

From China's Export Ban To A Nevada Leach Pad: The Junior With a Domestic Solution to the US Antimony Supply Chain

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Issued on behalf of [NevGold Corp.](#)

From a 1.11% antimony intercept at Resurrection Ridge, up to 99% gold recoveries on a brownfield leach pad - and an upsized brokered placement that closed on strong institutional demand - NevGold Corp. (TSXV: NAU | OTCQX: NAUFF | FRA: NAU) is heading into its maiden antimony-gold Mineral Resource Estimate fully funded, and on a near-term U.S. antimony production pathway that very few of its peers can claim.

USA News Group News Commentary - North American gold producers are operating in one of the most favorable commodity-and-policy windows of the past two decades. Gold continues to trade at or near record highs. Antimony - a U.S.-designated Critical Mineral with 100% U.S. import reliance - is now the subject of unprecedented federal procurement attention following China's December 2024 export restrictions targeting the United States. Those restrictions were partially suspended in November 2025, but the licensing regime and end-use scrutiny remain in place, which means U.S. buyers continue to face renewed disruption risk on a metal used in everything from flame retardants and semiconductors to military munitions and lead-acid batteries.

Inside that environment, junior explorers exposed to both gold and antimony - at a single, U.S. project - are a very short list. One Vancouver-based junior has just delivered the most catalyst-dense six-week stretch in its corporate history.

NevGold Corp. (TSXV: NAU) (OTCQX: NAUFF) (Frankfurt: 5E50) is an exploration and development company with four 100%-owned projects across Nevada and Idaho, anchored by the Limousine Butte gold-antimony project (White Pine County, Nevada) and the Nutmeg Mountain gold project (Idaho). [1] Between March 12 and April 20, 2026, the Company stacked operational disclosures - drill mobilization, district-scale Bullet Zone drill hits, sequential antimony-then-gold metallurgy, Resurrection Ridge headline drill release, sonic drill confirmation on the historic leach pads, and an upsized brokered placement that together sets up a maiden antimony-gold NI 43-101 Mineral Resource Estimate at Limousine Butte targeted for Q2 2026, a pathway to near-term antimony production by 2027. [1]

The Financing That Caps The Run: C\$42.2 Million, Upsized From C\$25 Million, On Strong Institutional Demand

On April 20, 2026, NevGold announced that its previously announced C\$25 million brokered private placement had been upsized to over C\$42 million on strong demand. [1] The upsized offering comprises 22,223,946 common shares at C\$1.90, with Scotia Securities Inc. as sole agent and bookrunner, and is expected to close on or about May 12, 2026. [1] Net proceeds are for advancing Limousine Butte, Nutmeg Mountain, working capital, and general corporate purposes. [1] The shares will be subject to a four-month-and-one-day hold period from closing in accordance with applicable securities laws. [1]

A previously announced C\$25 million brokered deal getting upsized by roughly 69% - without warrants - is a signal, not noise. It tells you something about who the institutions in the book are willing to underwrite, and at what stage of the catalyst cycle they want to be in the stock.

The Drill Bit Behind The Bid: 1.11% Antimony Over 6.1 Meters Inside A 100.6-Meter Gold Equivalent Intercept

The April 9, 2026 disclosure was arguably the headline of the quarter. At Resurrection Ridge - part of the Limousine Butte project - and the structural setting that hosts both the Bullet Zone discovery (made in 2025) and the Armory Fault discovery (announced February 18, 2026) - NevGold intersected 1.93 g/t gold equivalent over 100.6 meters from surface (1.07 g/t gold + 0.22 g/t antimony), with a high-grade interval of 1.11% antimony over 6.1 meters inside that broader intercept. [1] [2] CEO Brandon Bonifacio described Limo Butte as "one of the highest grade antimony projects in North America that is near-surface and

This was not an isolated print. On March 19, 2026, the Company had already disclosed Hole LB25-024 with 11.42 g/t Au over 7.7 meters (2.64% Sb + 1.17 g/t Au), within a broader 4.91 g/t AuEq over 27.4 meters (1.09% Sb + 0.67 g/t Au). [2] AuEq calculations are based on assumed prices of US\$3,000/oz gold and US\$40,000/tonne antimony, with assumed metal recoveries of 80% gold and 75% antimony. [2]

For investors who track antimony as a critical mineral story, 1.11% over 6.1 meters is a number that compares favorably to the U.S. and ex-China advanced peer set. For investors who track gold, the 100.6-meter envelope at over 1.9 g/t AuEq from surface - with the gold component alone at 1.07 g/t - is a credible bulk-tonnage signature on a project that already has Nevada State Land Management approval for an Exploration Plan of Operations covering the full 68 km² property and up to 200 acres of permitted disturbance over a 10-year term. [1]

