

Silver's New Strategic Status Is Rewriting the Rules for Critical Mineral Investment

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Issued on behalf of [Americore Resources Corp.](#)

Silver's formal addition to the U.S. Critical Minerals List truly triggered a structural reassessment of how markets value the metal, placing it alongside lithium and cobalt as essential to national security and economic stability^[1]. The Council on Foreign Relations warns that China's expanding export controls on rare earths and strategic metals threaten Western supply chains across defense, energy, and advanced manufacturing sectors^[2]. In the aftermath of these actions, capital is flowing toward Americore Resources (TSXV: AMCO) (OTCQB: AMCOF), Santacruz Silver Mining (TSXV: SCZ) (NASDAQ: SCZM), Vizsla Silver (NYSE: VZLA) (TSX: VZLA), Aya Gold & Silver (TSX: AYA) (OTCQX: AYASF), and [Fortuna Mining](#) (NYSE: FSM) (TSX: FVI).

The Silver Institute projects the global market will remain in deficit for a sixth straight year, with total demand outstripping supply by an estimated 67 million ounces in 2026^[3]. Silver prices remain up more than 180% year-over-year even after retreating from January highs, while global exchange-traded product holdings have firmed at an estimated 1.31 billion ounces^[4].

Americore Resources Corp. (TSXV: AMCO) (OTCQB: AMCOF) has received all data from its recently completed drone-magnetometer survey at the 100%-owned Trinity Silver Project in Pershing County, Nevada. The company has also initiated drill permitting for a Q2 2026 program designed to confirm the project's historic drill database.

Pioneer Exploration Consultants of Ottawa flew the survey, which covered approximately 350 line-km of strike running southwest to northeast with the Trinity open pit at its center. The program was designed to identify structures within roughly six kilometers of that corridor.

Americore has contracted Campbell and Walker Geophysics to perform a comprehensive review and interpretation of the new survey data. That work will incorporate all available historic geophysical data from the property.

On the permitting front, the company is advancing approvals for both BLM land and fee land through the Bureau of Mining Regulation and Reclamation and Nevada Division of Environmental Protection. The Q2 drill program is planned to include 5 to 10 core holes twinning historic drillholes, followed by step-out drilling.

"We continue to systematically move the Trinity Project forward," said Jeff Poloni, CEO of Americore Resources. "The exploration plan which includes both confirmation and expansion drilling will allow us to move the resource from Inferred to Indicated and will become the foundation for a new mineral resource estimate."

The Trinity Project sits on a consolidated land package spanning approximately 22,700 acres. That position includes an option on the adjacent Primus Resources property, where grab samples have returned grades as high as 1,690 g/t silver.

The property carries a 2012 historic resource estimate of 36 million ounces of silver equivalent. The site is no greenfield target. US Borax mined Trinity in 1987 and 1988, producing roughly five million ounces of silver through heap-leach processing before shutting down when silver prices collapsed.

Americore is also evaluating monetization of surface stockpiles containing an estimated 400,000 ounces of silver in oxide material and 365,000 ounces in sulphide. The company is weighing two processing pathways:

toll processing at an existing facility or construction of an on-site pilot plant.

With survey interpretation underway, drill permits advancing, and near-surface silver sitting at the ready, Americore is building a clear path toward a new mineral resource estimate at one of North America's most established silver districts.

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In other industry developments and happenings in the market include:

Santacruz Silver Mining (NASDAQ: SCZM) (TSXV: SCZ) has been recognized as the top performer on the 2026 TSX Venture 50 List of top-performing companies. The ranking acknowledges exceptional market performance in 2025, with the company delivering 1,103% share price appreciation and 1,137% market cap growth while maintaining diversified production operations across Bolivia and Mexico. The TSX Venture 50 represents the exchange's highest achievers across five industry sectors.

"To be named the #1 ranked company on the 2026 TSX Venture 50 is an extraordinary honour and marks a transformative year for Santacruz," said Arturo Préstamo, Executive Chairman and CEO of Santacruz Silver Mining. "This distinction recognizes the strength of our operations, the quality of our asset portfolio, and the dedication of our hardworking team."

