



MetalsGrove

Investor Presentation

June 2022

www.metalsgrove.com.au

Proposed ASX Code: MGA

Lithium, Tin, Tantalum

Rare Earth

Copper-Gold

Base Metal

Manganese

Disclaimers

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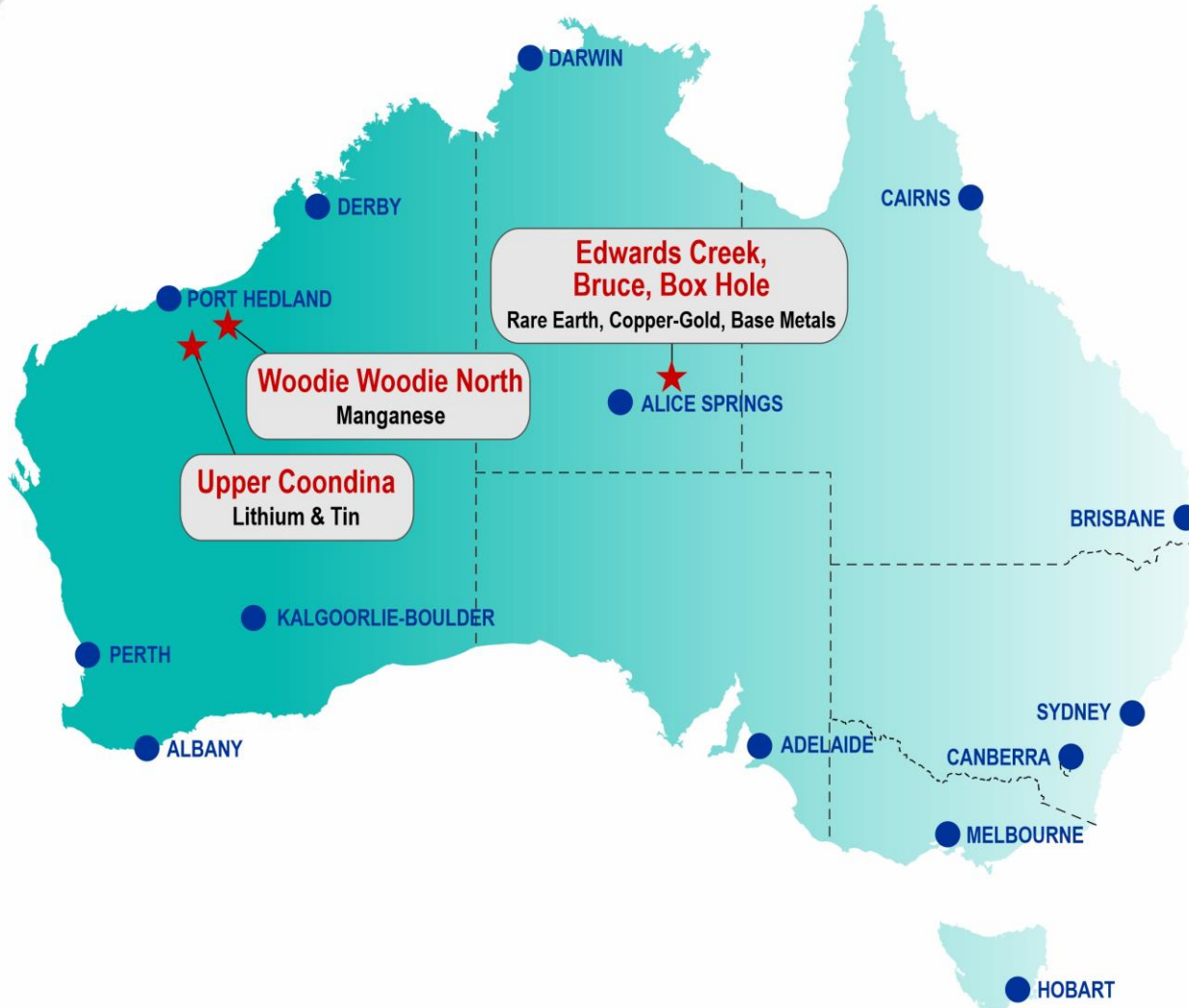
FORWARD LOOKING STATEMENT

