

Gold Hits \$3,700 As Fed Cuts and Central Bank Buying Converge

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Equity Insider News Commentary - Issued on behalf of Lake Victoria Gold Ltd

Fed rate cut expectations have reached certainty levels, with futures markets now showing 100% probability for a 25 basis-point reduction in September, following tepid August employment data that solidified monetary easing momentum^[1]. This policy pivot arrives as gold surges past \$3,700 toward Goldman Sachs' aggressive \$3,700 year-end target^[2], while central banks accelerated purchases to 166 tonnes in Q2 2025 alone^[3], a 41% surge above historical norms as sovereign institutions diversify away from traditional dollar-denominated assets. The convergence of easier monetary policy with structural de-dollarization trends is creating unprecedented conditions that benefit Lake Victoria Gold (TSXV: LVG) (OTCQB: LVGLF), 1911 Gold Corporation (TSXV: AUMB) (OTCQB: AUMBF), Tudor Gold Corp. (TSXV: TUD) (OTCPK: TDRFF), Teuton Resources Corp. (TSXV: TUO) (OTCQB: TEUTF), and [Talisker Resources Ltd.](#) (TSX: TSK) (OTCQX: TSKFF).

JPMorgan now forecasts gold reaching \$4,000 by mid-2026^[4], supported by projected quarterly demand averaging 710 tonnes from central banks and investors, while warning prices could surge even earlier if demand outpaces expectations.

Lake Victoria Gold (TSXV: LVG) (OTCQB: LVGLF) has already cleared a crucial regulatory hurdle as Tanzania's National Environment Management Council approved the Updated Environmental and Social Management Plan for its fully-permitted Imwelo Gold Project. This approval removes what many consider the final significant barrier to development, positioning the company among the few junior miners with both regulatory clearance and near-term production potential in one of Africa's most prolific gold regions.

The timing proves strategic. While many explorers struggle with permitting delays that can stretch years, LVG now operates under a clear regulatory framework backed by its existing 10-year renewable mining license. This positions the company to capitalize on gold's continued strength, with the metal currently trading above \$3,700 per ounce.

"Approval of the updated ESMP is a significant milestone for Imwelo, reinforcing that the project is environmentally sound and socially responsible," said Marc Cernovitch, President & CEO of Lake Victoria Gold. "Combined with the foundation provided by the 2021 Updated Pre-Feasibility Study, Imwelo represents a rare opportunity for near-term gold production in Tanzania with modest capital requirements, strong expansion potential, and the potential to generate cash flow that will support our broader growth strategy across the Lake Victoria Goldfield."

The milestone validates LVG's development strategy centered on Imwelo, positioned just 12 kilometers from AngloGold Ashanti's flagship Geita mine. The company targets first gold within 12 months of construction start, with Area C as the priority development zone featuring 3.7 g/t average gold grades-among the highest in the historical resource.

A planned strategic 7,750m drill program combines 3,750m of grade control drilling for mine planning with 4,000m targeting mineralized extensions. Previous intercepts such as 6.8m at 14.6 g/t gold from 33m demonstrate production-ready mineralization, supporting optimization work ahead of a construction decision anticipated after Q3 2025.

"With updated environmental approvals now in place, our team is focused on the practical steps to bring Imwelo into production," said Seth Dickinson, Chief Operating Officer of Lake Victoria Gold. "The project benefits from a straightforward mine plan, proven metallurgy, and proximity to existing regional infrastructure."

As it approaches the anticipated closing of its previously announced financing, the company is strengthening its financial position comprising up to \$6 million through a non-brokered LIFE private placement and an additional \$1.5 million concurrent placement.

Priced at \$0.175 per share when announced in late July with gold around \$3,200 per ounce, the timing appears favorable with LVG shares now trading at \$0.225 (a 29% premium to the offering price), as well as gold's current \$3,700 price being 12% higher than the \$3,300 it was at on the day of the financing's announcement. Proceeds will fund a work program that will satisfy several conditions precedent to unlock a pre-paid forward (PPF) with Monetary Metals that will fund Capex to advance Imwelo to production.

Additional opportunities are also emerging through LVG's Tembo Project, where a planned 3,000m drilling program targets shallow, high-grade zones suitable for toll milling at the nearby Nyati Resources processing facility. Historic results including 28.57 g/t over 3m from 54m and 17.23 g/t over 4m from 19m demonstrate the potential for immediate cash generation ahead of full Imwelo development, creating a dual-track production strategy that reduces development risk while maintaining upside exposure.

Beyond core development, LVG maintains exposure to potential US\$45 million in milestone payments from the 2021 asset sale to Barrick's Bulyanhulu operation. Strategic partnerships include the above-mentioned pre-pay forward with Monetary Metals and an alliance with Taifa Group, Tanzania's largest mining contractor.

