

PANTORO

February 2024

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IMPORTANT NOTICES CONTINUED



Past performance. Past performance metrics and figures (including past share price performance of Pantoro), as well as pro forma financial information, included in this presentation are given for illustrative purposes only and should not be relied upon as (and is not) an indication of Pantoro's, or any other party's views on Pantoro's future financial performance or condition or prospects. Investors should also note that the pro forma historical financial information is for illustrative purpose only. Investors should note that past performance of Pantoro, including in relation to the historical trading price of Pantoro 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 Pantoro performance, including the future trading price of Pantoro shares. The historical information included in this presentation is, or is based on, information that has previously been released to the market.

Exploration Targets, Exploration Results. The information in this report that relates to Exploration Targets and Exploration Results is based on information compiled by Mr Scott Huffadine (B.Sc. (Hons)), a Competent Person who is a Member of the Australian Institute of Geoscientists. Mr Huffadine is a Director and full time employee of the Company. Mr Huffadine is eligible to participate in short and long term incentive plans of and holds shares, options and performance rights in the Company as has been previously disclosed. Mr Huffadine 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 Huffadine consents to the inclusion in the report of the matters based on his information in the form and context in which it appears.

ASX Listing Rule 5.23 Mineral Resources & Ore Reserves. This presentation contains estimates of Pantoro's ore reserves and mineral resources, as well as estimates of the Norseman Gold Project's ore reserves and mineral resources. The information in this presentation that relates to the ore reserves and mineral resources of Pantoro has been extracted from a report entitled 'Annual Mineral Resource & Ore Reserve Statement' announced on 29 September 2023 and is available to view on the Company's website (www.pantoro.com.au) and www.asx.com (**Pantoro Announcement**).

For the purposes of ASX Listing Rule 5.23, Pantoro confirms that it is not aware of any new information or data that materially affects the information included in the Pantoro Announcement and, in relation to the estimates of Pantoro's ore reserves and mineral resources, that all material assumptions and technical parameters underpinning the estimates in the Pantoro Announcement continue to apply and have not materially changed. Pantoro confirms that the form and context in which the Competent Person's findings are presented have not been materially modified from that announcement.

ASX Listing Rule 5.19 Production Targets. The information in this presentation that relates to production targets of Pantoro has been extracted from reports entitled 'DFS for the Norseman Gold Project' announced on 12 October 2020, 'Annual Mineral Resource & Ore Reserve Statement' announced on 26 September 2022, 'Annual Mineral Resource & Ore Reserve Statement' announced on 29 September 2023 and 'Underground Development to Commence at Scotia' announced on 17 January 2024 and are available to view on the Company's website (www.pantoro.com.au) and www.asx.com (**Pantoro Production Announcements**).

For the purposes of ASX Listing Rule 5.19, Pantoro confirms that all material assumptions underpinning the production target, or the forecast financial information derived from the production target, in the Pantoro Production Announcements continue to apply and have not materially changed.

JORC Code. It is a requirement of the ASX Listing Rules that the reporting of ore reserves and mineral resources in Australia comply with the Joint Ore Reserves Committee's Australasian Code for Reporting of Mineral Resources and Ore Reserves ("JORC Code"). Investors outside Australia should note that while ore reserve and mineral resource estimates of the Company in this document comply with the JORC Code (such JORC Code-compliant ore reserves and mineral resources being "Ore Reserves" and "Mineral Resources" respectively), 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 S-K, which governs disclosures of mineral reserves in registration statements filed with the SEC. Information contained in this document 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.



COMPANY OVERVIEW

PANTORO ANNUAL SUMMARY



LARGE, HIGH-GRADE MINERAL RESOURCE

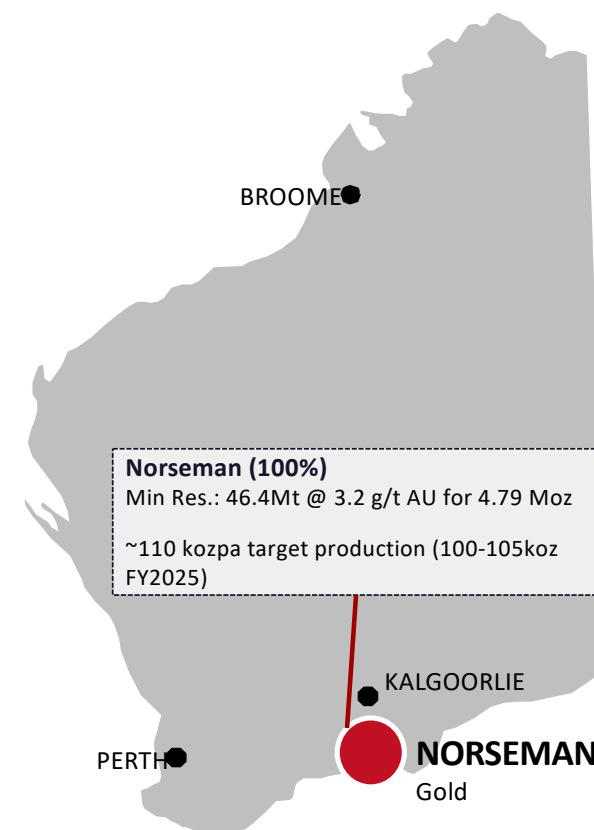
- 46.4 Mt @ 3.2g/t for 4.8 million ounces gold.

GROWING GOLD PRODUCTION POSITION

- New, fully operational gold mining operation which includes:
 1. New 1 million tonne per annum processing plant operating at nameplate capacity and readily expandable.
 2. High grade OK underground mine outperforming the Mineral Resource and Ore Reserve.
 3. Open pit mining centre at Scotia. Large cut back completed and mining in higher grade ore zones underway.
- Production guidance of 100,000 oz for FY 2024 @ AISC of A\$1,900 per oz.

SIGNIFICANT GROWTH POTENTIAL

- Prolific goldfield now 100% owned by Pantoro – historical production of approximately 6 million ounces of gold from one of Western Australia's highest grade goldfields. Norseman has had split ownership for the majority of its history.
- A large pipeline of ore sources and exploration targets ensure long mine life and future expansion options.



CAPITAL STRUCTURE



CAPITAL STRUCTURE

Share Price ¹	4.2 cps
Ordinary Shares	5,204 million
Options and rights ³	48.9 million
Cash and gold ²	\$35 million
Market Capitalisation	A\$218.5 million
Debt	US\$40 (A\$63) million
Zero Cost Currency Collars	Guaranteed AUD Value to December 2024
Gold Hedging	NIL

SHAREHOLDERS³

Tulla Resources Group	18.61%
Franklin Advisors	9.13%
Regal Funds Management	8.2%
Robmar Investments	4.6%
McCusker Holdings	2.6%

BOARD

Wayne Zekulich Chair

- Financial management, banking and accounting background
- Extensive public company experience at CFO and director level

Paul Cmrlec Managing Director

- Mining Engineering background with >25 years experience
- Extensive experience in feasibility, project development, operations and corporate management

Fiona Van Maanen Independent Non-executive Director

- Certified Practising Accountant and holds a Bachelor of Business (Accounting)
- 28 years experience in corporate governance, financial management, and accounting in the mining industry

Colin McIntyre Independent Non-executive Director

- Mining Engineering background with extensive experience across the gold industry. Specialised in contract mining of open pits, underground mines, crushing and screening.

Kevin Maloney Non-executive Director

- Chairman and founder of Tulla Resources Group and Chairman of THEMAC Resources.
- Extensive experience in corporate banking, finance and the resources industry

Mark Maloney Non-executive Director

- Managing Partner of Tulla Resources, previously CEO of The MAC Services.
- 15 years experience in investment markets.
- Bachelor of Business (Hons).

