

As America Pursues Mineral Independence, A US\$2.9 Billion EXIM Loan Signals the Next Phase for Domestic Critical Mineral Projects

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

Washington's commitment to rebuilding a secure American antimony supply chain is creating renewed investor focus on advanced U.S. critical mineral projects - with multiple domestic developers, not just one, expected to be required to close the structural supply gap.

USA News Group News Commentary - America's push to secure domestic critical mineral supply chains continues to accelerate as rising geopolitical tensions, trade disputes and strategic competition reshape global industrial priorities. At the center of that effort is a growing U.S. objective: reducing dependence on foreign-controlled critical mineral supply chains, particularly those tied to China.

For years, China has played an outsized role across the global critical minerals ecosystem - mining, refining, processing and downstream supply chains tied to materials used in defense systems, advanced manufacturing, industrial technologies and energy infrastructure. As trade tensions, tariffs, export controls and broader economic competition between Washington and Beijing have intensified, concerns surrounding mineral security have moved squarely into focus. Critical minerals are no longer viewed strictly as industrial commodities; they are increasingly discussed through the lenses of national security, economic resilience and supply chain independence.

That changing backdrop is creating renewed investor interest across the domestic critical minerals sector - and Washington just put a major exclamation point on it. On May 21, 2026, the Board of the Export-Import Bank of the United States ("EXIM") unanimously approved a US\$2.9 billion senior secured long-term loan to support the development of [Perpetua Resources Corp.](#)'s (NASDAQ: PPTA) Stibnite Gold-Antimony Project in Idaho under EXIM's "Make More in America" Initiative. [1] The 13-year facility, combined with Perpetua's existing cash, is expected to fully fund direct construction of the project, which is designed to produce gold and the nation's only reported domestic reserve of the critical mineral antimony. [1]

For investors following the space, the financing represents far more than support for a single asset. It reinforces a broader federal commitment to rebuilding American access to strategic mineral resources - and confirms that antimony, in particular, has moved from an industrial afterthought to a national security priority.

But the investment narrative may extend well beyond one project alone.

If the United States intends to meaningfully reduce reliance on foreign-controlled critical mineral supply chains, industry observers - and the U.S. government itself - suggest multiple domestic projects will ultimately be required. Even Perpetua's flagship Stibnite Project, large as it is, will not on its own close the structural antimony supply deficit facing American manufacturers and defense contractors.

Why Antimony - and the Broader Critical Mineral Theme - Matters Right Now

Antimony has emerged as a flashpoint in the broader critical mineral story for a simple reason: there is currently only one active antimony smelter in the United States, and China has historically dominated global supply of the metal, which is essential to ammunition primers, flame retardants, hardened lead alloys, and a wide range of defense applications. Geopolitical risk around that concentration has been escalating - even as China has signaled a temporary easing of certain antimony export measures, broader licensing controls and military-end-user restrictions remain in place, leaving Western buyers structurally exposed.

That exposure is exactly what the EXIM loan was designed to begin addressing. As NevGold Corp. (TSXV: NAU) (OTCQX: NAUFF) (Frankfurt: 5E50) noted in its May 22, 2026 commentary on the Perpetua financing, "The US\$2.9 billion EXIM commitment underscores the strategic importance of antimony and the need for multiple domestic sources to close the large supply deficit in the United States. Even with Stibnite moving toward production, the antimony supply gap remains substantial now and into the future." [2]

That observation is drawing increasing attention toward emerging American resource developers advancing projects positioned within the critical minerals theme - particularly those with near-term production optionality rather than decade-long development timelines.

NevGold Corp. and the Limousine Butte Project: A Near-Term Antimony Production Pathway in Nevada

One company working to position itself within the evolving American critical minerals landscape is NevGold Corp. (TSXV: NAU) (OTCQX: NAUFF) (Frankfurt: 5E50).

