



GENESIS
MINERALS LIMITED

Heart of gold

Introducing Ulysses, Admiral and GMS

ASX GOLD

4th April 2023



Important information



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All dollar values are in Australian dollars (**A\$ or AUD**) unless otherwise stated. Amounts, totals and change percentages are calculated on whole numbers and not the rounded amounts presented.

Genesis Group

As at the date of this presentation, Genesis owns approximately 80% of the shares in Dacian Gold Limited (Dacian) and accordingly controls Dacian. Unless otherwise indicated, all financial information and information relating to production targets, Mineral Resources and Ore Reserves of the group comprising Genesis and Dacian (and their respective controlled entities), in this presentation is presented on a 100% consolidated basis without adjustment for any minority interests in Dacian.

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Past performance metrics and figures (including past share price performance of Genesis included in this Presentation) are given for illustrative purposes only and should not be relied upon as (and is not) an indication of Genesis', or any other party's, views on future financial performance or prospects). Investors should note that past performance of Genesis, including in relation to historical trading price of Genesis shares, production, mineral resources and ore reserves, costs and other historical financial information cannot be relied upon as an indicator of (and provides no guidance, assurance or guarantee as to) future Genesis performance, including the future trading price of Genesis shares. The historical information included in this Presentation is, or is based on, information that has previously been released to the market.

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JORC Code

It is a requirement of the ASX Listing Rules that the reporting of (amongst other things) exploration results and mineral resources in Australia comply with the 2012 edition of the Joint Ore Reserves Committee's Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves (**JORC Code**). Investors outside Australia should note that while mineral resource estimates of Genesis in this Presentation comply with the JORC Code (such JORC Code mineral resources being "**Mineral Resources**"), they may not comply with the relevant guidelines in other countries, and in particular, do not comply with (i) National Instrument 43-101 (Standards of Disclosure for Mineral Projects) of the Canadian Securities Administrators (the "**Canadian NI 43-101 Standards**"); or (ii) Item 1300 of Regulation SK, which governs disclosures of mineral reserves in registration statements filed with the US Securities Exchange Commission (the "**SEC**"). Information contained in this Presentation describing mineral deposits may not be comparable to similar information made public by companies subject to the reporting and disclosure requirements of Canadian or US securities laws. You should not assume that quantities reported as "resources" will be converted to reserves under the JORC Code or any other reporting regime or that Genesis will be able to legally and economically extract them.

JORC compliance statement

The information in this Presentation that relates to Exploration Results referable to Genesis is extracted from investor presentation titled "Creating a leading Australian gold house" released to the ASX on 12 December 2022 and for which the consents of the Competent Persons, Mr Haydn Hadlow and Mr Michael Fowler, were obtained. Genesis confirms that it is not aware of any new information or data that materially affects the information included in the market announcement. Genesis confirms that the form and context in which the Competent Persons' findings are presented have not been materially modified.

The information in this Presentation that relates to Mineral Resources referable to Genesis is extracted from Genesis' ASX announcement dated 29 March 2022 and entitled "Leonora Resource increases by 400,000oz to 2Moz" and for which the consent of the Competent Person, Mr Paul Payne, was obtained. Genesis confirms that it is not aware of any new information or data that materially affects the information included in the market announcement and Genesis confirms that all material assumptions and technical parameters underpinning the mineral resource estimates in the market announcement continue to apply and have not materially changed. Genesis confirms that the form and context in which the Competent Person's findings are presented have not been materially modified.

The information in this Presentation that relates to Mineral Resources referable to Dacian is extracted from Dacian's ASX announcement dated 30 March 2023 and entitled "Updated Jupiter Mineral Resource Estimate" and for which the consent of the Competent Person, Mr Alex Wishaw, was obtained. Genesis confirms that it is not aware of any new information or data that materially affects the information included in the market announcement and Genesis confirms that all material assumptions and technical parameters underpinning the mineral resource and ore reserve estimates in the market announcement continue to apply and have not materially changed. Genesis confirms that the form and context in which the Competent Person's findings are presented have not been materially modified.

The information in this Presentation that relates to Ore Reserves referable to Dacian is extracted from Genesis' ASX announcement dated 12 December 2022 and entitled "Reporting on Dacian Projects" and for which the consent of the Competent Person, Mr Atish Kumar, was obtained. Genesis confirms that it is not aware of any new information or data that materially affects the information included in the market announcement and Genesis confirms that all material assumptions and technical parameters underpinning the mineral resource and ore reserve estimates in the market announcement continue to apply and have not materially changed. Genesis confirms that the form and context in which the Competent Person's findings are presented have not been materially modified.

St Barbara Information

The information in this Presentation that relates to the Mineral Resources and Ore Reserves referable to St Barbara is extracted from the report titled "31 Dec 2022 Ore Reserves and Mineral Resources Statements" released to ASX on 22 February 2023 and available to view at stbarbara.com.

The information in this Presentation that relates to Exploration Results referable to St Barbara is extracted from investor presentation titled "Creating a leading Australian gold house" released to the ASX on 12 December 2022.

Production targets

The material assumptions underpinning the production target are contained in Appendix G of the investor presentation titled "Creating a leading Australian gold house" released to the ASX on 12 December 2022. Genesis confirms that all material assumptions underpinning the production target in that investor presentation continue to apply and have not materially changed. There is a low level of geological confidence associated with inferred mineral resources and there is no certainty that further exploration work will result in the determination of indicated mineral resources or that the production target itself will be realised.



