



GENESIS
MINERALS LIMITED

INTRODUCING GENESIS

A growing Australian gold house

CORPORATE PRESENTATION - NORTH AMERICA

September 2023

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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 of Genesis, including in relation to historical trading prices of Genesis shares, production, mineral resources and ore reserves, costs and other historical financial information in this Presentation is for illustrative purposes only and 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.

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Some statements in this Presentation regarding estimates or future events are forward-looking statements. They include indications of, and guidance on, future matters. Forward-looking statements include, but are not limited to, statements preceded by words such as “planned”, “expected”, “projected”, “estimated”, “may”, “scheduled”, “intends”, “anticipates”, “believes”, “potential”, “could”, “nominal”, “conceptual” and similar expressions. Forward-looking statements, opinions and estimates included in this Presentation are based on assumptions and contingencies which are subject to change without notice, as are statements about market and industry trends, which are based on interpretations of current market conditions.

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Important Information



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The information in this Presentation that relates to:

- Mineral Resource and Ore Reserve estimates for the Leonora assets which Genesis acquired from St Barbara are extracted from Genesis' ASX announcement dated 17 April 2023 and entitled "Reporting on St Barbara's Leonora Projects", as amended on 20 April 2023, and for which the consent of the Competent Persons Brett Ascott (in respect of the ore reserves at Gwalia and Zoroastrian), Andrew Francis (in respect of the Ore Reserves at Aphrodite), Martin Liu and Glen Williamson (in respect of the ore reserves at Tower Hill), Jane Bateman (in respect of the Mineral Resources at Tower Hill and the Bardoc Deposits) and David Reid (in respect of the Mineral Resources at Gwalia and Harbour Lights), were obtained.
- Other Genesis Mineral Resource and Ore Reserve estimates are extracted from Genesis' ASX announcement dated 3 July 2023 and entitled "Completion of the Leonora acquisition elevates Genesis to a leading Australian gold house" and for which the consent of the Competent Persons, David Price (in relation to Mineral Resources) and Chris Burton (in relation to Ore Reserves), were obtained.
- Mineral Resource and Ore Reserve estimates referable to Dacian are extracted from Dacian's ASX announcement dated 3 July 2023 and entitled "2023 Mineral Resources and Ore Reserves update" and for which the consent of the Competent Persons, Alex Whishaw (in relation to Mineral Resources) and Ross Cheyne and Hemal Patel (in relation to Ore Reserves), were obtained.
- Exploration Results is based on information compiled by Mr. Andrew de Joux who is a full-time employee of Genesis Minerals Limited, a shareholder of Genesis Minerals Limited and is a member of The Australian Institute of Geoscientists. Mr de Joux has sufficient experience that is relevant to the style of mineralisation and type of deposit under consideration and to the activity being undertaken to qualify as a Competent Person as defined in the 2012 Edition of the 'Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves'. Mr de Joux consents to the inclusion in the report of the matters based on his information in the form and context in which it appears.

In each case above, Genesis confirms that it is not aware of any new information or data that materially affects the information included in the market announcements and Genesis confirms that all material assumptions and technical parameters underpinning the Mineral Resource estimates and Ore Reserve estimates in the market announcements continue to apply and have not materially changed. Genesis confirms that the form and context in which the Competent Persons' findings are presented have not been materially modified.

Refer to Appendix A of this Presentation for the table of Ore Reserve estimates. Refer to Appendix B of this Presentation for the table of Mineral Resource estimates. Mineral Resource estimates in this Presentation are reported inclusive of Ore Reserve estimates (where an Ore Reserve estimate exists).

Refer to Appendix E of the Genesis ASX announcement dated 17 April 2023 titled "Presentation - Acquisition of St Barbara's Leonora Assets" for the material assumptions relating to Genesis' production target. The Company confirms that all the material assumptions underpinning the production target in that announcement 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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Release authorised by: Raleigh Finlayson, Managing Director, Genesis Minerals Limited

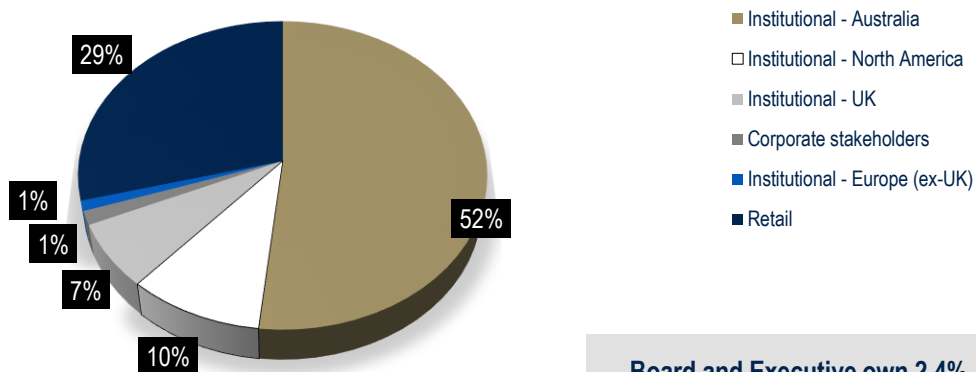
Corporate Overview



Key metrics (ASX: GMD)^{1,2}

Shares on issue	1,037m ³
Share price	A\$1.59
Market capitalisation	US\$1.05b (A\$1.65b)
Cash at 30th June 2023	US\$100m (A\$156m⁴)
Bank debt	Nil
Liquidity	30-day ADV 7.2m shares
Major indices	ASX200, MSCI Small cap, GDXJ
Hedging	Nil
Group Ore Reserves	3.9Moz (30th June 2023)
Group Mineral Resources	15.0Moz (30th June 2023)

Ownership - Geographic



Board

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

Executive

Chief Financial Officer	Morgan Ball
Corporate Development Officer	Troy Irvin
General Manager - Leonora	Matt Nixon
General Manager - Laverton / GMS	Lee Stephens
General Manager - Technical Services	Andrew Francis
General Manager - People and Culture	Kellie Randell

Substantial shareholders

AustralianSuper Pty Ltd	18.9%
Resource Capital Fund VII L.P.	7.6%
Paradice Investment Management	6.3%

