

Beyond Tech: The Hidden Winners of the AI Energy Boom

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Issued on behalf of [Eagle Energy Metals Corp.](#)

USANewsGroup.com News Commentary - President Trump's directive to quadruple nuclear capacity^[1] is currently colliding with a projection that AI data center consumption could double by 2026^[2]. This creates a friction point where utilities are seeking to fill critical gaps in baseload generation before any grid failures, putting a massive spotlight on the domestic value chain represented by Spring Valley Acquisition Corp. II (OTC: SVIIF), Centrus Energy (NYSE: LEU), Constellation Energy (NASDAQ: CEG), [NuScale Power](#) (NYSE: NXE) (TSX: NXE), and NuScale Power (NYSE: SMR).

The timing is pivotal because analysts are tracking a structural supply deficit heading into 2026^[3]; mine production does not appear to be keeping up with these aggressive reactor requirements. When you factor in the Department of Energy allocating \$10 billion to expand domestic enrichment^[4], it becomes apparent that sovereign resource control is now a primary investment thesis in the energy transition cycle.

Spring Valley Acquisition Corp. II (OTC: SVIIF) a special purpose acquisition company (SPAC) recently announced a proposed merger with uranium miner Eagle Energy Metals, a next-generation nuclear energy company. The two companies announced last week that the SEC has declared its registration statement effective, clearing a key regulatory hurdle for its NASDAQ listing under the ticker NUCL. The company's shareholder meeting is scheduled for February 23, 2026, where investors will vote on the business combination. Notably, Spring Valley Acquisition Corp. II (OTC: SVIIF) is led by the same SPAC team that brought NuScale Power Corporation (NYSE: SMR) public in 2022.

The registration approval follows Eagle Energy Metals' recent engagement with BBA USA Inc., a consulting firm tasked with designing a drilling campaign at the Aurora Uranium Project to support a Pre-Feasibility Study. Eagle Energy holds rights to what it describes as the largest open pit-constrained, measured and indicated uranium deposit in the United States. The Aurora Project sits on the Oregon-Nevada border with 32.75 million pounds of indicated uranium and 4.98 million pounds inferred, based on 500 drill holes.

"We're seeing sustained demand for nuclear power translate into real demand for uranium, particularly for projects located in the U.S.," said Mark Mukhija, CEO of Eagle Energy Metals. "Advancing Aurora with BBA is about making sure this asset is positioned to meet that demand as the market continues to tighten."

President Trump recently signed four executive orders aimed at removing regulatory barriers and quadrupling U.S. nuclear power generation over the next 25 years, while invoking the Defense Production Act to secure domestic uranium supply.

Meanwhile, electricity demand is accelerating as AI, quantum computing, and cryptocurrency operations strain global grids. Google recently announced plans to build a \$10 billion AI data center in Louisiana powered by nuclear energy from Constellation Energy, while Microsoft, Amazon, Oracle, and Nvidia have struck major deals to power their operations with nuclear.

Beyond uranium, Eagle Energy Metals also holds rights to Small Modular Reactor (SMR) technology. The company is advancing its asset as domestic uranium supply becomes increasingly prioritized.

Centrus Energy (NYSE: LEU) has been awarded \$900 million by the U.S. Department of Energy to expand its uranium enrichment facility in Piketon, Ohio, including commercial-scale production of High-Assay, Low-Enriched Uranium (HALEU). The company indicated that the project is expected to support thousands of American jobs, including 1,000 construction jobs and 300 permanent operating positions in Ohio, with the first new capacity expected to come online in 2029.

"This award represents a historic commitment to revitalizing America's nuclear fuel supply chain and reclaiming American leadership on the global stage," said Amir Vexler, CEO of Centrus Energy. "This award will catalyze additional private investment in the industry."

and supports the prospect of further expansion as the market continues to grow. Uranium enrichment in Ohio has a big this is just the beginning."

Centrus Energy has already announced that it has secured \$2.3 billion in LEU purchase commitments from utilities and more than \$1.2 billion in private capital via convertible note transactions to support its expansion plans. The total task contract value with all options included reaches \$1.07 billion, with up to \$170 million in additional options to produce another HALEU to the Department.