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The information contained in this Presentation relating to Genesis and its projects, being the Leonora Gold Project (consisting of Ulysses, Admiral, Orient Well and Puzzle deposits), including where that information has been included in aggregated information relating to the merged St Barbara and entity Genesis, has been prepared by Genesis.

The information contained in this Presentation relating to Dacian and its projects, being the Mt Morgans, Redcliffe and Jupiter projects, have been extracted from Genesis' ASX announcement dated 12 December 2022 entitled "Reporting on Dacian Projects" and Dacian's ASX announcement dated 27 July 2022 entitled "2022 Mineral Resources and Ore Reserves Update".

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Key metrics (ASX: GMD) - At 4th April unless otherwise stated

Shares on issue ¹	415m
Share price	A\$1.11
Market cap	A\$461m
Cash	A\$75m (31 March 2023 - Unaudited, excluding Dacian)
Debt	Nil
EV	A\$386m
Liquidity	30-day ADV 1.0m shares
Mineral Resources ²	2.0Moz (29 th March 2022, excluding Dacian)
80% of Dacian (ASX: DCN)	Assets include (100% basis): 2.9Mtpa mill, 2.66Moz Resource ² , A\$35m cash (31 March 2023; unaudited)

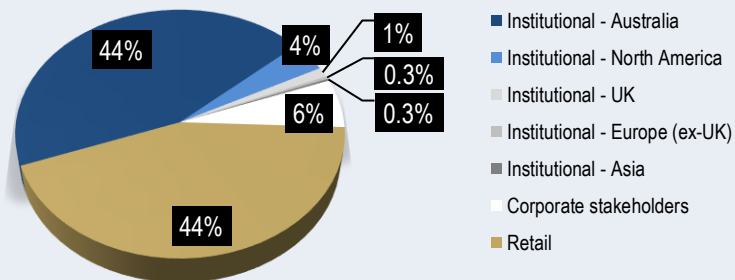
Board

Non-Executive Chairman	Tony Kiernan
Managing Director	Raleigh Finlayson
Non-Executive Director	Michael Bowen
Non-Executive Director	Gerry Kaczmarek
Non-Executive Director	Mick Wilkes

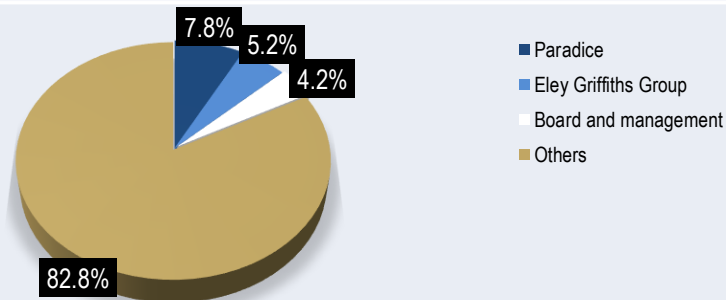
Key Management

Chief Financial Officer	Morgan Ball
Corporate Development Officer	Troy Irvin
General Manager - Projects and Operations	Lee Stephens
Company Secretary	Geoff James

Ownership - Geographic



Ownership - Substantials



1. Excludes ~49m unquoted securities (~39m options at various exercise prices and ~10m performance rights); 2. Refer to Appendix A for Mineral Resources and Ore Reserves.



Genesis today:

- **Long life, unhedged ~150kozpa base case plan¹**
- Underpinned by **two new “capital-light” mines:**
 1. **Ulysses** - Shallow high-grade underground mine; development underway
 2. **Admiral** - Shallow high-grade pit; first application of **Genesis Mining Services (GMS)** low-cost owner-operator model from September quarter 2023
- **Plus Jupiter mine (DCN)** - Resource more than doubled to 830koz, advancing low-cost owner mining studies²
- **Mt Morgans mill (DCN)** - On care and maintenance, pristine condition to ensure short lead time when production resumes
- **June quarter 2023 Maiden Reserves**
- **Robust balance sheet;** GMD A\$75m cash / no debt
- **EV / production A\$2,973³** (v ASX peers A\$4,376/oz⁴)

Hoover House tomorrow:

- **Proposed merger with St Barbara (SBM) to form Hoover House;** SBM to demerge Atlantic, Simberi and other; GMD A\$275m conditional placement
- Combined **15.1Moz Resources** and **3.1Moz Reserves⁵**
- **Long life +300kozpa base case “quality > quantity” plan⁶:**
 1. **Transition Gwalia to high grade, selective mining** - Targeting 120-130kozpa; add new Ulysses to “fill the mill”
 2. **Reduce costs; right size the business**
 3. **Advance new Tower Hill high grade pit** towards production; **grow to +300kozpa**
- **5-year outlook planned September quarter 2023**
- Management capability, financial flexibility and investor mandate to grow Leonora
- **Potential equity re-rate** to “fill the gap” between ASX 100 gold producers and the rest



Hoover House transaction gets the green light:



“The premium Australian gold producer - Sustainable, high quality, +300koz pa²”

Fill the void with premium “Aussie-leader” characteristics

+300koz pa²
Two+ operations
Low all-in cost
+7 years mine life
Priority WA

Deliver superior TSR



Discipline first - Track record of sensible accretive M&A

Strategy, process, team / capabilities, quality, value per share

OPTIONALITY - M&A just one-prong in a multi-pronged approach

Leonora District - Long milling / short ore...”Home ground advantage”

