

Gold Hits \$4,000 As Miner Funds Post Best Year Since 1979

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

Gold's historic breach of \$4,000 per ounce Tuesday marked the culmination of a remarkable year that has seen the precious metal gain approximately 50%-the strongest annual performance in more than four decades^[1]. The rally has triggered a powerful rotation into gold mining equities, with funds focused on miners delivering 114% returns year-to-date and drawing \$5.4 billion in third-quarter inflows alone, the largest quarterly influx since the depths of the 2009 financial crisis^[2]. Despite the stunning rally, technical analysts note that the sector remains widely under-owned, with gold mining stocks still trading at valuations that imply bullion prices near \$2,500^[3], creating what many see as a disconnect that could drive further gains across producers and developers, including [Lake Victoria Gold](#) (TSXV: LVG) (OTCQB: LVGLF), TRX Gold Corporation (NYSE-American: TRX) (TSX: TRX), Arras Minerals Corp. (TSXV: ARK) (OTCQB: ARRK), [Red Pine Exploration Inc.](#) (TSXV: RPX) (OTCQB: RDEXF), and [Fortuna Mining Corp.](#) (NYSE: FSM) (TSX: FVI).

Goldman Sachs added fuel to the bullish sentiment Monday by raising its forecast to \$4,900 per ounce by mid-2026^[4], with other analysts now describing \$5,000 gold as a "certainty" rather than a speculative target, driven by concerns over Federal Reserve independence, geopolitical instability, and accelerating central bank purchases^[5]. With gold companies generating record free cash flow at current prices-yet trading at forward earnings multiples below their ten-year averages-the mining sector appears positioned to benefit from both continued metal price appreciation and long-overdue valuation expansion.

Lake Victoria Gold (TSXV: LVG) (OTCQB: LVGLF) has commenced drilling at Area C, the highest-grade zone within its fully permitted Imwelo Gold Project in Tanzania, marking a critical inflection point in the company's path toward near-term production.

The first of approximately 24 planned holes is now drilling as part of a 4,000-metre program designed to finalize pit design, upgrade resource confidence, and test extensions at the priority starter pit. The company is using a cost-efficient drilling approach that captures the technical data required for final mine scheduling while keeping cycle times short.

"Kicking off drilling at Area C is a tangible step toward first production at Imwelo," said Marc Cernovitch, President and CEO of Lake Victoria Gold. "This program is designed to tighten our final pit design, convert ounces where appropriate, and set up for grade-control drilling so that once construction begins we can move quickly into pre-strip and stockpiling."

The drilling targets several key goals: finalizing pit design with detailed engineering data, upgrading the confidence level of existing historical gold resources, testing for additional gold beyond currently defined zones, preparing operational mining plans, and optimizing gold recovery rates.

The first hole is testing Area C mineralization at approximately 120 metres depth near the western end of the zone, going deeper than previous drilling. Historical results from this area returned 6.8 metres at 14.6 g/t gold at 32 m and 2.0 metres at 7.5 g/t from 22m.demonstrating high potential production-grade mineralization.

"We've engineered this campaign to answer the last technical questions: slope angles, ramp geometry, and continuity down-dip and to the west," said Seth Dickinson, Chief Operating Officer of Lake Victoria Gold. "By combining RC with diamond tails we are keeping costs down without compromising core data quality."

The drilling launch follows LVG having recently reached a pivotal agreement in principle with the Government of Tanzania on the government's statutory minimum 16% free carried interest, satisfying a

principal regulatory requirement. Combined with environmental approval of the Updated Environmental and Social Management Plan, the regulatory framework is now effectively in place to advance toward construction.

Located just 12 kilometers from AngloGold Ashanti's flagship Geita mine, Imwelo holds a 10-year renewable mining license with metallurgical recoveries exceeding 90%-meaning 90 cents of every dollar of gold in the rock can in principle be extracted and sold. Perhaps more importantly, Lake Victoria Gold targets first gold within 12 months of breaking ground.

Financial momentum continued building in September, after LVGofficially closed an oversubscribed \$6 million financing and an about to close \$2 million concurrent private placement. Proceeds support work programs satisfying conditions for a pre-paid forward purchase facility with Monetary Metals funding mine construction capital.

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

The timing of drilling commencement could hardly be more strategic. With gold breaking through \$4,000 per ounce for the first time in history, Lake Victoria Gold is mobilizing equipment at a fully permitted project in one of Africa's premier gold districts at precisely the moment when high-grade ounces command maximum value. As regulatory clearances align with exceptional metal prices and active field programs across two projects, LVG has positioned itself at the intersection of technical de-risking and unprecedented market opportunity.