Constellation Energy (NASDAQ: CEG) has completed its acquisition of Calpine Corporation from Energy Capital Partners, reportedly creating the nation's largest producer of electricity with 55 gigawatts of capacity. The combined organization will join Constellation Energy's zero-emission nuclear fleet with Calpine's natural gas and geothermal generation to serve more than 10 million retail and business customers nationwide.

"This isn't just about two great companies coming together - it's about strengthening America's future," said Joe Dominguez, President and CEO of Constellation Energy. "By uniting Constellation and Calpine, we're providing the reliable, clean energy that keeps our communities strong, our businesses competitive and our nation secure."

Constellation Energy indicated that the acquisition strengthens its footprint in high-demand regions including Texas and Florida, while maintaining significant operations in Illinois, Maryland, New York and Pennsylvania. With its expanded platform, the company indicated that it is positioned to scale new clean technologies including advanced nuclear, geothermal, carbon capture and sequestration, and long-duration storage.

NexGen Energy (NYSE: NXE) (TSX: NXE) has announced the expansion of its high-grade subdomain at Patterson Creek, with the primary high-grade zone growing 23% in vertical extent from 335 m to 412 m across 210 m of strike length. The mineralized footprint expanded to 700 m vertical extent and 620 m strike length, with 67 of 102 drill holes returning mineralized intervals including 17 intersecting off-scale readings.

"The 2025 drill program has rapidly advanced this new discovery, while underscoring the tremendous prospectivity of NexGen's 100% owned dominant land holdings which is driving the expanded activity in 2026," said Leigh Curyer, CEO of NexGen Energy. "The NexGen team is laser focused on concluding the final Federal permitting and licensing for the Rook I Project and is advancing through construction into production whilst simultaneously advancing the exciting PCE discovery and other high-priority targets."

NexGen Energy has announced that it has commenced a 45,500-meter 2026 exploration program, with 42,000 m of diamond drilling at PCE representing the largest program conducted at the discovery to date. The company will also conduct initial diamond drilling at its 100% owned SW3 property with 3,500 m targeting high-priority greenfield areas in the southwest Athabasca Basin.

NuScale Power (NYSE: SMR) announced that it has released study results from a techno-economic assessment conducted in collaboration with Oak Ridge National Laboratory demonstrating that its small modular reactor technology can profitably and reliably power commercial chemical plants. The two-year study found that a 12-NPM plant configuration is the most promising, as a minimum 4-NPM configuration combined with boilers can meet all chemical plant requirements.

"As the first and only SMR to have our designs certified by the U.S. Nuclear Regulatory Commission (NRC), NuScale can lead in the development of new technologies to provide process heat and electricity," said Dr. José Reyes, Co-founder and CEO of NuScale Power. "Delivering high-temperature steam with NuScale's scalable architecture provides industrial users with unparalleled flexibility that can be integrated into their processes and offers a promising new path for them to explore."

The study reportedly demonstrated that the NuScale integrated energy system could meet chemical plant requirements of 10 million kg/h of process steam at 400°C while also providing 73 MW of electric power. NuScale Power remains the only provider with NRC-certified designs, positioning it to serve diverse customers across electrical generation, data centers, desalination, and hydrogen production.

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Additional Information and Where to Find It

