

Construction-Stage Producers Race to Capture the Supply Gap as Gold Prices Approach \$4,700

01:04 Uhr | [CNW](#)

Construction-Stage Gold Producers Offer the Cleanest Leverage to ~\$4,700 Gold: LVG, AGI, SKE, LGDTF, RVLGF

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

USANewsGroup.com News Commentary

Gold is trading near \$4,700 per ounce and the smart money stopped arguing about whether the rally is real sometime last year. [1] Goldman Sachs and Bank of America have both quietly revised their year-end targets to \$6,000 per ounce, and the VanEck Junior Gold Miners ETF (NYSE: GDXJ) has now returned more than 200% over the trailing twelve months as the operating leverage of a ~\$4,700 gold price finally gets applied to compressed junior valuations. [2] But the real squeeze is on the supply side. Mine output is stalling, high-grade discoveries are getting harder to find, and the companies that matter most in this cycle are not the explorers, not the majors - they are the builders. The narrow cohort of juniors with fully permitted, fully funded, construction-stage projects are the cleanest leverage to every incremental dollar gold prints. Companies positioned squarely in that lane include Lake Victoria Gold Ltd. (TSXV: LVG) (OTCQB: LVGLF), Alamos Gold Inc. (NYSE: AGI), Skeena Gold & Silver (NYSE: SKE), Liberty Gold Corp. (OTCQX: LGDTF), and Revival Gold Inc. (OTCQX: RVLGF).

The World Gold Council has been blunt about the structural problem: even at current price levels, the industry is not replacing reserves fast enough, and capital is rotating toward quality rather than quantity. [3] Central bank purchases have not slowed. NATO allies, emerging-market sovereigns, and Western institutional funds have all continued accumulating physical metal in a way that historically precedes sustained mining equity re-ratings. The M&A window has reopened in earnest - in January 2026 alone, more than \$11 billion of mining transactions closed, with over three-quarters of that capital flowing into gold and silver assets. [4] For investors, the implication is simple: at ~\$4,700 gold, the highest-value real estate in the sector is a fully permitted project with a financing package in place and a calendar that shows "first pour" measured in months, not years.

Key Takeaways

- Gold is trading near \$4,700 per ounce, with Goldman Sachs and Bank of America both targeting \$6,000 by year-end 2026.
- The VanEck Junior Gold Miners ETF (GDXJ) has returned over 200% in the trailing twelve months as operating leverage kicks in for mid-tier and junior producers.
- Construction-stage juniors - fully permitted, fully financed - are the cleanest structural leverage play in the sector right now.
- Lake Victoria Gold (TSXV: LVG / OTCQB: LVGLF) is advancing the permitted Imwelo Gold Project in Tanzania's Lake Victoria Goldfields, a region that has produced tens of millions of ounces for majors including Barrick and AngloGold Ashanti.
- Comparable construction-stage and permitting-stage names with recent April 2026 news include Alamos Gold (AGI), Skeena Gold & Silver (SKE), Liberty Gold (LGDTF), and Revival Gold (RVLGF).

Lake Victoria Gold Ltd. (TSXV: LVG) (OTCQB: LVGLF) - A Shovel-Ready Gold Mine in One of Africa's Most Established Gold Jurisdictions

Lake Victoria Gold sits squarely in the most sought-after segment of the gold equity curve: fully permitted, construction-stage assets with a clear path to production.

The Company is advancing the Imwelo Gold Project in Tanzania's Lake Victoria Goldfields - a region that has produced tens of millions of ounces of gold from operations run by some of the world's largest producers, including Barrick and AngloGold Ashanti. Imwelo is fully permitted, the financing package to complete construction is in place, and the Company's focus in 2026 is converting months of engineering, procurement, and site work into an operating gold mine.

What separates Imwelo from the typical pre-production story is that Lake Victoria Gold is not asking the market to underwrite speculative resource growth at ~\$4,700 gold. The technical case for the project was built at \$1,800 gold levels, meaning every incremental dollar above the prior base case drops directly through to project economics.

Beyond Imwelo, Lake Victoria Gold retains exposure to significant upside through the Tembo Project, located immediately adjacent to Barrick Gold's Bulyanhulu operation. This provides investors with a dual-track story: near-term production potential at Imwelo, combined with district-scale exploration optionality in one of Africa's most prospective gold belts. The Company is advancing a potential processing arrangement with Nyati Resources, which could provide a pathway to near-term production and cash flow from Tembo with limited upfront capital, further enhancing its ability to self-fund exploration and development. In addition, Lake Victoria Gold retains a meaningful economic interest in licences previously sold to Barrick, including the right to receive contingent payments tied to future gold discoveries of up to \$45 million, providing ongoing exposure to exploration success without additional capital investment and a layer of potential non-dilutive upside not typically reflected in junior developer valuations.

For investors who want leverage to ~\$4,700 gold without exploration risk and without the valuation compression of a major, Lake Victoria Gold offers the rarest profile on the board: an African gold mine being built - right now - in a jurisdiction where the neighbors are the biggest names in the industry.

CONTINUED… Read this and more news for Lake Victoria Gold at:

<https://usnewsgroup.com/2025/04/14/with-funding-commitments-in-place-a-gold-mine-is-being-built-and-this-stock-is->

In other industry developments and happenings in the market include:

Alamos Gold Inc. (NYSE: AGI) - An Intermediate Producer Showing Stock-Specific Strength Into Q1 Results

On April 2, Alamos Gold formally announced the timing of its first-quarter 2026 financial results and conference call, scheduled for April 29-30.[5] The intermediate producer operates the Island Gold District and Young-Davidson mine in northern Ontario as well as the Mulatos District in Sonora, Mexico, and is advancing the Lynn Lake project in Manitoba. The day-of market reaction underscored Alamos's relative positioning: AGI traded up approximately 2.7% on the announcement while a basket of metals peers in the same momentum set traded lower by 5% to 6%, an indication of stock-specific strength in a sector that has seen sharp internal rotation.[6] The Company continues to trade well above its 200-day moving average, and the upcoming AGM on May 28, 2026 will anchor investor focus as the quarterly results print.