...consolidation makes sense

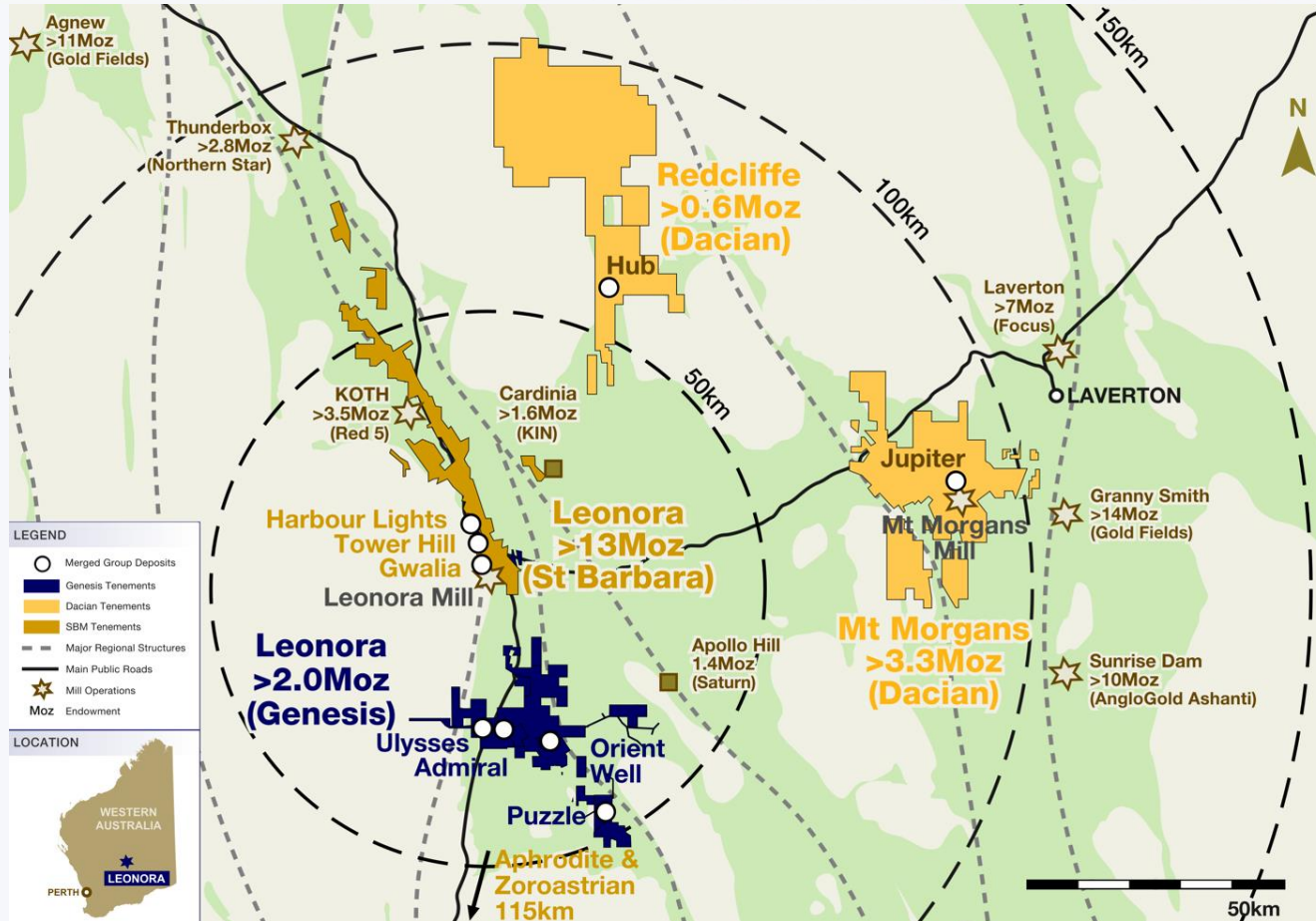
Genesis is open for business



COMMODITY	JURISDICTION	PROJECT STAGE	SCALE	MINING AND METALLURGY	GEOLOGY AND MINE LIFE	COSTS / FINANCIAL
Gold Gold / Copper Copper / Gold	Prioritise Western Australia	Advanced exploration Producing Mine development / refurbishment	>100koz pa potential Target group >300koz pa Multiple mines	Open pit Underground Bulk mining experience Conventional metallurgy Refractory metallurgy	Eastern Goldfields geology Leonora District 7+ year mine life Significant inventory upside All Australian geological settings	Target “first half” all-in cost potential Value accretive per share Sector-leading return on invested capital (ROIC) Internal competition for capital
PEOPLE AND CULTURE, PROGRESSIVE ESG						

1. Refer to GMD ASX announcement 4th April 2022 “Open for Business - Corporate Presentation”. 2. Refer to the important information section for information on the material assumptions relating to the production target. There is a low level of geological confidence associated with inferred mineral resources and there is no certainty that further exploration work will result in the determination of indicated mineral resources or that the production target itself will be realised.

