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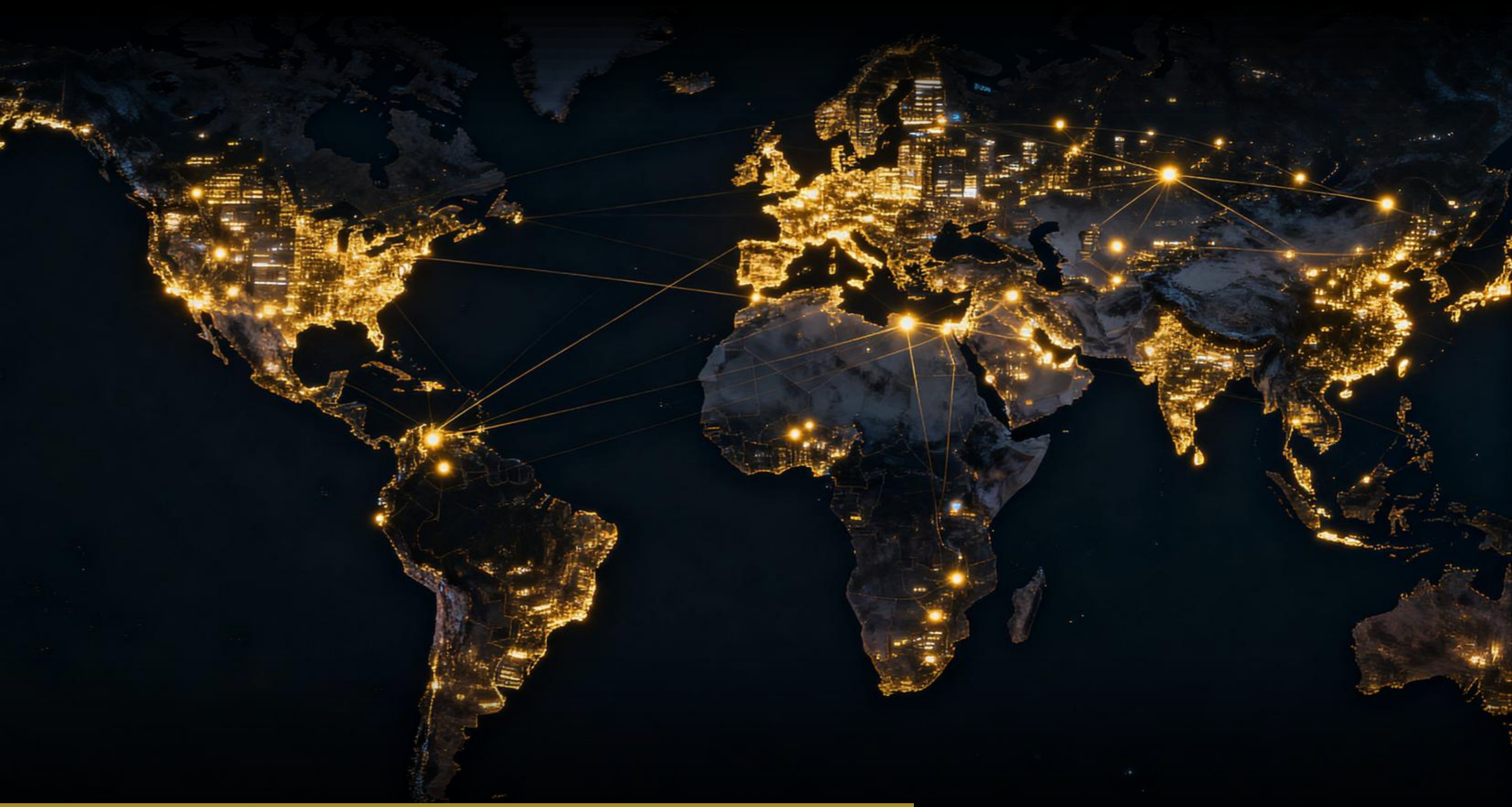
Where global mining capital meets opportunity

