

Gold Surges Past \$3,800 as Institutions Eye Junior Mining Opportunity

01.10.2025 | [CNW](#)

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

Gold prices broke past \$3,800 an ounce for the first time Monday, hitting a record high as expectations of further U.S. rate cuts and concerns about a potential government shutdown fueled safe-haven demand^[1]. The precious metal's inflation-adjusted price reached its first record since 1980 earlier this month, with Deutsche Bank now forecasting gold could rise above \$4,000 by year-end, implying a full-year return exceeding 50%^[2]. This rally has sparked a notable shift in institutional positioning, with firms like Southern Capital Advisors initiating new positions in junior gold mining funds as buy-side attendance at key industry events surged more than 30%^[3], signaling growing confidence in companies across the exploration and development spectrum, including [Lake Victoria Gold](#) (TSXV: LVG) (OTCQB: LVGLF), Omai Gold Mines Corp. (TSXV: OMG) (OTCQB: OMGGF), Integra Resources Corp. (NYSE-American: ITRG) (TSXV: ITR), [Sun Summit Minerals Corp.](#) (TSXV: SMN) (OTCQB: SMREF), and [Northern Superior Resources Inc.](#) (TSXV: SUP) (OTCQB: NSUPF).

The rally has been boosted by a weaker dollar and persistent market tightness across precious metals, with silver, platinum, and palladium also posting strong gains as lease rates surge well above normal levels^[4]. Analysts now characterize gold as entering a potential "blowoff phase", with projections targeting \$5,000 before the current cyclical rally pauses, driven by what traders describe as a fundamental loss of confidence in government debt sustainability and fiat currency stability^[5].

Lake Victoria Gold (TSXV: LVG) (OTCQB: LVGLF) is mobilizing drilling equipment at Area C, the highest-grade zone within its fully permitted Imwelo Gold Project in Tanzania, marking a decisive step toward near-term production.

The 4,000-metre campaign combines mine development planning and extension drilling designed to test strike continuity and down-dip potential. With the first rig scheduled to commence drilling October 6 and a second rig on order to accelerate progress, the company is advancing on parallel fronts, thus tightening production timelines while looking to expand the resource envelope at what represents the priority starter pit.

"By mobilizing now and adding a second rig, we're advancing Imwelo on two fronts---short-term production readiness and resource growth potential," said Marc Cernovitch, President and CEO of Lake Victoria Gold. "This drill program is designed to tighten mine scheduling, validate pit and slope design, and test down-dip and western extensions at Area C."

The program targets mineralization that has historically been tested only to approximately 45 metres depth, with new holes designed to intersect gold zones at 100 and 200 metres down-dip. Area C maintains an average grade of 3.7 g/t gold across the historical resource, with previous intercepts including 6.8 metres at 14.6 g/t gold from 33 metres and 7 metres at 3.22 g/t from 27 metres demonstrating potential production-scale mineralization.

Step-out drilling will test westward continuity across an interpreted fault structure where geophysics and mapping suggest mineralization may be offset rather than terminated, potentially expanding the open-pit resource envelope. Geotechnical diamond drilling will support final pit slope optimization while representative core will undergo metallurgical testing focused on the transition zone to refine recovery assumptions and early-stage mine scheduling.

The drilling launch comes as LVG recently reached a pivotal agreement in principle with the Government of Tanzania establishing the framework for the government's statutory minimum-16% free carried interest in the project. This breakthrough satisfies a principal regulatory requirement, enabling the next phase toward production, and establishes a foundation for long-term partnership through a new joint venture company

structure. Combined with the company having cleared a crucial environmental hurdle through approval of the Updated Environmental and Social Management Plan, regulatory pathways now support the transition from development to construction.

Located just 12 kilometers from AngloGold Ashanti's flagship Geita mine, Imwelo benefits from a 10-year renewable mining license and metallurgical recoveries exceeding 90%. The company targets first gold within 12 months of construction start, with Area C representing the initial focus based on grade profile and infrastructure access within Tanzania's premier gold district.

Financial momentum continues building after LVGofficially closed an oversubscribed \$6 million financing plus a soon to close \$2 million concurrent placement. Proceeds support work programs satisfying conditions for a pre-paid forward purchase facility with Monetary Metals targeting construction capital, while strategic backing from Taifa Group-Tanzania's largest mining contractor-provides both equity support and operational infrastructure.

Beyond Imwelo, the Tembo Project offers additional near-term optionality through a planned 3,000m drilling program at Ngula 1, where historic intercepts of 28.57 g/t gold over 3 metres from 54 metres demonstrate potential for toll milling at the nearby Nyati Resources facility. The company also maintains exposure to up to US\$45 million in milestone payments from the 2021 asset sale to Barrick's Bulyanhulu operation.

With drills turning, regulatory frameworks secured, and gold trading above \$3,800 per ounce, Lake Victoria Gold represents the convergence of execution momentum and market timing positioning the company among East Africa's most advanced near-term gold developers.

NOTE: For a Cautionary Note on Production Decision, please see the Disclaimer below.