SENIOR MANAGEMENT

Scott Huffadine Chief Operating Officer

- Geologist with strong operational and project development background and 28 years experience
- Extensive site general management and corporate experience

Scott Balloch Chief Financial Officer

- Highly experienced CFO and financial controller with approximately 25 years experience with ASX listed mining companies

David Okeby Company Secretary

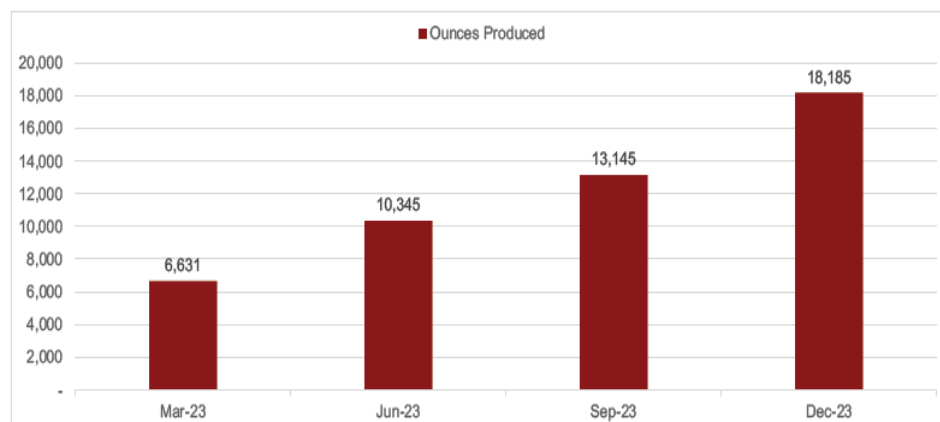
- Approximately 20 years working in mining companies and experienced in all areas of company legal and secretarial matters

1. Closing Price 3 November 2023; 2. Estimated cash and gold as at 31 December 2023

NORSEMAN ADVANCING TOWARDS STEADY STATE

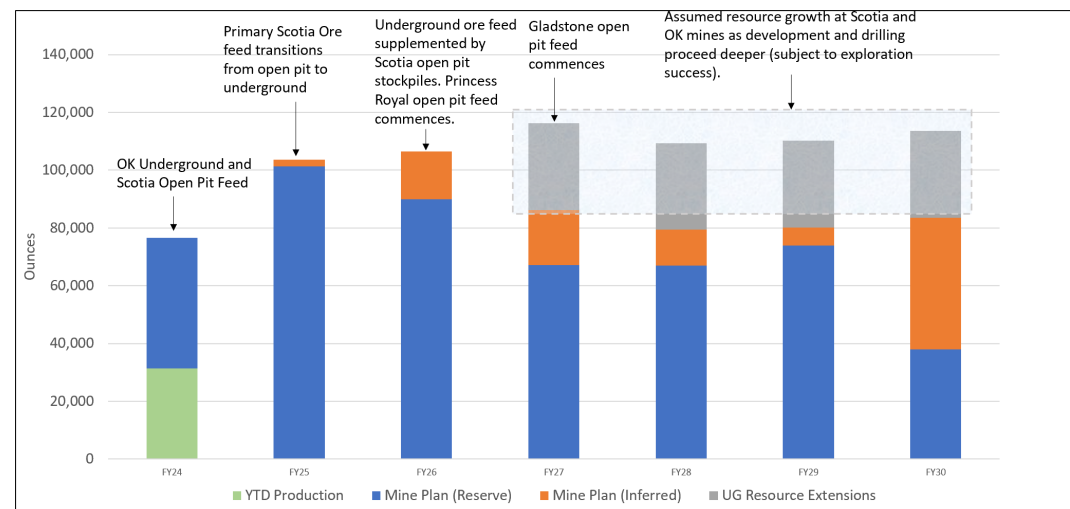


CY 2023 Production Growth



- Production significantly improved every quarter as OK mine developed and Scotia ore was accessed.
- Further improvement to full production rates expected as Scotia open pit advances and Scotia underground development progresses.
- 970,000 Oz Ore Reserve underwrites mine plan and can replace 'extension' ounces if necessary.
- Significant Ore Reserve growth at OK already realised through both development and underground drilling.
- Plant built to easily accommodate ~50% expansion and potential to increase production via additional underground high-grade sources.

Mine Plan to 2030



Financial Year	2024	2025	2026	2027	2028	2029	2030
Production to Date ('000 Oz)	31.3						
Mine plan (Reserves) ('000 Oz)	45.3	101.4	90.0	67.2	74.0	38.0	27.4
Mine Plan (Inferred Mineral Resource) ('000 Oz)		0.2	16.5	12.3	6.2	45.5	53.7
Underground extensional target * ('000 Oz)				30.0	30.0	30.0	30.0
Total ('000 Oz)	77	102	107	110	110	114	111
AISC (\$/Oz)		\$1,700 – \$1,800	\$1,800 – \$1,850				

CURRENT NORSEMAN GOLD PROJECT MINERAL RESOURCE AND ORE RESERVE



Norseman Gold Project Mineral Resource

	Measured			Indicated			Inferred			Total		
	kT	Grade	kOz	kT	Grade	kOz	kT	Grade	kOz	kT	Grade	kOz
Total Underground	297	15.4	147	3,002	11.2	1,077	2,563	11.0	906	5,861	11.3	2,130
Total Surface South	140	2.3	10	14,464	1.8	841	13,417	2.6	1,123	28,022	2.2	1,981
Total Surface North	4,165	0.7	100	4,207	2.0	276	3,325	2.5	264	11,684	1.7	639
Total ⁽³⁾	4,603	1.7	258	21,673	3.2	2,195	19,305	3.7	2,294	45,567	3.2	4,750

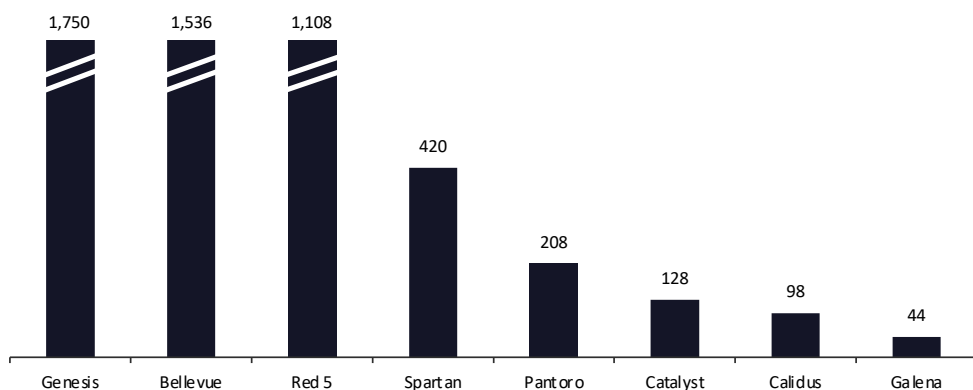
Norseman Gold Project Ore Reserve

	Proven			Probable			Total		
	kT	Grade	kOz	kT	Grade	kOz	kT	Grade	kOz
Underground	65	7.6	16	1,939	5.1	317	2,004	5.2	333
Open Pit - Northern Mining Centres	-	-	-	2,058	2.4	161	2,058	2.4	161
Open Pit - Southern Mining Centres	-	-	-	5,742	2.0	363	5,742	2.0	363
Stockpiles	4,165	0.8	100	-	-	-	4,165	0.8	100
Total	4,230	0.9	116	9,739	2.7	842	13,969	2.1	958