The company's dual-jurisdiction operational footprint positions it to capitalize on rising silver demand while managing jurisdictional risk. With proven execution across multiple mining sites and strong management oversight, Santacruz Silver Mining enters 2026 with operational momentum and market recognition that few junior miners achieve.

Vizsla Silver (TSX: VZLA) (NYSE: VZLA) recently outlined its 2025 achievements and 2026 development timeline for the Panuco project in Mexico. The company's feasibility study demonstrates robust economics with projected annual production of 17.4 million ounces silver equivalent over a 9.4-year mine life, supported by an after-tax NPV of US\$1.8 billion at a 5% discount rate, 111% internal rate of return, and a seven-month payback period. With a cash position exceeding US\$450 million, the project is fully funded through construction and commissioning.

"2025 was an extraordinary year for Vizsla, the Panuco project and the underlying commodities," said Michael Konnert, President and CEO of Vizsla Silver. "With a current cash position of over US\$450M, the project is now fully financed, and we are ready to build and ready to grow following receipt of our MIA permit expected sometime mid-year."

First production is targeted for the second half of 2027, with permitting progress on track. The company's transition from explorer to near-term producer positions it to capture value during a favorable pricing environment for precious metals while maintaining financial flexibility throughout the construction phase.

Aya Gold & Silver (TSX: AYA) (OTCQX: AYASF) announced the discovery of a new parallel mineralized structure at its Boumadine project in Morocco, located approximately 500 meters east of the main trend. Recent drilling returned high-grade intercepts including 255 grams per tonne silver equivalent over 11.9 meters, with a higher-grade interval of 337 grams per tonne over 7.9 meters. The company has completed 28,904 meters of drilling year-to-date, with ten active drill rigs and two additional rigs scheduled to arrive in March.

"These results, including a new southern parallel structure and mineralization more than 500 metres from any known zone, reinforce that the resource potential continues to grow," said Benoit La Salle, President and CEO of Aya Gold & Silver. "With ten rigs active, we're fast-tracking development and the 2026-2027 infill program, with two more rigs expected in March."

The expanded drilling campaign targets resource growth ahead of updated mineral estimates while

advancing the project toward production decisions. Morocco's established mining infrastructure and regulatory framework support development timelines, while the discovery of parallel structures suggests significant exploration upside beyond currently defined mineralization.

Fortuna Mining (NYSE: FSM) (TSX: FVI) reported record financial performance for the fourth quarter and full year 2025, highlighted by US\$330 million in annual free cash flow and US\$132.3 million in the fourth quarter alone. The company produced 317,001 gold equivalent ounces during 2025 while maintaining US\$704 million in total liquidity and US\$381.5 million in net cash. Mineral reserves at the Séguéla operation in Côte d'Ivoire expanded by 31%, extending mine life and supporting growth plans.

"Q4 was a strong end to the year as we delivered record free cash flow from operations of \$132.3 million and returned \$12.1 million to our shareholders," said Jorge A. Ganoza, President and CEO of Fortuna Mining. "2025 was a transition year for Fortuna as we streamlined our portfolio by divesting non-core assets and positioned the Company for its next phase of growth at Diamba Sud and the Séguéla plant expansion. All this is underpinned by one of the best balance sheets in our peer group with \$704 million in liquidity and \$381 million in net cash."

The company's strategic focus on West African operations and portfolio optimization enhances operational leverage to precious metals pricing while maintaining financial strength for growth investments and shareholder returns.

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SOURCES:

1. <https://www.federalregister.gov/documents/2025/11/07/2025-19813/final-2025-list-of-critical-minerals>
2. <https://www.cfr.org/reports/leapfrogging-chinas-critical-minerals-dominance>

3. <https://www.nasdaq.com/articles/silver-institute-market-heading-sixth-straight-deficit-2026>

4.

<https://bfsi.economicstimes.indiatimes.com/articles/silver-price-outlook-for-2026-remains-strong-on-supply-crunch-and-e>

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