



PLENARY SHOWCASE

08.00 **Registration opens**

08.50 **Welcome from the organiser**
Andrew Thake, Global Head of Content and Research, **Mines and Money**

SESSION 1: THE FUTURE OF EXPLORATION, MINING AND INVESTMENT

08.55 **Welcoming Address from Session Chair**
Andrew Thake, Global Head of Content and Research, **Mines and Money**

09.00 **Keynote Address: The future for mining exploration – what's next?**
• What's next for exploration?
• What's next for exploration investment?
• What's next for exploration financing?
Rick Rule, President & CEO, **Sprott U.S. Holdings**

09.30 **Reserved for Sponsor** (*reserved for Saudi Government*)

09.50 **Keynote Address: Succeed together or fail apart: the choice facing the mining industry and its stakeholders**
• What must change for the mining industry to move from a mindset of short-term exploitation to long-term profitability?
• What can be done to combat the challenge of indebtedness – why are miners still putting 'unprofitable' gold on the market and why are banks continuing to finance their ventures?
• Reviewing the changes to different mining codes in Africa – how can the industry adapt whilst still delivering dividends to shareholders?
• Is now the right time to be doing M&A, or is M&A the road to impairments?
• Are we past peak gold and what can the industry do to replenish its pipeline?
John Welborn, Managing Director & CEO, **Resolute Mining**

10.10 **Keynote Fireside Chat: What does London's leading natural resource fund manager think about the future of the mining sector?**
BlackRock Gold and General Fund's has US\$1.1bn in gold stocks, from Barrick to B2Gold. Blackrock also runs the World Mining Trust, which has US\$1bn invested in stocks such as Glencore and First Quantum.
Tom's interviewer is Jamie Strauss, who is one of the best-connected brokers in London, and the founder and CEO of Digbee Ltd, an alternative mining research platform, and a NED of Altius Minerals, Gold Standard Ventures and Bacanora Minerals.
Always a highlight of Mines and Money, this hard-hitting interview will cover critical issues such as M&A and ESG, critical commodities such as gold and battery metals, and how the mining investment landscape is changing to adapt to new challenges.
Thomas Holl, Director and Portfolio Manager, Natural Resources, **BlackRock**
Interviewed by:
Jamie Strauss, CEO, **Digbee**

10.40 **Exhibition Break**

SESSION 2: (RISK) AND REPUTATION – THE MISSION-CRITICAL IMPORTANCE OF ESG

11.10 **Welcoming Address from Session Sponsor**
 SATARLA
Real Training. Credentialed. Research.

11.15 **Keynote Panel Debate: Is the mining industry doing enough to implement ESG at the ground level?**
• Why has ESG moved towards the top of mining CEOs in-tray?
• Understanding ESG as a net-contributor to the business bottom line
• Defining the material risks and opportunities that ESG issues present for the mining industry
• What steps can be taken to win back public trust post Brumadinho? It wasn't the first tailings management disaster (Samarco 2015) and it is unlikely to be the last
• An update on the ICMM's Tailings Governance Framework – key findings, recommendations and next steps
• Guidelines for shaping an effect ESG framework, including process and reporting, aligning interests of shareholders
• How are investors moving towards adopting a holistic ESG mind-set in their investment process?
Panellists:
Elaine Dorward-King, Executive Vice President, Sustainability and External Relations, **Newmont**
John Howchin, Secretary General, Council on Ethics, **Swedish Pension Funds**
Tal Lomnitzer, Senior Investment Manager, Natural Resources, **Janus Henderson**
Tom Butler, CEO, **ICMM**
Sharon Flynn, Executive Vice President of External Affairs & Social Performance, **Oceana Gold**
Cecilia Jofre, Chief Sales Officer, **IsoMetrix**

12.05 **Out of the box address: Time for a brand overhaul? What can the mining industry learn from other industries about reinventing its image?**
• Case studies of successful brands in other sectors – what can the mining industry learn from them?
• Strategies for dealing with negative PR stories
• Why do you never see a 'good news' story in mining – strategies for getting mining's positive image out
• Turning diversity from a statement of intent to something meaningful and encompassed by your brand
• How can you turn brand overhaul turn into ROI?
David Haigh, Founder and CEO, **Brand Finance**
Richard Haigh, Managing Director, **Brand Finance**

12.30 **Premium Mining Spotlight**
Darren Millman, Vice President and Chief Financial Officer, **Centerra Gold**

12.40 **Premium Mining Spotlight**
Jose Manuel Dominguez, General Manager – Spain, **Black Dragon Gold**

12.50 **Premium Mining Spotlight**
Jay Layman, President & Chief Operating Officer, **Seabridge Gold**

13.00 **Lunch & Exhibition Break**

SESSION 3: WORKING WITH STAKEHOLDERS IN AFRICA

13.40 **Welcoming Address from Session Chair**
Charles Vivian, Director, **Tavistock**