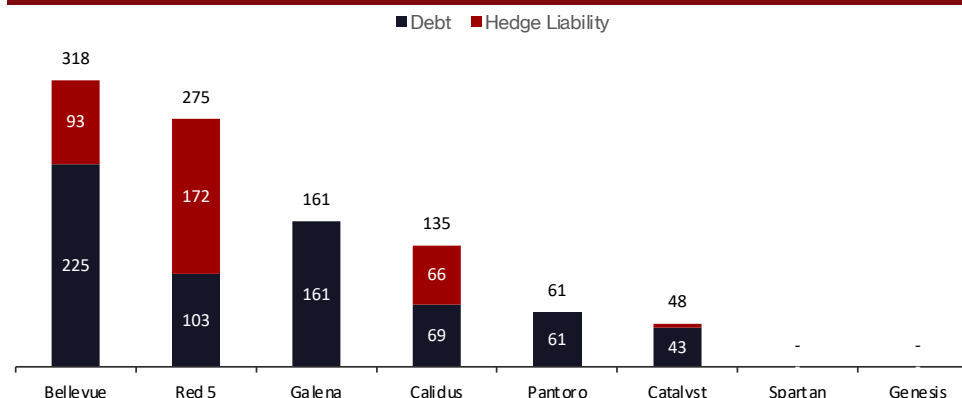
PEER DEVELOPERS CAPITAL STRUCTURE COMPARISON



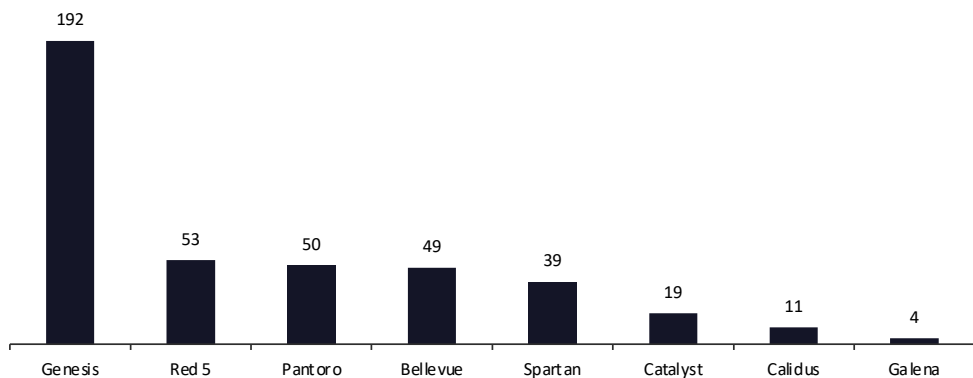
Market Capitalisation (A\$m)¹



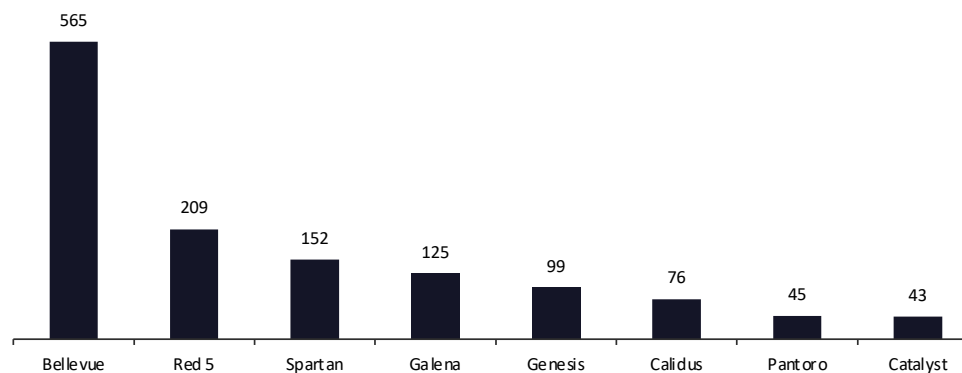
Total Debt (Incl. Hedge Liability) (A\$m)²



Cash (A\$m)



EV/Resource (A\$/oz)³



1. As at 9-Feb-2024. Galena share price as at 8-Jan-2024, prior to Suspension from Quotation
2. Hedge asset/liability calculated as at 9-Feb-24, based on gold price of US\$2,048/oz
3. EV includes hedge asset / liability as at 9-Feb-2024. Galena Resource converted to gold equivalent using commodity prices as at 9-Feb-2024



NORSEMAN GOLD PROJECT

NORSEMAN GOLD PROJECT OVERVIEW



OPERATIONS UPDATE

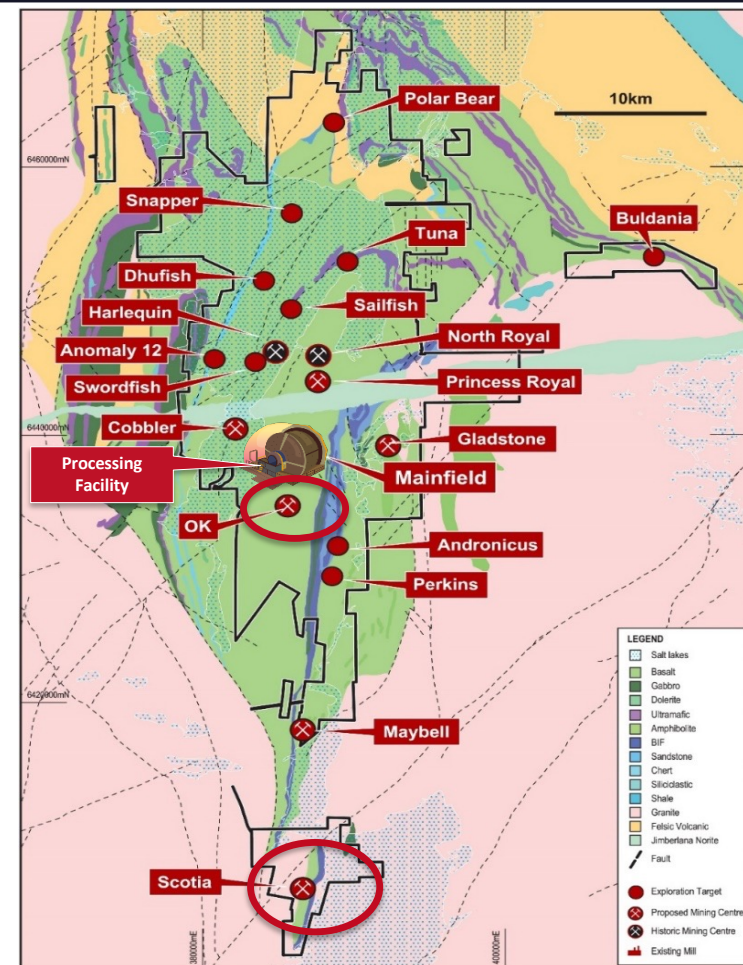
- 1MTPA processing plant build completed in November 2022. Currently operating above nameplate capacity and at design recovery.
- Mining at OK underground mine has generated excellent results and the mine is producing to plan.
- Open pit mining at Scotia has now advanced past historical open pits. Plans modified with underground to commence next quarter. New open pit contractor commenced February 2024.
- Initial target of 110 Koz per annum with multiple expansion options.

MULTIPLE MINING CENTRES PROVIDE LONG MINING PIPELINE

- 800km² position with 70 km along strike of one of Australia's most significant goldfields.
- Strong Ore Reserve growth since acquisition ongoing.
- Production from two key mining centres for several years - Long life mines.

HUGE EXPLORATION UPSIDE POTENTIAL

- Pantoro's work represents the first systematic drilling and exploration for 25 years – yielding strong results. Project Ore Reserve now stands at 958,000 ounces.
- Less than 30% of known Mineral Resource areas drilled for Ore Reserve conversion to date.
- Opportunity to increase production as additional high-grade ore sources are brought to Ore Reserve status.