This presentation contains forward looking statements concerning the projects owned by MetalsGrove. Statements concerning mining reserves and resources may also be deemed to be forward looking statements in that they involve estimates based on specific assumptions. Forward looking statements are not statements of historical fact and actual events and results may differ materially from those described in the management's beliefs, opinions and estimates should change or to reflect other future developments. Data and amounts shown in this presentation relating to capital costs, operating costs and project timelines are internally generated best estimates only. All such information and data is currently under review as part of MetalsGrove's ongoing development and feasibility studies. Accordingly, MetalsGrove cannot guarantee the accuracy and/or completeness of the figures or data included in the presentation until the feasibility studies are completed.

EXPLORATION RESULTS

The information in this presentation that relates to Exploration Results is based on results from third parties. MetalsGrove is not aware of any new information in respect of the results and that full details with respect to the results are included in the applicable ASX announcement referenced to in the presentation.

Company Overview



- Mineral explorer focused on **GREEN METAL** exploration and development including **BATTERY** and **RENEWABLE ENERGY** market.
- Targeting lithium, rare earth, copper, manganese, gold and base metal resources.
- Led by proven board, management and advisory team driven by ESG fundamentals.
- Upper Coondina: lithium tin and tantalum project is in the Pilbara lithium mineral field-WA.
- Woodie Woodie North: manganese project is adjacent to well known manganese mines in the Pilbara-WA.
- Arunta: REE, copper, gold, lead and zinc projects are in the Arunta mineral field near Alice Springs-NT.
- MGA is seeking to raise **AUD\$5M** via an IPO on ASX with the ability to take a further **AUD\$2M**.
- Enterprise value post admission **A\$4m** (Tight capital structure with low EV).

Investment Highlights



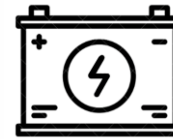
LITHIUM AND TIN EXPLORER

- Upper Coondina project is located within the Tier-1 lithium province with access to world class infrastructure.
- Pegmatite outcrop mapped within the project area.
- Historical tin mine within the project area which produced significant tin.
- CSR identified simple pegmatite veins as the sources of the tin.
- Surface sampling has returned a number of highly anomalous lithium up to 256ppm (LiO2) assays.



RARE EARTH EXPLORER

- Bruce and Box Hole are located in the Arunta project, Northern Territory.
- Presence of rare earth anomalism associated with Cu-Au and base metal has been demonstrated in the Arunta project (*Norwest Minerals and WA1 Resources*).
- Historical pegmatite workings are located within the project area with geological mapping suggesting potential for pegmatite-hosted rare earth and LCT mineralisation.



COPPER, GOLD & BASE METAL EXPLORER

- The projects of the Arunta are the Box Hole, Edwards Creek and Bruce Gold Projects.
- located in the Northern Territory.
- Edwards Creek prospect CRAE (1980s) drilling intersected 4.5m @ 2.25% Cu, 0.11% Pb, 1.54% Zn, 0.14 g/t Au from 47m and 18.6m @ 0.22% Cu, 0.17% Pb, 0.49% Zn, 0.14 g/t Au from 44.3m.
- Drilling intersected 13m @ 2.7% Zn, 0.7% Pb from 17m Incl: 5m @ 2.3% Zn, 1.4% Pb and 5m @ 4.3% Zn, 0.2% Pb from 25m Incl: 1m @ 14.7% Zn, 0.3% Pb from 25m.



MANGANESE EXPLORER

- Woodie Woodie North Manganese Project is located within the Tier-1 Pilbara manganese province with access to world-class infrastructure.
- Multiple drilling targets and aggressive exploration programme to commence early this year.
- Surface sampling has returned a number of highly anomalous manganese and cobalt assays (up to 52% Mn and 540ppm Co).

