

The Scarcity Premium: Investors Target High-Grade Systems in a \$4,300 Market

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Issued on behalf of Lake Victoria Gold

EquityInsider.com News Commentary - Gold's climb above \$4,300/oz continues attracting attention to high-grade discoveries. Major new gold deposits remain rare, creating structural advantages for companies delivering exceptional grades at surface or shallow depths^[1]. Among those capitalizing on this dynamic are Lake Victoria Gold (TSXV: LVG) (OTCQB: LVGLF), Lion One Metals Limited (TSXV: LIO) (OTCQX: LOMLF), [Collective Mining Ltd.](#) (NYSE: CNL) (TSX: CNL), [Arizona Metals Corp.](#) (TSX: AMC) (OTCQX: AZMCF), and [Tudor Gold Corp.](#) (TSXV: TUD).

J.P. Morgan projects gold averaging \$5,400/oz by Q4 2027, driven by sustained central bank demand and investor flows totaling 585 tonnes quarterly^[2]. Declining ore grades industry-wide amplify the economic advantages of bonanza-grade systems, positioning high-grade developers to command valuation premiums as margins expand faster than peers operating lower-grade deposits^[3].

Lake Victoria Gold (TSXV: LVG) (OTCQB: LVGLF) has confirmed high-grade gold mineralization up to 35.45 g/t at its Tembo Project in northwestern Tanzania, with artisanal sampling validating priority drill targets ahead of a planned Q1 2026 program. The results come from eight active artisanal mining locations across the project, with the highest grades at Ngula 1 reinforcing its status as the company's primary near-term target.

"With an LOI in place with Nyati, our focus has shifted decisively toward execution," said Marc Cernovitch, President and CEO of Lake Victoria Gold. "We are moving from exploration to execution. The high-grade samples at surface confirm the system's potential, while our engagement with Nyati Resources offers a tangible path to process that material. Our focus is squarely on defining the resource at Ngula 1 and finalizing a processing agreement that leverages existing infrastructure to minimize capital output."

Additional notable results include 35.21 g/t and 12.94 g/t from Ngula 2, plus 22.68 g/t and 5.90 g/t from the previously under-drilled Mgusu Target. Mineralization is consistently associated with smokey-grey quartz veins hosted in sheared basalts, with visible pyrrhotite and pyrite sulphides aligned along multiple structural trends matching the company's established geological model for the area.

Lake Victoria Gold is now advancing discussions with Nyati Resources regarding potential use of a 500 tonne-per-day carbon-in-pulp processing plant located on one of LVG's Tembo mining licences, directly adjacent to Barrick's Bulyanhulu Mine. The company is targeting the conclusion of a binding agreement in early 2026, which would establish a near-term production pathway from Tembo ahead of full-scale development at its flagship Imwelo Gold Project.

Tembo's close-spaced drilling program at Ngula 1 is expected to commence in Q1 2026, targeting a 300-400m strike length that has returned consistently high-grade results in both historical drilling and recent artisanal sampling.

In parallel, the company continues advancing its fully permitted Imwelo Gold Project, located just 12kms from AngloGold Ashanti's Geita Mine. Recent drill results from Area C have extended mineralization beyond current pit designs, with down-dip continuity now demonstrated to over 250m vertical depth.

Backing this dual-track strategy is exposure to potential US\$45M in milestone payments from the company's 2021 asset sale to Barrick's Bulyanhulu operation. Financial runway is supported by a gold prepay facility with Monetary Metals and a C\$11.52 million strategic investment from Taifa Group.

With drilling, processing agreements, and funding advancing in parallel, Lake Victoria Gold is building the operational platform to transition from explorer to producer.

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:

Lion One Metals Limited (TSXV: LIO) (OTCQX: LOMLF) has reported significant high-grade gold results from 4,040.90m of underground infill and grade control drilling at its Tuvatu Gold Project in Fiji, with drilling focused on the Zone 5 area targeting down-dip extensions of the UR2 lode below current mine development levels.

Top results included 99.13 g/t gold over 3.3m from 136.4m depth, including sub-intervals of 459.05 g/t gold over 0.3m and 338.00 g/t gold over 0.5m, located approximately 60m below level 1084, along with 218.31 g/t gold over 1.2m from 109m depth, including 366.00 g/t gold over 0.6m.

