

# Why Smart Capital Is Rotating Into High-Grade Gold Assets

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

USA News Group News Commentary - The smart money is moving fast. Emerging market operations captured over 30% of top-performing gold stocks<sup>[1]</sup> in 2025, signaling a massive structural realignment toward jurisdictions offering true permitting velocity. This rotation places Lake Victoria Gold (TSXV: LVG) (OTCQB: LVGLF), Galiano Gold (NYSE-A: GAU) (TSX: GAU), Omai Gold Mines (TSXV: OMG) (OTCQV: OMGGF), Aris Mining (NYSE-A: ARMN) (TSX: ARIS), and [K92 Mining](#) (TSX: KNT) (OTCQB: KNTNF) directly at the intersection of institutional demand and production velocity.

The supply/demand math is undeniable. Central banks purchased a record 863 tonnes of gold in 2025<sup>[2]</sup>, draining global inventory just as analysts project prices could reach \$5,000 per ounce in 2026<sup>[3]</sup>. Crucially, this demand hits a hard wall: global mine production has plateaued near 3,672 tonnes in 2025<sup>[2]</sup>. This supply constraint creates an immediate valuation premium for high-grade developers capable of near-term execution.

Lake Victoria Gold (TSXV: LVG) (OTCQB: LVGLF) just completed drilling and received all analytical results from its recent program at the Imwelo Gold Project in Tanzania, confirming mineralization extends well beyond the current pit design at Area C. The results strengthen confidence in the geological model and represent a step toward final pit optimization and development planning as the company advances toward construction readiness.

Twenty-one holes were completed, with highlights including 11.88 g/t gold over 1.33 meters from 169.75 meters depth, 9.31 g/t over 2.45 meters from 130 meters, and 6.96 g/t over 2.56 meters from 132.80 meters. The drilling accomplished several objectives at once: it confirmed mineralization continues down-dip beneath the planned pit, it identified new zones to the east and west of the current design, and it delivered geotechnical data needed to finalize pit shell optimization.

"These results further validate Imwelo as a near-term production asset," said Marc Cernovitch, President and CEO of LVG. "We have now demonstrated continuity of mineralization beyond the current pit design, both at depth and laterally, which strengthens confidence in the geological model underpinning our development plans."

The technical picture is tightening. Mineralization now shows geological continuity to over 250 meters vertical depth, compared to the historical resource limit of roughly 200 meters. The average vertical intersection depth from this program was approximately 120 meters, more than double the historical drilling depth of around 50 meters. That gives the company information below previously modeled limits and supports potential resource conversion from Inferred to Indicated classification.

Two dedicated geotechnical drill holes were completed, providing oriented core for detailed logging and rock mass characterization. The resulting data will support refinement of slope angles, wall support requirements, and ramp geometry, completing the in-pit geotechnical dataset required for final pit shell optimization.

It should be also noted that Atrium Research recently re-initiated coverage on Lake Victoria Gold with a BUY rating and a target price of \$0.50 per share, citing the company's path to production at Imwelo and strategic partnerships that could provide cash through milestone payments and exploration success.

Imwelo sits just 12 kilometers from AngloGold Ashanti's Geita Mine and is fully permitted for mine construction and production. The company previously completed geotechnical studies that support consolidating Area C into a single continuous open pit. Meanwhile, the Tembo Project delivered surface grades up to 35.45 g/t gold from artisanal mining sites.

With drilling complete and analytical results received, Lake Victoria Gold is moving methodically from definition toward execution.

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:

Galiano Gold (NYSE-A: GAU) (TSX: GAU) expands its high-grade footprint at Abore with multiple intercepts in latest drilling including 14.2 grams per tonne gold over 15 meters and 4.7 grams per tonne gold over 24 meters at the Asanko Gold Mine in Ghana. Step out drilling confirms new high-grade mineralization up to 200 meters below previous holes, demonstrating the robustness of Abore's underground potential with results to be included in the maiden Abore underground Mineral Resource estimate expected in February 2026.

