

The Metal You've Never Heard Of Is Becoming a National-Security Priority -- and America Barely Mines It

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

Antimony goes into ammunition, flame retardants, and next-generation batteries - and the United States produces almost none of it. A wave of capital is now chasing the few companies that could change that.

American News Group News Commentary - Gold gets the headlines. Antimony gets the strategic memos. While investors spent the past two years watching bullion set records, a far more obscure metal quietly became one of the most geopolitically charged materials on the periodic table. Antimony is essential to military ordnance, flame retardants, semiconductors, and a new generation of grid-scale batteries - and the United States, by most accounts, mines effectively none of it domestically while leaning on imports from countries that have shown a willingness to use that dependence as leverage. That combination, scarcity plus strategic necessity, has turned a once-overlooked byproduct metal into a national priority, and it is reshaping how investors look at a small group of North American developers.

Among the companies stepping into that gap is NevGold Corp. (TSXV: NAU) (OTCQX: NAUFF) (Frankfurt: 5E50), a Vancouver-based exploration and development company whose flagship Limousine Butte project in eastern Nevada has, over the past year, transformed from a gold story into a gold-and-antimony story - and, increasingly, into a bet on whether America can rebuild a domestic supply chain for a metal it has almost entirely outsourced. The trajectory of NevGold's field, and of the company's own positioning within it, is a window into one of the most under-appreciated corners of the critical-minerals boom.

Why Antimony Suddenly Matters

For decades, antimony was treated as an industrial afterthought - a metal used to harden lead, retard flames, and clarify glass, sourced cheaply from abroad and rarely discussed. That complacency ended abruptly when the metal's supply chain collided with geopolitics. China dominates global antimony production and processing, and when export controls tightened, Western governments were confronted with an uncomfortable reality: a material critical to defense and energy applications was overwhelmingly controlled by a single strategic rival. The United States formally classifies antimony as a critical mineral, and its applications read like a list of national-security priorities - ammunition and military hardware, night-vision and infrared, flame retardants, and emerging long-duration energy storage.

The result has been a scramble to rebuild domestic and allied supply. The clearest signal came in May 2026, when Perpetua Resources secured an approximately US\$2.9 billion senior secured loan from the Export-Import Bank of the United States under the "Make More in America" initiative to advance its Stibnite gold-antimony project in Idaho - a project widely described as the only large-scale domestic antimony resource. When the U.S. government commits billions to a single antimony project, it is making a statement about how seriously it now treats the supply gap. And it casts a spotlight on every other company with a credible domestic antimony story, because one project alone cannot close the gap.

NevGold's Place in the Picture

NevGold's flagship Limousine Butte, or "Limo Butte," sits in White Pine County in eastern Nevada - a brownfield site that hosted a previously mined open-pit, heap-leach gold operation in the late 1980s. That history is central to the company's pitch. Because the site was mined before, it comes with existing disturbance and infrastructure, and crucially, with historical gold leach pads whose material was never

processed for antimony. NevGold believes that at-surface, already-mined material could offer an unusually fast path to antimony output, and the company has publicly targeted potential near-term U.S. antimony production within roughly 12 to 18 months, ahead of the multi-year timelines that typically govern new mines.

The technical results have supported the thesis. NevGold has reported high-grade, near-surface oxide antimony-gold intercepts - including a headline interval of 1.93 grams per tonne gold-equivalent over 100.6 metres from surface at its Resurrection Ridge area, and a separate hole grading 4.91 g/t gold-equivalent over 27.4 metres - and metallurgical testwork indicating that antimony and gold can be sequentially recovered from the same feed stream, with gold recoveries above 93% after antimony leaching. CEO Brandon Bonifacio has framed Limo Butte as one of the highest-grade antimony projects in North America that is both near-surface and oxide, attributes that tend to simplify processing. The company is advancing toward a maiden antimony-gold mineral resource estimate expected in mid-2026 - a milestone that would, for the first time, put defined numbers around the opportunity.

*Gold equivalents ("AuEq") referenced herein are as disclosed in the Company's news release and are based on assumed metals prices of US\$3,000/oz of gold and US\$40,000 per tonne of antimony, and assumed metals recoveries of 80% for gold and 75% for antimony.