The company intersected high-grade mineralization in 17 out of 22 drillholes, with most intercepts located within 20m to 60m below level 1084 and anticipated to be incorporated into the mine plan in the next three to twelve months. The deepest high-grade interval of 16.09 g/t gold over 1.0m was intersected approximately 125m below level 1084, representing approximately six additional levels of mining and indicating strong vertical continuity of high-grade structures in this part of the deposit.

Collective Mining Ltd. (NYSE: CNL) (TSX: CNL) has significantly expanded the Apollo system at its Guayabales Project in Colombia by up to 450m through the serendipitous discovery of a new Hanging Wall Vein Zone, with highlight intercepts including 61.30m at 1.78 grams per tonne gold equivalent and 130.40m at 1.15 grams per tonne gold equivalent. The discovery increased Apollo's interpreted northeast strike length by 43% to approximately 1,050m, with the system now measuring 1,050m by 400m width by 1,370m vertical extent.

"It's time to reframe our view of Apollo-not merely as a mineralized breccia system, but as a much larger entity encompassing the breccia body and surrounding sheeted vein zones with the potential to extend strike lengths by hundreds of meters," said Ari Sussman, Executive Chairman of Collective Mining. "Most exciting is the serendipitous discovery of mineralization in the Hanging Wall Vein Zone during directional drilling of mother holes, which were intended solely to establish kick-off points for testing the high-grade Ramp Zone at depth."

The company plans an aggressive follow-up drilling campaign targeting the Hanging Wall Vein Zone commencing early Q1 2026 to rapidly expand and delineate this discovery. With \$135 million in cash as of December 1, 2025, Collective Mining is fully funded for its planned 2026 program targeting up to 100,000 metres of additional drilling across ten active rigs.

Arizona Metals Corp. (TSX: AMC) (OTCQX: AZMCF) has reported initial drill results from its 2025 reverse-circulation program at the Sugarloaf Peak Project in Arizona, with mineralization intersected in all nine assayed drill holes covering 900m along strike and 800m in width. Highlights include 195.1m at 0.31 g/t gold, including 25.9m at 0.61 g/t gold in hole SP-25-09, an infill hole demonstrating excellent continuity from surface, and 109.7m at 0.31 g/t gold, including 16.8 m at 0.49 g/t gold in hole SP-25-11.

"We are pleased to confirm the expansion potential at Sugarloaf Peak," said Duncan Middlemiss, President and CEO of Arizona Metals. "This is a very large mineralized system that our drilling has expanded, not only laterally but within the deposit. In particular, our drilling confirmed excellent continuity of mineralization, a real benefit in a bulk-mining open-pit scenario."

The company has completed 5,186m of drilling in 25 holes to date, with assay results from 16 additional drill

holes pending. Several drill holes extended mineralization 40-75m deeper than previous drilling, demonstrating vertical continuity of the system.

Tudor Gold Corp. (TSXV: TUD) has secured approximately \$24.5 million through recent financings to advance its Treaty Creek Project in British Columbia's Golden Triangle, targeting an updated mineral resource estimate in January 2026 that will guide development of a mid-size underground mine. The company's 2025 drilling program intersected 2.31 g/t gold over 54m at the Goldstorm Deposit, including high-grade zones of 5.90 g/t gold and 343.00 g/t silver over 1.5m.

"With the closing of our recently announced financings, we have the financial strength to push ahead with what we believe is the most straightforward, economically attractive development path to gold production at Treaty Creek and the Golden Triangle - a mid-size underground mine with a small footprint," said Joe Ovsenek, President and CEO of Tudor Gold. "An underground operation in the range of 10,000-tonnes-per-day targeting the higher-grade gold mineralization within the Goldstorm Deposit could be the accelerator for profitable production."

The company expects to receive an underground exploration permit in 2026, which will enable year-round drilling to de-risk the Goldstorm Deposit and adjacent SC-1 Zone. Surface exploration in 2026 will target the Perfectstorm, CBS, and Eureka zones along the Sulphurets-Treaty Thrust Fault, with metallurgical test work results anticipated in Q1 2026.

Article Source:

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SOURCES CITED

1. <https://www.cruxinvestor.com/posts/gold-stocks-the-2025-portfolio-game-changer>
 2. <https://www.jpmorgan.com/insights/global-research/commodities/gold-prices>
 3. <https://www.cruxinvestor.com/posts/gold-stocks-the-2025-portfolio-game-changer>
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