

VALUE CHAIN SERIES COPPER

Materials & Metallurgical Society of the Canadian Institute of Mining, Metallurgy and Petroleum (CIM) Present

Value Chain Series – Copper

May 19-20 8AM-11AM Eastern

Phillip Mackey – Copper Event Organizer

Gerardo Alvear – Industrial Lead

Boyd Davis - Series coordinator

Overall message:

Copper is the cornerstone in the electrification of the world's technology. Its consistent supply is challenged by many factors, including: geo-politics, supply chain, ESG, climate change, and mine and smelter availability. Much of global copper is concentrated in a limited number of countries. Thus, only a handful of countries account for the bulk of global mined copper. As well, smelting and refining facilities are similarly concentrated in a few (different) countries – many of the plants and related infrastructure are dated.

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Page 1

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Day 1 – May 19th, 2022 - 8:00am – 11:00am (Eastern)

8:00am	<p>Welcome & Introduction to the Copper Investment Thematic (Phillip Mackey & Boyd Davis)</p> <ul style="list-style-type: none"> - What makes Cu investing different from other metals. <ul style="list-style-type: none"> o Range of options (juniors, mid-tier, majors, geography, geology)
8:05am – 8:20am	<p>Copper: The electrifying metal – Why it is Time for Investors to Pay Attention (ICA Bernard Respaut)</p> <ul style="list-style-type: none"> ▪ <i>Copper, once just another infrastructure metal, is now a key resource in the 21st century’s electrification of the planet. Its supply is getting more diverse.</i>
8:20am – 8:50am	<p>Copper Markets: Near, Medium & Long-term -Supply/Demand Outlook <i>The supply/demand and issues that could affect this. Like EV.</i></p> <ul style="list-style-type: none"> ▪ Nic Pickens (Supply) (WoodMac) ▪ Carlos Risopatron (Demand) (International Copper Study Group)
8:50am – 9:10am	<p>How to invest in copper</p> <ul style="list-style-type: none"> ▪ <i>Options for different investment exposure</i> Stefan Ioannou (Cormark) ▪ Gianni Kovacevic (Copperbank)
9:10am – 9:50am	<p>Discussion Panel & Q & A</p>
9:50am – 10:05am	<p>Smelter terms (Peter Munroe)</p>
10:05am – 10:20am	<p>Urban mining: Meeting the copper demand and addressing ESG aspects of the business</p> <p>(Kunal Sinha - Glencore)</p> <p>Key technical elements to financially succeed in recycling <i>How relevant is the recycling business? What different types of materials can be processed? Is this complementary or independent of primary copper? How is the scrap market going to affect copper supply? How diverse is the scrap market?</i></p>
10:20am -10:55am	<p>Q&A</p>
10:55am – 11:00am	<p>Day 1 – Closing Comments, Intro for Day 2</p>

Day 2 May 20th, 2022 - 8:00am – 11:00am (Eastern)

Detailed Geology & Process Discussions – Winners & Losers

Mining

8:00am – 8:45am

Geology & Exploration & Mining of Copper

What are the current sources? How much is split between the smaller and larger companies? What does the future hold?

Location, Ore Types, Discoveries, Mining

- Existing Copper Supply & Resources (David Love)
- Mining (George Mclsaac)
 - What good and bad looks like and Role of juniors in the sector (Mike Doggett)

8:45am – 9:15am

Q&A

Processing

9:15am – 10:00am

Primary Processing of Copper

What are the main processing methods for copper?

- Introduction (Phillip Mackey)
- Mineral Processing (Joe Pease)
- Sulphide Processing and concentrate value chain (Cam Harris)
- Oxide processing (Juan Carlos Salas)

10:00 am – 10:25am

Refining/Processing for End Use of Copper

How does the type of copper use impact the market?

- Copper anode Copper cathode PM/Critical (Mike Moats)
- Other applications (Jonathan Barnes – Wood)

10:25am – 10:55am

Q & A for all & Closing Comments

- *Featuring Gerardo Alvear*

10:55am – 11:00am

Day 2 – Closing Comments (Boyd Davis)