Founder and Board Members

Mr. Richard Beazley

Non-Executive Chairman



Founder and Director of both Altair Mining Consultancy and Hydrogen Energy Pty Ltd and the Interim CEO and Managing Director for Troy Resources (ASX-TRY). Mr Beazley is an experienced mining engineer with 35 years of experience with a strong corporate, operational and technical background in the resources industry. Throughout his career he has worked on projects throughout Australia, Africa and South America.

With Altair, he has driven and delivered valued outcomes for mining clients which in turn has led to strong market growth outside the mining industry to include oil and gas, renewables, infrastructure, manufacturing and security due to his corporate and operational expertise and his extensive network across the globe.

His former roles have included the Chief Operating Officer for Sandfire Resources NL (ASX-SFR), Managing Director Peak Resources Limited (ASX-PEK), General Manager Operations at Consolidated Minerals, General Manager Southern Cross Operations at St Barbara Limited (ASX-SBM) and Manager Mining Greenbushes at Sons of Gwalia Ltd (ASX-SGW).

Mr. Sean Sivasamy

Managing Director and CEO



Mr Sivasamy is a mining professional more than 25 years of global experience. He has held Senior Management roles within large, medium and junior Mining companies in Australia, Africa, India and South East Asia.

He is the founder Director and CEO of MetalsGrove Mining Limited. He has held director roles with Tambourah Metals Ltd (ASX-TMB) and Pilgangoora Minerals. He also held senior management role with Aditya Birla Minerals (ASX-ABY) that is engaged in mining, processing & marketing copper in Australia that eventually was acquired by MetalsX Ltd. He is a director of OreMin Consultants which has been undertaking consulting engagements for many mining companies within Australia and overseas.

Mr Sivasamy is a skilled geologist. His professional contribution includes improving the efficiency of mining operations and optimising processing methods. During his working life prior to becoming an entrepreneur, he has identified a gold resource concession in Victoria which eventually had an estimated gold deposits of circa 1m ounces and discovered a copper sulphide deposit in Western Australia. He also identified 4 copper deposits in Queensland for further exploration and mining.

He holds a master's degree in Geology. He is a member of Australasian Institute of Mining and Metallurgy. He is a member of the Australia Institute of Company Directors.

Mr. Haidong Chi

Non-Executive Director



Mr Chi is a one of the very early Co-founders of Kimberley Metals Group and KMG Mining Pty Ltd. Mr Chi has been the Managing Director of the company's business operations, liaising with key relevant stakeholders, driving strategic company growth, and responsible for the overall performance of the business for more than 10 years.

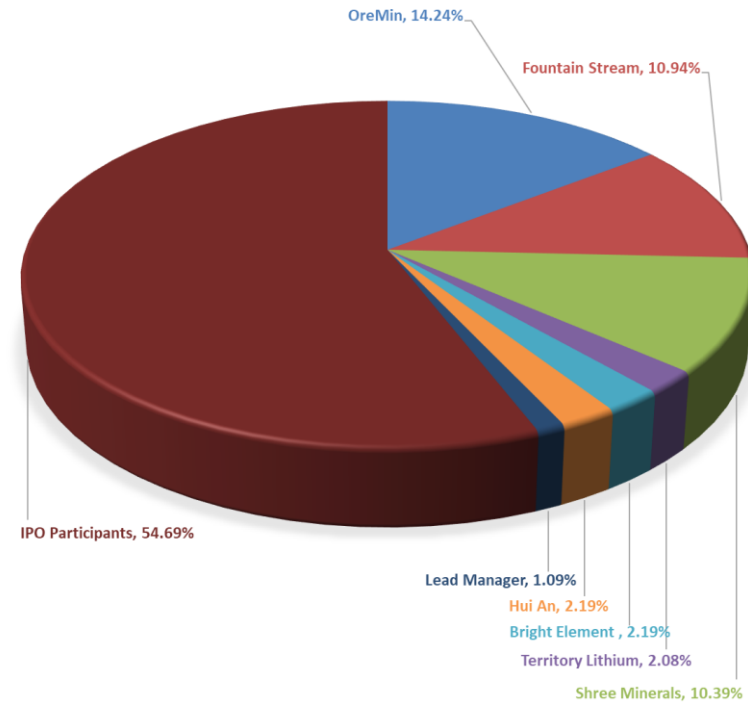
Mr Chi has a proven track of executive management skills and holds extensive experience in the commodity trading markets for the past 20 years. He also holds a Master's degree in Business Administration (MBA) from Peking University, and developing managerial skills in the business sectors.