13.45 **Keynote Address: How is a leading Africa-based miner responding to the challenge of resource nationalism?**
• The changing nature of resource nationalism in South Africa and Africa
• How does a mining company such as Sibanye-Stillwater engage with governments to mitigate and manage risk?
• Is diversification (other jurisdictions) the way forward?
Neal Froneman, Chief Executive Officer, **Sibanye-Stillwater**

14.05 **African Government Address Angola Projects**
Endiama and **CATOCA**

14.25 **Africa Mining Spotlight**
Mabvuto Chipata, Acting CEO, **ZCCM-IH**

14.45 **Keynote Panel Discussion: Rising resource nationalism and mechanisms for ensuring better wealth distribution – how can the mining industry work better with governments and local communities?**
• Why are we seeing an increase in resource nationalism? Is it always linked to rising commodity prices or is it something deeper?
• When, and under what circumstances is resource nationalism justified?
• How should miners best respond to the threat of resource nationalism?
• How can resource nationalism best be factored in to investment decisions?
• Identifying future hotspots for government and jurisdictional risk in Africa
Presenter and Panellist:
Peter Leon, Co-Chair – Africa Practice, **Herbert Smith Freehills**
Panellists:
Deshnee Naidoo, CEO, **Vedanta Zinc International**
Jon Samuel, Group Head of Social Performance & Engagement, **Anglo American**
Dr David Twist, Investment Committee member and Founding Partner, **AMED Funds**
Aime Emmanuel Yoka, Managing Partner, **Marys Capital Investments** and President, **Mining Federation, Congo Brazzaville**
Moderator:
Charles Vivian, Director, **Tavistock**

15.45 **Africa Mining Spotlight**
Cuango

15.55 **Africa Mining Spotlight**
Chitotolo

16.05 **African Mining Spotlight**
African Gold Group

16.15 **Call to Action: ESG and Artisanal & Small Scale Mining**
Jamie Lesser, Chief Operating Officer, **Mineral & Financial Investments Limited (M&FI)**

16.25 **Panel discussion: Responsible mining in Africa – what does this mean in practice for key stakeholders**
Panellists:
Richard Musukwa, Minister of Mines and Minerals Development, **Government of the Republic of Zambia**
Olebogeng Sentsho, CEO, **Simba Mgodini Mining Incubation Fund**
Owen Hegarty, Executive Chairman, **EMR Capital**
Moderator:
Brendan Clarke, Director Africa, **CSA Global**

16.55 **Host's Closing Summary and Key Takeaways**

17.00 **After dark social agenda commences**

EXPLORATION THEATRE

10.00 **Welcome from the organiser**

10.05 **Introduction from Morning's Host**
Michael White, President & CEO, **IBK Capital**

10.10 **Investment Thesis: In Gold We Trust – key takeaways from one of the leading reports on gold**
Ronald-Peter Stoeferle, CMT, Research & Investment Funds, **Incrementum AG**

10.30 **Mining Spotlight**
Victor Cantore, CEO, **Amex Exploration**

10.40 **Mining Spotlight**
Garett Macdonald, Chief Executive Officer and Director, **Maritime Resources**

10.50 **Mining Spotlight**
Keith Barron, CEO, **Aurania Resources**

11.00 **Mining Spotlight**
Alan Carter, CEO, **Cabral Gold**

11.10 **Mining Spotlight**
Brian Maher, CEO, **PPX Mining**

11.20 **Investment Thesis: Understanding the supply demand dynamics of Zinc**
The refined market remains tight, with exchange stocks hovering near decade lows and wide backwardations on the LME in the first half of this year, although this has not been reflected in metal premiums to date. Despite a marked slowing of zinc consumption, a return to balance has been stubbornly difficult to achieve so far, providing some support to prices.
On the other hand, the market for zinc concentrates has eased considerably. Spot TCs bottomed below \$20/t conc in H1 2018, and they have since risen to above \$260/t for clean concentrate. Indeed, the challenge for new entrants has been placing more complex material into the Chinese market at sensible (<300 \$/t) TCs.
While there are clearly bullish and bearish arguments to be had, a protracted delay in the flow-through of rising mine to refined supply is keeping both sides of the argument alive
Alice Fox, Zinc Strategist, **GRU Group**

11.40 **Mining Spotlight**
Steve Williams, CEO, **Pasinex Resources**

11.50 **Mining Spotlight**
Patrick Soares, CEO, **Foran Mining**

12.00 **Mining Spotlight**
Ricus Grimbeek, CEO, **Trevali Mining**

12.10 **Mining Spotlight**
Justin Brown, Managing Director, **Element 25**

12.20 **Mining Spotlight**
John Prineas, CEO, **St George Mining**

12.30 **Mining Spotlight**
Roger Jackson, Executive Director, **NQ Minerals**

12.40 **Mining Spotlight**
Hamish Bohannan, CEO, **Gulf Manganese**

12.50 **Mining Spotlight: FinnCobalt – an advanced cobalt mine development project**
Markus Ekberg, Co-owner, **FinnCobalt**

13.00 **Mining Pitch Battle – Heat 1 – Gold & Precious**
Sponsored by:
 DUNDEE CORPORATION