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

CONTINUED… Read this and more news for Lake Victoria Gold at:

<https://equity-insider.com/2025/04/14/with-funding-commitments-in-place-a-gold-mine-is-being-built-and-this-stock-is-st>

In other industry developments and happenings in the market include:

TRX Gold Corporation (NYSE-American: TRX) (TSX: TRX) achieved record quarterly results at its Buckreef Gold project in Tanzania, with production and sales of 6,404 and 6,977 ounces of gold respectively in Q4 2025, representing a 37% production increase over Q3 2025. The company benefited from an average gold price of approximately \$3,350 per ounce during the quarter, with its working capital ratio improving from 0.8 to 1.2 and cash balance reaching \$7.8 million by August 31, 2025.

"We're very pleased with the positive trajectory and record gold production achieved at Buckreef Gold this quarter as the Company benefited from access to higher grade ore following successful completion of our scheduled strip campaign earlier in the year," said Stephen Mullaney, CEO of TRX Gold. "Our short-to-medium term priorities remain the same - continue to expand and upgrade processing capacity in line with our PEA, continue advancing exploration in key areas, and strengthen our liquidity."

TRX Gold has commenced procurement of near-term plant enhancements including a thickener, elution plant upgrades, and additional slurry oxidation capacity to improve gold recoveries. The company's run-of-mine stockpile has grown to an estimated 15,162 ounces of contained gold as of August 31, 2025, while it fully repaid approximately \$3.0 million in short-term borrowings during the quarter.

Arras Minerals Corp. (TSXV: ARK) (OTCQB: ARKRF) has delivered exceptional results from its Berezski East Target at the Elmes Project in Kazakhstan, with hole EL25019 intersecting 457.5 meters grading 0.63 g/t gold-equivalent starting at surface, including 231.0 meters grading 0.98 g/t gold-equivalent and 91 meters grading 1.77 g/t gold-equivalent. The discovery of copper sulfides and broad zones of potassic alteration indicates the target may be situated on the margin of a larger porphyry copper-gold system.

"Drillhole EL25019 has delivered an exceptional high-grade gold-copper intercept from surface, confirming

Berezski East's strong potential to host broad zones of high-grade mineralization," said Tim Barry, CEO of Arras Minerals. "When we look at the area between Berezski Central and Berezski East, we continue to see the potential for continuity and scale."

The company has completed detailed magnetotellurics and gravity surveys and will commence a high-density top-of-bedrock drill program in the coming weeks. Preliminary gravity survey results reveal a pronounced gravity low coincident with copper-gold mineralization at Berezski Central, with a second gravity low identified immediately northeast of the latest high-grade intercept, supporting the interpretation of a mineralized porphyry system.

Red Pine Exploration Inc. (TSXV: RPX) (OTCQB: RDEXF) has announced high-grade drilling results from its near-surface program at the Wawa Gold Project in Ontario, with hole SD-25-573 returning 7.76 g/t gold over 15.49 meters including 84.20 g/t gold over 1.00 meter. The company has completed 69 drill holes totaling 24,531.19 meters and has received all gold assay results needed for an updated independent mineral resource estimate currently underway by WSP Canada Inc. for disclosure in a pending preliminary economic assessment.

"We are excited by these near surface drill results that continue to identify higher grades within the Jubilee Shear Zone," said Michael Michaud, President and CEO of Red Pine. "With the drilling for the updated mineral resource estimate now completed, we are moving forward to completing a preliminary economic assessment in the first half of 2026."

Metallurgical, geotechnical, and baseline work is underway to support permitting, while the company's next drill phase to further expand near-surface gold mineralization is set to begin shortly. With funding in place to complete the preliminary economic assessment, Red Pine is advancing toward production in what management describes as a strong gold price environment.

Fortuna Mining Corp. (NYSE: FSM) (TSX: FVI) delivered production of 72,462 gold equivalent ounces for the third quarter of 2025 from its three operating mines in West Africa and Latin America, maintaining consistent performance with 71,229 gold equivalent ounces in Q2 2025. The Séguéla Mine in Côte d'Ivoire produced 38,799 ounces of gold during the quarter at an average head grade of 3.01 g/t gold with 91.4% recovery, representing a 1% increase over the previous quarter.

The company's Lindero Mine in Argentina delivered its highest quarterly production of the year with 24,417 ounces of gold, benefiting from a 5% higher gold grade and improved recovery from the leach pad. Fortuna has successfully completed its tailings storage facility expansion at Séguéla, providing capacity at current throughput rates until August 2029, while optimization of the crushing circuit at Lindero achieved average throughput of 1,061 tonnes per hour, 8% above the 2024 average.

Article Source:

<https://equity-insider.com/2025/04/14/with-funding-commitments-in-place-a-gold-mine-is-being-built-and-this-stock-is-st>

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SOURCES CITED

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