14 & 15 July 2026



CONFERENCE PROGRAMME

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Participating companies

- ABx Group
- Asian Battery Metals
- Barkly Rare Earths
- Blackstone Minerals
- Cabral Gold
- Galan Lithium Limited
- Hawk Resources
- Oroco
- PMET Resources
- Renforth Resources Inc.
- Silver Acadia
- Stakeholder Gold
- Sector Investment Managers – Investing in the Resources Giants of Tomorrow
- Verdigris Strategic
- Global Mining Capital 环球矿业资本有限公司
- Eco Future Metals
- Premier Miton – Original Thinking
- Peel Hunt
- Resource Capital Funds
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- AAM – Asymmetric Asset Management
- American Rare Earths
- Orion Industrial Ventures
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- Wheaton Precious Metals
- TechMet
- Southern Palladium

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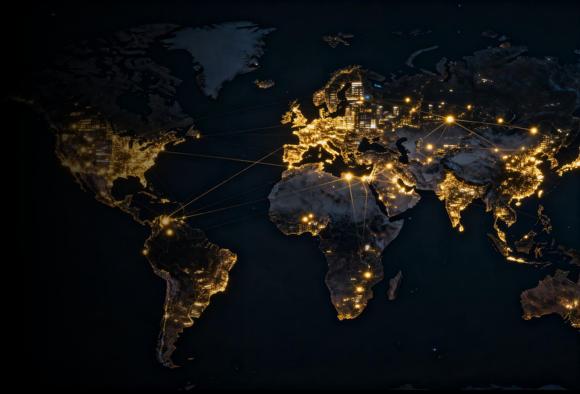

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Speakers include

Randy Smallwood
Chair of the Board & Director
Wheaton Precious Metals

Helaina Matza
Chief Strategic Development Officer
TechMet

Roger Baxter
Executive Chairman
Southern Palladium

Melissa Sanderson
Board Member, Former CEO
American Rare Earths

Mark Frayman
Managing Partner
Orion Industrial Ventures

Cailey Barker
Managing Director
Xcelsior Capital

Martin Valdes
Partner, Managing Director, Latin America
Resource Capital Funds

Ludivine Wouters
Managing Partner
Latitude Five

Gunnar Pedersen
Chief Executive Officer
Asymmetric Asset Management

Ian Timis
Managing Director, Strategic Investments
Eco Future Metals Capital Partners LLP

Gervais Williams
Head of Equities
Premier Miton Group

Ross Allister
Managing Director, Mining
Peel Hunt

Angelos Damaskos
Chief Executive Officer
Sector Investment Managers

Jay Hambro
Chief Executive Officer
Verdigris Strategic

Keith Spence
Chief Executive Officer & Partner
Global Mining Capital

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Tuesday, 14 July

Programme built around curated 1:1 meetings

Content is designed to frame the investment themes, but the core value of Mines & Money Online Connect is direct, pre-scheduled meetings between mining companies, investors and strategic partners.

09:00 – 10:00 GMT

Mining Investment Thematics (Pre-recorded)

09:00 **Opening Keynote: Funding Beyond Mining – Capital Deployment to the Mineral Value Chain**

As the global race to secure critical minerals intensifies, investment strategies must evolve well beyond the mine gate. The exponential demand growth driven by the energy transition, AI, and robotics has made it essential to build resilient supply chains that can serve global critical mineral markets. This session explores how capital deployed strategically across the full mineral value chain from processing and refining to recycling and trading can unlock the next generation of critical mineral supply.

- ✓ The most significant investment opportunities lie not in mining itself, but downstream in processing, refining, and recycling, where capital can generate both strategic leverage and differentiated returns.
- ✓ Geopolitics and investment are increasingly inseparable, with Western government alignment, development finance partnerships, and proximity to policymakers becoming critical differentiators for capital deployment in this sector.
- ✓ Blended finance models that combine private capital with development finance institutions and commodity trading partners are proving essential to achieving the scale needed to build credible alternatives to incumbent supply chains.