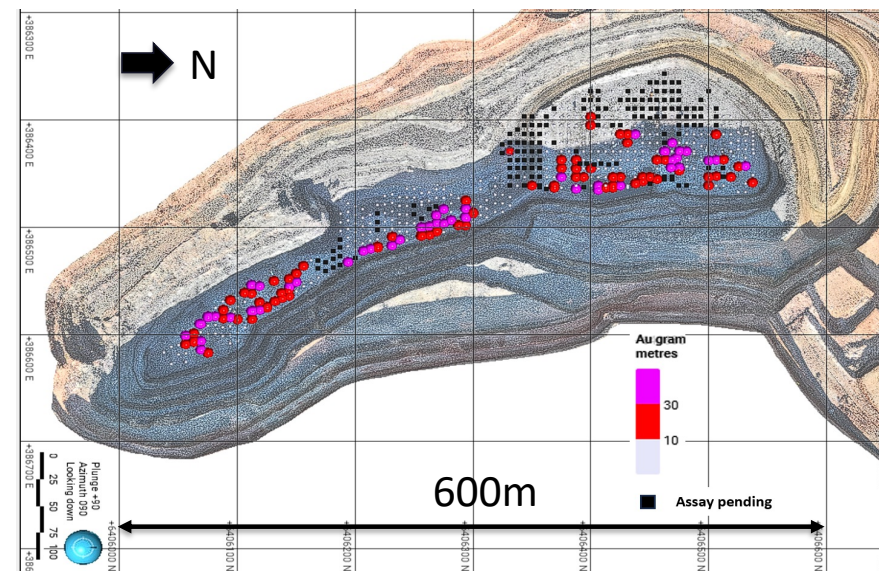
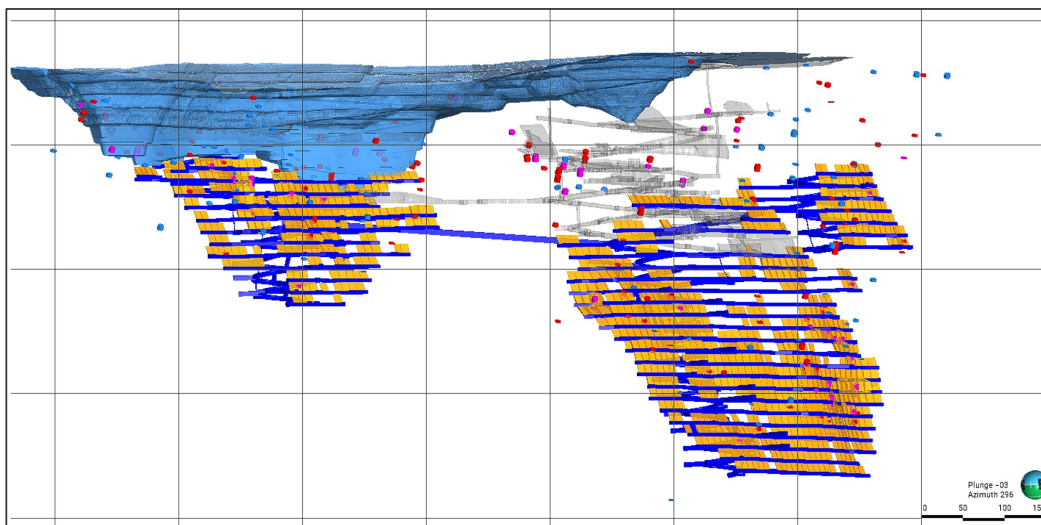


SCOTIA – A NEW BEGINNING



Open Pit

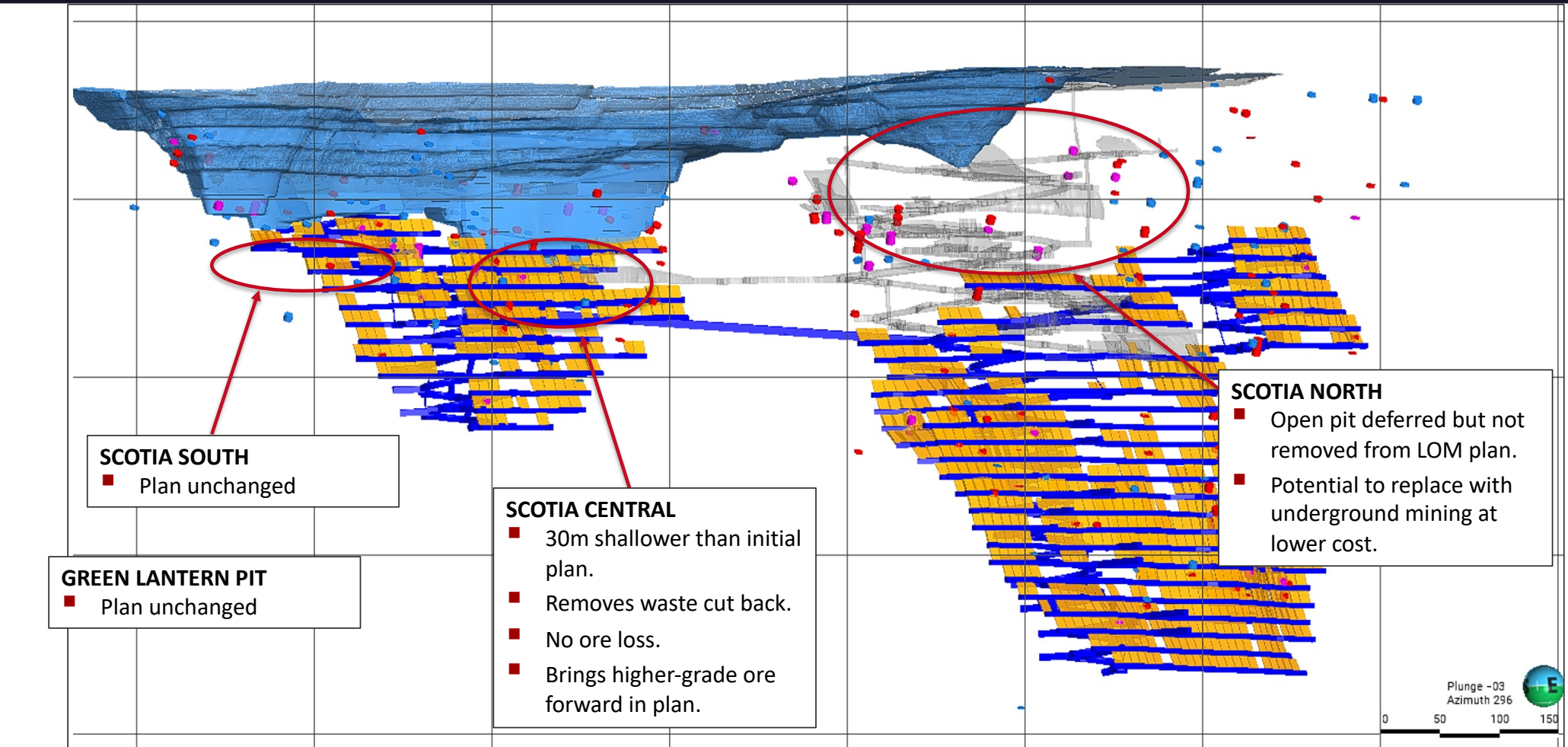
- High grade ore beneath old mine voids now accessed with mining underway with grade increasing as expected.
- Grade control drilling revealing thick, high grade mineralisation in remainder of the South and Central open pits.
- New contractor in place as of 1 February and fully operational.
- New contract better aligned to operational priorities.
- Open pit mining to continue until Q4 2024