Mr Chi has strong experience in market insights, strategic advice, business operations, financial performance, investments, and ventures. He has delivered valued outcomes and maintained positive relations with business partners, shareholders, and relevant authorities. Most recently Mr Chi was a Vice President of US Capital Holdings Group, a US based private equity investment company that specialises in assisting Chinese companies gain access to international capital markets.

Corporate

PROPOSED CAPITAL STRUCTURE		
Key Details of Public Offers	\$5M Raise	\$7M Raise
Price Per Share	0.20	0.20
Shares on Issue-OreMin	6,510,000	6,510,000
Shares on Issue-Fountain Stream	5,000,000	5,000,000
Shares on Issue-Bright Element	1,000,000	1,000,000
Shares on Issue-Mrs Hui An	1,000,000	1,000,000
Shares on Issue-Seed Capital	1,000,000	1,000,000
Shares on Issue-Shree Minerals	4,750,000	4,750,000
Shares on Issue-Territory Lithium	950,000	950,000
Shares on Issue-Lead Manager-Ventnor	500,000	500,000
Shares offered under IPO	25,000,000	35,000,000
Amount to be raised in IPO	\$5,000,000	\$7,000,000
Performance Rights on issue ¹	4,270,000	4,270,000
Total Shares expected to be on issue post Admission (undiluted)	45,710,000	55,710,000
Market Capitalisation post Admission (undiluted) @ \$0.20	\$9,142,000	\$11,142,000
Enterprise Value post admission (undiluted)	\$4,098,112	\$4,098,112
Shares on issue Post-Listing (fully diluted)	55,480,000	65,480,000
Market Capitalisation Post-Listing (fully diluted)	\$11,096,000	\$13,096,000