Helaina Matza, Chief Strategic Development Officer, **Techmet**

Interviewed by: TBD

09:20 **Panel Discussion: Why 2026 is the Year to Invest in the Mining Industry**

As precious metals prices continue to exceed expectations & profits for producers outperforming almost all forecasts, as well as the Simandou Iron Ore project coming online as a deflationary force in that market; investors are well placed to take advantage of cost-cutting and streamlining initiatives taken by operators across the board. This session will offer pathways for investors to:

- ✓ Position ahead of tightening supply – Invest in mining companies developing or controlling assets in commodities facing structural shortages, particularly where years of underinvestment are now colliding with rising demand.
- ✓ Capture growth from global electrification and energy security – Allocate capital to producers and projects supplying the metals required for renewable energy, electrified transport, and resilient critical mineral supply chains.
- ✓ Identify valuation gaps in mining equities – Take advantage of companies with improving balance sheets, stronger capital discipline, and quality assets that are still trading below long-term valuation norms.

Whitney Kofford, Managing Director, **Sorbie Bornholm**

Jay Roberge, Managing Director, **Tehama Capital**

Andy Forster, Senior Investment Officer, **Argo Investments**

Mark Gibson, Head of Mining, **Chrystal Capital Partners LLP**

09:50 **Winners & Losers in 2026 – How Deglobalisation is Redirecting Capital Flows into Mining**

As geopolitical tensions and supply chain fragmentation reshape global trade, capital is increasingly flowing toward mining jurisdictions and projects that can offer security of supply. Governments and investors alike are prioritising domestic production and politically stable partners for critical minerals. This shift is creating clear winners and losers across the mining landscape. The session will explore how deglobalisation is influencing investment decisions, project financing, and the strategic importance of certain commodities and regions.

- ✓ Identify the jurisdictions attracting capital – Understand how geopolitical alignment, regulatory stability, and resource security are driving investment into select mining regions.
- ✓ Assess which commodities are gaining strategic priority – Examine how critical minerals, energy metals, and precious metals are benefiting from new industrial policies and supply chain realignment.
- ✓ Recognise where capital is retreating – Explore how political risk, trade fragmentation, and shifting alliances are reducing investment appetite in certain markets and projects.

Martin Valdes, Partner, Head of Private Equity, **Resource Capital Funds**

Paolo Catellan, Vice President, **WCPD Group**

Erez Ichilov, Director, **Evolution Global Acquisition Corp**

Angelos Damaskos, Chief Executive Officer, **Sector Investment Managers**

Moderator: TBD

13:00 – 14:00 GMT

Country Showcases

13:00 **Australia as a Global Leader in Responsible Mining**

Australia is recognised globally for delivering mining projects that are safe, technically robust, and responsibly managed. Increasingly, this leadership extends to enabling clean energy supply chains and decarbonised mining operations. This panel brings together leading Australian companies across drilling, engineering, and mining to showcase best practice across the project lifecycle—demonstrating how Australian expertise supports both operational excellence and the global energy transition.

Drawing on international experience, panellists will examine how Australian standards and innovation reduce risk, improve performance, and embed decarbonisation—from early exploration decisions through to low-emissions operations—supporting sustainable development of the critical minerals essential for clean energy technologies.

- ✓ How Australian mining best practice enables lower-carbon project delivery from exploration through to operations, including energy efficiency, electrification, and emissions reduction.
- ✓ The role of collaboration between specialised Australian mining and engineering service providers in integrating clean energy solutions and decarbonisation pathways
- ✓ Why Australian expertise is trusted globally to deliver safe, efficient, and sustainable outcomes that underpin clean energy and critical-minerals supply chains.

