

Gold Surges Past \$3,650 on Fed Cuts and Central Bank Demand

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USA News Group News Commentary: Issued on behalf of [Lake Victoria Gold Ltd.](#)

Gold has shattered the \$3,650 barrier for the first time in history after markets priced in the now-certain Federal Reserve rate cuts-the first of this year^[1], creating unprecedented momentum for precious metals. The metal's 39% surge this year^[2] has been amplified by central banks accumulating 900 tonnes of gold reserves^[3] as nations diversify away from dollar-dominated assets amid mounting geopolitical tensions. This confluence of monetary easing expectations and institutional demand has positioned gold mining companies as prime beneficiaries of the evolving economic landscape, with Lake Victoria Gold (TSXV: LVG) (OTCQB: LVGLF), TRX Gold Corporation (NYSE-American: TRX) (TSX: TRX.TO), Dakota Gold Corp. (NYSE-American: DC), [Fuerte Metals Corp.](#) (TSXV: FMT) (OTCQB: FUEMF), and [Newmont Corp.](#) (NYSE: NEM) (TSX: NGT).

Wall Street's most prominent investment banks are forecasting gold to reach \$4,000 by mid-2026^[4], with Goldman Sachs targeting \$3,700 by year-end and UBS raising its forecast to \$3,800 amid escalating tariff uncertainty^[5].

Lake Victoria Gold (TSXV: LVG) (OTCQB: LVGLF) has reached a pivotal agreement in principle with the Government of Tanzania on the framework for the Government's statutory free carried interest in the Imwelo Gold Project. The breakthrough, announced following productive negotiations held on September 10, 2025, in Arusha, removes one of the most significant regulatory hurdles on the pathway to production and establishes a foundation for long-term partnership between the company and Tanzania.

Under Tanzania's Mining Act and recent regulations, the Government is entitled to a minimum 16% non-dilutable free carried interest in all mining projects, ensuring direct participation in the ownership of natural resources. The fiscal framework also includes a 6% royalty on gold production plus a 1% export levy, with a reduced rates of 4% for in-country refining and requirements for local beneficiation.

"Reaching agreement in principle with the Ministry of Minerals marks an important milestone for Lake Victoria Gold and for Tanzania," said Marc Cernovitch, President and CEO of LVG. "The Government's participation ensures that the Imwelo Project will be developed in alignment with national priorities, including responsible mining, in-country refining, and long-term value creation for all stakeholders. While final approvals and details remain to be completed, this first step lays the groundwork for a constructive partnership through the new joint venture company."

The agreement establishes a framework for creating a new joint venture company to hold and operate the Imwelo Mining Licence, providing transparency and durability for the collaboration. This regulatory clarity comes as LVG has already cleared a crucial environmental hurdle with Tanzania's National Environment Management Council approving the Updated Environmental and Social Management Plan for the fully-permitted project.

The timing proves strategic with gold currently trading above \$3,700 per ounce. While many explorers struggle with permitting delays, LVG now operates under clear regulatory frameworks backed by its existing 10-year renewable mining license, 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.

Imwelo sits just 12 kilometers from AngloGold Ashanti's flagship Geita mine, with the company targeting first gold within 12 months of construction start. Area C represents 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 grade control drilling for mine planning with extensions targeting. Previous intercepts including 6.8m at 14.6 g/t gold from 33m demonstrate production-ready mineralization.

Now as the company has officially closed an oversubscribed financing, LVG has strengthened its financial position with \$6 million through a non-brokered LIFE private placement and additional \$2 million private placement, expected to close imminently. Proceeds will fund work programs satisfying conditions to unlock a pre-paid forward facility with Monetary Metals for construction capital.

Additional opportunities emerge through the 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 demonstrate potential for immediate cash generation ahead of full Imwelo development.

Beyond core development, LVG maintains exposure to potential US\$45 million in milestone payments from the 2021 asset sale to Barrick's Bulyanhulu operation, plus strategic partnerships with Monetary Metals and Taifa Group, Tanzania's largest mining contractor.

With government agreement secured, environmental approval complete, and financing closing imminent, Lake Victoria Gold represents the convergence of regulatory clearance, market timing, and operational momentum that positions the company for successful development in Tanzania's premier gold district.

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Earlier in the summer, another Tanzania-focused project comes from TRX Gold Corporation's (NYSE-American: TRX) (TSX: TRX.TO) Buckreef Gold Project where the company delivered strong Q3 results with 4,687 ounces of gold poured and \$12.5 million in revenue. The company achieved a record average realized price of \$3,114 per ounce while reducing mining costs to \$3.63 per tonne and processing costs to \$14.60 per tonne during the quarter.

"We're pleased with the progress at Buckreef Gold this quarter, driven by the successful execution of our scheduled strip campaign to access higher-grade ore, combined with lower mining and processing cost per tonne," said Stephen Mullooney, TRX CEO. "We have started to see the benefits of this work and since May 31st, the Company's adjusted working capital turned positive, improving from \$3.3 million (negative) to approximately \$3.9 million as of today."

The company has substantially improved its financial position with current ratio increasing from 0.8 to 1.1 and stockpile inventory growing from 290,000 tonnes at 1.00 g/t to 401,000 tonnes at 1.31 g/t containing 16,876 ounces of gold. TRX Gold also established domestic gold sales with Bank of Tanzania, benefiting from reduced royalty rates of 4% versus 7.3% for exported sales.

Dakota Gold Corp. (NYSE-American: DC) has advanced its Richmond Hill Oxide Heap Leach Gold Project with a 27,500-meter drill campaign, intercepting higher gold grades than the average resource grade of 0.463 g/t. Recent metallurgical drilling returned 1.50 g/t gold over 62.1 meters in hole RH25C-171, significantly exceeding the measured and indicated resource grade.

"We are pleased with the progress of the 2025 drill campaign and look forward to releasing additional results from the drilling in the northeast Project area as they are received," said Jack Henris, President and COO of Dakota Gold. "Dakota Gold remains focused on advancing the Project through disciplined exploration and technical rigor with the results from the current drill campaign contributing to the Feasibility Study, which is expected to be completed in early 2027."

The company is conducting core drilling and metallurgical testing to support feasibility studies while targeting higher-grade zones in the northeast project area with potential to add measured, indicated and inferred resources. Dakota Gold has appointed Mike Eiselein as Vice President Project Development to oversee the metallurgical program, bringing over 34 years of operational experience in heap leach processing.

Fuerte Metals Corporation (TSXV: FMT) (OTCQB: FUEMF) has announced a transformational acquisition of the Coffee Gold Project from Newmont Corporation (NYSE: NEM) (TSX: NGT) for total consideration of up to \$150 million including \$10 million cash and \$40 million in shares. The Coffee Project hosts 3.0 million ounces of measured and indicated gold resources within 80 million tonnes at 1.15 g/t gold, making it one of the largest and highest-grade heap leach projects globally.

"The acquisition of Coffee is highly transformational for Fuerte," said Tim Warman, CEO of Fuerte Metals. "The project is on a clear path to complete permitting and has strong financial and technical partners who have the vision to advance the project to production and build the next great Canadian gold producer."

Fuerte is targeting completion of a preliminary economic assessment in H1 2026 and feasibility study in H2 2026, with the project benefiting from extensive de-risking by Goldcorp and Newmont through significant drilling and engineering work. The company has secured a concurrent equity financing of up to C\$50 million backstopped by key shareholders, with Newmont joining Agnico Eagle, Pierre Lassonde and Trinity Capital as major shareholders following the transaction.

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