Behind that work sits a strengthened balance sheet. In the spring of 2026, NevGold upsized a brokered private placement to C\$42 million, providing capital to fund a 20,000-metre drill program focused on resource conversion, expansion of its 2025 Bullet Zone and Armory Fault discoveries, and new targets across a consolidated land package. For a junior explorer, a well-funded treasury paired with a clear catalyst calendar is exactly what allows a strategic thesis to be tested rather than merely talked about.

The Field NevGold Is Competing In

NevGold is one of a cohort of companies racing to build Western-aligned supply for critical and precious metals, and looking at how a few peers are positioned helps frame both the opportunity and the scale of the challenge.

[Perpetua Resources Corp.](#) (NASDAQ: PPTA) (TSX: PPTA) is the defining reference point for the domestic-antimony thesis. Its Stibnite project in Idaho - a dual gold-and-antimony asset - secured an approximately US\$2.9 billion EXIM loan in 2026 and is positioned as the flagship of America's antimony-reshoring effort. Perpetua operates at a scale and stage well beyond NevGold, but it validates the entire category: it demonstrates that the U.S. government is prepared to back domestic antimony with serious capital, which is precisely the tailwind a near-term developer like NevGold is trying to ride.

[United States Antimony Corp.](#) (NYSE American: UAMY) is one of the few public companies with a long operating history specifically in antimony processing, running smelting and processing operations in North America. As an established, antimony-focused name, it illustrates the downstream side of the supply chain - the processing and refining capacity that any domestic antimony revival will ultimately need - and underscores that the bottleneck is not only mining but the ability to turn ore into usable product on home soil.

[Americas Gold and Silver Corp.](#) (NYSE American: USAS) (TSX: USA) represents the producing end of the domestic-antimony story. A growing North American silver, copper, and antimony producer, its flagship Galena Complex in Idaho is described as the largest active antimony-producing mine in the United States, and in 2026 the company formed a joint venture with United States Antimony to build a domestic antimony processing hub - a "mine-to-finished product" solution - while reporting a breakthrough in high-purity antimony extraction from its concentrate. As an established producer already generating U.S. antimony units, Americas Gold and Silver illustrates the production-stage end of the spectrum that an earlier-stage developer like NevGold is working toward.

[Almonty Industries Inc.](#) (NASDAQ: ALM) (TSX: All) rounds out the group as the tungsten-focused analogue - another China-dominated critical metal with heavy defense exposure. Almonty's move from development into production at its flagship mine, and the strong investor response to Western critical-metal supply stories, offers a template for how a single-commodity, supply-security narrative can re-rate as it crosses from exploration toward output. These companies are referenced to illustrate the sector and do not imply any partnership, endorsement, affiliation, or comparable financial performance; they span different metals, stages, and sizes, and NevGold sits among the earlier-stage, pre-resource names.

Gold as the Anchor, Antimony as the Catalyst

It would be a mistake to read NevGold purely as an antimony story. The company's projects are anchored in gold - a metal enjoying its own historic run - and the oxide, heap-leachable nature of much of Limo Butte's mineralization is what makes the economics potentially attractive in the first place. The elegance of the thesis is that antimony does not replace the gold case; it layers a strategic, policy-supported second metal on top of it. In an environment where investors prize both precious-metal exposure and critical-mineral leverage, a project that credibly offers both occupies unusually attractive ground.

That said, the usual cautions for a junior developer apply in full. NevGold is an exploration and development company; it does not yet have a defined antimony-gold resource, its near-term production ambitions depend on successful metallurgy, engineering, and permitting, and exploration outcomes are inherently uncertain. Drill results, however encouraging, are not reserves, and timelines can slip. The forward-looking nature of the company's production targets means investors should weigh the strategic appeal against meaningful execution risk.

A Sector at an Inflection Point

Step back, and the larger trajectory is hard to miss. A metal that almost no one discussed five years ago is now the subject of billion-dollar government loans, export-control headlines, and a scramble for domestic supply. The question facing the sector is no longer whether antimony matters - policymakers have answered that - but which companies can actually deliver domestic ounces and tonnes, and how quickly. NevGold has placed itself in that conversation with a near-surface, oxide, brownfield project, a funded drill program, and a maiden resource estimate on the horizon. Whether it converts that positioning into production remains to be proven, but the current carrying the sector is unmistakable: the United States has decided it needs to make more of this overlooked metal at home, and the developers positioned to help are stepping into one of the more compelling supply-security stories in the market.

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