The Vancouver-based exploration and development company is advancing its 100%-owned Limousine Butte Project ("Limo Butte") in Nevada, where it is nearing completion of a maiden antimony-gold Mineral Resource Estimate ("MRE") targeted for Q2 2026. [3] On May 21, 2026, NevGold also announced the commencement of a roughly 20,000-meter 2026 drill program at Limo Butte focused on resource building, expansion and new discoveries. [4]

What differentiates Limo Butte within the broader landscape of global antimony projects, per the Company, comes down to three structural attributes:

- Oxide antimony-gold mineralization - avoiding the complexity and cost of sulphide processing and downstream smelting, a particularly relevant advantage given there is only one active antimony smelter operating in the United States today. [2]
- At-surface, historically mined material in the gold leach pads - previously stacked and crushed for historical gold operations but never processed for antimony, providing a potential rapid pathway to near-term antimony production from existing surface feedstock. [2]
- A straightforward permitting and environmental landscape in Nevada - supporting what NevGold describes as an efficient development timeline that could position Limo Butte as one of the nearest-term antimony production opportunities in the United States over the next 12 to 18 months. [2]

Underlying technical results have been supportive. In April 2026, NevGold reported drill intercepts at Limousine Butte's Resurrection Ridge target including 1.93 g/t gold-equivalent over 100.6 meters from surface, with 1.11% antimony over 6.1 meters within that intercept. [5] Subsequent Phase II metallurgical testwork on oxide antimony-gold material from the historical leach pads returned average gold recoveries above 93% - with individual samples reaching 99% - and acid-leach antimony extraction ranging from 54% to 92% across the tested samples. [6]

On the financial side, NevGold completed an upsized C\$42.2 million financing earlier this quarter, which the Company says removes the near-term treasury overhang through the maiden MRE, continued drilling and metallurgical testwork at Limo Butte, plus continued advancement at its Idaho-based Nutmeg Mountain gold project. [7]

NevGold CEO Brandon Bonifacio summarized the Company's positioning following the EXIM announcement: "Perpetua has played a foundational role in establishing the framework for a U.S. antimony supply chain, and we congratulate their team on this important milestone. Advanced U.S. antimony projects must co-exist to achieve true mineral independence and security for America." [2]

Critical Mineral Investors Continue Watching Sector Peers

Beyond NevGold, several U.S.-listed names continue attracting investor attention within the broader critical minerals and strategic supply chain discussion.

Perpetua Resources Corp. (NASDAQ: PPTA) became the centerpiece of the conversation following the EXIM Board's May 21, 2026 unanimous approval of the US\$2.9 billion senior secured loan for the Stibnite Gold Project - structured as a 13-year facility with a US\$2.4 billion upfront component and the remainder covering capitalized interest during construction and EXIM's exposure fee. [1] Combined with Perpetua's existing cash holdings, the package is structured to fully fund the project's US\$2.5 billion direct construction cost. [1]

[United States Antimony Corp.](#) (NYSE: UAMY) (NYSE Texas: UAMY) has continued building out what it describes as the only fully integrated antimony producer outside of China and Russia. [8] On May 14, 2026, the Dallas-based company reported Q1 2026 results highlighting the completion of the first two delivery notices under its US\$245 million Defense Logistics Agency contract, US\$12.8 million in Department of War

grant milestones achieved at the Thompson Falls expansion, and approximately US\$48.6 million in post-quarter equity proceeds, while reiterating full-year 2026 gross revenue guidance of US\$125 million. [9]

Nova Minerals Limited (NASDAQ: NVA) announced on May 11, 2026 the successful completion of its 2026 winter freight mobilization to the Estelle Project in Alaska, delivering approximately 1.5 million pounds of heavy equipment and supplies needed for antimony ore mining, extraction and processing under a US\$43.4 million U.S. Department of War award. [10] The company is targeting initial antimony production from Estelle in late 2026 or 2027 and is one of only two U.S. projects to receive that level of Department of War antimony funding. [11]

[Americas Gold and Silver Corp.](#) (NYSE American: USAS) (TSX: USA) reported record Q1 2026 silver production of approximately 787,000 ounces, up 76% year-over-year, alongside material progress on its 51%-owned antimony processing joint venture in Idaho's Silver Valley formed with United States Antimony in February 2026. [12] On May 22, 2026, the Company announced it had reached an agreement with Spratt Mining to terminate the remaining 592,000-ounce obligation under its Silver Delivery Agreement in exchange for common shares - converting a stream obligation into equity and freeing capital for reinvestment in Galena, Crescent and Cosalá. [13]