13:20 **Mendoza as a Strategic Hub for Mining in Argentina**

Mendoza is increasingly recognised for its potential to support modern, responsible mining development within Argentina. With strong natural resource potential, proximity to the

Andes mineral belt, and growing interest in critical minerals essential for the energy transition, Mendoza is positioning itself as a key jurisdiction for technically robust and environmentally responsible projects. This panel brings together leading companies across exploration, engineering, and mining to showcase best practice across the project lifecycle—demonstrating how expertise and investment can unlock Mendoza's mineral potential while supporting sustainable regional development.

Drawing on experience from projects across Argentina and the wider Andean region, panellists will examine how modern mining standards, technology, and collaboration can reduce risk, improve operational performance, and integrate environmental stewardship—from early exploration decisions through to efficient, low-impact operations—supporting the responsible development of the critical minerals required for global clean energy technologies.

- ✓ How modern mining best practice can enable responsible project delivery in Mendoza from exploration through to operations, including efficient water management, environmental protection, and sustainable resource use
- ✓ The role of collaboration between exploration companies, engineering providers, and local stakeholders in developing mining projects that align with Mendoza's environmental expectations and long-term economic development goals.
- ✓ Why Mendoza has the potential to become a trusted location for responsible mining investment, supporting Argentina's role in global critical-minerals and clean-energy supply chains.

13:40 **Saudi Arabia – Developing a Midstream Hub for Critical Minerals Processing**

Saudi Arabia has identified the development of midstream processing & metallurgy capacity for critical minerals as a key strategic priority inline with Vision 2030. Leveraging its geographic location, existing energy infrastructure, and industrial base to capture more value within global supply chains. As demand for minerals essential to clean energy technologies—such as lithium, cobalt, and rare earth elements—continues to rise, the Kingdom aims to move beyond raw material extraction and into refining and processing. This shift not only diversifies the economy under Vision 2030 but also strengthens supply chain resilience for key trading partners across Europe, Asia, and Africa.

- ✓ Saudi Arabia is targeting the midstream segment to bridge the gap between upstream mining and downstream manufacturing, capturing higher economic value and reducing reliance on imports of processed materials.
- ✓ The country's competitive advantages include low-cost energy, established petrochemical expertise, and strategic logistics connectivity across three continents.
- ✓ Partnerships with international mining firms and technology providers will be critical to accelerate capability-building and ensure alignment with evolving global standards for sustainability and traceability.

17:00 – 17:45 GMT

Mining Pitch Battles (Live Broadcast)

09:00 **Critical Minerals & Battery Metals**

Three mining companies. Five natural resource investors. One winner.

Each company delivers a three-minute pitch, followed by a seven-minute investor Q&A as the panel puts the projects under the spotlight.

Ken Brisden, President & Director, **PMET Resources**

Judges: Gervais Williams, Head of Equities, **Premier Milton Group**

21:00 – 22:00 GMT

Commodity Insights: Copper, Rare Earths & Lithium (Pre-recorded)

21:00 **Opening Panel: Critical Minerals, Critical Markets: Pricing Trends and Equity Performance in a Resource-Driven World**

As the need to develop technology & National Defense infrastructure continue to dominate national agendas, combined with a growing sense of resource nationalism across key mining jurisdictions; a new environment has emerged for mining investors. Whether it by copper, rare earth elements, nickel, graphite or lithium, access to critical minerals has become a key strategic priority; but how is this impacting equity & pricing performance in their related markets? This session will delve into:

- ✓ How companies across the value chain, from exploration, through to production and processing of these key metals are able to effectively raise capital
- ✓ The relationship between commodity & share prices and how investors can develop strategies that offer exposure to both
- ✓ Which of these metals are set to offer the most promising value proposition dependent on risk appetite

Cailey Barker, Managing Director, **Xcelsior Capital**

Greg Kofford, Chief Executive Officer & Founder, **Sorbie Bornholm**

Jay Hambro, Chief Executive Officer, **Verdigris Strategic**

Ludivine Walters, Managing Partner, **Latitude Five**

21:20 **Fireside Chat: How the AI Race is Creating Opportunity for Copper Investors & Miners in 2026**

As the global race to build AI infrastructure accelerates, demand for power generation, data centres and electrified networks is rising sharply—placing copper at the centre of the next phase of industrial growth. From hyperscale computing facilities to grid expansion, the metal's role in enabling high-performance digital infrastructure is becoming increasingly clear.

