genesis Minerals	GMD		down	gold
Genmin	GEN		rising	iron ore
Gold Road	GOR		sideways	gold
Great Boulder Resources	GBR		softer	gold exploration
Hastings Technology Metals	HAS		risen to resistance line	rare earths
Hazer Group	HZR		sideways at lows	hydrogen
Heavy Minerals	HVY		still in downtrend	garnet
Highfield Resources	HFR		breached steepest downtrend	potash
Hillgrove Resources	HGO		down	copper
Iluka Resources	ILU		still down	mineral sands
Image Resources	IMA		testing resistance line	mineral sands
ioneer (was Global Geoscience)	INR		testing resistance line	lithium
Ionic Rare Earths	IXR		hugging support line	rare earths
Jervois Mining	JVR		breached downtrend	nickel/cobalt
Kaiser Reef	KAU		recovering from lows	gold
Kallina Power	KPO		stronger	power station additive
Kingston Resources	KSN		at resistance	gold
Krakatoa Resources	KTA		rising	rare earths
Kingfisher Mining	KFM		stronger	rare earths
Kingwest Resources	KWR		new low	gold
Legend Mining	LEG		new low	nickel exploration
Lepidico	LPD		new low	lithium
Lindian Resources	LIN		breached steep uptrend, ST down	bauxite
Lion One Metals	LLO		down	gold
Los Cerros	LCL		new low	gold exploration

Lotus Resources	LOT		sideways through downtrend	uranium
Lucapa Diamond	LOM		sideways at lows	diamonds
Lunnon Metals	LM8		down	nickel
Lynas Corp.	LYC		rising but still under resistance line	rare earths
Magnetic Resources	MAU		surge on REO news, then retracement	gold exploration
Mako Gold	MKG		down	gold exploration
Marmota	MEU		drifting lower	gold exploration
Matador Mining	MZZ		new low	gold exploration
Mayur Resources	MRL		stronger	renewables, cement
Meeka Gold	MEK		falling back towards support line	gold
Megado Gold	MEG		new low	rare earths, gold exploration
MetalsX	MLX		sideways through downtrend	tin, nickel
Metro Mining	MMI		still down	bauxite
Mincor Resources	MCR		down	gold/nickel
Mithril Resources	MTH		down	gold/silver
Musgrave Minerals	MGV		still falling, gently	gold exploration
Nagambie Resources	NAG		stronger	gold, antimony
Neometals	NMT		rising	lithium
Northern Star Res.	NST		strong rise	gold
Nova Minerals	NVA		rising towards secondary resistance	gold exploration
Orecorp	ORR		at lows	gold development
Oz Minerals	OZL		off its highs	copper
Pacific Gold	PGO		new low	gold exploration
Pantoro	PNR		new low	gold
Panoramic Res	PAN		down	nickel
Peak Resources	PEK		rising	rare earths
Peel Mining	PEX		still down	copper
Peninsula Energy	PEN		sideways	uranium
Poseidon Nickel	POS		still down	nickel
Perseus Mining	PRU		rising	gold
Provaris Energy	PV1		just holding uptrend	hydrogen
PVW Resources	PVW		down	rare earths
QMines	QML		new low	copper
Queensland Pacific Metals	QPM		sideways	nickel/cobalt/HPA
Red River Resources	RVR		suspended	zinc
Regis Resources	RRL		sideways at lows	gold
Renergen	RLT		down	gas, helium
Resource Mining Corp.	RMI		sideways	nickel exploration
RIO	RIO		sideways at lows	diversified, iron ore
Rumble Resources	RTR		secondary downtrend	gold exploration
S2 Resources	S2R		sideways	gold exploration
St Barbara	SBM		collapse to new low	gold
Sandfire Resources	SFR		new low	copper
Santos	STO		breached trend line support	oil/gas

