

Emerging Markets Report: Piece of Cake

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Today's featured company is a simple story. It's a uranium play.

For those of you who have dabbled in the markets for any length of time you may recall that when uranium gets hot interest in companies pegged to yellow cake soars. This is hardly breaking news, just a simple and reflexive approach to market activity and the spot price.

For many, uranium companies like [Generation Uranium Inc.](#) (TSXV: GEN) (OTCQB: GENRF) (FRA: W85) present an opportunity to play uranium. Unlike gold or other metals, you can't stick Krugerrands or shiny bars of uranium in that secret spot behind the family portrait.

Uranium affords no such proximity.

So, when headlines like those below adorn the newsfeeds of 2024, publicly traded companies present some exposure to the phenomenon at hand. But first a few headlines and links:

Bloomberg: Deadly and Wildly Profitable, Uranium Fever Breaks Out
The radioactive metal's price is up 233%, revealing the speed at which the world is embracing nuclear power once again. *Source.*

Forbes: U.S. Ban Could Spark Another 60% Hike In The Price Of Uranium
----- *Source.*

Hopefully, venerable Forbes and Bloomberg meet your journalistic standards.

Back to Generation Uranium, because, well, the Company is paramount in the success algorithm. It is easy to jump into a white hot industry and stake your claim literally or figuratively. That certainly doesn't mean you're going to succeed.

The Company has an exceptional Investor Presentation here and we strongly encourage you to check it out because A) it speaks quite well to the overall opportunity and momentum for uranium and B) how the Company is looking to execute in this opportunity.

Here are a couple points worth noting, paramount among them is that there appears to be significant interest in the power and efficiency of nuclear energy, energy that is reliant on yellow cake/uranium.

From the deck:

"The world needs more nuclear to achieve a low cost, reliable and greener future of energy and Canada is the second largest producer of Uranium in the world at 15%, behind Russia friendly Kazakhstan which produces 43% of the world's supply.

"Canada is home to the Athabasca Basin and the Thelon Basin, two of the highest-grade uranium districts in the world. Global Yellowcake supply is set to reach 145M lbs in 2024, but demand is already at 180M lbs, representing a roughly 35M lbs deficit.

"The World Nuclear Association expects demand to nearly double to 300M lbs by 2040. Nuclear Power

needs to triple by 2050 to meet the Paris Accord goal of global temperature reduction.

"As of January 2024 there are around 60 nuclear plants under construction with another 110 planned (2) In 2022, global energy consumption was 31.6% from oil and 26.7% from coal while nuclear was only at 4%. A push for more reliable and greener energy at a low cost paves the way for significant nuclear energy growth."

Ok, that's the opportunity in the sector with a nod to Mother Canada which is both well-positioned with uranium and geo-politically stable. Times of war such as the Ukraine/Russia conflict remind us how important this component is.

But the deck goes on to eloquently lay out the opportunity that Generation Uranium is putting forth. The pitch is pretty concise and clear.

The Company is well-positioned with positions in multiple locations to capitalize on the enthusiasm for nuclear energy, a greener future, and affordable power.

Again, from the deck:

"In an era where the quest for sustainable and reliable energy sources intensifies, Generation Uranium emerges as a beacon of potential.

"At the heart of our mission lies the untapped riches of the Thelon Basin, poised to redefine the uranium market. Our strategic position, underscored by robust historical data and promising geological forecasts, sets the stage for unprecedented exploration opportunities.

"Join us as we embark on a journey to harness the power of uranium, fueling a greener future and offering a unique investment horizon. With Generation Uranium, you're not just investing in a company; you're investing in the future of energy."

It's more than just those catchy tag lines. The company has to perform, bring goods to market and tell their story to an investing public that is clearly enthusiastic about yellow cake. If it can perform into this white-hot market the rest can and should take care of itself.

Public companies like Generation Uranium can certainly provide investors with a chance to hold their own 'piece of (yellow) cake' if you will, as the company earns their trust and interest with the execution of a well-thought out business plan in one of the hottest industries on the planet.

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