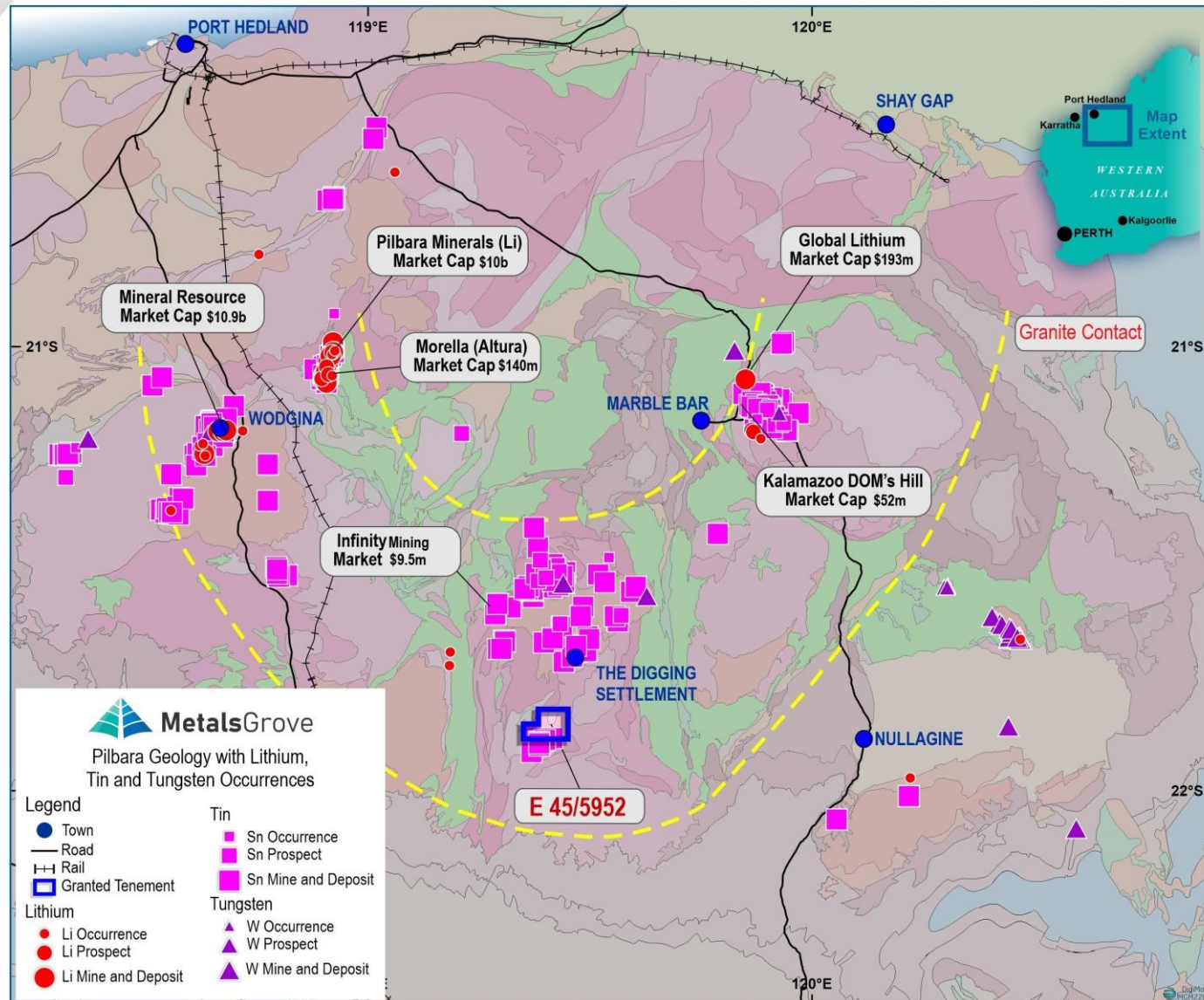
Indicative Timetable	Date ²
Lodgment of Prospectus with the ASIC	13-May-22
Priority Offer Record Date	13-May-22
Exposure Period begins	13-May-22
Offer Opening Date	21-May-22
Priority Offer Closing Date	6-Jun-22
Offer Closing Date	13-Jun-22
Issue of Shares under the Offer	20-Jun-22
Despatch of holding statements	20-Jun-22
Expected date for quotation on ASX	27-Jun-22



Significant Shareholders	% Undiluted	% Fully diluted
OreMin-Sean Sivasamy	14.24%	18.98%
Fountain Stream-Haidong Chi	10.94%	14.15%
Shree Minerals	10.39%	8.56%
Territory Lithium	2.08%	1.71%
Bright Element	2.19%	1.80%
Hui An	2.19%	1.80%

1. A- 1,650,000 vesting on 20 day VWAP at or above 100% of IPO issue price (40c) exp 2 yrs.
 B- 1,450,000 vesting on 20 day VWAP at or above 150% of IPO issue price (60c) exp 2 yrs.
 C- 1,170,000 Upon completion of drilling 10m @ 1.25% Cu or 10m @ 36% Mn or 10m @ 1% Li-exp 2 yrs.
 2. The above dates are indicative only and may change without notice. The Company reserves the right to amend the timetable at any time.
 3. The above assumes a \$5m subscription in the Public Offer is reached.

