

The \$5,000 Gold Pivot: Why the 2026 Production Sprint is Triggering a Systemic Re-rating

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Issued on behalf of [Lake Victoria Gold Ltd./wp](#)

[USA News Group News Commentary - Global mined gold production is entering a definitive structural plateau as the depletion of aging assets outpaces the rate of primary discovery^{\[1\]}. This tightening physical constraint aligns with updated institutional forecasts projecting gold toward \\$5,000 per ounce by late 2026, a target reinforced by persistent and non-price-sensitive central bank demand^{\[2\]}. This fundamental shift toward secure, near-term supply fuels the 2026 investment case for Lake Victoria Gold \(TSXV: LVG\) \(OTCQB: LVGLF\), Patagonia Gold \(TSXV: PGDC\) \(OTCPK: HGLD\), G Mining Ventures \(TSX: GMIN\) \(OTCQX: GMINF\), OceanaGold \(TSX: OGC\) \(OTCQX: OCANF\), and \[wp=1824\]Perpetua Resources \(NASDAQ: PPTA\) \(TSX: PPTA\).](#)

Accelerating regional mining investment across Tanzania and other proven jurisdictions reflects a broader mandate for infrastructure-ready projects^[3]. These structural tailwinds are further bolstered by global central bank diversification, creating asymmetric upside for developers capable of successfully transitioning from the drill bit to tangible production timelines^[4].

Lake Victoria Gold (TSXV: LVG) (OTCQB: LVGLF) just confirmed surface grades up to 35.45 g/t gold at its Tembo Project in Tanzania, and the results are turning heads. Eight artisanal mining sites delivered consistently strong numbers, with Ngula 1 emerging as the clear priority for the company's next drilling campaign.

"We are moving from exploration to execution," said Marc Cernovitch, President and CEO of Lake Victoria Gold. "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."

What makes this interesting isn't just the grades themselves. It's the location. These samples came from active mining sites where local artisanal miners are already pulling material from the ground. That validation at surface means drilling can target mineralization with confidence, not just hope.

Additional highlights included 35.21 g/t and 12.94 g/t from Ngula 2, plus 22.68 g/t and 5.90 g/t from the under-drilled Mgusu Target. The gold appears in smokey-grey quartz veins within sheared basalts, matching LVG's geological model for the broader corridor.

Lake Victoria Gold is now finalizing a processing deal with Nyati Resources to access a 500 tonne-per-day plant located directly on one of LVG's Tembo licences, right beside Barrick's massive Bulyanhulu Mine. A binding agreement is expected by early 2026, creating a near-term production pathway from Tembo ahead of full development at the company's flagship Imwelo Gold Project.

The Tembo drill program kicks off in Q1 2026, targeting a 300 to 400 meter strike at Ngula 1 where both historical drilling and recent sampling have delivered consistent high grades.

Meanwhile, Imwelo continues moving forward. Located just 12 kilometers from AngloGold Ashanti's Geita Mine, recent drill results from Area C extended mineralization beyond current pit designs, with continuity now demonstrated to over 250 meters depth.

Supporting this dual-track approach is exposure to potential US\$45 million in milestone payments from the company's 2021 asset sale to Barrick's Bulyanhulu operation. Funding is backed 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 together, Lake Victoria Gold is building the platform to move 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:

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In other industry developments and happenings in the market include:

Patagonia Gold (TSXV: PGDC) (OTCPK: HGLD) advanced construction of its Calcatreu project toward first leaching expected to commence during Q1 2026 following receipt of all permits in Q4 2024. Mining activities commenced in August 2025 with first blast completed in September and mineralized material currently stockpiled in the crushing area with measured and indicated mineral resources totaling 9.84 million tonnes at 2.11 grams per tonne gold and 19.8 grams per tonne silver yielding 669,000 ounces gold and 6.3 million ounces silver.

The first section of the leach pad necessary to commence leaching has been completed with 80 tonnes of chemical product delivered to site on December 23, 2025 and the carbon in column section of the plant nearing completion expected to be finished during January 2026.

G Mining Ventures (TSX: GMIN) (OTCQX: GMINF) received a mining license from the Guyana Geology and Mines Commission for its 100%-owned Oko West gold project located in Region 7, Guyana with the license already granted and valid for twenty years authorizing development, operation and commercial gold production. This approval marks the final major permitting milestone for the project and completes the main regulatory requirements necessary for full construction and long-term operations.

"Securing the Mining License reflects not only the technical robustness of Oko West but also the collaborative relationships we have established with Guyanese authorities, communities, and partners," said Louis-Pierre Gignac, President & CEO of G Mining Ventures. "Our commitment to responsible development is unwavering, and this milestone positions us to build Oko West into a world-class mining operation that delivers lasting economic and social benefits to Guyana."

The project is poised to begin pre-production open-pit mining in the first quarter of 2026 with assembly of the initial mining equipment fleet already underway. G Mining Ventures is advancing Oko West development and construction in a disciplined manner aligned with the company's project timeline with all major permits and approvals secured.

OceanaGold (TSX: OGC) (OTCQX: OCANF) received permit approval from the Expert Panel appointed by the New Zealand government for the Waihi North Project, which includes the high-grade Wharekirauponga Underground mine located approximately 10 kilometres north of the company's Waihi operation in New Zealand. The permit approval includes development of Wharekirauponga Underground and associated surface infrastructure, expansion of the current processing plant and water treatment plant, and construction of a new tailings storage facility, while also allowing an increase in the number of exploration drill pads and a doubling of allowable drill rigs to six enabling accelerated definition and conversion drilling.

"We are delighted to have received approval for our Waihi North Project, which allows access to one of the best undeveloped, high-grade orebodies in our industry," said Gerard Bond, CEO of OceanaGold. "This is a major milestone for OceanaGold and for the Waihi operation and is a testament to our 35-year history of safe and responsible mining in New Zealand."

The OceanaGold Board has approved the selection of the mining contractor for tunnelling of the

underground mine plus awarding of contracts for bulk earthworks at the Willows portal site and a power upgrade project, with the mining contractor expected to mobilize and begin tunnelling in the first half of 2026. The company is in a strong net cash position and expects to internally fund Waihi North Project over the coming years.

Perpetua Resources (NASDAQ: PPTA) (TSX: PPTA) announced the selection of Hatch Ltd as the Engineering, Procurement, and Construction Management contractor for the Stibnite Gold Project, with the appointment marking a major milestone in the company's transition from planning to development ahead of a final investment decision expected in the spring of 2026. Hatch is making a \$4 million equity investment in the company and brings internationally recognized expertise in pressure oxidation technology and metallurgical processing facilities combined with a decades-long record of successfully executing large-scale mining projects across North America, making Hatch the ideal partner for development of Stibnite.

"Hatch brings the depth, discipline, and proven execution capability required to responsibly deliver the Stibnite Gold Project," said Jon Cherry, CEO of Perpetua Resources. "Their experience with sophisticated mining and metallurgical facilities in the United States will play a critical role in advancing Stibnite to the next phase of development."

Perpetua Resources and Hatch are currently negotiating terms of the definitive EPCM contract to reflect the terms of Hatch's winning bid with the contract expected to be finalized in the coming weeks.

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SOURCES CITED:

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