Sarama Resources	SRR		down	gold exploration
Silex Systems	SLX		testing downtrend	uranium enrichment technology
Silver Mines	SVL		breached steepest downtrend	silver
South Harz Potash	SHP		still in downtrend	potash
Southern Cross Gold	SXG		testing secondary downtrend	gold exploration
Stanmore Coal	SMR		surge higher	coal
Strandline Resources	STA		breaching uptrend	mineral sands
Sunstone Metals	STM		downtrend	exploration
Suvo Strategic Minerals	SUV		sideways	kaolin
Talga Resources	TLG		testing steepest downtrend	graphite
Tamboran Resources	TBN		breached downtrend	gas
Technology Metals	TMT		down	vanadium
Tesoro Resources	TSO		new low	gold exploration
Theta Gold Mines	TGM		strong rise from lows - at resistance	gold
Thor Mining	THR		sideways through downtrend	gold exploration
Tietto Minerals	TIE		rising	gold
Turaco Gold	TCG		new low	gold exploration
Vanadium Resources	VR8		testing downtrend	vanadium
Venture Minerals	VMS		down	tin, tungsten
West African Resources	WAF		down	gold
Westgold Resources	WGX		down	gold
West Wits Mining	WWI		new low	gold
Whitehaven Coal	WHC		new high	coal
Zenith Minerals	ZNC		breached steepest downtrend	gold exploration
Totals	16%	24	Uptrend	
	53%	78	Downtrend	
		146	Total	

Guides to Chart Interpretations

- Charts usually go pass from one trend (up or down) into the other via a period of indecision and uncertainty during which the trend can either recover or change. This period is signified by the orange colour. The orange represent both the greatest risk and greatest reward possibilities.
- Once a chart is in confirmed up or downtrends it is not uncommon for 10-20% of that trend to have already transpired.
- There are trends within trends. The focus of this chart review is the immediate trend that affects the sentiment i.e. it can be a downtrend within a long-term uptrend.
- Not every chart warrants a new comment every week. The new comments are in bold type. Grey type comments may be dated.
- Individual charts provide a single view. It is valuable to look at charts of other companies in similar commodities, and the overall sentiment is also very valuable. Not many stocks can swim against the tide.
- We periodically add or delete charts, some times for obscure reasons. If a chart consistent gives poor signals or is very erratic, we may delete it. Sometimes we add a chart because we want to see what all the fuss is about. We do have a preference for charting stocks that we cover in our research as well.
- Errors and omissions may occur from time to time, especially in fast moving markets.

Amber Lights in Tables: Just a reminder if when the amber light is used in the table – it is when the charts are ambiguous or when there is a change of trend taking place. If a chart is breaching a downtrend it can either be a positive sign or a trap. Only once it has done more work can it be confirmed as a new uptrend. Maybe it is a new uptrend (or conversely a new downtrend); the risk takers can decide to jump on board early (or sell). They will maximise their profits (or minimise their losses if indeed it is the start of the new uptrend (downtrend). More risk-averse investors should wait a little longer, being prepared to give up some of the gains in return for greater certainty.

Weightings of Sectors Represented in the Company Charts			
Sector	**No. of Companies**	**Weighting**	
Gold	**32**	**21.9%**	
Gold Exploration	**21**	**14.4%**	
Rare Earths	**12**	**8.2%**	
Nickel	**11**	**7.5%**	
Copper	**9**	**6.2%**	
Oil/Gas	**10**	**6.8%**	
Iron Ore/Manganese	**6**	**4.1%**	
Zinc/Lead	**4**	**2.7%**	
Lithium	**4**	**2.7%**	
Uranium	**4**	**2.7%**	
Graphite/graphene	**3**	**2.1%**	
Potash/Phosphate	**3**	**2.1%**	
Coal	**3**	**2.1%**	
Mineral Sands	**3**	**2.1%**	
Silver	**2**	**1.4%**	
Bauxite	**2**	**1.4%**	
Vanadium	**2**	**1.4%**	
Cobalt	**1**	**0.7%**	
Tin	**2**	**1.4%**	
Diamonds	**1**	**0.7%**	
Other	**11**		
Total	**146**		

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