Home game - Focused exclusively on Leonora gold

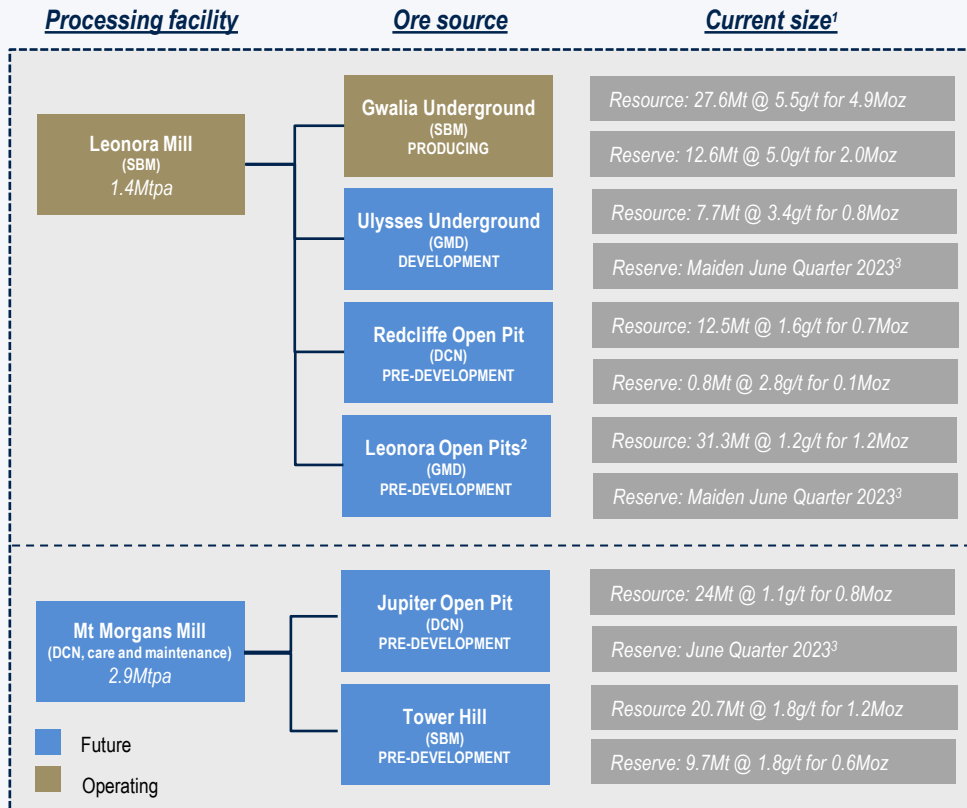


Central player in +65Moz
Leonora District¹

- Genesis
- + Dacian
- + St Barbara

1. Leonora District is defined as the 150km radius surrounding the Leonora town.
Total endowment is mined ounces plus un-mined Mineral Resources

Right ores in the right mills



Benefits to Hoover House shareholders

The addition of Ulysses Underground enables “quality > quantity” mining strategy
 Reduced mining rate to 0.7 - 0.8Mtpa of higher-grade ore

Target mining rate of 0.6 - 0.7Mtpa
 Capital-light / fully funded development underway, first ore FY24

Low risk, high grade, open pit “sweetener”, risk management lever, closer to Gwalia
 Includes 3.4g/t Hub open pit with underground upside

Longer term addition of open pit volumes to “top-up” for under-utilised Leonora mill
 First mining opportunity for Genesis Mining Services (GMS)

0.8Moz Resource in a A\$2,400 pit optimisation shell
 Time to install leaner owner operator model (GMS)

1.2Moz Resource in a A\$2,500 pit optimisation shell
 Time to install leaner owner operator model (GMS)

ALL SUBJECT TO OPTIMISATION
- NEW STRATEGIC PLAN SEPTEMBER QUARTER 2023

1. Refer to Appendix A for Mineral Resources and Ore Reserves; 2. Leonora Gold Project Open Pits include Admiral, Puzzle and Orient Well; 3. Subject to Feasibility study outcomes.

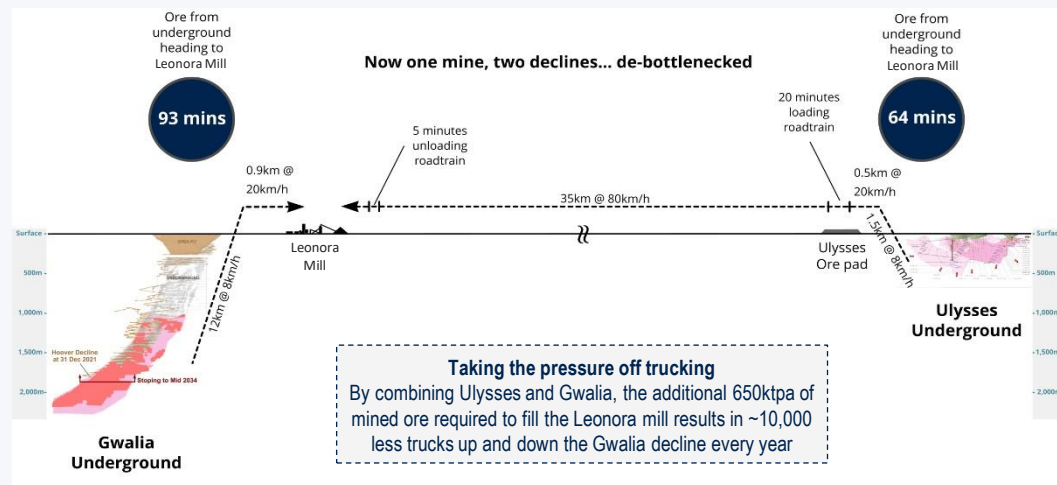


Ulysses offers a unique opportunity to restore Leonora up to 200kozpa^{1,5} with lower costs and lower risk:

- **Gwalia / Ulysses operated as one mine** - Neighbouring deposits just 35km apart
- Couple the deepest underground gold mine in Australia with the shallowest (and newest)
- Ulysses haulage time is less than that from underground heading to Leonora mill
- **Shared fixed costs / lower group costs**
- **Reconfigure Gwalia to a lower mining rate** ~0.7-0.8Mtpa (v 1.1Mtpa FY23 plan²; v 5-year actual average 0.7Mtpa³)
- Prioritise development and waste haulage
- Smaller, higher-grade stopes; **reduced geotechnical risk**
- Set solid foundations from which to **grow production to +300kozpa**