This conversation will explore how the rapid expansion of AI is reshaping copper demand expectations and what it means for miners, developers and investors navigating the market in 2026.

- ✓ How AI data centres, power infrastructure and grid upgrades are influencing the medium-term outlook for copper demand
- ✓ Where investment opportunities are emerging across producers, developers and exploration-stage companies
- ✓ What supply constraints, project timelines and capital discipline mean for copper pricing and equity performance in the coming years

Ian Timis, Managing Director, Strategic Investments, **Eco Future Metals Capital Partners**

Interviewed by: TBD

21:40 **Presenting the Investment case for Rare Earths**

Melissa Sanderson, Board Member, **American Rare Earths**

21:50 **Presenting the Investment Case for Lithium**

Wednesday, 15 July

09:00 – 10:00 GMT

Bear vs Bull Debates (Pre-recorded)

Bear vs Bull Debates tackle the biggest disagreements in mining investment today. Leading investors present opposing theses and challenge each other on where capital should and should not be going.

09:00 **Debate 1: Is it Too Late to Strike Gold in 2026?**

The immense performance of gold pricing has been one of the hottest topics of conversation in the mining world in the last year at least, however is it now simply too late for investors looking for exposure to gold as a store of value as currency debases? Hear a host of gold analysts offer both perspectives and more

Simon Popple, Director, **Brookville Capital**

Ben Jones, Founder & Chief Executive Officer, **Ben Jones Investments**

Keith Spence, Chief Executive Officer & Founder, **Global Mining Capital**

09:20 **Debate 2: Junior Mining: Deep Value or Structural Decline?**

Junior mining companies remain the engine of discovery across the sector, responsible for the majority of new mineral finds and early-stage project development. With renewed investor interest in resource security and critical mineral supply, many juniors are once again accessing capital markets and attracting strategic investment.

This debate will explore whether the current environment represents a compelling deep-value opportunity for investors, or whether structural challenges in exploration, development timelines and market expectations continue to shape the long-term outlook for the junior mining model.

Kai Hoffman, Co-Founder & Partner, **Kama Invest Asset Management**

Antony Rowe, Managing Director, **Arrowpoint Mining Capital**

Gervais Williams, Head of Equities, **Premier Milton Group**

09:40 **Debate 3: Will AI Transform the Mining Industry?**

The metals and mining industries have no shortage of AI evangelists; however this technology is not without it's sceptics. The question is less about the technology itself, but rather our capacity to identify the use-cases with maximum potential ROI; properly manage the change that could come with it and execute at industry scale.

This debate will hear experts from both sides of the AI debate go head to head in what could be one of the defining questions for the next decade of mining.

Mark Frayman, Managing Partner, **Orion Industrial Ventures**

Farzi Yusufali, Co-Founder, **StratumAI**

Mark O'Brien, General Manager, Digital Transformation & Innovation (CIO), **CITIC Pacific Mining**

Moderator: Kal Ruberg, Chief Executive Officer and Executive Technology Advisor, **Karu Advisory**

13:00 – 14:00 GMT

Decarbonisation, Sustainability & Social License to Operate (Pre-recorded)

13:00 **Fireside Chat: Room for Improvement: Where the Mining & Minerals Industries can make the biggest sustainability gains quickly**

Sustainable mining is good for our whole ecosystem, whether it be enabling livable environmental conditions for local communities, driving cost efficiency for operators &

making projects more investable and financeable for capital providers. However identifying the specific areas mining, metallurgy & logistics companies should invest in is a more challenging task, this session will debate and explore the various options including:

- Reducing waste through superior asset management and expanding the lifespan of equipment
- Optimising water management systems including advanced monitoring technology
- Utilising renewable energy sources to power mining operations