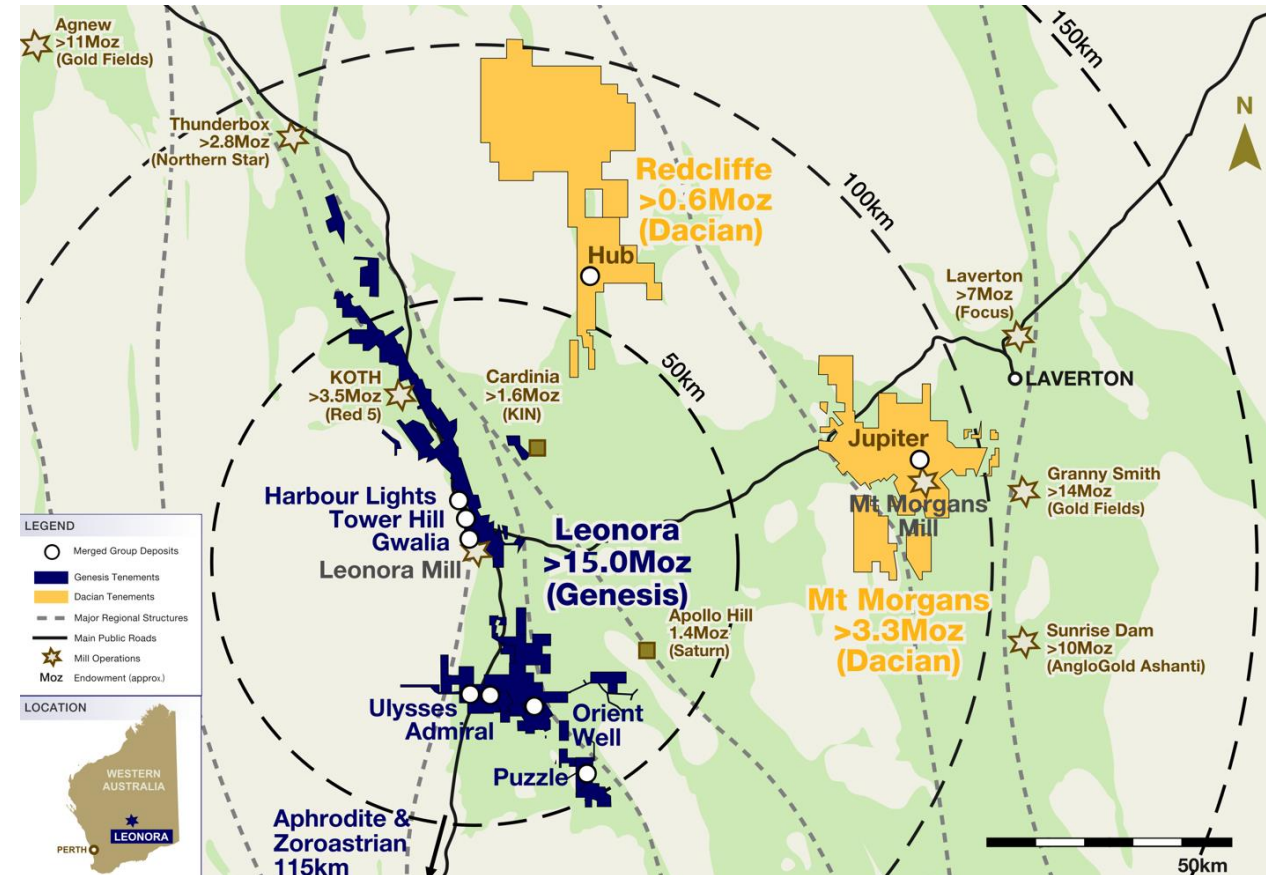
A new and growing Australian gold house



100% focused on Leonora:

- ▶ **Successful acquisition of St Barbara's Leonora assets**, including Gwalia underground mine, 1.4Mtpa Leonora mill, Tower Hill project
- ▶ **3.9Moz Group Reserves and 15.0Moz Group Resources**
- ▶ **Long life 300kozpa base case “margin > ounces” plan¹:**
 - ▶ **Transition Gwalia to high grade, selective mining** - Add new Admiral open pit to “fill the mill”; **Targeting 180-200kozpa**
 - ▶ **Reduce costs; right size the business**
 - ▶ **Advance new Tower Hill high grade pit** - **Significant value to be unlocked** via Mt Morgans milling solution and GMS open pit mining; **Grow to +300kozpa**
- ▶ **Strategic review December half 2023**
- ▶ **US\$100m cash** (before ~A\$40m transaction costs); **no bank debt**
- ▶ **Management capability, financial flexibility and investor mandate to grow Leonora**

Dominant position in the prolific Leonora District



GMD owns 80% of Dacian (ASX: DCN) - Assets include (100% basis):
2.9Mtpa mill, 2.7Moz Resources, US\$16m cash (30th June 2023)

1. Refer to Appendix E of the Genesis ASX announcement 17th April 2023 “Presentation - Acquisition of St Barbara's Leonora Assets” for the material assumptions relating to the production target. The Company confirms that all the material assumptions underpinning the production target in that announcement 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.

Business Development - Leonora transaction gets the green light



5-year VISION set in April 2022¹ is on track:



VISION

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



Fill the void with premium “Aussie-leader” characteristics



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



Deliver superior TSR



M&A

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



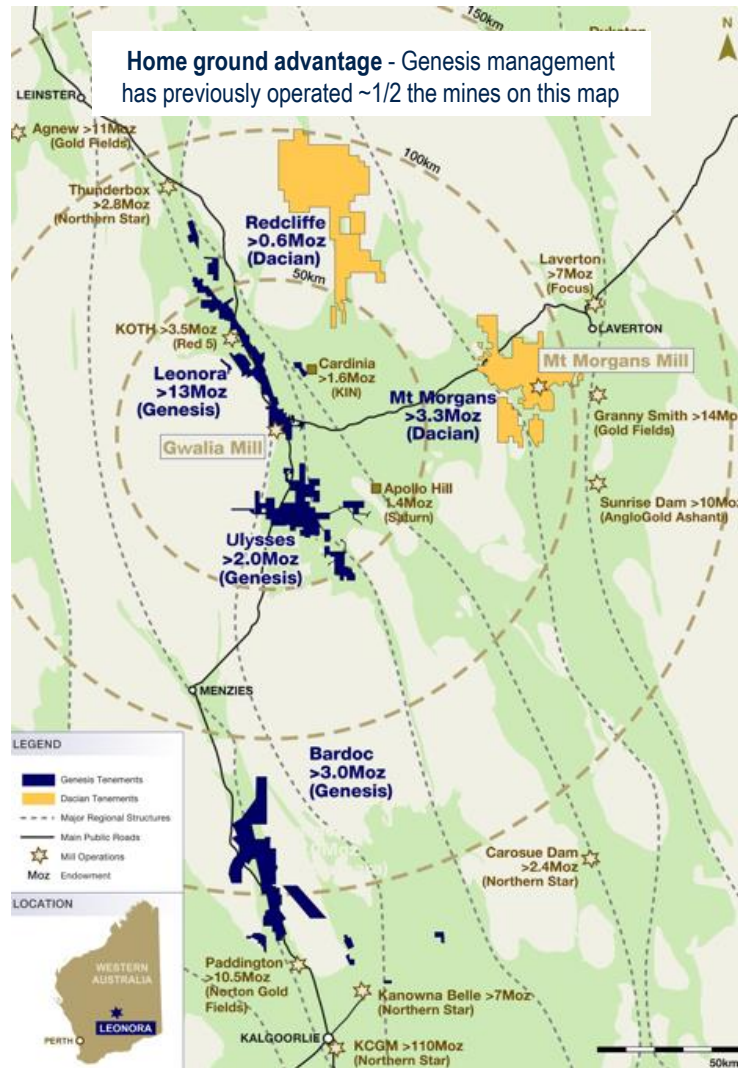
COMMODITY	JURISDICTION	SCALE	PROJECT STAGE	MINING AND METALLURGY	GEOLOGY & MINE LIFE	COSTS/ FINANCIAL
Gold Gold / Copper Copper / Gold	Prioritise Western Australia	Advanced exploration Producing Mine development / refurbishment	>100koz pa potential Target group >300koz pa Multiple mines	Open pit Underground 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”.