Two becomes one:

		Gwalia	Ulysses full scale ⁴	Combined
Annual mining rate	Mtpa	0.7 - 0.8	0.6 - 0.7	1.3 - 1.5
Annual gold production	kozpa ¹	120 - 130	60 - 70	180 - 200



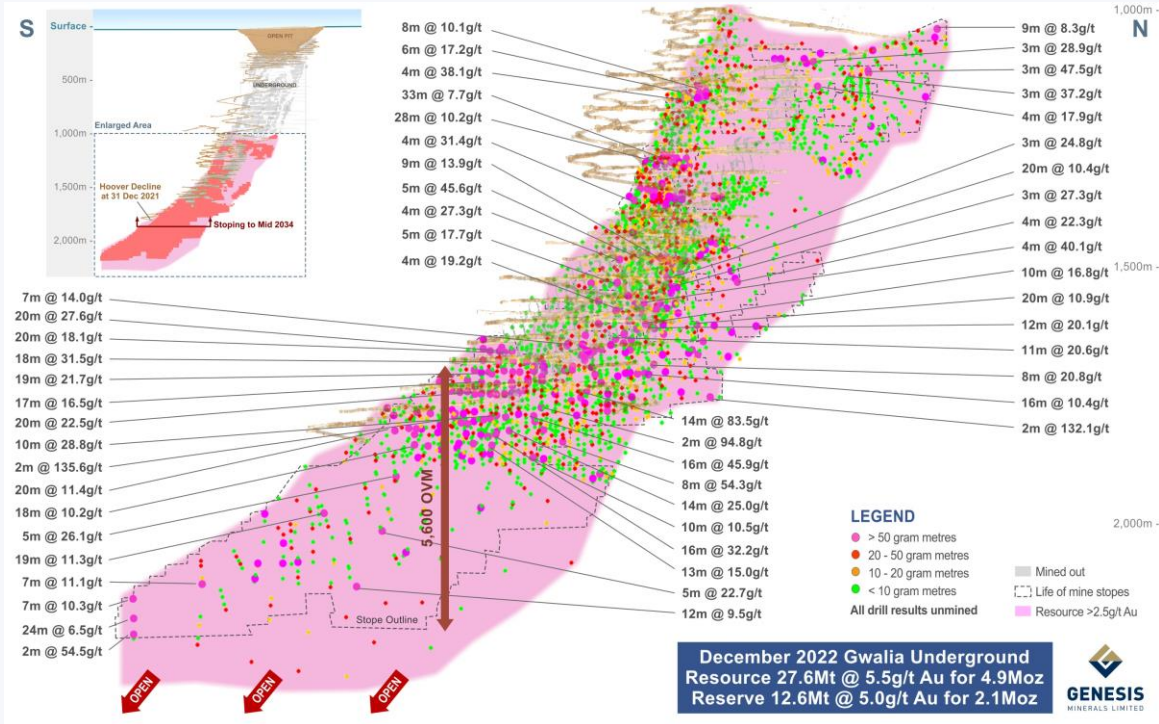
NEW STRATEGIC PLAN SEPTEMBER QUARTER 2023 INCLUDING PRODUCTION / AISC / CAPITAL COST OUTLOOK

1. Refer to the important information section for information on the material assumptions relating to the production target. There is a low level of geological confidence associated with inferred mineral resources and there is no certainty that further exploration work will result in the determination of indicated mineral resources or that the production target itself will be realised; 2. Refer to St Barbara ASX announcement dated 19 September 2022, "Presentation to 2022 Denver Gold Forum"; 3. St Barbara quarterly reports; 4. Full scale ramp-up by FY26; 5. 200kozpa is a subset of the 300kozpa Production Target.

Prolific high-grade, long-life asset:

- Life of mine plan underwritten by **5,600oz per vertical metre**
- All drill intercepts on image currently **unmined**
- Addition of **new Ulysses** to “fill the mill” and **transition Gwalia** to “**quality > quantity**” high grade, selective mining:
 - **Re-focus on true “heart of gold”** South-West Branch; scene of previous success
 - Deprioritise lower grade northern extensions
 - **Target 120-130kozpa**; in line with December half 2022 run-rate 66koz¹
 - **Target reduction in costs**

Gwalia - Long section



Western Australia's newest gold mine:

- **Development underway** 35km south of Leonora
- **Capital-light / fully funded** development
- **Unhedged** future gold production
- Initial open pit mining (contractor Big Yellow)...
- ...to be followed by underground mining from September quarter 2023 (tenders received and under review)
- **First ore in FY24**
- Plan to process at St Barbara's 1.4Mtpa Gwalia mill¹
- **Project development in parallel with ongoing extensional work**