Rachel Johnston, Head of Sustainability, **Benwerrin**

13:20 **Panel Discussion: Transforming Reputational Risk into a Reputational Asset**

The mining sector sits at a reputational inflection point: demand for minerals tied to the energy transition and digital economy is accelerating, yet public trust is fragile. Restoring credibility requires three simultaneous shifts, radical transparency, tangible local benefit, and accountable performance. all of which will enable industry stakeholders to reframe the narrative surrounding our industry. This panel will focus on:

- How companies, financiers, governments and civil society can transform perceptions and engage marginalised voices.
- Skilfully constructing narratives that cut through the noise while maintaining authenticity
- Improving transparency in order that performance backs up storytelling

Bill Cobb, Vice President, Chief Operating Officer, **Freeport McMoRan**

Carol Plummer, Executive Vice President, Sustainability, People & Culture, **Agnico Eagle**

Ed Johnson, Corporate Responsibility Director, **Gemfields Group**

Paul Ferneyhough, Executive Vice President, Chief Financial Officer, **El Dorado Gold**

13:50 **Masterclass: Translating Your Sustainability Strategy for Investors**

Mining companies are investing heavily in sustainability initiatives, yet many struggle to communicate these efforts in ways that resonate with capital markets. This masterclass will explore how companies can present sustainability strategies not just as compliance or reputation management, but as drivers of project resilience, lower risk and stronger investment cases.

The session will outline how to translate sustainability initiatives into a narrative that investors and financiers understand when assessing projects and allocating capital.

- Communicating how sustainability initiatives actively derisk projects for financiers and long-term investors
- Framing sustainability metrics in financial terms so investors can see the connection between ESG performance, project economics and valuation
- Aligning sustainability disclosures with investor expectations and reporting frameworks to strengthen credibility during capital raises

Pavel Laberko, Director, **Emerging Markets Investors Alliance**

17:00 – 17:45 GMT
Mining Pitch Battles (Live Broadcast)

09:00 **Gold & Precious Metals**

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Michael Michaud, President & Chief Executive Officer, **RPX Gold**

Mike McAllister, Vice President, Investor Relations, **Cerrado Gold**

Judges: Gervais Williams, Head of Equities, **Premier Milton Group**

21:00 – 22:40 GMT

Commodity Highlights: Gold & Precious Metals (Pre-recorded)

21:00 **Fireside Chat: Why the Royalty & Streaming Model Is a Powerful Way to Access Gold in 2026**

In a 2026 environment defined by overperforming gold prices, driven by geopolitical uncertainty, constrained mine supply, and sustained investor demand for gold, the royalty & streaming structure offers a cleaner, more resilient path to gold exposure than direct exposure to the metal. Streaming & royalty companies are uniquely positioned to capitalised on a highly profitable environment for producers – this session will explain why:

- High-margin, low-risk exposure: Royalty and streaming companies benefit from rising gold prices while avoiding operational risks like cost overruns, labor issues, and permitting delays.
- Built-in diversification: Portfolios typically span dozens of assets and jurisdictions, reducing single-mine or geopolitical concentration risk.
- Scalable upside with limited downside: Fixed purchase prices or royalty rates create strong leverage to gold price increases, while downside is cushioned by minimal ongoing capital requirements.

Randy Smallwood, Chair of the Board & Director, **Wheaton Precious Metals**

Interviewed by: TBD

21:20 **Presenting the Investment Case for PGMs**

Roger Baxter, Executive Chairman, **Southern Palladium**

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The Mines & Money Playbook

Torsten Dennin
Chief Investment Officer
Asset Management Switzerland

The Lassonde Curve and how it shapes investment theses?

Whitney Kofford
Chief Executive Officer
Sorbie Bornholm

The Lassonde Curve and how it shapes investment theses

Scott North
Co-Founder
Kamoa Capital

Top 5 mistakes investors make in mining, and how to avoid them

Melissa Sanderson
Board Member, Former CEO
American Rare Earths

Why are critical minerals critical?

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