Creation of the central player in the tier-one Leonora District



Sustainable growth to +300,000 ounces per annum:



Overview

Key mines / projects

- Gwalia
- Ulysses
- Tower Hill
- Admiral / Orient Well / Puzzle
- Jupiter / Redcliffe (Dacian)
- Zoroastrian
- Aphrodite
- Harbour Lights

Mining method

Underground and open pit

Processing

Conventional CIL

Milling capacity

Leonora - 1.4Mtpa
Mt Morgans (Dacian) - 2.9Mtpa

Ore Reserves

41Mt @ 3.0g/t for 3.9Moz Au

Mineral Resources

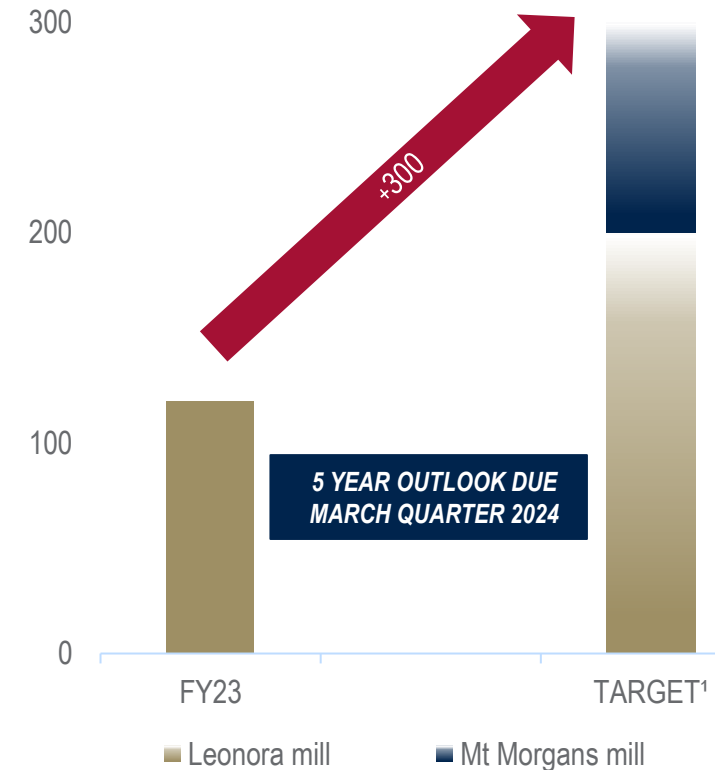
220Mt @ 2.2g/t for 15.0Moz Au

Production target¹

+300kozpa

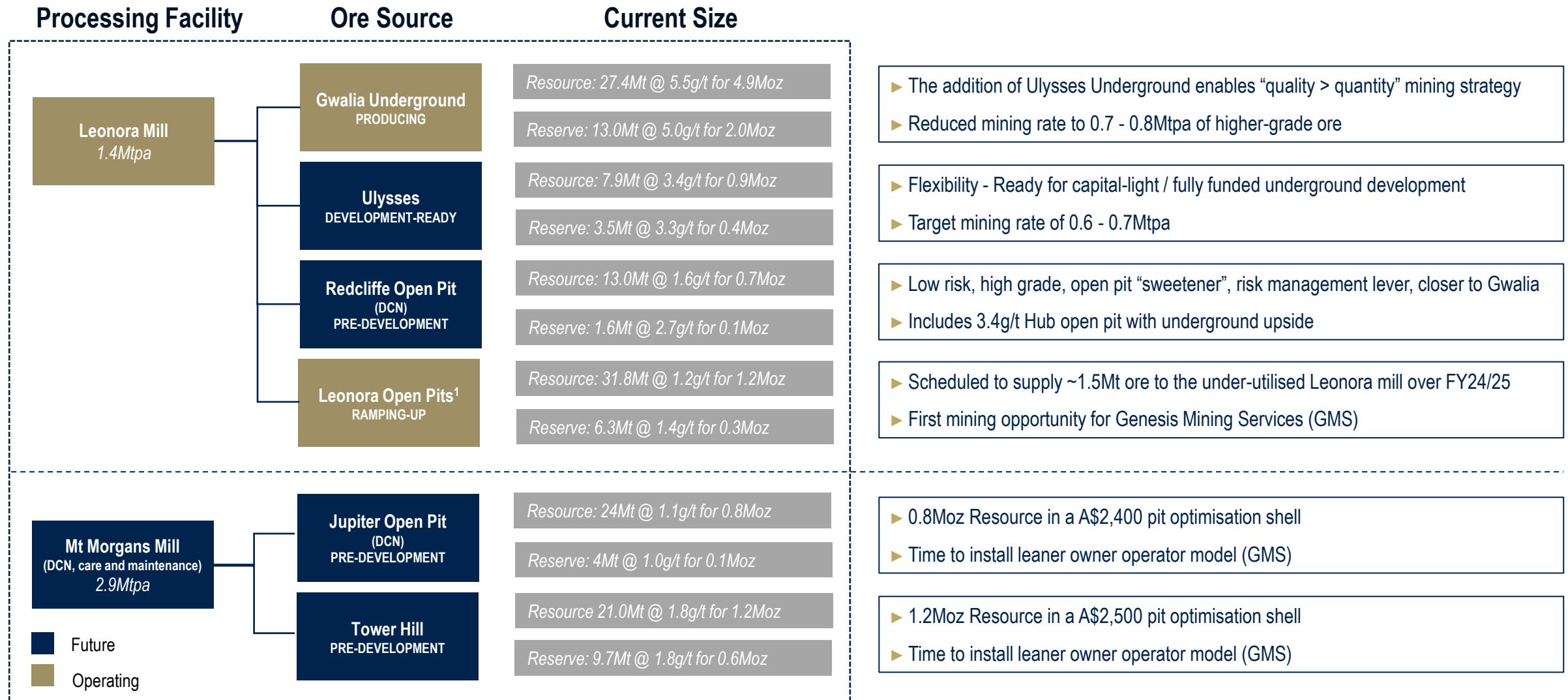
Genesis' VISION

"The premium Australian gold producer - Sustainable, high quality, +300kozpa"



1. Refer to Appendix E of the Genesis ASX announcement 17th April 2023 "Presentation - Acquisition of St Barbara's Leonora Assets" for the material assumptions relating to the production target. The Company confirms that all the material assumptions underpinning the production target in that announcement 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.