Action at the high-grade Ulysses West mine

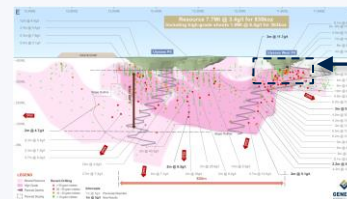
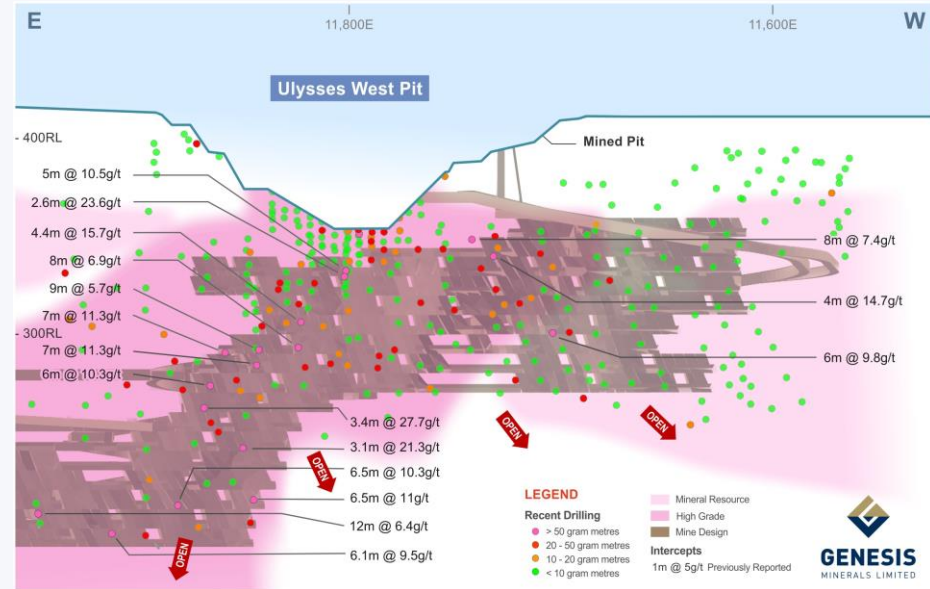


1. In the event the merger with St Barbara fails to complete, St Barbara and Genesis are working together on a toll treatment agreement to potentially enable Ulysses, Admiral (or other Genesis ore) to be processed at Leonora over a specified timeframe.

A strategic asset in Leonora:

- The prize:
 - **New shallow mine** (ore from ~50m below surface)
 - **2,400oz per vertical metre**
 - Free milling
 - Low bond work index
 - **Excellent geotechnical conditions**
 - Open along strike and at depth
- Extensive grade control drilling **de-risks initial >2 years of high-grade mining** in Ulysses West
- June quarter 2023: Maiden Reserves

Ulysses West first 4 years of production - Long section



Blue box denotes Ulysses West area shown above

Introducing Genesis Mining Services (GMS)



Genesis in-house open pit mining contractor:

- **Application of unique ex-Saracen open pit mining business model**
 - **8-year track record of beating guidance** at Saracen / KCGM
- **Simplified, low cost open pit business** with increased focus:
 - GMS focused on operational execution (people and equipment)
 - GMD technical teams focused on mine design, scheduling, mine life and geological opportunities
- **Flexibility to transfer people and equipment between sites**
- **First opportunity at Admiral** - Deliver ore to under-utilised Leonora mill¹
- **Scalable for additional internal projects or third-party projects**
- **Initial orders placed for new open pit fleet** including excavators, trucks and ancillary equipment - **Delivery from June 2023**

GMS management in place, building the team

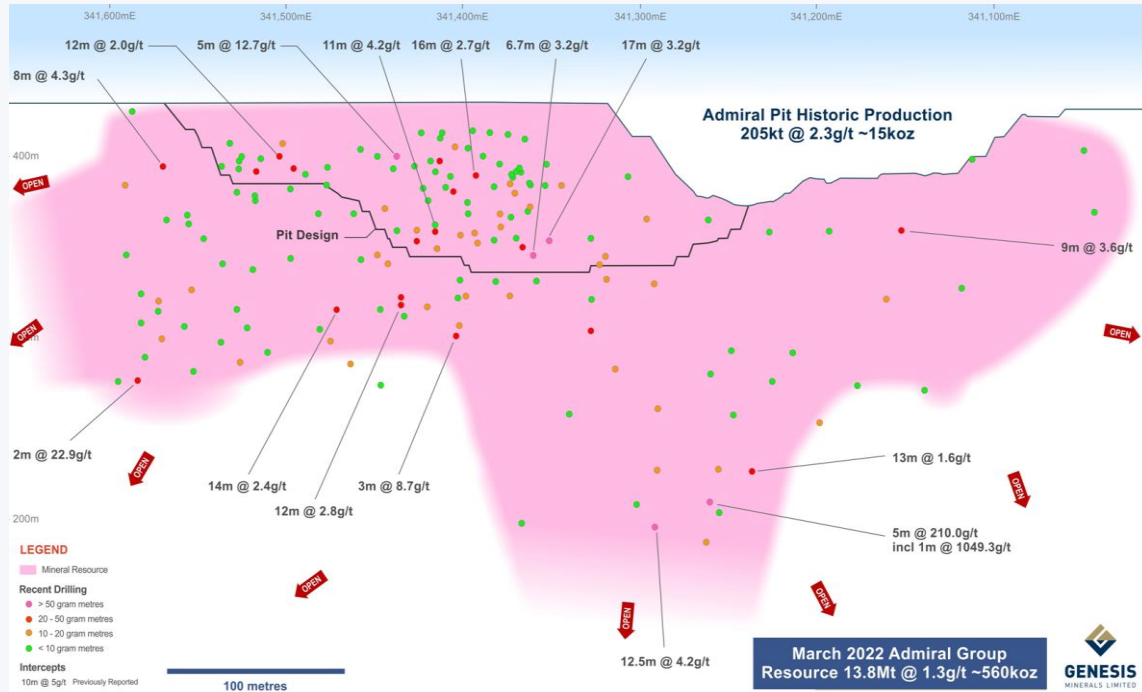
Lee Stephens General Manager - Projects and Operations	Ex-KCGM, Thunderbox and Carosue Dam
Matt Walter General Manager - GMS	Ex-KCGM Maintenance Manager / Mine Superintendent
Galabinga Henderson Commercial Specialist	Ex-Northern Star, Newmont, FMG
Rob Watters Maintenance Mining Services Manager	Ex-Emeco
Paul Sumich Open Pit Mining Services Manager (from April 2023)	Ex-RIO, KCGM
Fiona Lewis Administrator	Ex-Rock on Ground

1. In the event the merger with St Barbara fails to complete, St Barbara and Genesis are working together on a toll treatment agreement to potentially enable Ulysses, Admiral (or other Genesis ore) to be processed at Leonora over a specified timeframe.