In connection with the transactions (the "Proposed Business Combination") contemplated by the related Spring Valley Acquisition Corp. II ("SVII") merger agreement (the "A&R Merger Agreement") with Eagle Energy Metals Corp ("Eagle"), Eagle Nucleonics Corp. ("New Eagle") filed with the Securities and Exchange Commission (the "SEC") a registration statement on Form S-4 (File No. 333-290631) (the "Registration Statement"), which was declared effective on January 30, 2026. On February 2, 2026, New Eagle filed a final prospectus with respect to New Eagle's securities to be issued in connection with the Proposed Business Combination and a final proxy statement to be distributed to holders of SVII's Class A Ordinary Shares in connection with the solicitation of proxies for the vote by SVII's shareholders with respect to the Proposed Business Combination and other matters described in the Registration Statement (collectively, the "Proxy Statement"). This document does not contain all of the information that should be considered concerning the Proposed Business Combination and is not a substitute for the Registration Statement, the Proxy Statement or for any other document that SVII, New Eagle or Eagle may file with the SEC. Before making any investment voting decision, investors and security holders of SVII, New Eagle and Eagle are urged to read the Registration Statement, the Proxy Statement, and any amendments or supplements thereto, as well as all other relevant materials filed or that will be filed with the SEC in connection with the Proposed Business Combination as they become available because they will contain important information about New Eagle, Eagle, SVII and the Proposed Business Combination. Investors and security holders will obtain free copies of the Registration Statement, the Proxy Statement and all other relevant documents filed or that will be filed with the SEC by SVII, New Eagle or Eagle through the website maintained by the SEC at www.sec.gov. In addition, the documents filed by SVII may be obtained free of charge from SVII's website at www.sv-ac.com or by directing a request to Spring Valley Acquisition Corp. II, Attn: Corporate Secretary, 2100 McKinney Avenue, Suite 1675, Dallas, Texas 75201. The information contained in this document may be accessed through, the websites referenced in this document is not incorporated by reference into, and is not a part of this document.

Participants in the Solicitation

New Eagle, Eagle, SVII and their respective directors, executive officers and other members of management and employees, under the rules of the SEC, be deemed to be participants in the solicitations of proxies from SVII's shareholders in connection with the Proposed Business Combination. For more information about the names, affiliations and interests of SVII's directors and executive officers, please refer to SVII's Annual Report on Form 10-K for the year ended December 31, 2024, which was filed with the SEC on April 11, 2025 (the "2024 Form 10-K") and the Registration Statement, Proxy Statement and other relevant documents filed or to be filed with the SEC in connection with the Proposed Business Combination when they become available. All information regarding the participants in the proxy solicitation and a description of their direct and indirect interests, which in some cases, be different than those of SVII's shareholders generally, will be included in the Registration Statement and the Proxy Statement. Shareholders, potential investors and other interested persons should read the Registration Statement and the Proxy Statement, and any amendments or supplements thereto, carefully, before making any voting or investment decisions. Investors may obtain free copies of these documents from the sources indicated above.

No Offer or Solicitation

This document shall not constitute a "solicitation" as defined in Section 14 of the Exchange Act. This document shall not be an offer to sell or exchange, the solicitation of an offer to buy or a recommendation to purchase, any securities, or a solicitation of any vote, consent or approval, nor shall there be any sale, issuance or transfer of securities in any jurisdiction in which such solicitation or sale may be unlawful under the laws of such jurisdiction. No offering of securities in the Proposed Business Combination shall be made except by means of a prospectus meeting the requirements of the Securities Act or an exemption therefrom.