The Metallurgy That Makes The Story Unusual: up to 99% Gold Recovery - After The Antimony Has Been Leached Out

The April 2, 2026 metallurgical disclosure may be the single most meaningful catalyst in the sequence, and it is one that puts NevGold (nev-gold.com) into a category of its own. Phase II testwork on oxide antimony-gold material from the Limo Butte historical gold leach pads showed cyanide shake test average gold recoveries above 93%, with individual samples reaching 99%, on residual tailings after the antimony had already been leached out. [1] Acid leach antimony extraction across the tested samples ranged from 54% to 92%, and additional antimony mineralization was identified at surface in a historical pre-strip waste dump. [1]

The sequential process - antimony first, gold second, both metals from the same feed stream - is the punchline. It means NevGold is not picking between gold or antimony at Limo Butte. It is recovering both, in sequence, from material that has already been crushed, stacked, and sitting at surface on a brownfield site.

That part - the brownfield part - is what positions Limousine Butte as one of the only near-term, at-surface antimony production scenarios in the United States with a path to potential metal production by 2027. The historical gold leach pads were already crushed, were already stacked, and are at surface requiring no further mining activities. April 14, 2026 sonic drill results on those same pads delivered 0.34% antimony with 0.41 g/t gold over 12.5 meters, 0.33% Sb and 0.55 g/t Au over 11.0 meters, and 0.31% Sb and 0.50 g/t Au over 14.6 meters - consistent with or better than the Phase I test pit averages. [1]

The 2026 TSX Venture 50 Recognition Wasn't An Accident

NevGold was named to the 2026 TSX Venture 50 - one of the top 50 performers among more than 1,500 TSXV-listed issuers - on the back of a 330% share price appreciation and 515% market capitalization growth in 2025. [1] The recognition uses three equally weighted criteria: one-year share price appreciation, market cap growth, and Canadian consolidated trading value. The list is not an opinion. It is an output.

The Comparable Set: How NevGold Stacks Up

NevGold (www.nev-gold.com) sits at an unusual intersection of theses - domestic critical mineral, sequential gold recovery, near-term production optionality from a brownfield pad, and Tier-1 jurisdiction (Nevada and Idaho). To frame the opportunity, four comparables are worth tracking:

1. [United States Antimony Corp.](#) (NYSE American: UAMY) is currently the only fully integrated antimony company in China and Russia. [3] On April 2, 2026, USAC announced the restart of mining operations at Stibnite Hill in Thomas County, Montana - a property the company previously mined from 1968 until 1983. [4] The company has raised FY2026 revenue guidance to \$125 million - a 25% increase from prior guidance - and received a \$27.0 million award from the U.S. Department of War under Title III of the Defense Production Act. [5] [6] USAC's Madero, Mexico smelter has approximately 200,000 tons per month of capacity, and the company remains sole-source approved to supply antimony trisulfide to the Defense Logistics Agency. [5] What UAMY illustrates is that the U.S. antimony market is being rebuilt brick by brick, and that buyers are willing to pay for domestic, vertically integrated production.
2. Perpetua Resources Corp. (Nasdaq: PPTA / TSX: PPTA) holds the only identified domestic reserve of the critical mineral antimony at its Stibnite Gold Project in central Idaho. [11] The Project is projected to be one of the highest-grade antimony mines in the United States, with reserves of approximately 4.8 million ounces of gold and 148 million pounds of antimony. It is expected to produce roughly 450,000 ounces of gold annually over its first four years. [11] On October 21, 2025, Perpetua broke ground on early works construction at the US\$1.3 billion Stibnite project after posting US\$139 million in financial assurance and receiving notice from the U.S. Forest Service that the 2025 Record of Decision requirements had been satisfied. [12] Perpetua received an indicative term sheet for up to US\$2 billion in debt support from the U.S. Export-Import Bank and is targeting a final investment decision in 2026. [13] What Perpetua demonstrates is that the U.S. is willing to underwrite domestic gold-antimony pairings at scale - the same fundamental thesis NevGold (nev-gold.com) is pursuing at Limo Butte, but at a much earlier stage and a fraction of the market capitalization.