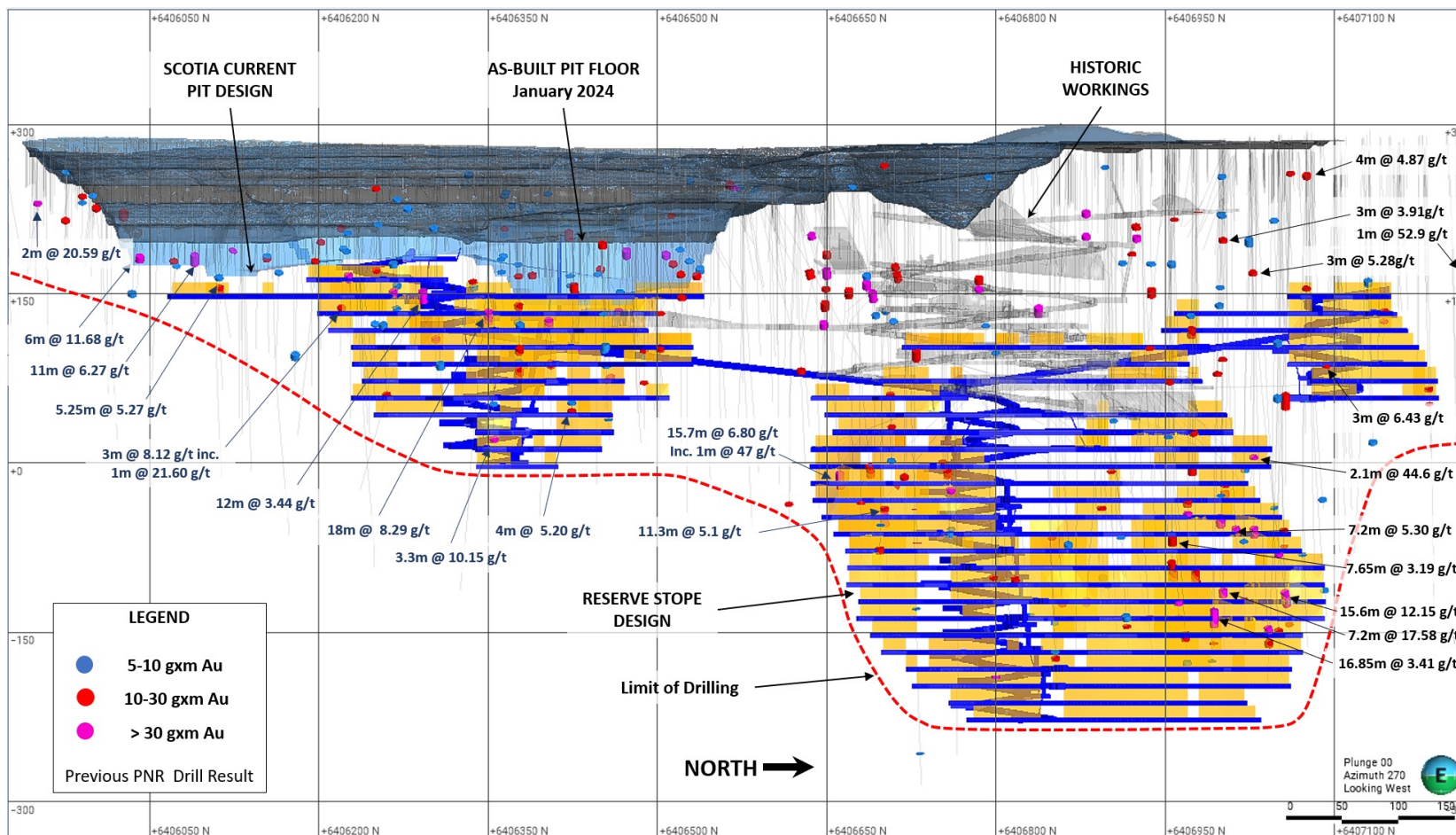
Underground

- Commencement brought forward to Q2 2024.
- Multiple contractors currently tendering underground contract.
- Removes the need for additional waste cut-backs, reducing overall site costs.
- Rapid access to ore levels, increasing mill grade through second half of 2024.

SCOTIA – OPTIMISED TO THE OREBODY AND MARKET CONDITIONS



SCOTIA – DEEP DRILLING UNDERWRITES THE LONG TERM PLAN



Scotia Underground Key Milestones

- Underground development and production contract Award – March 2024
- Portal Excavation – April 2024
- Ore Development – July 2024
- Production stoping – Q3 2024
- Steady State – Q1 2025

Scotia Underground Key Metrics

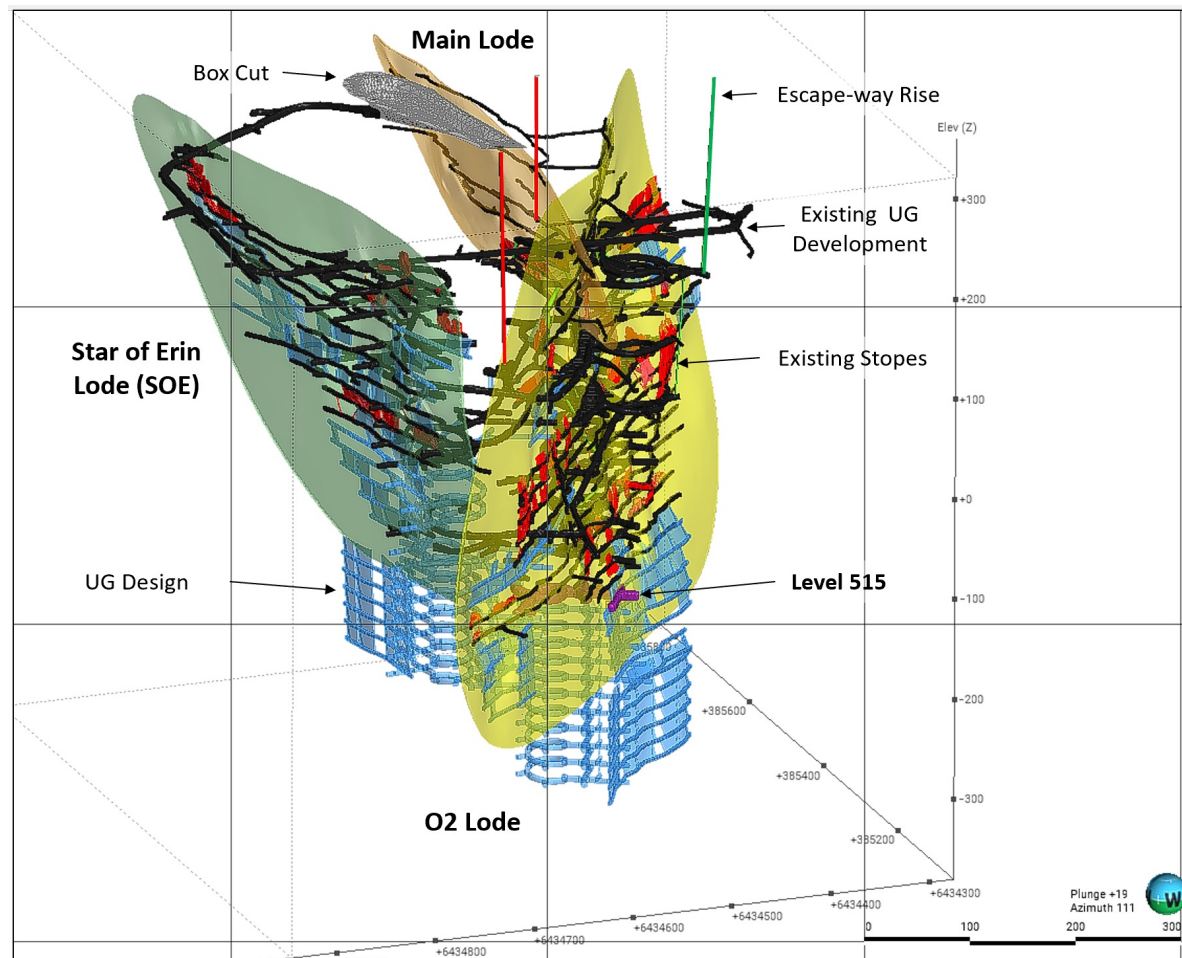
- Pre-production expenditure - \$8M
- Maximum exposure before positive cashflow - \$12.5M @ \$2,900/Oz gold price (Sept 24 Qtr)
- Steady state production - 450,000 tonnes per annum
- Mine Plan Grade – 4.5g/t Au
- Expected ASIC <\$1,700/Oz