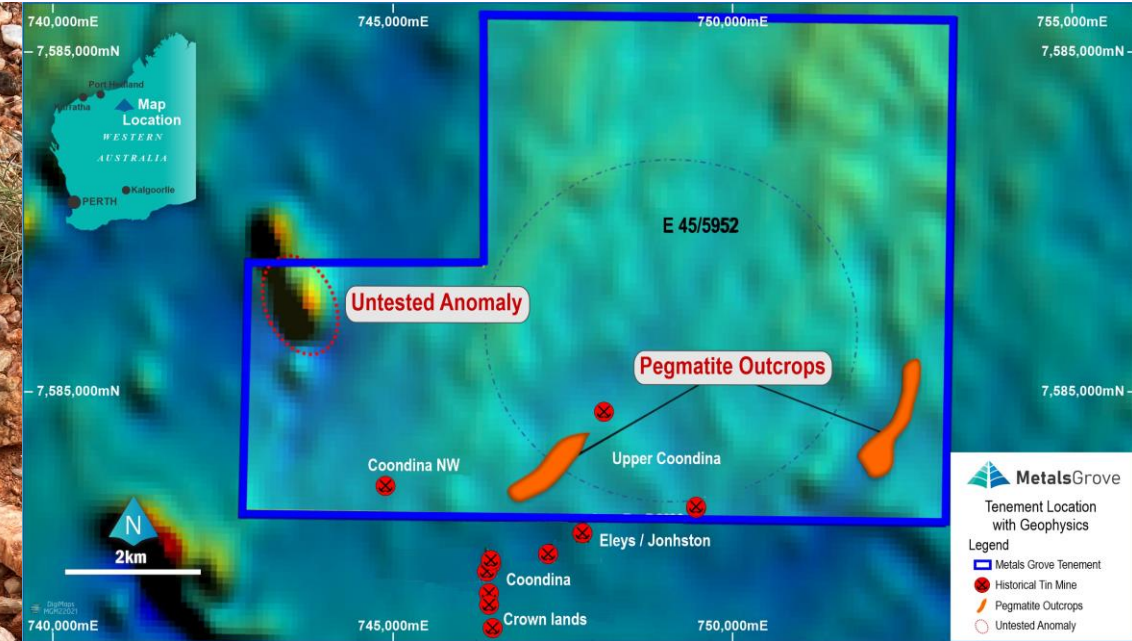
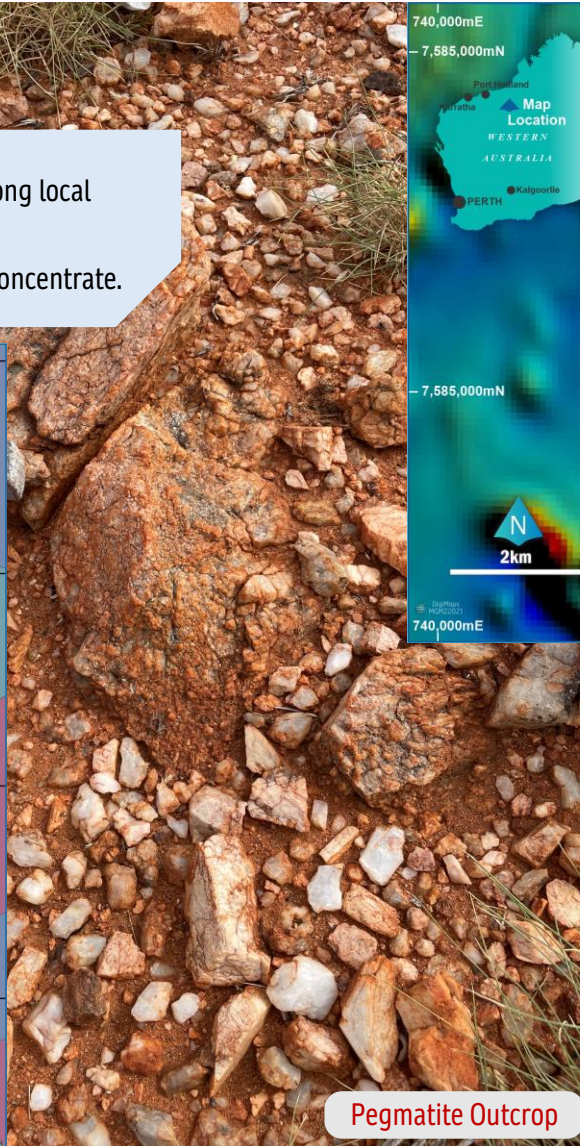