Right Ores in the Right Mills



ALL SUBJECT TO OPTIMISATION - NEW STRATEGIC PLAN MARCH QUARTER 2024

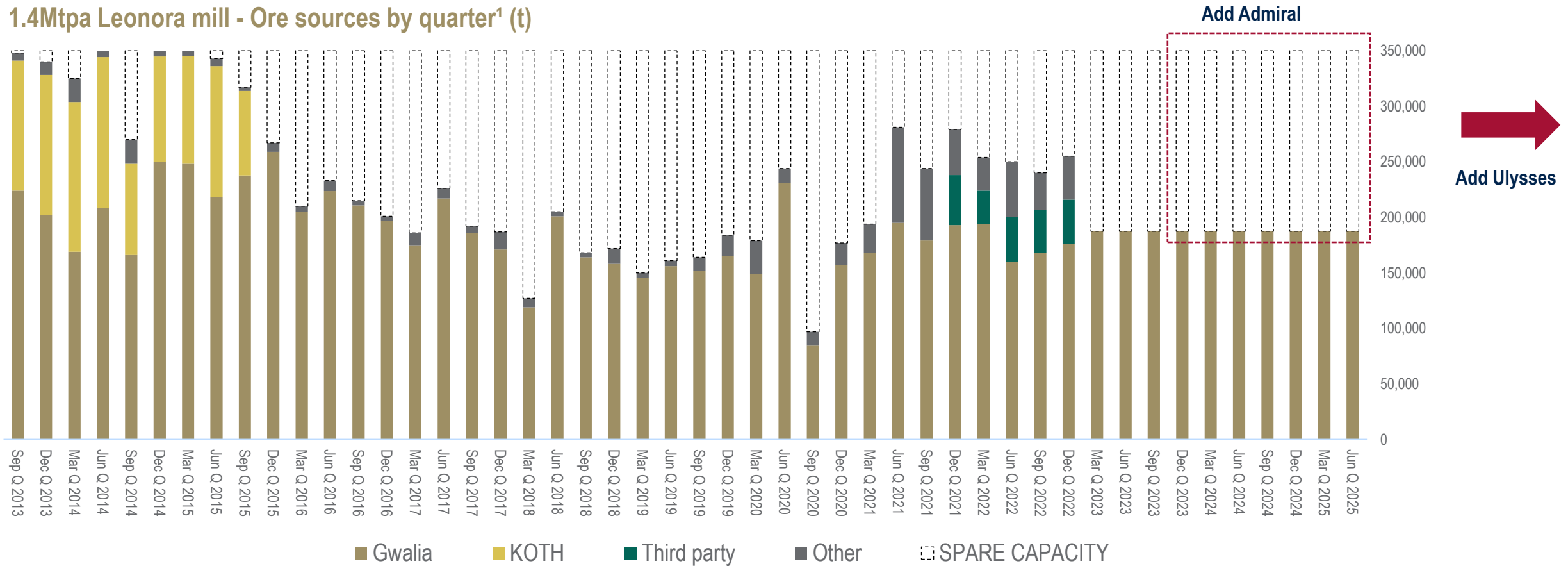
1. Leonora Gold Project Open Pits include Admiral, Puzzle and Orient Well.

1. Fill the Leonora mill



Taking the pressure off Gwalia and filling the Leonora mill:

1.4Mtpa Leonora mill - Ore sources by quarter¹ (t)



- ▶ Leonora mill underutilised since 2015; New **Admiral open pit fast-tracked to fill the mill over the next ~2 years**
- ▶ **Lower processing costs** (better utilisation of high fixed cost mill); **Lower AISC**

2. Ramp-up Admiral open pit

New, shallow, high grade 1.6g/t open pit:

- ▶ Admiral is located ~40km trucking distance from the 1.4Mtpa Leonora mill
- ▶ Maiden assignment for **Genesis Mining Services (GMS, Genesis' in-house open pit mining arm)**
- ▶ New GMS equipment arrived on site in preparation for **delivery of first ore in the December quarter**
- ▶ ~1.5Mt of ore scheduled from Admiral over the next ~2 years



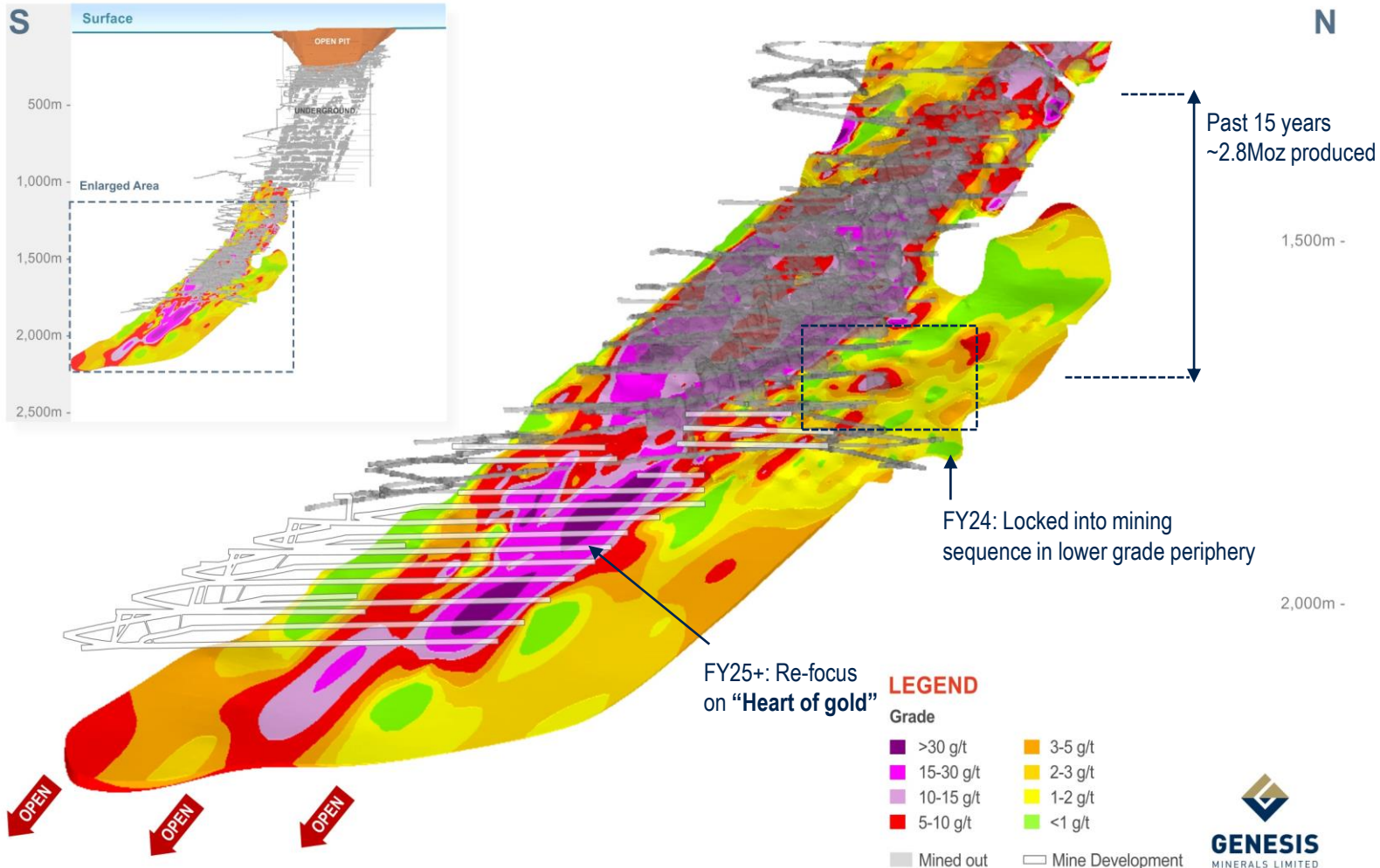
3. Transition Gwalia to high grade, selective mining