With environmental approval secured, financing closing imminent, and drilling programs launching, Lake Victoria Gold represents the convergence of regulatory clearance, market timing, and operational momentum that experienced mining investors recognize as prerequisites for successful development in Africa's premier gold districts.

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In other industry developments and happenings in the market include:

1911 Gold Corporation (TSXV: AUMB) (OTCQB: AUMBF) has commenced a PEA on its True North Project with AMC Consultants to evaluate potential restart of underground mining operations. The study will assess development scenarios utilizing the existing permitted 1,300 tonne-per-day processing facility at Bissett, Manitoba.

"Initiating a PEA with AMC is a critical milestone as we advance the True North Mine toward a restart," said Shaun Heinrichs, President and CEO of 1911 Gold. "We intend to use the results of the PEA, together with delineation drilling to be completed in the fall on two bulk sample target zones, to finalize plans for a trial production run in mid-2026. This initial trial mining campaign, expected to last 3-5 months, will provide an important step toward demonstrating the planned mining and development methods, as well as confirm the resource and economics."

The company plans 30,000 metres of drilling over the next several quarters including exploration drilling on the San Antonio West and San Antonio Southeast zones. With rehabilitation work nearing completion on Level 16 and Hancon Mining Ltd. crews mobilized for critical infrastructure upgrades, 1911 Gold expects to deliver the PEA by first quarter 2026.

Tudor Gold Corp. (TSXV: TUD) (OTCPK: TDRRF) has delivered 2.57 g/t gold equivalent over 54.00 meters from its 2025 drilling program at the 80%-owned Treaty Creek Project in British Columbia's Golden Triangle. Recent drilling expanded the 300N Zone mineralized footprint by 45 meters to the north while intersecting robust intervals in the CS-600 Zone.

"The discovery of another high-grade hydrothermal breccia stockwork system between the previously identified corridors demonstrates the potential for the continuity for high-grade gold at depth at Treaty Creek," said Ken Konkin, P.Geol., Senior Vice-President, Exploration of Tudor Gold. "With our underground development permit filed, we plan to fill-in the gaps between 300N and the SC-1 Zone with more efficient and

cost-effective underground drilling."

The Treaty Creek Project hosts the Goldstorm Deposit with an Indicated Mineral Resource of 27.87 million ounces of gold equivalent grading 1.19 g/t and an Inferred Mineral Resource of 6.03 million ounces grading 1.25 g/t. The company continues advancing high-grade structural corridors within the SC-1 Zone while preparing for underground development operations.

Teuton Resources Corp. (TSXV: TUO) (OTCQB: TEUTF) has reported visual drill results from 1,717 meters drilled across six completed holes at its Ram Property in British Columbia's Golden Triangle. The program tested two magnetic anomaly targets, both associated with significant mineralization including broad domains of pyrrhotite-pyrite-chalcopyrite mineralization and porphyry-copper-gold systems.

"We are encouraged that inaugural drilling on the Ram property has yielded significant visual results from both of the chosen targets," said Dino Cremonese, P. Eng., CEO of Teuton. "Given the high proportion of pyrrhotite identified at Target 1, and the association between pyrrhotite and precious metal at the nearby Red Mountain gold deposit and Surebet, we have reason to hope for associated precious metal endowment on the Ram."

Target 1 drilling intersected high proportions of magnetic pyrrhotite bearing mineralization with 1-3 calcite-pyrrhotite veins per meter ranging up to 50 cm width. The company holds a 20% carried interest in Treaty Creek with a 0.98% NSR covering the Goldstorm deposit, providing additional exposure to British Columbia's prolific Golden Triangle region.

Talisker Resources Ltd. (TSX: TSK) (OTCQX: TSKFF) has completed its first gold sale from the Bralorne Gold Project, selling 707 ounces of gold in August for gross proceeds of approximately US\$2.3 million. This milestone confirms the company's successful transition from advanced-stage developer to active gold producer while validating its phased ramp-up strategy at the 100%-owned British Columbia operation.

"The sale of our first gold is a significant achievement for Talisker, and a proud moment for our entire internal team and operational partners," said Terry Harbort, President and CEO of Talisker. "With initial production revenue now in place, Talisker has entered a new growth phase supported by operational execution and strengthened financial flexibility."

Proceeds from the initial sale will be reinvested in ongoing underground development, resource conversion and infrastructure upgrades at Bralorne. The company continues advancing its broader exploration program seeking additional high-grade zones while implementing its successful offsite milling strategy with partner [Nicola Mining Inc.](#) to support regular future gold sales.

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