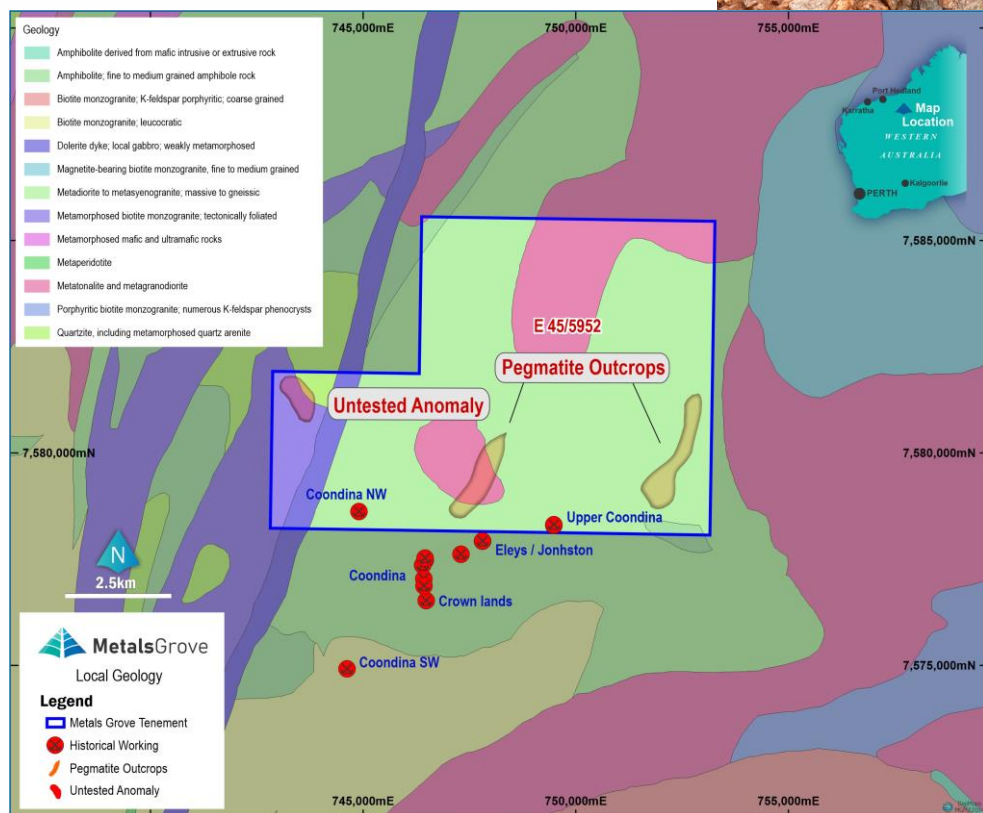
Project Highlights-Lithium, Tin and Tantalum-WA