Prolific high-grade, long-life asset:

- ▶ Life of mine plan underwritten by **5,600oz per vertical metre**
- ▶ Addition of new Admiral to “fill the mill” and transition Gwalia to “quality > quantity”
- ▶ **Re-focus on true “heart of gold”**
South-West Branch; De-prioritise lower grade peripheral mineralisation
- ▶ **Target reduction in costs**
- ▶ Drill results include:

1.7m @ 269g/t	10.8m @ 22.7g/t
21.2m @ 24.1g/t	5.6m @ 39.1g/t
12.3m @ 30.1g/t	1.2m @ 175g/t
3.2m @ 94.2g/t	10.4m @ 20.1g/t

Gwalia - Long section



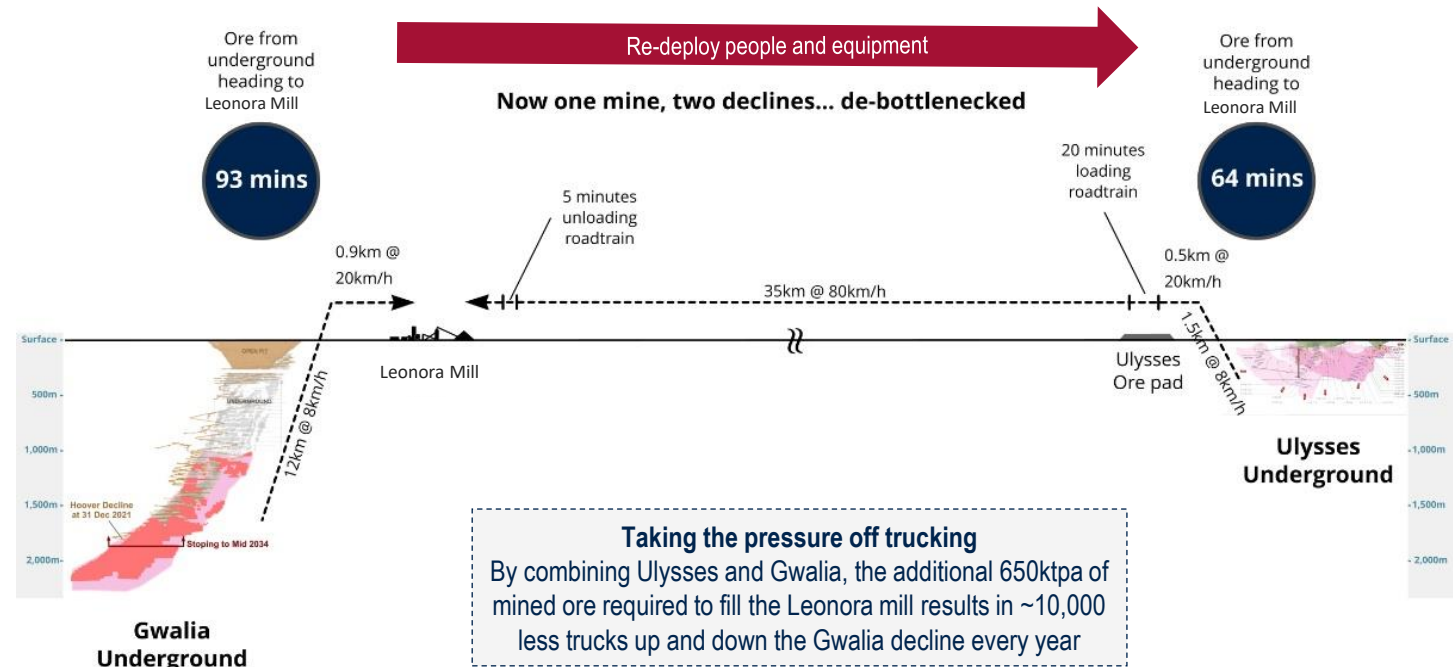
4. Ulysses “up the sleeve”

Ulysses flexibility - Ready for development:

- ▶ The ability of **Admiral** to fill the **Leonora mill**...
- ▶ ...affords the **flexibility to match Ulysses underground development** with the **equipment and labour requirements of Gwalia**
- ▶ **Gwalia / Ulysses to be 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 Gwalia underground heading to Leonora mill
- ▶ **Shared fixed costs / lower group costs**
- ▶ **Reconfigure Gwalia to a lower mining rate** ~0.7-0.8Mtpa

Two becomes one

		Gwalia	Ulysses full scale ²	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



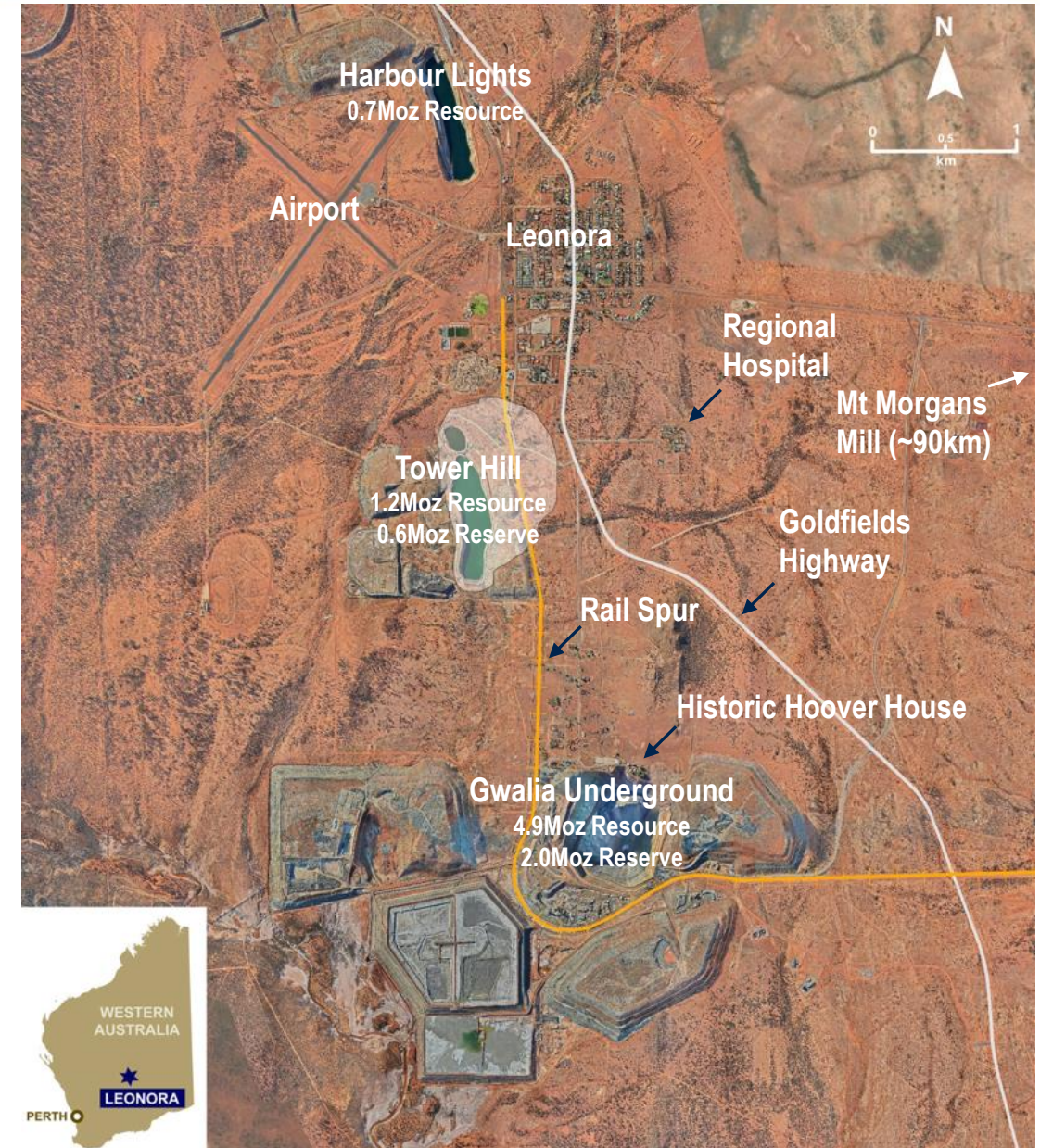
NEW 5 YEAR OUTLOOK MARCH QUARTER 2024 INCLUDING PRODUCTION / AISC / CAPITAL COST OUTLOOK