Contestants:
Tony Truelove, COO, **Panthera Resources**
Ivan Bebek, CEO, **Auryn Resources**
Ben Whiting, VP Exploration, **Barsele Minerals / Belcarra Group**
Paul Cronin, CEO, **Adriatic Metals**
Steve Swatton, CEO, **K2 Gold**
Judges:
Mark Burrige, Managing Partner, **Baker Steel Capital Managers**
Jeremy Atkinson, CEO, **Northshore Capital Advisors**
Ian Henderson, Private Investor
Jonathan Goodman, Executive Chairman, **Dundee Corporation**
Marco Roque, Director, **Emerging Markets Capital**
Emcee: **Jochen Staiger**, Chief Editor, **Commodity-TV**

13.55 **Introduction from Afternoon's Host**
Ellis Martin, CEO & Founder, **Ellis Martin Reports**

14.00 **Investment Thesis: Lithium processing technology – the real roadblock to lithium investment opportunities?**
Rodney Hooper, Consultant, **Lithium Rocks**

14.20 **Mining Spotlight**
Jeremy Wrathall, CEO, **Cornish Lithium**

14.30 **Mining Spotlight**
Michael Bennett, President & CEO, **Altamira Gold**

14.50 **Mining Spotlight**
Paul Adams, Managing Director, **Spectrum Metals**

15.00 **Investment Thesis: Should investors be viewing nickel as the best way to play the EV investment thesis?**
Jim Lennon, Managing Director, **Red Door Research**

15.20 **Mining Spotlight**
Jim Paterson and **Colin Smith**, **ValOre Metals Corp**

15.30 **Mining Spotlight**
Brandon Macdonald and **Neil McRae**, **Fireweed Zinc**

15.40 **Mining Spotlight**
Gerhard Redelinghuys, CEO, **Bowen Coking Coal**

15.50 **Mining Spotlight**
Rui Feng, CEO, **Silvercorp**, **New Pacific Metals**

16.00 **Applying Bottom Up Investing To Junior Mining**
Matt Geiger, Managing Partner, **MJG Capital**

16.20 **Mining Pitch Battle – Heat 2 – Gold & Precious**
Sponsored by:
 DUNDEE CORPORATION

Contestants:
Alexander Yakubchuk, Director of Exploration, **Orsu Minerals**
Michael Bennett, President & CEO, **Altamira Gold**
Peter Ledwidge, Managing Director, **Mako Gold**
Jose Manuel Dominguez, General Manager – Spain, **Black Dragon Gold**
Craig Roberts, CEO, **Ethos**
Judges:
Amanda Van Dyke, Portfolio Manager, **South River Asset Management**
Torsten Dennin, Founder and CEO, **Lynkeus Capital**
Mark Burrige, Managing Partner, **Baker Steel Capital Managers**
Daniel Rose, Managing Director - Head of Commodities – Asia, **VTB Capital**
Clive Donner, CEO, **The LINQ Group**
Emcee:
Jochen Staiger, Chief Editor, **Commodity-TV**

17.20 **Host's Closing Summary and Key Takeaways**

17.30 **Close of Exploration Theatre**

17.30 **After dark social agenda commences**

OTHER EVENTS

10.00-17.00 **Exhibition open**

09.00-17.00 **Mines and Technology London – Exhibition floor**

14.00-17.00 **Guru Garden – Exhibition floor, Coffee Area**

12.00-17.00 **Roundtables – Exhibition floor, Coffee Area**

GURU GARDEN – Book a one on one meeting with a leading metal guru expert

14.00 **Investment Guru**
Egon Von Greyerz, CEO and Founder, **Matterhorn Asset Management**

14.30 **Investment Guru**
Owen Hegarty, Executive Chairman, **EMR Capital**

15.00 **Investment Guru**
Torsten Dennin, CEO, **Lynkeus Capital**

15.30 **Investment Guru**
Chris Harris, Managing Director, **Hexa Resources**

16.00 **Investment Guru**
Rick Rule, President & CEO, **Sprott U.S. Holdings** (*booked*)

16.30 **Investment Guru**
Lawrence Roulston, Managing Director, **WestBay Capital**

ROUNDTABLES – 10 people, Chatham House Rules

11.00 **Commodity Roundtable: Diamonds**
Kieron Hodgson, Executive Director - Commodities & Mining Research, **Panmure Gordon**

12.00 **Topic Roundtable: How miners can manage legal risks in emerging markets**
Sylvia Noury, Partner, **Freshfields**

14.00 **Commodity Roundtable: Investment opportunities in battery metals**
Andrew O'Donnell, Managing Director, **Supercharged Stocks**

15.00 **Topic Roundtable: Mergers and Acquisitions in Mining**
Rod Nichol, Managing Director, **Lionsgate Capital**

16.00 **Topic Roundtable: Co-investments in mining**
Huw Williams, Associate Director Equity, **EBRD**

AFTER DARK SOCIAL AGENDA

17.00 onwards **Mines and Money and Young Mining Professionals Networking Reception – Exhibition Floor**