A Sector Narrative That May Continue Building

Trade tensions between the United States and China, concerns surrounding foreign supply dependence, reshoring initiatives, defense considerations and now a US\$2.9 billion federal loan commitment are reshaping how investors evaluate strategic resource opportunities. The EXIM approval for Perpetua signals that Washington is willing to put significant capital behind the rebuild of a domestic antimony supply chain - and given the size of the structural deficit, multiple projects, not just one, will likely be required to deliver true mineral independence.

For developers like NevGold, with a near-term antimony production pathway anchored by oxide material at surface in a permitting-friendly U.S. jurisdiction, that narrative may continue to translate into meaningful investor focus through the balance of 2026.

CONTINUED… Read this and more news for NevGold Corp. at:
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Article Sources

[1] Perpetua Resources Corp. press release, May 21, 2026 - "Export Import Bank of the United States Approves \$2.9 Billion Loan for Development of Perpetua Resources' Stibnite Gold Project":
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[2] NevGold Corp. press release, May 22, 2026 - "NevGold Congratulates Perpetua Resources On US\$2.9 Billion Loan for the Gold-Antimony Stibnite Project in Idaho; NevGold Rapidly Advancing its At-Surface Oxide, Antimony-Gold Limo Butte Project to Near-Term U.S. Production" (GlobeNewswire).

[3] NevGold Corp. press release, March 19, 2026 - confirming initial antimony-gold Mineral Resource Estimate at Limousine Butte on schedule for Q2-2026; reaffirmed in subsequent NevGold disclosures including the May 22, 2026 release referenced above.

[4] NevGold Corp. press release, May 21, 2026 - "NevGold Commences 20,000 Meter Drill Program at Antimony-Gold Limo Butte Project, Nevada; Streamlined Focus on Resource Building, Expansion, and New Discoveries" (GlobeNewswire).

[5] NevGold Corp. press release, April 9, 2026 - "NevGold Intercepts 1.11% Antimony Over 6.1 Meters, Within 1.93 g/t AuEq Over 100.6 Meters (1.07 g/t Au And 0.22% Antimony) From Surface" (GlobeNewswire).

[6] NevGold Corp. press release, April 2, 2026 - "NevGold Announces Up to 99% Gold Recovery From

Phase II Metallurgical Testwork on Oxide Antimony-Gold; Identifies More Antimony Mineralization At Surface In Historical Gold Waste Dump" (GlobeNewswire).

[7] NevGold Corp. press release, May 12, 2026 - "NevGold Announces Closing of Upsized \$42M Brokered Private Placement Financing" (gross proceeds C\$42,225,497) (GlobeNewswire).

[8] United States Antimony Corporation corporate description - self-described as "the only fully integrated antimony company in the world outside of China and Russia," May 14, 2026 Q1 2026 earnings press release (ACCESS Newswire).

[9] United States Antimony Corporation press release, May 14, 2026 - "United States Antimony Corporation Reports First Quarter 2026 Financial and Operating Results" (ACCESS Newswire).

[10] Nova Minerals Limited press release, May 11, 2026 - winter freight mobilization to the Estelle Project completed (~1.5 million pounds delivered) (GlobeNewswire).

[11] Nova Minerals Limited corporate disclosures, May 2026 - US\$43.4 million U.S. Department of War antimony award; targeted antimony production late 2026/2027.

[12] Americas Gold and Silver Corporation press release, April 16, 2026 - "Americas Gold and Silver Corporation Announces New Record Quarterly Silver Production and Sales, Including 787,000 Ounces Produced and 830,000 Ounces Sold"; February 2026 51/49 joint venture with United States Antimony to build a mine-to-finished-product antimony processing hub at Galena (Newsfile Corp.).

[13] Americas Gold and Silver Corporation press release, May 22, 2026 - "Americas Gold and Silver Announces Agreement with Sprott Mining Inc. to Terminate Silver Delivery Agreement" (Newsfile Corp.).

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