OK MINE



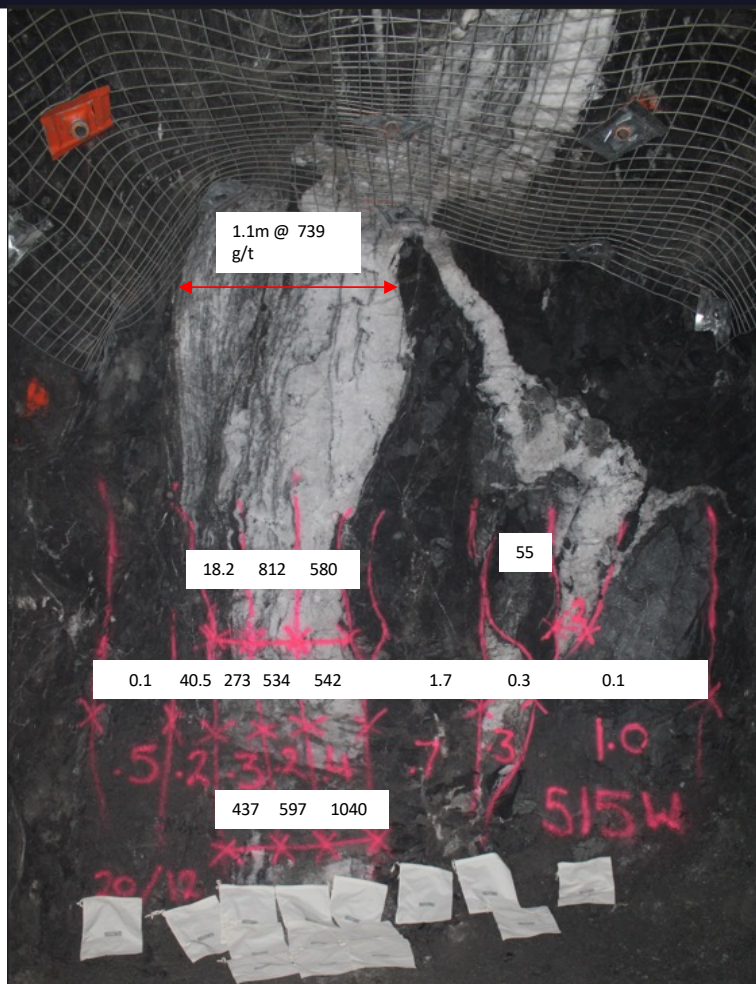
OK UNDERGROUND MINE

- Production underway from Star of Erin and O2 Lodes.
- Mine is meeting budget expectation with significant capacity to expand production.
- Very high grades encountered in first new level (515 level) in O2 Lode.
- Star of Erin continues to produce very high grade pay runs.
- Substantial ore Reserve additions in first year. Underground drilling ongoing with additional extensions expected.
- Long-term, high-grade ore source for Norseman.

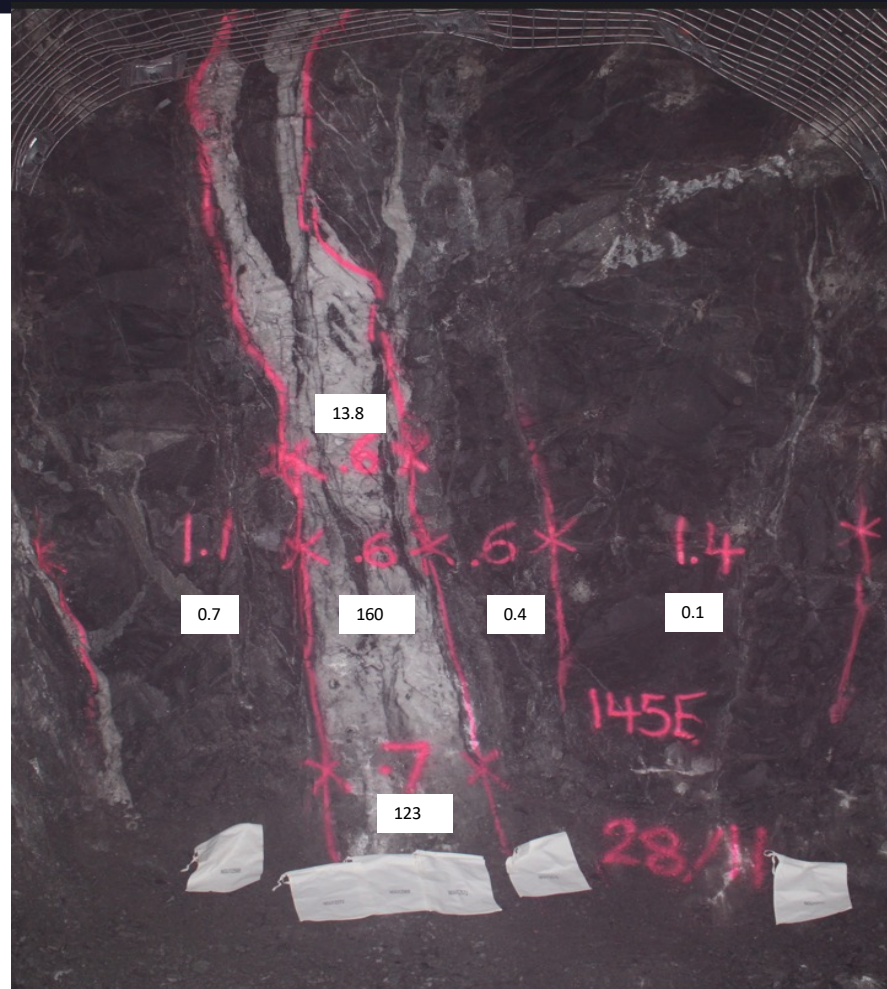


1. See ASX releases dated 17/04/2020 and 16/6/20

OK MINE – EXAMPLE HIGH GRADE FACES IN CURRENTLY ACTIVE AREAS



515W OD1 Face 3 (O2 Lode) – **First New Level at bottom of mine**
Local Grid: -2425N, -865E, -515mRL



145E OD1 Face 112 (SOE Lode) – **Currently Stopping**
Local Grid: -2067N, -695E, -139mRL



EXPLORATION UPSIDE HAS NOT CHANGED

NORSEMAN – PROLIFIC FIELD WITH MASSIVE GROWTH POTENTIAL



A HIGH SCALE, TOP TIER ASSET

Norseman produced ~6Moz historically and has a substantial Mineral Resource at high grade. It is part of the highly prospective Yilgarn Craton, clustered near other large deposits

WORLD-CLASS GREENSTONE BELT

Pantoro's tenure is situated in the southern end of the most gold-endowed Greenstone Belt of the Yilgarn Craton. **The Norseman-Wiluna Greenstone Belt has seen 195Moz²** Au produced to date