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In other industry developments and happenings in the market include:

Omai Gold Mines Corp. (TSXV: OMG) (OTCQB: OMGGF) has delivered strong drill results from its Wenot deposit in Guyana, intersecting 3.08 g/t gold over 25.8 metres, 6.84 g/t gold over 9.5 metres, and 1.52 g/t gold over 37.5 metres as part of its 2025 program that has completed 43 holes totaling 23,500 metres to date. The company continues to advance a deep exploration hole that has reached 1,860 metres downhole depth, testing potential 600 metres below the known limits of the deposit.

"We are very pleased with our recently announced, significantly increased, updated Mineral Resource Estimate," said Elaine Ellingham, CEO and Executive Chairman of Omai Gold. "Today's new drill results from Wenot, were completed at the end of the resource drilling program, but assays were received after the cutoff date for the MRE."

With four drill rigs now active at the property, Omai Gold is focused on optimizing the resource for an updated Preliminary Economic Assessment expected in early 2026 while testing both the eastern and western limits of the Wenot deposit. The company is also exploring earlier-stage targets for potential near-surface satellite deposits that could provide higher-grade mill feed early in the mine life.

Integra Resources Corp. (NYSE-American: ITRG) (TSXV: ITR) has achieved a critical permitting milestone with the United States Bureau of Land Management determining its updated Mine Plan of Operations for the DeLamar Project in Idaho has met all content requirements under federal regulations. The acceptance follows nearly three years of environmental baseline studies and incorporates refinements including prioritizing placement of mine features on previously disturbed ground and leveraging refining capacity at Integra's Florida Canyon Mine to reduce processing activities at DeLamar.

"The acceptance of the updated MPO for DeLamar highlights the quality and scarcity value of the DeLamar Project," said George Salamis, President, CEO and Director of Integra. "Incorporating several years of

environmental baseline studies, initial engineering design, and descriptions of mining and reclamation activities, the acceptance of the refined MPO represents a major milestone on the path to permitting mining activities at DeLamar."

The company expects the BLM to publish the Notice of Intent, which will commence formal work on the Environmental Impact Statement as DeLamar advances through the NEPA permitting process. Integra recently entered into a Relationship Agreement with the Shoshone-Paiute Tribes of the Duck Valley Indian Reservation and expects to announce a Feasibility Study for DeLamar in the fourth quarter of 2025.

Sun Summit Minerals Corp. (TSXV: SMN) (OTCQB: SMREF) has mobilized a second drill rig to follow up on recent success at the Creek Zone of its JD Project in British Columbia's Toodoggone District, where hole CZ-25-007 intersected 78.0 metres of 3.72 g/t gold at 30 metres downhole. The company has expanded its 2025 exploration program to over 5,500 metres of drilling, approximately 10% more than originally planned, with ten additional drill holes totaling 3,340 metres awaiting assay results.

"We are delighted to mobilize a second drill rig to the Creek Zone at the JD Property prior to the end of the drill season in order to follow up on the success from Hole CR-25-007," said Niel Marotta, CEO of Sun Summit Minerals. "The exceptional grades and strong continuity in this hole highlighted what we believe may be a new parallel zone, making it a top priority to test further while the drills are turning."

Drilling has also commenced at the Finn Zone, where six holes are designed to test near-surface gold-silver mineralization defined in historical drilling, while reconnaissance drilling at the Belle South copper-gold porphyry target has completed over 900 metres across two holes. With a fourth rig now active at the eastern end of Wenot and ongoing work to test multiple high-priority targets across the project, Sun Summit continues to advance understanding of the JD Project's district-scale potential.

Northern Superior Resources Inc. (TSXV: SUP) (OTCQB: NSUPF) has expanded the mineralization potential at its Philibert Project in Quebec with historical drilling at the newly acquired Hazeur property intersecting 1.10 g/t gold over 25.5 metres, including 7.28 g/t gold over 1.7 metres, located approximately 350 metres west of the current conceptual pit. The company has also acquired 2,100 hectares of new claims contiguous to its Chevrier Project, bringing total landholdings in the Chibougamau Gold Camp to more than 70,000 hectares.

"These early Hazeur results demonstrate meaningful gold mineralization immediately west of Philibert, highlighting the potential for resource growth across our expanding land package," said Simon Marcotte, President and Chief Executive Officer of Northern Superior. "The addition of the new claims north of Chevrier adds to the recent acquisition of the Hazeur, Monster Lake West, and Monster Lake East properties as we continue to consolidate our position in a camp rapidly gaining global recognition."

With approximately 90% of the Philibert expansion drilling program now completed and reported, Northern Superior is finalizing an exploration drilling program at Hazeur scheduled to begin later this month while conducting reconnaissance work including mapping and surface sampling across the newly acquired ground. The company's geological team has identified what appears to be the western extension of the Red Fox zone traced for approximately 600 metres west of the Philibert pit, with work underway on an updated Preliminary Economic Assessment expected in early 2026.

Article Source:

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SOURCES CITED

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