### NEW EXTRA SPRING EDITION - DUE TO POPULAR DEMAND

# VVESTMENIT



We were extremely impressed with the turnout and quality of meetings at the 2016 Hong Kong conference. We've been marketing in Asia for the past 8 years and this conference is a MUST! We will definitely be returning.

Todd Anthony, VP Investor Relations, First Maiestic



Presenting companies include:



















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If you are interested in sponsoring or becoming a mining corporate presenter at any of the 121 MINING INVESTMENT events please contact: pablo.martin@weare121.com or toby.duckworth@weare121.com



### **CONFERENCE OUTLINE**



#### Wednesday 29 March 2017

08:00 Registration and morning coffee

09:00 Conference opening

#### 09:10 Mining company CEO briefings

09:10 Keith Neumeyer, President & CEO, First Majestic Silver

09:20 Michael Carvill, Managing Director, Kenmare Resources

09:30 Bryan Dixon, Managing Director, Blackham Resources

09:40 Dev Randhawa, Chairman & CEO, Fission Uranium

### 09:50 State of the industry panel: Mining investment outlook 2017

- Post-Trump and Brexit state of the global economy and outlook for metals and mining equities
- Availability of funding sources across the development cycle
- Cost management as the market improves Will miners avoid the mistakes of the last bull market?
- What our panellists like the look of in 2017
  Panellists include:

Andrew Ballingal, CIO & Portfolio Manager, BIA Pacific Fund Dev Randhawa, Chairman & CEO, Fission Uranium Stefan White, Portfolio Manager, LIM Advisors Xi Xi, Director, Sailing Capital

#### 10:30 Mining company CEO briefings

10:30 Bradley Langille, President & CEO, Gogold Resources

10:40 Paul Burton, Managing Director, TNG

10:50 Chris Reed, Managing Director, Neometals

11:00 George Paspalas, President & CEO, MAG Silver

11:10 Morning refreshments and networking

### 11:30 Hong Kong Panel: Role of Hong Kong as a mine finance destination

- How are mining stocks performing on the HKEx?
- How attractive is mining for Hong Kong's investment funds compared with other sectors?
- Which types of project are attracting Hong Kong investors?
- Advice for mining companies on sourcing investment in Hong Kong and the Greater China region
   Panelists include:

Rani Jarkas, Chairman, Cedrus Group Timothy Shen, Chairman, Looks Asset Management Robert Wrixon, Managing Director, Starboard Global

#### 12:00 Mining company CEO briefings - Precious metals

12:00 Neil Herrick, CEO, Taung Gold

12:10 Jan Louw, Managing Director, Frontier Diamonds

12:20 Todd Hibberd, Managing Director, White Cliff Minerals

12:30 Robert Mosig, CEO & Managing Director, Platina Resources

12:40 Walter Coles, CEO, Skeena Resources

12:50 John McConnell, President, Director & CEO, Victoria Gold

13:00 Lunch and networking

## 14:00 Commodity outlook panel: Gold and precious - Outlook for price and equities in 2017

- Where next for the USD?
- Precious metals buying trends in China and India
- Supply-side: Costs, production levels, resource replacement
- Trends in industrial demand for silver and PGMs
  Panellists include:

Keith Neumeyer, President & CEO, First Majestic Silver Samson Li, Senior Precious Metals Analyst, Thomson Reuters GFMS

#### 14:40 Mining company CEO briefings - Precious metals

14:40 Dr. Michael Jones, Managing Director, Impact Minerals

14:50 Paul Cmrlec, Managing Director, Pantoro

15:00 Rob Thompson, Managing Director, Stonewall Resources

### 15:10 Metals usage in a world of new energy, disruptive technologies and new ways of working and living

- Outlook for renewable energy: Metals usage for power infrastructure and energy storage
- Update on emerging battery technologies Where will new demand for metals and minerals be created?
- Emerging models of vehicle usage and the rise of autonomous and e-vehicles
- From coal to cobalt: Metals and minerals winners and losers in the future energy landscape
   Jon Hykawy, President and Director, Stormcrow Capital