3. [Americas Gold and Silver Corp.](#) (NYSE American: USAS / TSX: USA) consolidated 100% ownership of the Galena in Idaho's Silver Valley in December 2024 - described by the company as the nation's largest antimony mine. [7] In 2026, Americas signed a definitive joint venture agreement with United States Antimony Corporation for a 51% joint venture to construct and operate an antimony processing facility at Galena, with the stated goal of building a U.S. mine-to-finished-product antimony solution. [7] In March 2026, Americas announced its largest exploration program in company history at approximately 64,000 meters of drilling across Galena/Crescent and Cosalá Mexico, reporting intercepts as high as 4,896 g/t over 1.3 meters. [8] On April 30, 2026, the company reported its fourth major new discovery at Galena - six new high-grade silver-copper-antimony veins approximately 150 meters southwest of the 149 Vein, including 1,392 g/t Ag, 1.5% Cu and 1.5% Sb over 1.9 meters at the 43L-TJ Vein Complex. [9] USAS is the closest thing in the peer set to a "domestic antimony producer with a real silver counterweight," which is a thesis adjacent to NevGold's gold-antimony pairing.
4. [Orla Mining Ltd.](#) (NYSE American: ORLA / TSX: OLA) reported Q1 2026 production of 81,206 ounces of gold across its operating mines - Musselwhite (Ontario) and Camino Rojo (Mexico) - and reaffirmed full-year 2026 guidance of 300,000 to 360,000 ounces. [10] Orla ended Q1 2026 with \$96.0 million in net cash, declared its inaugural quarterly cash dividend of \$0.10 per share in Q2 2025, and is advancing the South Carlin Complex (formerly South Railroad) - a feasibility-stage open-pit heap leach project on Nevada's Carlin trend. [10] The relevance for NevGold is jurisdictional: Orla and NevGold are both advanced gold projects in Nevada, but with very different footprints and capital structures.

The Q2 2026 Catalyst: Maiden Antimony-Gold MRE At Limousine Butte

The next direct catalyst on the NevGold timeline is a maiden antimony-gold NI 43-101 Mineral Resource Estimate at Limousine Butte, expected in Q2 2026. [1] That MRE will be the first time the antimony quantities sitting in the historical leach pads are quantified under modern reporting standards, and it will set the technical baseline for the near-term production scenario the company is targeting for 2027.

NevGold has not yet established a current NI 43-101 mineral resource at Limousine Butte; the maiden MRE remains forthcoming. Investors should review the Company's filings and the qualified persons' technical disclosures on www.nev-gold.com before drawing conclusions. The technical information disclosed by NevGold in its 2026 news releases has been reviewed and approved by Greg French, CPG, the Company's Vice President, Exploration, who is NevGold's Qualified Person under National Instrument 43-101. [2]

The Bottom Line

For investors trying to triangulate where the U.S. antimony supply chain is being rebuilt, the names UAMY, Perpetua, USAS, and ORLA all matter. But NevGold (TSXV: NAU | OTCQX: NAUFF | FRA: 5E50) is the rare junior that sits at the intersection of multiple theses simultaneously: U.S. Critical Mineral exposure, near-term brownfield antimony production optionality, sequential gold recovery validated by up to 99% recovery testwork, and a fully funded balance sheet heading into a maiden MRE - at junior-explorer valuations.

The maiden MRE is the next catalyst. Watch this space.

Visit the company website at www.nev-gold.com for the latest corporate updates, investor presentations, and the full set of recent press releases.

Frequently Asked Questions

Q: What does NevGold Corp. do? A: NevGold Corp. (TSXV: NAU | OTCQX: NAUFF | FRA: 5E50) is a Vancouver-based exploration and development company with four 100%-owned projects across Nevada and Idaho. Its two flagship programs are Limousine Butte (gold-antimony, Nevada) and Nutmeg Mountain (gold, Idaho); Cedar Wash (gold, Nevada) and Zeus (copper, Idaho) round out the portfolio. [1]

Q: What was the upsized financing announced on April 20, 2026? A: NevGold's previously announced C\$25 million brokered private placement was upsized to over C\$42 million (22,223,946 common shares at C\$1.90), with Clarus Securities Inc. as sole agent and bookrunner. The financing is expected to close on or about May 12, 2026, and proceeds are earmarked for advancing Limousine Butte, Nutmeg Mountain, working capital, and general corporate purposes. [1]

Q: What were the headline drill results from April 9, 2026? A: At Resurrection Ridge in the Limousine Butte

district, NevGold intersected 1.93 g/t gold equivalent over 100.6 meters from surface (1.07 g/t Au + 0.22% Sb), incorporating a higher-grade interval of 1.11% antimony over 6.1 meters. [1]

Q: What did the Phase II metallurgical testwork show? A: Cyanide shake tests on residual leach pad material - after the antimony had been leached out - returned average gold recoveries above 93%, with individual samples reaching 99%. Acid leach antimony extraction ranged from 54% to 92% across the tested samples. The sequential antimony-then-gold leaching process means both metals can be recovered from the same feed. [1]

Q: When is the next major catalyst? A: The maiden antimony-gold NI 43-101 Mineral Resource Estimate at Limousine Butte is targeted for Q2 2026, with near-term antimony production targeted for 2027. [1]

Q: How do I get more information? A: Visit www.nev-gold.com or the USA News Group NevGold profile for additional information, presentations, and the full set of recent press releases.\

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Article Sources

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[13] <https://www.mining.com/perpetua-starts-building-1-3b-stibnite-gold-antimony-mine/>

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