Preparing to attack:

- **Multiple high-grade results from recent drilling below 100m**
- **GMS internal mining opportunity #1:**
 - June quarter 2023 maiden Reserves
 - Capital light accelerated development
 - **Mining from September quarter 2023**
- “Top-up” for the under-utilised Leonora mill¹ (40km trucking distance)
- Multiple structures; **favourable for further growth:**
 - Including Redlake - Virtually unexplored shallow oxide immediately south of Admiral

Admiral - Long section



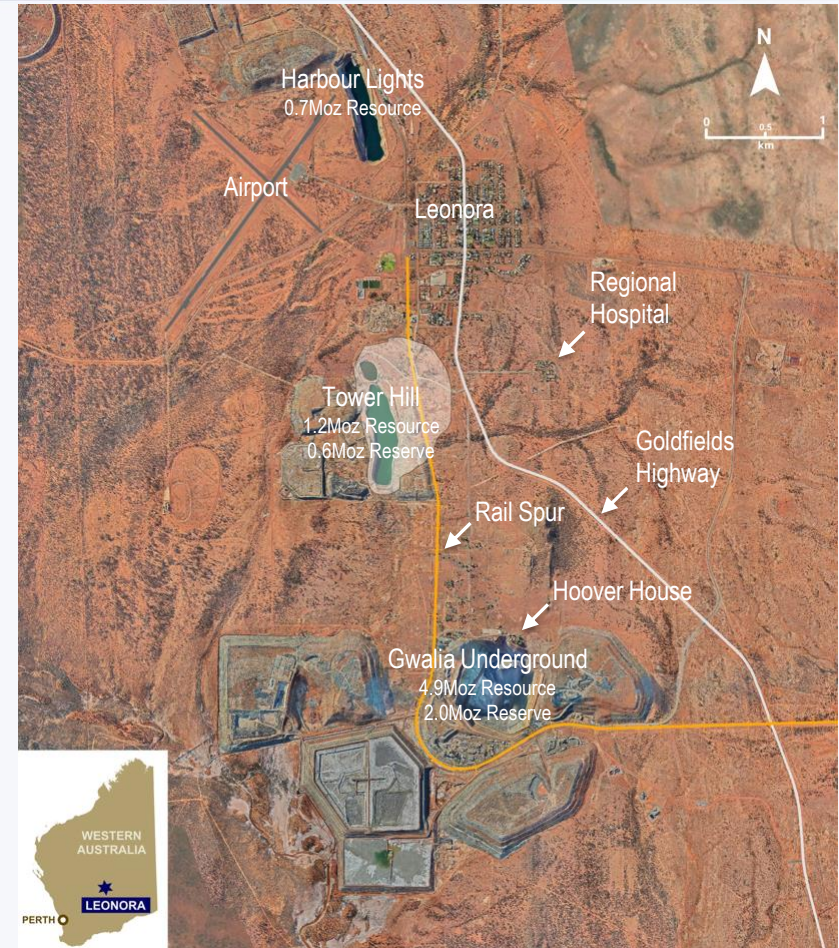
1. In the event the merger with St Barbara fails to complete, St Barbara and Genesis are working together on a toll treatment agreement to potentially enable Ulysses, Admiral (or other Genesis ore) to be processed at Leonora over a specified timeframe.

Introducing Tower Hill



Forgotten asset in the shadow of Gwalia:

- **Infrastructure-rich** location just 2km north of Gwalia
- **Shallow single open pit:**
 - 1.2Moz Resource
 - 560koz Reserve
- **Thick and wide ore body:**
 - Average drill intercept 35m @ 1.8g/t
- **To re-evaluate Reserves with lower costs:**
 - Mining - Perfect match for GMS model
 - Milling - Mt Morgans