#### 15:40 Mining company CEO briefings - Battery materials

15:40 Adrian Griffin, Managing Director, Lithium Australia

15:50 Cherie Leeden, Managing Director, Battery Minerals

16:00 Trevor Benson, Chairman, Walkabout Resources

16:20 Dennis O'Neil, Managing Director, Sayona Mining

#### 16:20 Mining company CEO briefings - Uranium

16:20 Peter Reeve, Executive Chairman, Aura Energy

16:30 Blake Steele, President & CFO, Azarga Uranium

16:45 Q&A

17:00 121 Mining Investment Drinks Reception at the Grand Hyatt Pool House



#### 1-2-1 private meetings

Visit the front desk at any time throughout the conference to set up a 1-2-1 meeting with the mining company management team of your choice



### **CONFERENCE OUTLINE**



#### Thursday 30 March 2017

08:00 Registration and morning coffee

08:50 Conference opening

09:00 Macro keynote: **Risks and opportunities in global markets? Louis-Vincent Gave, CEO, GaveKal** 

#### 09:30 Guest interview: Playing the mining cycle - Coal

- Background to the acquisition of Peabody's Olive Downs assets
- Views on the mining cycle and outlook for coking coal
- Plans for the development of Olive Downs
- Approaches to buying assets at the bottom of the cycle Barry Tudor, Chairman & CEO, Pembroke Resources

#### 10:00 Mining company CEO briefings - Copper-Gold

10:00 John Heugh, CEO, Gryphon Melanesia

10:10 Sam Spring, Managing Director, Kincora Copper

10:20 Dusty Nicol, President and CEO, Azarga Metals

### 10:30 China outbound investment panel: Securing resources for growth

- Appetite for outbound investment from China in 2017
- Who are the key players and how to find them
- From coal to gold Assessing China's demand for metals and mined commodities
- The "Belt and Road" initiative what it means for metals usage and outbound investment
- Understand our panellists criteria for investing in an overseas mining project

#### Panellists include:

Jianzhou Xu, Director, Can-China Global Resource Fund Pan Guochen, CEO, China Hanking Holdings Keith Spence, President & Partner, Global Mining Capital Corp Cathy Han, Executive Vice President, Shougang Fushan Resources

11:00 Morning refreshments and networking

# 11:30 PE panel: Going private: Making it work for investor and investee

- Pros and cons of listing vs taking a company private
- Best approaches for taking a company private
- Hands on vs hands off: Which approach should a PE investor take?
- How best can PE firms add value to a mining project development team?

#### Panellists include:

Susie Corlett, Investment Director, Pacific Road Capital Barry Tudor, Chairman & CEO, Pembroke Resources Eric Zurrin, Principal, Sandown Bay Resource Capital

#### 12:10 Mining company CEO briefings - Fertilizer minerals

- 12:10 Matt Shackleton, Executive Chairman, Australian Potash
- 12:20 Chris Tziolis, Managing Director, Verdant Minerals

#### 12:30 Mining company CEO briefings - Discovery and development

12:30 Tony Lofthouse, CEO, Thundelarra

- 12:40 Andrew Buxton, Managing Director, Alice Queen
- 12:50 Bruce Richardson, Managing Director, Global Geoscience
- 13:00 Lunch and networking

#### 14:00 Mining company CEO briefings - Tech metals

- 14:00 Iggy Tan, Managing Director, Altech Chemicals
- 14:10 Charles Lew, Executive Chairman, Hastings Technology Metals
- 14:20 Bruce Richardson, Managing Director, Anson Resources
- 14:30 Steven Promnitz, Managing Director, Lake Resources

#### 14:40 Mining company CEO presentations - Base metals

- 14:40 Dan Madden, Managing Drector, Talisman Mining
- 14:50 Brandon MacDonald, CEO, Fireweed Zinc
- 15:00 Rhod Grivas, Executive Director, Metsol

# 15:10 Commodities outlook: From copper and base metals to coal and bulks

- Why copper prices have risen in 2017 Short term spike or long term trend?
- Supply and demand fundamentals for base metals in 2017
- After surprise recovery in 2016 where next for coal and iron ore prices in 2017?
- From Philippines to Chile Labour and political risks to the base and bulks supply chains and impact on prices
- To what extent are coal and iron ore prices controlled by political rather than economic factors, and how should an investor play this?

#### Panellists include:

John Ellis, Investment Manager, APAC Resources Warren Gilman, Chairman and CEO, CEF Holdings Gunnar Mansfeld, President & CEO, Primest Capital

15:50 Conference wrap-up

16:00 121 Mining Investment Hong Kong Spring Farewell drinks See you in London and New York!

#### 1-2-1 private meetings

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