1. 200kozpa Production Target is a subset of the 300kozpa production target - Refer to Appendix E of the Genesis ASX announcement dated 17 April 2023 titled "Presentation - Acquisition of St Barbara's Leonora Assets" for the material assumptions relating to Genesis' production target. The Company confirms that all the material assumptions underpinning the production target in that announcement 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; 2. Full scale ramp-up by FY26.

5. Advancing Tower Hill

Forgotten asset in the shadow of Gwalia:

- ▶ **Key value driver:**
 - ▶ Mt Morgans milling solution
 - ▶ + GMS owner-operator open pit mining model
- = **Significant value unlocked from Tower Hill**
- ▶ **Infrastructure-rich**, just 2km north of Gwalia
- ▶ **Shallow single open pit:**
 - ▶ Resources 20.7Mt @ 1.8g/t for 1.2Moz
 - ▶ Reserves 9.7Mt @ 1.8g/t for 560koz
- ▶ **To re-evaluate Reserves with lower costs:**
 - ▶ Mining - Perfect match for GMS model
 - ▶ Milling - Mt Morgans

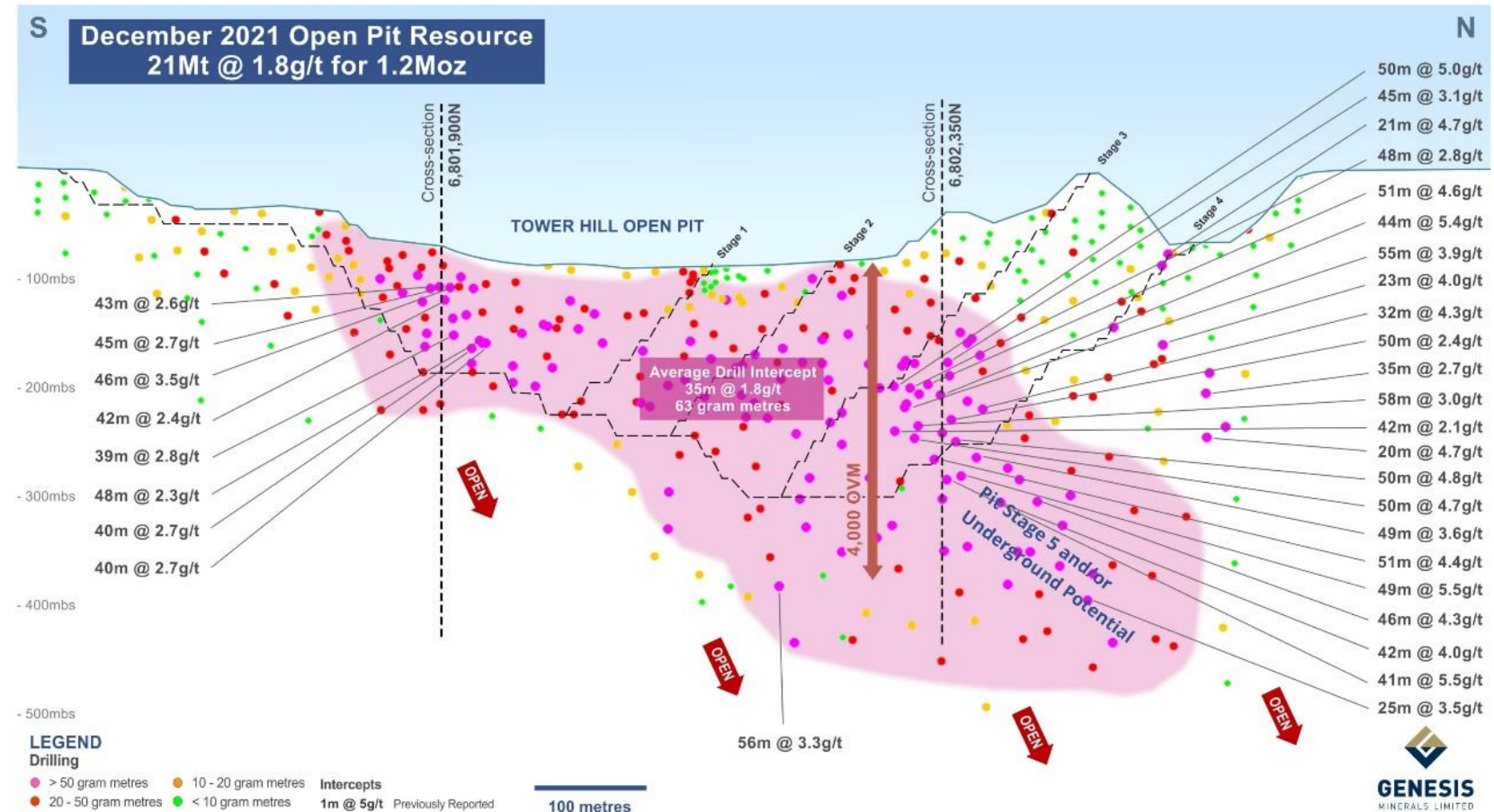


5. Advancing Tower Hill

A pit without peer:

- ▶ **Bulk, high grade open pit opportunity**
- ▶ Planned strike length +1km
- ▶ Average drill intercept 35m @ 1.8g/t
- ▶ 4,000oz per vertical metre
- ▶ **Further growth opportunities:**
- ▶ Open down plunge - Underground mining potential below pit shell
- ▶ Ongoing infill and extensional drilling
- ▶ **Approvals / development time** anticipated to be **~2-3 years** including re-location of rail siding