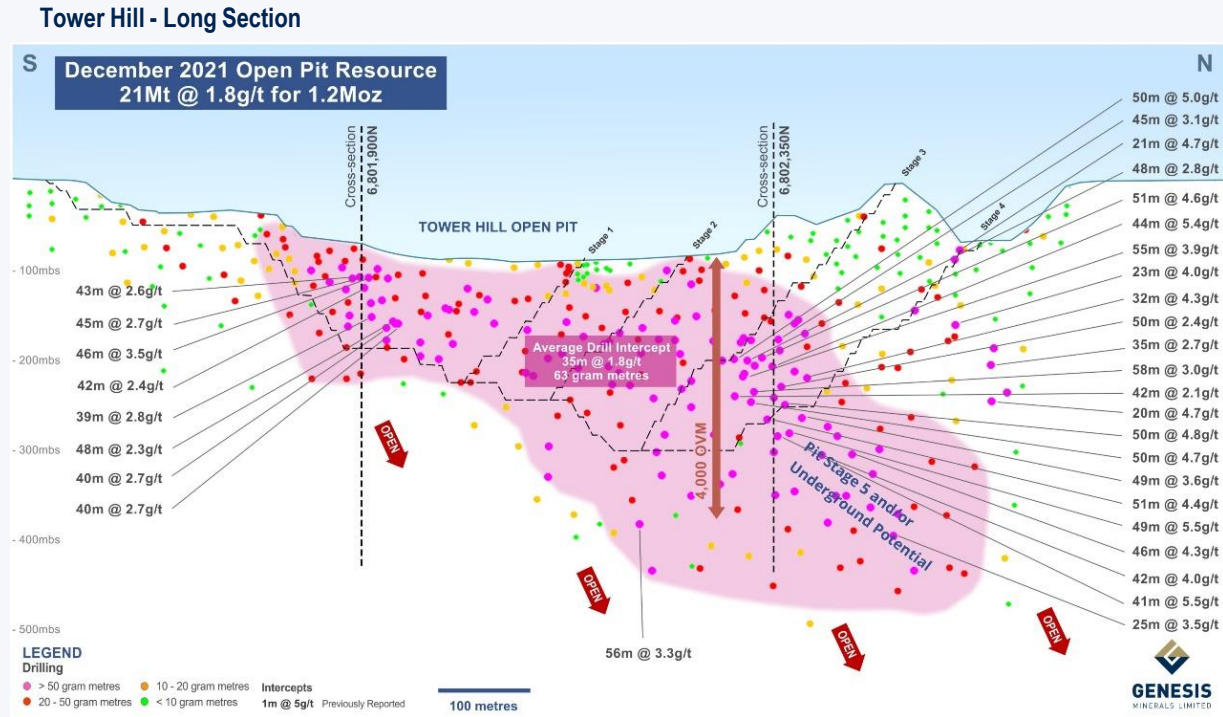


Introducing Tower Hill



A pit without peer:

- **Bulk, high grade open pit opportunity;** planned strike length +1km
- **4,000oz per vertical metre**
- **Further growth opportunities:**
 - **Open down plunge** (“Karari-style” underground mining below pit shell)
 - Ongoing infill and extensional drilling
- **Approvals / development time** anticipated to be **~2-3 years** including re-location of rail line





- **Compelling opportunity to create a leading ASX gold house**
- **Dominant position in the prolific Leonora District**
- **Targets sustainable, high-quality earnings with “capital-light” production growth**
- **Long life “quality > quantity” business plan**
- **Resonates with high investor appetite for sensible regional consolidation**
- **Management capability, financial flexibility and investor mandate to grow Leonora**
- **Potential re-rate to “fill the gap” between the ASX 100 gold producers and the rest**



Leonora District - Summary:

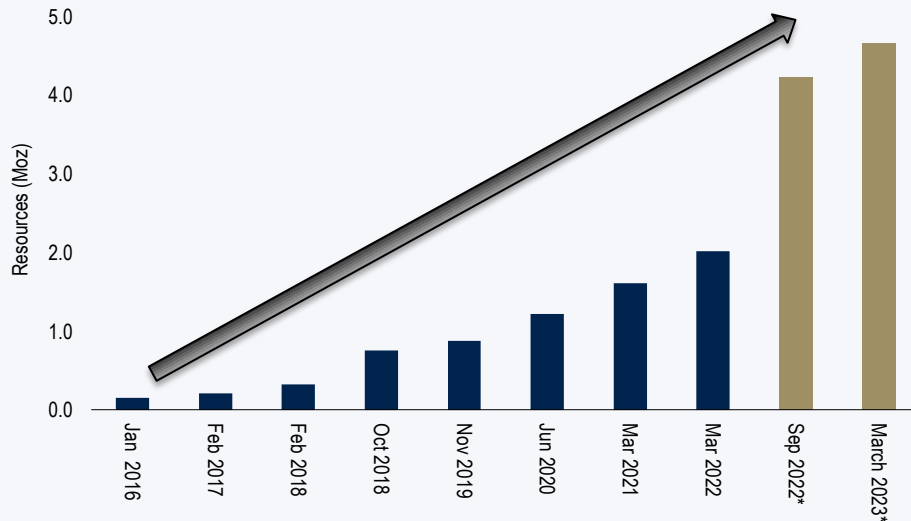
Mineral Resources:

	Moz
Genesis ¹	2.0
Dacian ²	2.7
St Barbara ³	10.4
TOTAL	15.1

Ore Reserves:

	Moz
Dacian ⁴	0.1
St Barbara ³	3.0
TOTAL	3.1

Genesis and Dacian combined Mineral Resource growth:



Now focused on translating outstanding Resource growth into reserve growth

Rounding may result in imbalanced totals.

Mineral Resources are reported inclusive of Ore Reserves.

1. Mineral Resources for Genesis are extracted from the ASX release dated 29th March 2022 "Leonora Resource increases by 400,000oz to 2Moz".

2. Mineral Resources for Dacian are extracted from the ASX release dated 30th March 2023 "Updated Jupiter Mineral Resource Estimate".

3. Mineral Resources and Ore Reserves for St Barbara are extracted from the ASX release dated 22nd February 2023 "31 Dec 2022 Ore Reserves and Mineral Resource Statements".

4. Ore Reserves for Dacian are extracted from Genesis' ASX release dated 12 December 2022 and entitled "Reporting on Dacian Projects".

Dacian Ore Reserve and Mineral Resource estimates are presented on a 100% basis.

* Genesis Mineral Resources plus 100% of Dacian Mineral Resources

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