HIGHLY PROSPECTIVE AREA

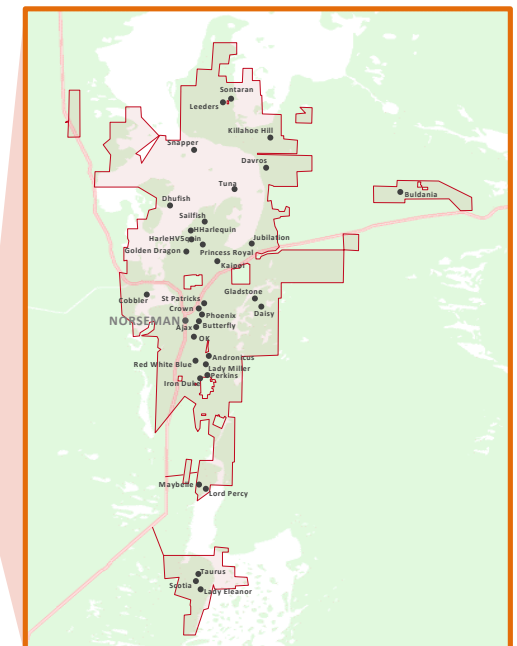
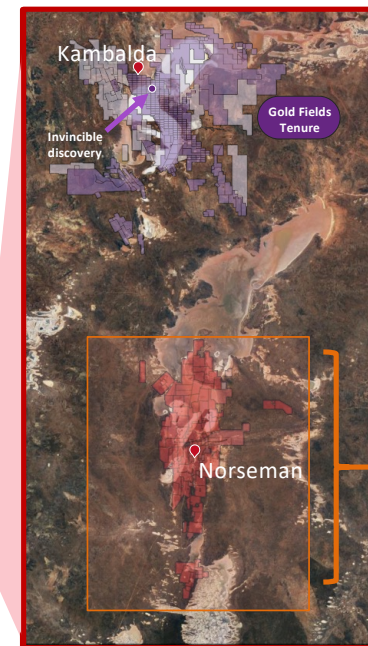
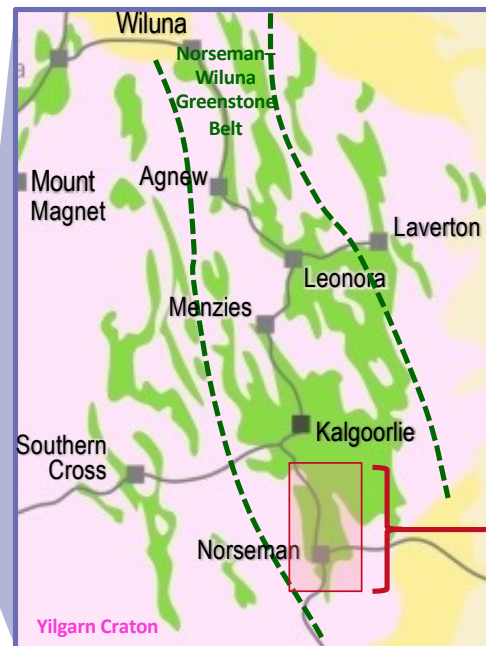
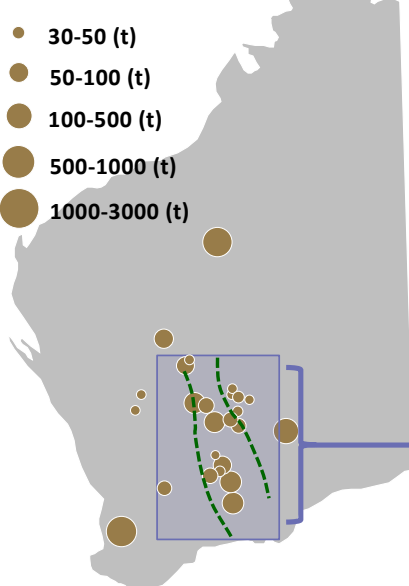
The area between Norseman and Kambalda is highly prospective, with **34Moz³** Au produced to date. **Much of the region is covered by lakes with minimal exploration**

SIGNIFICANT EXPLORATION UPSIDE

Pantoro's 50% Norseman tenure is a significant proportion of the highly prospective region, including Lake Cowan which has had minimal modern exploration

MAJOR WA GOLD DEPOSITS¹

- 30-50 (t)
- 50-100 (t)
- 100-500 (t)
- 500-1000 (t)
- 1000-3000 (t)

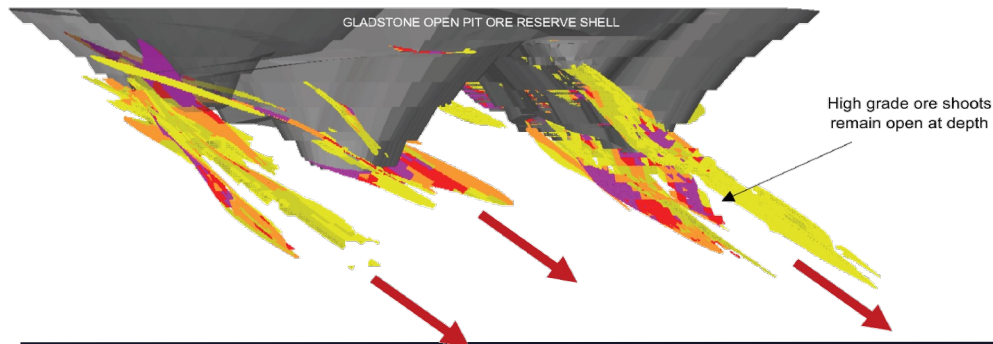
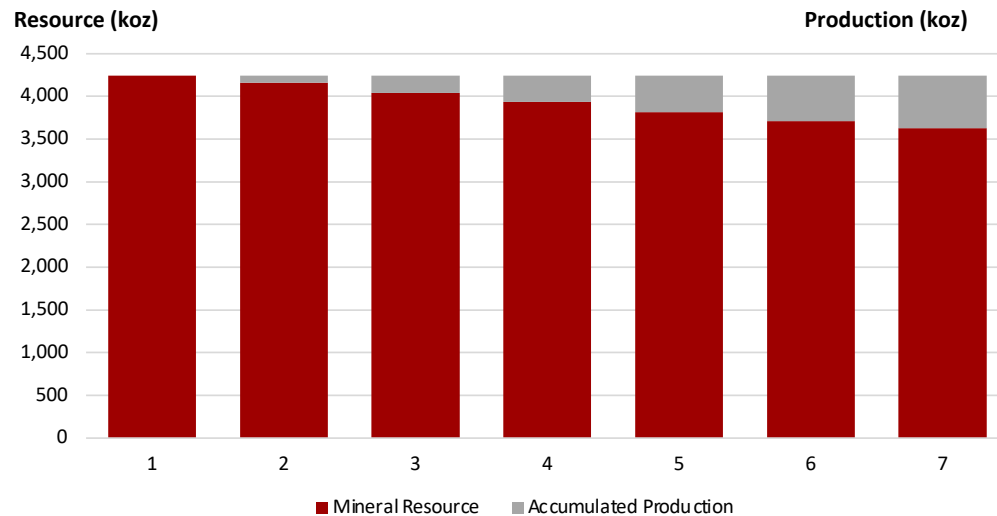


1. Adapted from Rush Australia's 21st Century Gold Industry (2016)
 2. WA Department of Mines, Industry Regulation and Safety 2019 Major Commodities Resources Data. Cumulative Gold Production from the following mineral fields: Broad Arrow, Coolgardie, Dundas, East Coolgardie, East Murchison, Mt Margaret, North Coolgardie, North East Coolgardie.
 3. WA Department of Mines, Industry Regulation and Safety 2019 Major Commodities Resources Data. Cumulative Gold Production from the Coolgardie and Dundas mineral fields