Tower Hill - Long Section

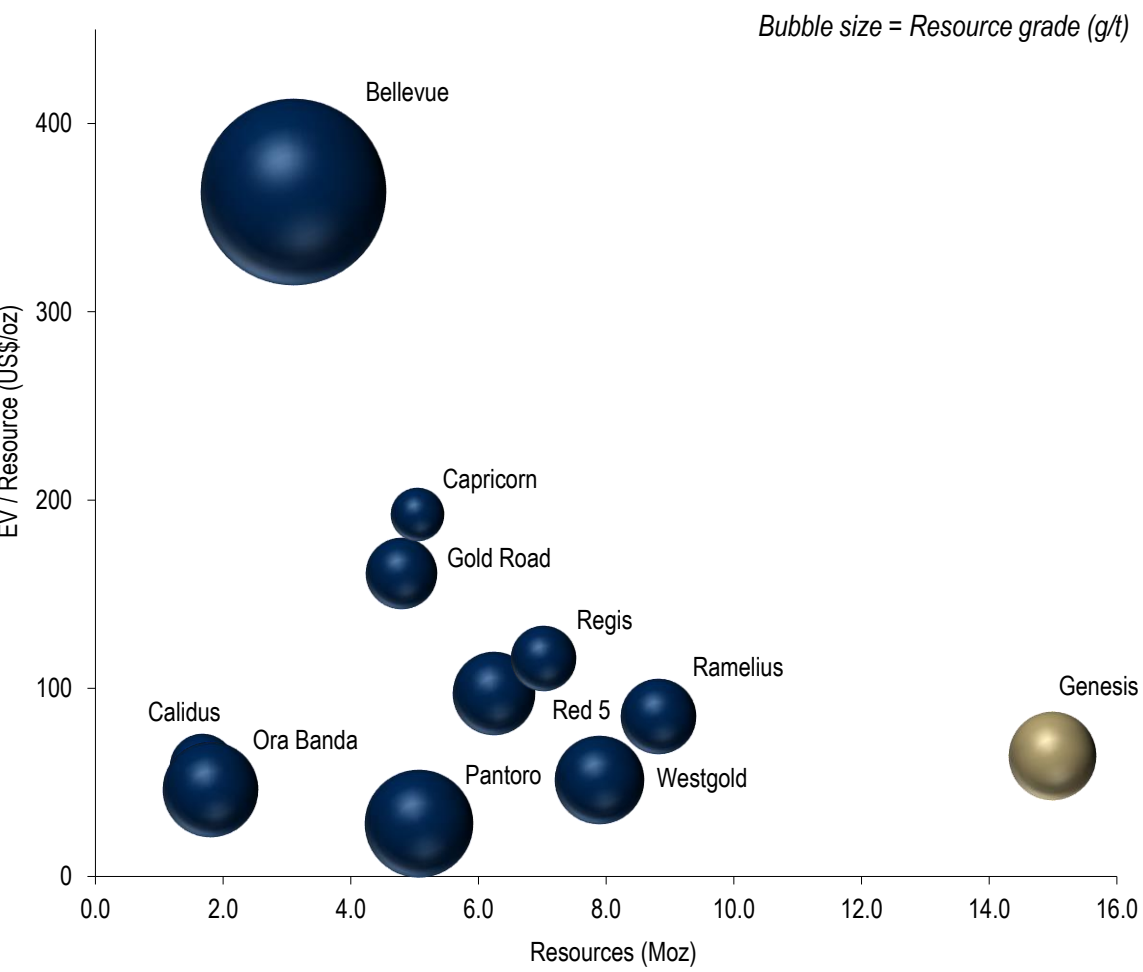


Western Australian peer comparison

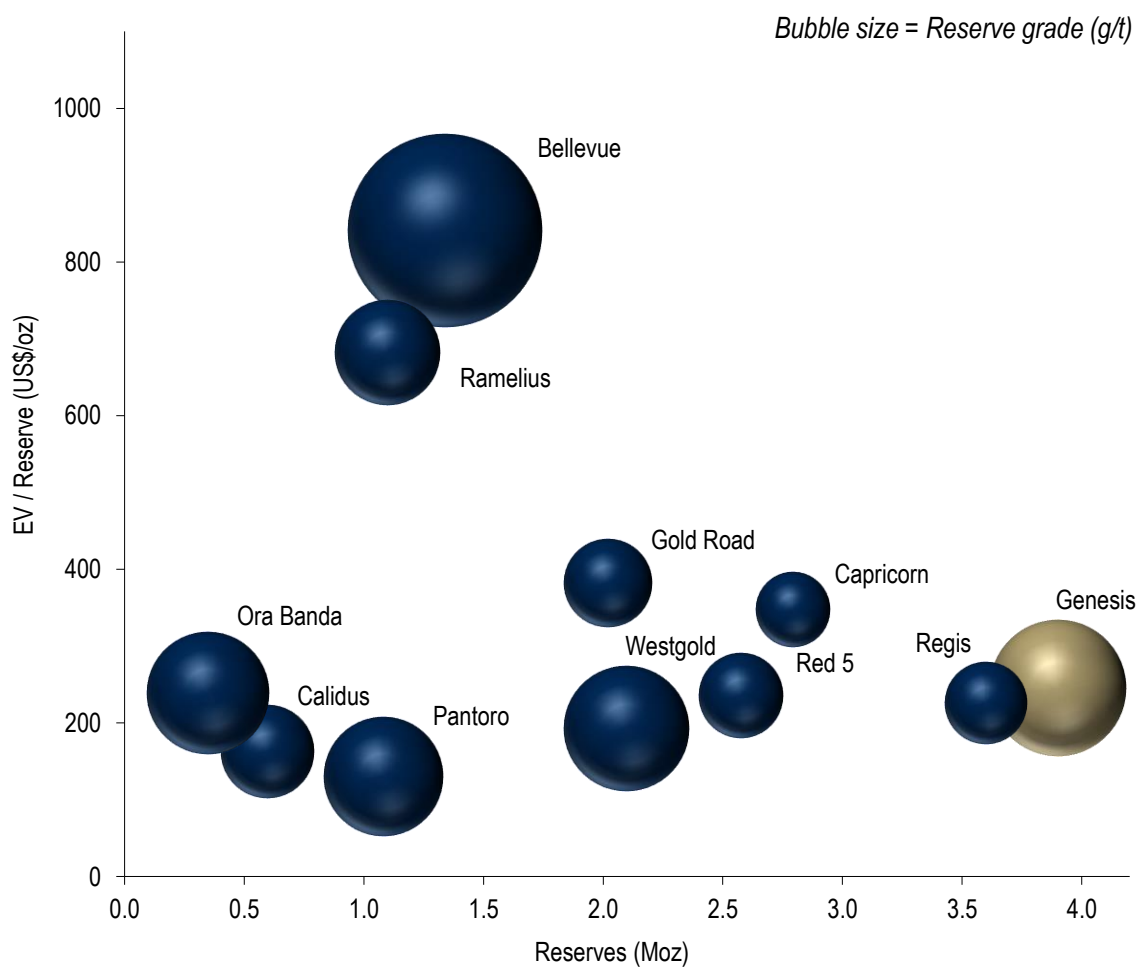


Attractive multiples - Largest Resources and Reserves in peer group, high grade:

EV / Resources (US\$/oz)



EV / Reserves (US\$/oz)



Source: Company ASX announcements, EV based on share prices at 11th September 2023. Peer group includes ASX-listed gold producers with 100% Western Australian production.