Cautionary Note Regarding Forward-Looking Statements

Certain statements included in this document are not historical facts but are forward-looking statements. All statements of historical facts contained in this document are forward-looking statements. Any statements that refer to plans, forecasts or other characterizations of future events or circumstances, including any underlying assumptions, are also forward-looking statements. In some cases, you can identify forward-looking statements by words such as "estimate," "project," "forecast," "intend," "expect," "anticipate," "believe," "seek," "strategy," "future," "opportunity," "may," "target," "will," "would," "will be," "will continue," "will likely result," "preliminary," or similar expressions that predict or indicate future trends or that are not statements of historical matters, but the absence of these words does not mean that a statement is not forward-looking. Forward-looking statements include, without limitation, SVII's, New Eagle's, Eagle's, or their respective management teams' expectations concerning the Proposed Business Combination and expected benefits thereof; the direction of Eagle's or New Eagle's business; the abilities to execute Eagle's or New Eagle's strategies; projected and estimated financial performance; anticipated industry trends; the future price of minerals; future capital expenditures; success of exploration, mining or processing issues; government regulation of mining operations; and environmental risks; as well as any information concerning possible or assumed future results of operations of Eagle or New Eagle. The forward-looking statements are based on the current expectations of the respective management teams of Eagle, New Eagle, and SVII, as applicable, and are inherently subject to uncertainties and changes in circumstance and their potential effects. There can be no assurance that future developments will be those that have been anticipated. These forward-looking statements involve a number of risks, uncertainties or other assumptions that may cause actual results or performance to be materially different from those expressed or implied in these forward-looking statements. These risks and uncertainties include, but are not limited to, (i) the risk that the Proposed Business Combination may not be completed in a timely manner or at all, which may adversely affect the price of SVII's securities; (ii) the risk that the Proposed Business Combination may not be completed by SVII's business combination deadline and the potential failure to obtain an extension of the business combination deadline if sought by SVII; (iii) the failure to satisfy the conditions to the consummation of the Proposed Business Combination, including the approval of the A&R Merger Agreement by the shareholders of SVII and the receipt of regulatory approvals; (iv) market risks; (v) the occurrence of any event, change or circumstance that could give rise to the termination of the A&R Merger Agreement; (vi) the effect of the announcement of the Proposed Business Combination on Eagle's business relationships, performance, and business generally; (vii) risks that the Proposed Business Combination disrupts current plans of Eagle and potential difficulties in its employee retention as a result of the Proposed Business Combination; (viii) the outcome of any legal proceedings that may be instituted against Eagle or SVII relating to the A&R Merger Agreement or the Proposed Business Combination; (ix) failure to realize the anticipated benefits of the Proposed Business Combination; (x) the inability to meet listing requirements and maintain the listing of the combined company's securities on Nasdaq Capital Market or a comparable exchange; (xi) the risk that the price of the combined company's securities may be volatile due to a variety of factors, including changes in laws, regulations, technologies, natural disasters or health epidemics/pandemics, national security tensions, and macro- economic and social environments affecting its business; (xii) fluctuations in spot and forward markets for lithium and uranium and certain other commodities (such as natural gas, fuel, electricity); (xiii) restrictions on mining in the jurisdictions in which Eagle operates; (xiv) laws and regulations governing mining operation, exploration and development activities, and changes in such laws and regulations; (xv) Eagle's ability to obtain the licenses and permits necessary for the operation and expansion of its existing operations and for the development, expansion and commencement of new operations; (xvi) risks and hazards associated with the business of mineral exploration, development and mining (including environmental hazards, potential unintended releases of contaminants, industrial accidents, unusual geological or structural formations, pressures, cave-ins and flooding); (xvii) inherent risks associated with tailings facilities and heap leach operations, including failure or leakages; the speculative nature of mineral exploration and development; the inability to determine, with certainty, production and cost estimates; inadequate or unreliable infrastructure (such as roads, bridges, power sources and water supplies); (xviii) environmental regulations and legislation; (xix) the effects of climate change, extreme weather events, water scarcity, and seismic events, and the effectiveness of strategies to deal with these issues relating to Eagle's exploration operations; (xx) fluctuations in currency markets; (xxi) the volatility of the metals markets, which may have the potential to impact Eagle's ability to meet its financial obligations; (xxii) disputes as to the validity of mining or exploration claims or rights, which constitute most of Eagle's property holdings; (xxiii) Eagle's ability to complete and successfully implement acquisitions; (xxiv) increased competition in the mining industry for properties and equipment; (xxv) limited supply of mining supply chain disruptions; (xxvi) relations with and claims by indigenous populations; (xxvii) relations with and claims by local communities and non-governmental organizations; and (xxviii) the risk that the Series A Preferred Stock Investment may not be completed, or that other capital needed by the combined company may not be raised on favorable terms, or at all. The above list is not exhaustive, and there may be additional risks that neither SVII, Eagle, nor New Eagle presently know or that SVII and New Eagle currently believe are immaterial. You should carefully consider the foregoing factors, any other factors described in this document and the other risks and uncertainties described in the "Risk Factors" section of the 2024 Form 10-K, the Registration Statement, the Proxy Statement, and any amendments or supplements thereto.

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3. <https://www.nasdaq.com/articles/uranium-price-forecast-top-trends-uranium-2026>

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4. <https://www.energy.gov/articles/us-department-energy-awards-27-billion-restore-american-uranium-enrichment>

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