

Infrastructure Pivot Unlocks Margin Expansion: Operational Grit Triggers 2026 Asset Re-Rating

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Issued on behalf of [Rua Gold Inc.](#).

Equity Insider News Commentary - The global mining sector is undergoing a structural realignment as producer margins reach record levels, with top-tier firms now reporting All-In Sustaining Costs (AISC) below \$1,500 per ounce^[1] while gold trades above historic \$4,700 resistance. As global gold production growth plateaus and capital efficiency becomes the primary metric for valuation^[2], capital is rotating into high-velocity platforms capable of compressing costs through on-site power optimization and owner-operator processing pivots, including RUA GOLD Inc. (TSXV: RUA) (OTCQB: NZAUF), Americas Gold and Silver (NYSE-A: USAS) (TSX: USA), [i-80 Gold](#) (NYSE-A: IAUX) (TSX: IAU), [Discovery Silver](#) (TSX: DSV) (OTCQX: DSVSF), [Gold](#) (TSXV: TUD) (OTCPK: TDRRF).

Institutional analysts now project gold averaging \$5,055 per ounce by Q4 2026^[3] as central bank demand and structural diversification accelerate the secular transition. This backdrop creates asymmetric upside for infrastructure-anchored producers where operational grit and margin expansion are superseding traditional exploration premiums as the ultimate 2026 value driver.

RUA GOLD Inc. (TSXV: RUA) (OTCQB: NZAUF) is accelerating the development of a strategic gold-antimony sanctuary in the South Pacific as Western nations scramble to secure non-Chinese sources of critical minerals.

According to a fresh update released to start the week, the company is aggressively expanding its footprint within New Zealand's historic Reefton Goldfield, where recent drilling has confirmed a major high-grade system at the Auld Creek project.

This development arrives at a pivotal moment as China tightens export controls on approximately 60% of the world's antimony production, and New Zealand formally designated the metal as critical. This shift places RUA GOLD at the epicenter of the geopolitical rotation toward sovereign supply chains.

The latest assay results from Auld Creek demonstrate exceptional scale and grade, highlighted by drill hole ACDDH050 which intersected 3.0m @ 21.27 g/t AuEq (4.5 g/t Au & 3.9% Sb) from a depth of 137m. These results have effectively extended the deposit strike length by 250 meters to a total of 870 meters, with the mineralized system remaining open in all directions at depth via plunging ore shoots.

With three drill rigs now operating on a double-shift basis from January 2026, the company is fast-tracking resource development to grow the gold-antimony resource above 300,000 ounces on the next reserve refresh expected in Q1 2026.

The company is now moving toward production by leveraging New Zealand's new legislative framework called the FAST TRACK process, designed to accelerate projects of national significance to receive permits within 6 months, the fastest permitting regime in the world.

"We intend to use the FAST TRACK legislation for the Auld Creek gold-antimony project, with the objective of bringing New Zealand's largest known antimony deposit into production," said Robert Eckford, CEO of RUA GOLD. "Our confidence in the permitting regime was reinforced by the approval of OceanaGold's Wharekirauponga gold-silver project in December 2025."

Within the Reefton, RUA GOLD controls 120,000 hectares in a district that historically produced over 2Moz of gold grades between 9 and 50g/t. The company is also advancing the Glamorgan Project on New Zealand's North Island, adjacent to OceanaGold's Wharekirauponga development.

With \$14 million in cash on hand (according to last reported figures) and a leadership team behind US\$11 billion in prior production, RUA GOLD is well-positioned to deliver meaningful discovery growth.

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In other industry developments and happenings in the market include:

Americas Gold and Silver (NYSE-A: USAS) (TSX: USA) provided an update on rapid progress at the Crescent Silver Mine in Idaho following acquisition in December 2025. The company achieved material power cost reduction through installation of low-cost grid electrical power to all three adits, reducing power costs from approximately 55 cents per kilowatt-hour to as low as 7 cents per kilowatt-hour.

"In less than a month since closing the Crescent acquisition, our team has achieved remarkable progress towards restarting production - from running grid power electrical lines down the mountain to power all three adits and eliminating higher-cost generators, to adding new equipment and organizing the site for efficient operations," said Paul Andre Huet, Chairman and CEO of Americas Gold and Silver. "This rapid execution is an excellent start to our plan to establish best-in-class operations at Crescent."

The company expanded and upgraded the underground mining fleet with two new 20-ton trucks and three new loaders, bringing the total fleet to 11 pieces. Americas Gold and Silver is targeting a mid-2026 restart of silver, copper and antimony production at Crescent, leveraging synergies with the neighboring Galena Complex to scale production in Idaho's Silver Valley.

i-80 Gold (NYSE-A: IAUX) (TSX: IAU) announced results of an engineering study for refurbishment of its Lone Tree Plant in Northern Nevada with a capital cost estimate of \$412 million plus \$18 million in capital spares. The study confirms nameplate capacity of 2,268 tonnes per day with integrated pressure oxidation and carbon-in-leach circuits capable of processing both refractory and non-refractory mineralized material.

"The Lone Tree Plant is a cornerstone asset within phase one of i-80 Gold's development plan," said Richard Young, President and CEO of i-80 Gold. "Refurbishing the Lone Tree Plant marks a major step forward in our goal of creating a mid-tier gold producer by enabling us to transition from toll-milling to an owner-operator processing model."

The refurbishment is expected to reduce current processing costs to approximately one third, resulting in an estimated margin increase of \$1,000 to \$1,500 per ounce of gold with a potential payback period of 12 to 24 months. i-80 Gold is one of two gold companies in Nevada with an autoclave facility and plans to commence construction in the second half of 2026 with plant commissioning anticipated at the end of 2027.

Discovery Silver (TSX: DSV) (OTCQX: DSVSF) announced production of 66,718 ounces of gold in fourth quarter 2025 from its Porcupine operations, bringing total gold production from closing of the acquisition on April 15, 2025 to year-end to 180,424 ounces. The company poured 67,010 ounces and sold 64,479 ounces at an average realized gold price of \$4,157 per ounce.

"2025 was a transformational year for Discovery," said Tony Makuch, Discovery's President and CEO. "We started the year as a development company advancing Cordero, one of the world's largest and most attractive silver projects. In April, we established Discovery as a growing Canadian gold producer through the acquisition of Newmont's Porcupine operations in and near Timmins, Ontario."

The Porcupine operations include the Hoyle Pond and Borden underground mines and the Pamour open-pit mine currently ramping up to commercial production. Discovery Silver released excellent exploration results from resource conversion and expansion drilling at all operations during the quarter, ending 2025 with approximately \$410 million in cash and closing a previously announced \$250 million revolving credit facility with a \$100 million accordion feature.

Tudor Gold (TSXV: TUD) (OTCPK: TDRRF) provided a year-end review of its Treaty Creek Project in British Columbia, announcing results from 5,052 meters drilled in five holes during 2025. The program successfully intersected mineralization confirming higher-grade gold structures within the bulk-tonnage mineral resource, with hole GS-25-188 intersecting 2.31 g/t gold, 16.98 g/t silver and 0.07% copper over 54 meters starting

900 meters from surface.

"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."

Tudor Gold completed flow-through financing for \$13 million and non-flow-through financing for \$11.5 million in December 2025. An updated mineral resource estimate incorporating approximately 15,000 meters of drill data from 2024 and 2025 programs is targeted for completion in January 2026, with the company expecting to receive an underground exploration permit in 2026.

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