"These latest results conclude an extremely successful year of discovery at Abore in 2025 that has seen the deposit emerge as a key growth target for the AGM," said Chris Pettman, Vice President of Exploration of Galiano Gold. "This latest phase of drilling highlights that the Abore mineralizing system is much larger than previously believed and remains open as we continue to step out and intersect mineralization at depth."

An aggressive program of 30,000 meters of drilling is planned at Abore in 2026 with drilling already underway using four rigs currently active. Galiano Gold has approved an initial 2026 exploration budget of \$17 million focused on delivering near term value through Mineral Resource and Mineral Reserve growth within the brownfields space while simultaneously continuing to advance the greenfields generative portfolio.

Omai Gold Mines (TSXV: OMG) (OTCQV: OMGGF) has engaged SLR Consulting to complete an updated Mineral Resource Estimate and Preliminary Economic Assessment for its 100% owned Omai Gold Project in Guyana, South America. The anticipated PEA will incorporate the much expanded Wenot open pit deposit together with the immediately adjacent Gilt Creek underground deposit.

"These next steps will provide all stakeholders with a better understanding of the size and value potential of the Omai Project," said Elaine Ellingham, President and CEO of Omai Gold. "We anticipate that this upcoming Preliminary Economic Assessment will be transformational and will illuminate the pathway to development."

The updated Mineral Resource Estimate is expected in Q1 2026, to be followed by the PEA in Q2 2026. In August 2025, Omai Gold Mines announced a 96% increase to the Wenot Gold Deposit resource to 970,000 ounces of gold Indicated averaging 1.46 grams per tonne and 3,717,000 ounces Inferred averaging 1.82 grams per tonne, bringing the global resource at Omai to 2,121,000 ounces Indicated and 4,382,000 ounces Inferred.

Aris Mining (NYSE-A: ARMN) (TSX: ARIS) delivered strong 2025 gold production of 256,503 ounces, exceeding the guidance midpoint and representing a 22% increase over 2024 production of 210,995 ounces. Fourth quarter production of 69,852 ounces capped off a year of strong operational execution driven by the expanded Segovia mill and above-guidance performance at Marmato.

"2025 was a pivotal year for Aris Mining," commented Neil Woodyer, CEO of Aris. "The successful expansion and on-going ramp-up at Segovia drove 26% production growth in the second half of the year, while Marmato delivered steady, above-guidance results as underground development progressed and construction of the new CIP plant and related infrastructure advanced on schedule."

Looking ahead to 2026, Aris Mining expects consolidated production of 300,000 to 350,000 ounces, supported by continued ramp-up at Segovia and increasing production from Marmato from Q4 2026 onwards. The company maintains a cash balance of over \$390 million and exited 2025 with strong momentum and a clear growth pipeline.

K92 Mining (TSX: KNT) (OTCQB: KNTNF) announced 2026 operational guidance forecasting production of 190,000 to 225,000 ounces gold equivalent, a significant increase from the record 2025 production of 174,134 ounces. Production is expected to be strongest in H2 2026, driven by progressive ramp-up in ore tonnes mined and processed from two new mining fronts.

"Building on our record operational performance in 2025, including the successful commissioning of the Stage 3 Expansion process plant, we are pleased to provide our 2026 guidance, forecasting a significant increase in production, with low cash costs and all-in sustaining costs," stated John Lewins, CEO of K92 Mining. "This growth is supported by the ramp-up in mining and processing of new mining fronts, together with the benefits of projects completed in 2025."

K92 Mining forecasted cash costs between \$710-\$770 per ounce gold and AISC of \$1,250-\$1,350 per ounce gold in 2026. The company plans a record exploration program of \$31-\$35 million targeting near-mine and regional targets, with two additional surface drill rigs arriving on-site in Q1 2026.

Article Source:

<https://usanewsgroup.com/2025/04/02/with-funding-commitments-in-place-a-gold-mine-is-being-built-and-this-stock-is->

CONTACT:

USA NEWS GROUP

[info@usanewsgroup.com](mailto:info@usanewsgroup.com)

(604) 265-2873

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SOURCES:

1. <https://farmonaut.com/mining/top-gold-mining-companies-stocks-2026-trends>
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