Re-building the Foundations



Conservative management committed to “future-proofing” Leonora:

GWALIA STRATEGIC REVIEW - December half 2023

- ▶ **Investment to ensure a new lease of life for Gwalia in the long-term:**
 - ▶ Re-build Resource, Reserve, life of mine plan
 - ▶ Re-set (slow) production; add Ulysses / Admiral
 - ▶ Accelerate development and drilling
 - ▶ Reduce geotechnical risk
 - ▶ Reduce costs
- ▶ **Defensive characteristics:**
 - ▶ Increase resilience to short term risk (while locked into existing mining sequence)
 - ▶ Restore trust in Gwalia over time

...THE LAUNCH - March quarter 2024

- ▶ **Five-year outlook including:**
 - ▶ Production
 - ▶ Costs - AISC, growth capital
 - ▶ People and culture initiatives
 - ▶ Sustainability initiatives
 - ▶ Exploration
- ▶ **Market access:**
 - ▶ Capital Markets Day
 - ▶ Investor site visit
 - ▶ Global investor road-show



- ▶ Genesis is a **new Australian gold house, 100% focused on Leonora**
- ▶ Genesis is targeting **sustainable, high-quality earnings** with **capital-light production growth**
- ▶ Genesis has the **management capability, financial flexibility** and **investor mandate to restore and grow Leonora**
- ▶ Genesis is **well funded to invest in Leonora** and **deliver the long-term benefits of more production at lower cost and lower risk**
- ▶ Genesis is positioned to **“fill the gap” between the ASX 100 gold producers and the rest**
- ▶ Genesis has **made a good start** - Building run-of-mine stocks and hitting targets in first two months of ownership

Appendix A: Group Ore Reserves



Deposit	Proved			Probable			Total		
	Tonnes (000's)	Grade (g/t Au)	Ounces (000's)	Tonnes (000's)	Grade (g/t Au)	Ounces (000's)	Tonnes (000's)	Grade (g/t Au)	Ounces (000's)
Genesis									
Gwalia ^(1,6)	2,100	5.1	350	11,000	5.0	1,700	13,000	5.0	2,000
Aphrodite ^(1,6)	-	-	-	2,800	3.6	320	2,800	3.6	320
Zoroastrian ^(1,6)	-	-	-	800	3.8	97	800	3.8	97
Tower Hill ^(1,6)	-	-	-	9,700	1.8	560	9,700	1.8	560
Admiral ^(2,4)	-	-	-	2,400	1.6	120	2,400	1.6	120
Orient Well ^(2,4)	-	-	-	1,200	1.2	46	1,200	1.2	46
Puzzle ^(2,4)	-	-	-	2,700	1.3	110	2,700	1.3	110
Ulysses Open Pit ^(2,4)	820	2.6	69	620	1.9	38	1,400	2.3	110
Ulysses Underground ^(2,7)	490	4.1	65	1,600	3.6	180	2,100	3.7	250
Total Genesis	3,400	4.3	480	32,000	3.1	3,200	36,000	3.2	3,600
Dacian									
Jupiter OP ^(2,3)	680	1.1	23	3,400	1.0	110	4,000	1.0	130
Redcliffe - Hub ^(2,4)	-	-	-	580	3.4	64	580	3.4	64
Redcliffe - GTS ^(2,4)	-	-	-	640	2.2	46	640	2.2	46
Redcliffe - Nambi ^(2,4)	-	-	-	380	2.5	31	380	2.5	31
Total Dacian	680	1.1	23	5,000	1.6	250	5,600	1.5	270
Group Total	4,100	3.8	500	37,000	2.9	3,400	41,000	3.0	3,900

Notes: All figures reported to two significant figures. Rounding errors may occur. 1. Ore Reserves are based on a gold price of A\$2,000/ounce; 2. Ore Reserves are based on a gold price of A\$2,300/ounce; 3. Cut-off grade is 0.43g/t; 4. Cut-off grades used is 0.7g/t; 5. Cut-off grades used are 0.8g/t, 0.9g/t and 1.0g/t for oxide/transitional/fresh material respectively; 6. Cut-off grades used for reserves are Gwalia - 4.0g/t, Aphrodite - 1.9g/t, Zoroastrian - 2.0g/t, Tower Hill - 0.4g/t; 7. Cut-off grades used for reserves is 1.8g/t.

Appendix B: Group Mineral Resources



Deposit	Tonnes (000's)	Measured Grade (g/t Au)	Ounces (000's)	Tonnes (000's)	Indicated Grade (g/t Au)	Ounces (000's)	Tonnes (000's)	Inferred Grade (g/t Au)	Ounces (000's)	Tonnes (000's)	Total Grade (g/t Au)	Ounces (000's)
Genesis												
Gwalia Deepes	3,600	5.5	630	18,000	5.7	3,300	2,400	6.6	520	24,000	5.8	4,500
Gwalia Shallows	1,100	3.5	130	1,500	3.7	180	770	3.3	81	3,400	3.5	390
Gwalia Open Pit	5,900	2.3	430	3,200	2.0	200	-	-	-	9,000	2.2	630
Harbour Lights	-	-	-	13,000	1.7	670	1,200	2.0	73	14,000	1.7	750
Tower Hill	-	-	-	21,000	1.8	1,200	-	-	-	21,000	1.8	1,200
Bardoc	150	2.3	11	36,000	1.8	2,000	17,000	1.8	970	53,000	1.8	3,000
Ulysses	1,600	3.8	190	4,100	3.5	460	2,200	2.9	210	7,900	3.4	850
Admiral Group	-	-	-	6,600	1.4	310	8,400	1.0	280	15,000	1.2	590
Orient Well Group	-	-	-	3,700	1.1	130	4,300	1.1	160	8,000	1.1	290
Puzzle Group	-	-	-	6,700	1.1	230	2,000	0.9	57	8,800	1.0	290
Laterite Deposits	-	-	-	570	0.7	12	200	0.7	4	770	0.7	17
Stockpiles	-	-	-	220	0.8	6	-	-	-	220	0.8	6
Total Genesis	12,000	3.5	1,400	110,000	2.4	8,700	39,000	1.9	2,300	160,000	2.4	12,000
Dacian												
Westralia	310	4.5	45	3,700	4.0	470	6,400	2.9	590	10,000	3.3	1,100
Jupiter	620	1.2	23	11,000	1.0	370	13,000	1.1	440	24,000	1.1	830
Mt Marven OP	-	-	-	1,200	1.2	45	340	1.2	13	1,500	1.2	58
Cameron Well/Maxwells OP	-	-	-	170	0.9	5	500	0.8	13	660	0.8	17
GTS	-	-	-	930	1.9	56	1,400	1.2	51	2,300	1.4	110
Hub	160	4.6	24	660	3.9	82	850	2.3	62	1,700	3.1	170
Nambi	-	-	-	720	2.7	62	850	2.8	76	1,600	2.7	140
Redcliffe Other	-	-	-	-	-	-	7,200	1.1	260	7,200	1.1	260
Stockpiles	-	-	-	-	-	-	3,200	0.4	41	3,200	0.4	41
Total Dacian	1,100	2.6	92	18,000	1.9	1,100	33,000	1.4	1,500	53,000	1.6	2,700
Group Total	13,000	3.5	1,500	130,000	2.3	9,800	72,000	1.7	3,900	220,000	2.2	15,000

Notes: All figures reported to two significant figures. Rounding errors may occur.



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