INITIAL PROGRAMS COVERED SMALL PORTION OF RESOURCES



REMAINING MINERAL RESOURCE



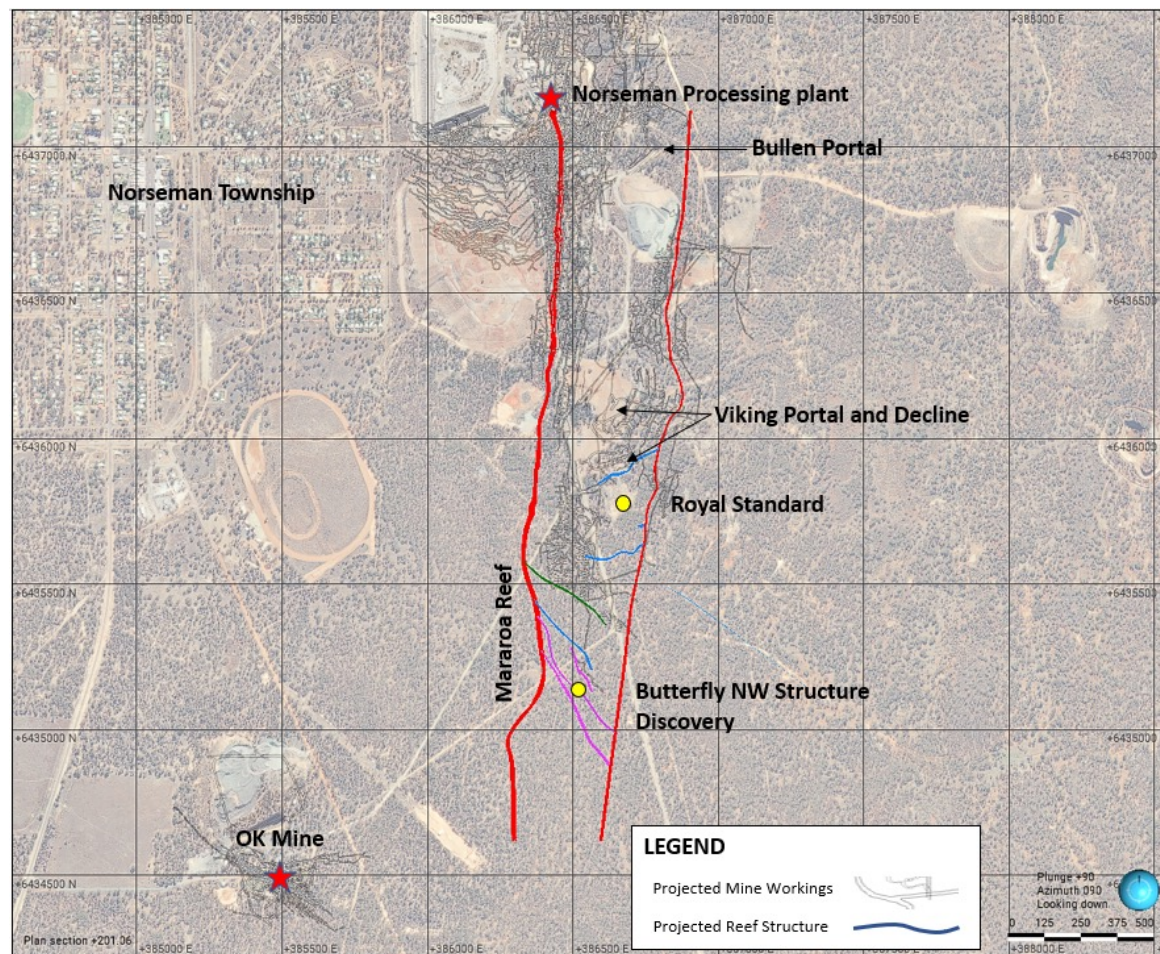
SMALL PORTION OF AVAILABLE MINERAL RESOURCE FURTHER DEVELOPED BY PANTORO TO DATE

- Less than 30% of the Mineral Resource considered in phase 1.
- Most areas focussed on open pits but have subsequent underground potential.

SURFACE EXPLORATION TO RECOMMENCE IN 2024

- Drilling to focus on high grade areas including:
 - ▶ **Scotia extensions** – depth and strike extension to known mineralisation, plus development.
 - ▶ **Mainfield** – Main source of high grade ore historically with mined grades and shallow depths by WA standards.
 - ▶ **Polar Bear** – additional large open pits and underground potential.

NORSEMAN – BUTTERFLY AREA



NORSEMAN MAINFIELD

- Large, high grade existing Mineral Resource with over 3km of strike.
- Drilling by Pantoro confirms multiple zones of high grade mineralisation. Results include:

5.7 m @ 35.85 g/t Au inc. 1.4 m @ 141.57 g/t Au.	
4 m @ 6.86 g/t Au.	
1 m @ 23.5 g/t Au.	2 m @ 6.21 g/t Au.
0.45 m @ 21.9 g/t Au.	2 m @ 5.8 g/t Au.
2 m @ 20.61 g/t Au.	4 m @ 5.68 g/t Au.
2 m @ 15.87 g/t Au.	3 m @ 5.35 g/t Au.
6 m @ 14.94 g/t Au.	1 m @ 10.3 g/t Au.
2 m @ 10.8 g/t Au.	1.15 m @ 8.47 g/t Au.

Butterfly Area

- Accessible via Viking Decline.
- Existing Mineral Resources at Mararoa and Royal Standard Reefs.
- New discovery of NW striking mineralisation with results including:

6 m @ 31.0 g/t Au. Inc. 2m @ 81.5 g/t Au	
2 m @ 20.66g/t Au.	1m @ 58.6 g/t Au.
0.64 m @ 91.62 g/t Au.	2m @ 12.43 g/t Au.
1.63m @ 11.4 g/t Au.	2m @ 11.69 g/t Au.
- Pantoro will target the Butterfly area as next underground mine to increase overall mill head grade and increase production.



APPENDIX

APPENDIX 1: COMPARABLE GOLD COMPANIES



Resource:															
ASX Code	Company	Project Stage	Measured			Indicated			Inferred			Total Resources			Source
			Tonnes (Mt)	Grade (g/t Au)	Contained Au (Moz)	Tonnes (Mt)	Grade (g/t Au)	Contained Au (Moz)	Tonnes (Mt)	Grade (g/t Au)	Contained Au (Moz)	Resource Tonnes (Mt)	Grade (g/t Au)	Contained Au (Moz)	
BGL	Bellevue Gold	Production	-		-	4.6	11.2	1.7	5.2	8.8	1.5	9.8	9.9	3.1	Bellevue Gold East Coat Roadshow Presentation Announced on the ASX 13 November 2023
CAI	Calidus	Production	6.8	1.5	0.3	27.3	1.6	1.4	28.9	1.3	1.2	63.0	1.4	2.9	Investor Webinar Presentation Announced on the ASX 10 January 2024 Maiden Bulletin Resource Announced on the ASX 26 October 2023
CYL	Catalyst Metals	Production	-		-	27.2	3.2	2.8	8.2	3.0	0.8	35.5	3.2	3.6	Catalyst Metals 2023 Annual Report Announced to ASX 13 October 2023 Plutonic and Trident Resource and Reserve - Update Announced on the ASX 8 December 2023
CYL	Galena Mining Ltd	Production	0.2	2.7	0.0	9.7	2.6	0.8	10.1	2.4	0.8	20.0	2.5	1.6	2023 Mineral Resource Update Announced on the ASX 7 August 2023 Au Eq. based on following prices: Gold US\$2,048/oz, Silver US\$22/oz, Lead US\$2,146/t
GMD	Genesis	Production	13.9	3.4	1.5	138.2	11.2	10.2	76.7	1.6	4.0	228.7	2.1	15.7	Corporate Presentation – Ready Set Grow Announced on the ASX 27 November 2023 Reporting on select Kin Mining Gold Projects Announced on the ASX 14 December 2023
PNR	Pantoro	Production	4.8	2.0	0.3	22.1	3.2	2.3	19.6	3.7	2.3	46.5	3.3	4.9	Annual Mineral Resource & Ore Reserve Statement Announced on the ASX 29 September 2023
RED	Red 5	Production	6.8	1.4	0.3	82.8	1.7	4.6	23.5	2.0	1.5	113.1	1.7	6.2	2023 Mineral Resource & Ore Reserve Statement Announced on the ASX 7 September 2023
SPR	Spartan Resources	Development	0.3	0.8	0.0	30.0	1.8	1.7	13.8	1.7	0.8	44.2	1.8	2.5	Dalgaranga Gold Project – Mineral Resource Estimate Update Announced on the ASX 14 December 2023