Major Institutions are Positioning the $30B Supply Shift for Strategic Growth Potential - Equity Insider.com News Commentary

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Issued on behalf of Eagle Nuclear Energy Corp.

Global energy needs are shifting. More than 75 nuclear reactors are currently under construction worldwide, and over 120 additional units are in advanced planning stages as baseload capacity expands across 15 countries[1]. The United States is actively working to anchor this buildout domestically. In February, the State Department brought together 54 nations at the 2026 Critical Minerals Ministerial, confirming a pivotal $30 billion in federal support to build highly secure supply chains over the last six months[2]. Right now, five scalable companies operating across uranium permitting, lithium offtake, high-grade silver discovery, copper resource expansion, and domestic tungsten development are positioning themselves to try to capture this structural realignment: Eagle Nuclear Energy Corp. (NASDAQ: NUCL), Lithium Ionic (TSXV: LTH) (OTCQB: LTHCF), Brixton Metals (TSXV: BBB) (OTCQX: BBBXF), Koryx Copper (TSXV: KRY) (OTCQB: KRYXF), and American Tungsten (CSE: TUNG) (OTCQB: TUNGF).

Major institutions are quietly positioning for strategic growth potential as global authorities validate this transition. The International Energy Agency's Electricity 2026 report projects nuclear generation rising steadily through 2030, estimating that renewables and nuclear will combine to generate roughly half of all global electricity by the end of the decade[3]. Yet, one of the value drivers separating advanced projects from stalled operations comes down to a single bottleneck: permitting certainty. In an era defined by a looming supply crunch, locking down early regulatory approval can be a contributor to long-term stability and sustainable market value.

Eagle Nuclear Energy (NASDAQ: NUCL) recently announced the appointment of SLR International Corporation as lead permitting manager for the Aurora Uranium Project, the company's flagship asset located along the Oregon-Nevada border.

For a company that just listed on the NASDAQ in February 2026, this is a calculated early move. Permitting is where uranium projects go to die slowly. Getting the right firm locked in before the regulatory clock starts ticking can mean the difference between a project that advances and one that stalls for years.

SLR is not a generic hire. The firm's designated team has direct working relationships with the Bureau of Land Management and the Oregon Department of Geology and Mineral Industries, the two agencies that will ultimately decide Aurora's fate. That same team already guided Paramount Gold's Grassy Mountain project and Jindalee Lithium's McDermitt project through permitting in Malheur County, Oregon, the exact county where Aurora sits. When a firm already knows the regulators by name, the learning curve is reduced.

There is also a potential shortcut in play. SLR helped get Jindalee's McDermitt project fast-tracked under the U.S. federal government's FAST-41 program, which is designed to compress environmental review timelines for major infrastructure projects. Eagle's management is now working with SLR to try to get Aurora onto that same list.

"SLR's permitting expertise, their proven track-record around the world, and their relevant experience in our neighbourhood, makes them a natural partner for Eagle as we plan to take Aurora toward the next stage of development," said Vishal Gupta, VP of Operations of Eagle. "The SLR team has been involved in extensive engagement with regulators at the county, state and federal levels, which has direct relevance to expediting the permitting process for Aurora."

SLR will manage all permitting work for Aurora, covering environmental baseline studies, drill program support, metallurgical studies, and hydrogeological analysis. The target is a Pre-Feasibility Study by late 2027.

Eagle is building toward a vertically integrated nuclear energy model, pairing the Aurora deposit, which holds 32.75 million pounds of indicated uranium and 4.98 million pounds of inferred uranium, with proprietary Small Modular Reactor technology. The company's recent membership in the Uranium Producers of America reinforces its positioning as a domestic uranium supply option at a time when U.S. reactors source more than 95% of their fuel from foreign suppliers.

Other industry developments and happenings in the market include:

Lithium Ionic (TSXV: LTH) (OTCQB: LTHCF) has secured binding offtake agreements with Yahua Group and Grand Chen for 170,000 tonnes per annum of spodumene concentrate from its Bandeira Lithium Project in Minas Gerais, Brazil. The five-year take-or-pay contracts include a US$1,000 per tonne floor price with no discount to spot and a combined US$20 million pre-payment facility to support construction financing.

"We are very pleased to be partnering with Yahua Group and Grand Chen - two highly capable and globally established participants in the lithium supply chain, and Tier-1 suppliers to leading battery and electric vehicle manufacturers," said CEO Blake Hylands of Lithium Ionic. "Their commitment to the Bandeira Project is a strong endorsement of both the quality of our asset and our ability to deliver high-quality spodumene concentrate into global markets."