Skeena Gold & Silver (NYSE: SKE) - A \$750 Million Senior Notes Pricing Clears the Runway to Eskay Creek Production

Also on April 2, Skeena Gold & Silver priced a US\$750 million senior secured notes offering due 2031, refinancing former project financing and funding a partial buy-back of the Eskay Creek gold stream.[7] The offering is expected to close April 10, 2026 and represents one of the larger financing milestones any Canadian gold developer has executed in this cycle. Eskay Creek - located in British Columbia's Golden Triangle and fully permitted following the receipt of both the B.C. Mines Act Permit and the Environmental Management Act Permit earlier in 2026 - is now 49% complete against a construction budget of US\$659 million, with initial production remaining on schedule for Q2 2027. For investors watching the construction-stage cohort, Skeena is the template: fully permitted, fully financed, and now capital-structure-optimized into commissioning.

Liberty Gold Corp. (OTCQX: LGDTF) - U.S. Forest Service NOI Clears a Critical Regulatory Milestone

On April 3, Liberty Gold Corp. announced that the United States Forest Service had published a Notice of

Intent in the Federal Register to prepare an Environmental Impact Statement for the Company's Black Pine Oxide Gold Project in southeastern Idaho.[8] The publication formally initiates the federal permitting process and is a prerequisite step on the path to a Record of Decision. Black Pine is one of the more advanced open-pit, heap-leach oxide projects in the U.S. pipeline, and for a market that has been rewarding projects capable of converting permits into ounces, the NOI is exactly the kind of regulatory milestone that separates shovel-ready juniors from perpetual explorers.

Revival Gold Inc. (OTCQX: RVLGF) - Mercur Gold Project Consolidation Paves the Way for Redevelopment

On April 2, Revival Gold closed its acquisition of Mercur Mines LLC, the owner of certain mineral and surface interests in the Mercur Gold Project in Utah.[9] The transaction consolidates the historical Mercur district - a past-producing gold camp - into a single operator and clears the way for Revival Gold to advance a redevelopment plan that leverages existing infrastructure and historical data. Alongside the Company's Beartrack-Arnett project in Idaho, Revival now holds two advanced gold projects in premier U.S. jurisdictions, precisely the kind of optionality the market is bidding up into the ~\$4,700 gold environment.

SOURCE:

<https://usanewsgroup.com/2025/04/14/with-funding-commitments-in-place-a-gold-mine-is-being-built-and-this-stock-is->

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Frequently Asked Questions

Why are construction-stage gold producers outperforming explorers in 2026?

At ~\$4,700 gold, every dollar above the prior technical case drops directly through to project economics - and the shortest path to revenue is a permitted, financed project that already has its construction calendar in motion. Exploration-stage projects face longer timelines, more dilution, and uncertain capex, while construction-stage juniors offer quantifiable leverage into a price environment no prior feasibility study anticipated.

Where is Lake Victoria Gold's Imwelo Gold Project located?

Imwelo is located in Tanzania's Lake Victoria Goldfields, a region that has produced tens of millions of ounces of gold from operations run by majors including Barrick and AngloGold Ashanti. The project is fully permitted and advancing toward production.

What is Lake Victoria Gold's relationship to Barrick's Bulyanhulu mine?

Beyond Imwelo, Lake Victoria Gold holds an interest in the Tembo Project, which is located immediately adjacent to Barrick's Bulyanhulu operation - giving investors an additional layer of discovery-stage exposure attached to a construction-stage anchor.

Who is the Qualified Person for the Imwelo Gold Project?

David Scott, Pr. Sci. Nat., SACNASP, a Director of Lake Victoria Gold, serves as the Qualified Person. He is not considered independent.

Has Lake Victoria Gold completed an NI 43-101 feasibility study on Imwelo?

No. The Company's production decision on Imwelo was made without the benefit of a completed feasibility study prepared to NI 43-101 standards - a structure common among junior producers operating on historical resource data and updated mine planning. The Company has disclosed the associated risks.

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Cautionary Note Regarding the Production Decision at Imwelo

Lake Victoria Gold's decision to place the Imwelo Project into production was not based on a feasibility study of mineral reserves demonstrating economic and technical viability prepared in accordance with NI 43-101. As such, there is increased uncertainty and specific economic and technical risks of failure associated with a production decision and the commencement of mining activities at the Imwelo Project. These risks include, among others, areas that are analyzed in more detail in a feasibility study, such as applying economic analysis to resources and reserves, more detailed metallurgy and a number of specialized studies in areas such as mining and recovery methods, market analysis, and environmental and community impacts.

SOURCES

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[3] Canadian Mining Report, "The Gold Trend That May Surprise Investors in 2026" -

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[5] Alamos Gold Inc., "Alamos Gold Provides Notice of First Quarter 2026 Results and Conference Call, and Annual General Meeting of Shareholders" (April 2, 2026) -

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[7] [Skeena Resources Ltd.](#), "Skeena Gold & Silver Announces Pricing of US\$750 Million Senior Secured Notes Offering" (April 2, 2026) - <https://www.theglobeandmail.com/investing/markets/stocks/SKE-T/pressreleases/1110531/skeena-gold-silver-announc>

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