The offtake counterparties supply tier-one customers including BYD, Tesla, CATL, and LG Energy Solution, providing strong third-party validation of Bandeira's commercial positioning. Lithium Ionic is advancing project financing toward a construction decision, with the agreements materially enhancing bankability across a rapidly growing global lithium supply chain.

Brixton Metals (TSXV: BBB) (OTCQX: BBBXF) has reported record-grade silver intercepts from its 2026 drill campaign at the wholly owned Langis Silver Project in Cobalt, Ontario, highlighted by hole LM-26-290 returning 82,334 g/t silver over 0.5 metres within a broader 11.35 metre interval grading 4,560 g/t silver. The result, representing the company's highest-grade single sample on record, was captured within two veins of massive native silver associated with cobalt and nickel-bearing minerals.

"These results are extraordinary and are among the most significant silver drilled intercepts known to the Company globally," said Chairman and CEO Gary R. Thompson of Brixton Metals. "Hole LM-26-290 has delivered an exceptional result, highlighted by 82,334 g/t silver from a 0.50m core length sample containing abundant native-silver. This represents the highest-grade single sample ever reported by the Company and, to our knowledge, one of the highest silver grades ever reported globally."

Drilling is ongoing in the Langis Shaft 6 area, targeting expansion and infill of established high-grade silver zones across a 2026 program that has completed 8,282 metres across 43 holes to date. Brixton Metals continues to demonstrate Langis as a high-grade primary silver project with significant discovery potential remaining.

Koryx Copper (TSXV: KRY) (OTCQB: KRYXF) has released an updated mineral resource estimate for its wholly owned Haib Copper Project in southern Namibia, now totalling 2,090,000 tonnes of contained copper in the Indicated category and 1,385,000 tonnes Inferred, with a copper equivalent grade increase of 18% in the high-grade Indicated zone to 0.40% CuEq. The updated estimate incorporates molybdenum and gold as by-products for the first time, while the project's stripping ratio improved substantially from 1.74x to 0.92x.

"We are very pleased with the large improvement and refinement of the Haib MRE, particularly the grade increase of the high grade portion to 0.40% CuEq coupled with the conversion of a large volume of material previously modelled as waste into lower grade mineralised material, thereby increasing the total copper inventory from 2.6Mt to 3.5Mt," said President and CEO Heye Daun of Koryx Copper. "The life-of-mine of the Haib project is expected to grow very significantly from its current 24 years to likely more than 35 years."

With 14 drill rigs advancing a 55,000 metre program expected to complete by mid-2026, Koryx Copper is targeting a further MRE update ahead of a Preliminary Feasibility Study planned for the fourth quarter of 2026.

American Tungsten (CSE: TUNG) (OTCQB: TUNGF) has reported initial drill results from its second D-Level station at the IMA Mine in Lemhi County, Idaho, with significant tungsten-silver intercepts in all holes confirming continuity of the polymetallic vein system along strike and up-dip from historical workings. Highlights include 28.3 feet grading 0.39% WO_3 and 1.08 oz/t silver in hole AT26-08, and 10 feet grading 0.80% WO_3 and 1.91 oz/t silver in hole AT26-10.

"The results from the second drill station on the D-Level further reinforce the continuity and scale of the tungsten-silver vein system at the IMA Mine," said CEO Ali Haji of American Tungsten Corp. "The consistent mineralization widths encountered across all drillholes support our understanding of the vein geometry and its extension up-dip and along strike from historical workings. These results provide continued confidence as we systematically advance drilling to define a modern, mineable resource."

American Tungsten has now completed 15 drillholes on the D-Level and 8 on the Zero Level, totalling approximately 7,800 feet, with excavation of a third drill station currently underway. Planning for the Zero Level includes up to 20 additional holes totalling approximately 10,000 feet from three locations.

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macro-economic and social environments affecting its business; and (vi) fluctuations in spot and forward markets for lithium and uranium and certain other commodities (such as natural gas, fuel oil and electricity). The foregoing list is not exhaustive, and there may be additional risks that Eagle does not presently know or that Eagle currently believes are immaterial. You should carefully consider the foregoing factors, any other factors discussed in this document and the other risks and uncertainties described in filings made with the SEC by Eagle from time to time, which are or will be accessible at www.sec.gov. Eagle cautions you against placing undue reliance on forward-looking statements, which reflect current beliefs and are based on information currently available as of the date a forward-looking statement is made. Forward-looking statements set forth in this document speak only as of the date of this document.

SOURCES:

1. https://world-nuclear.org/information-library/current-and-future-generation/plans-for-new-reactors-worldwide
2. https://www.state.gov/releases/office-of-the-spokesperson/2026/02/2026-critical-minerals-ministerial
3. https://www.iea.org/reports/electricity-2026/executive-summary

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