- **Project:** Upper Coondina – Western Australia.
- **Location:** located 85km south-west of Marble Bar in the East Pilbara district.
- **Size:** Approximately 6,365 ha (E45/5952).
- **Interest:** 100%.
- CSR identified simple pegmatite veins as the sources of the tin.
- Potential to establish economic long-term producing assets.
- High quality lithium, tin and tantalum project in highly prospective regions in Western Australia (Pilbara lithium mineral field).
- Well connected to mining infrastructure.

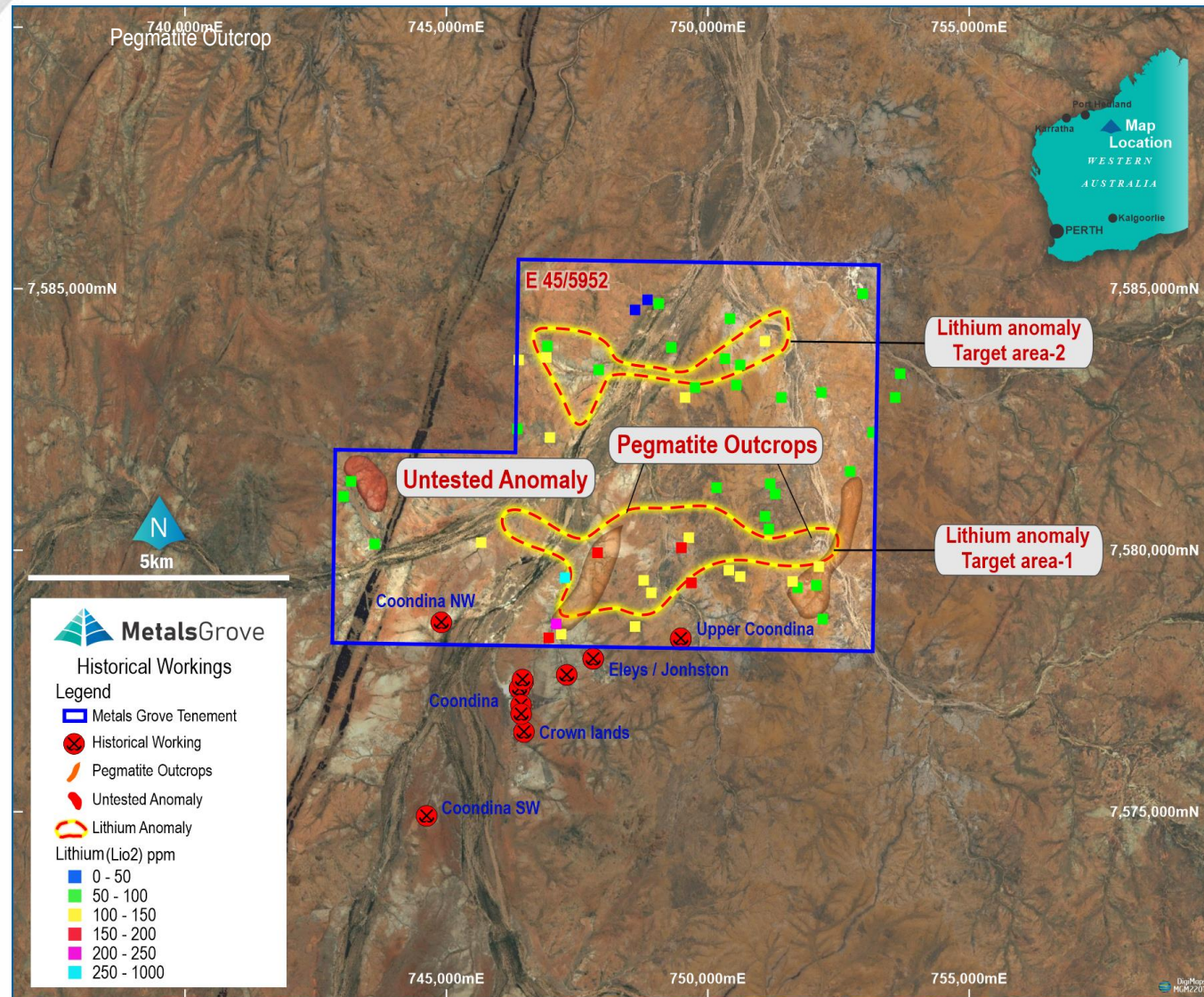
Upper Coondina-Lithium, Tin and Tantalum-WA

- This project is accessible via the Great Northern Highway then east along local formed roads and station tracks that ensures continued site access.
- The Shaw Tin Field has historically produced more than 6,500t of tin concentrate.



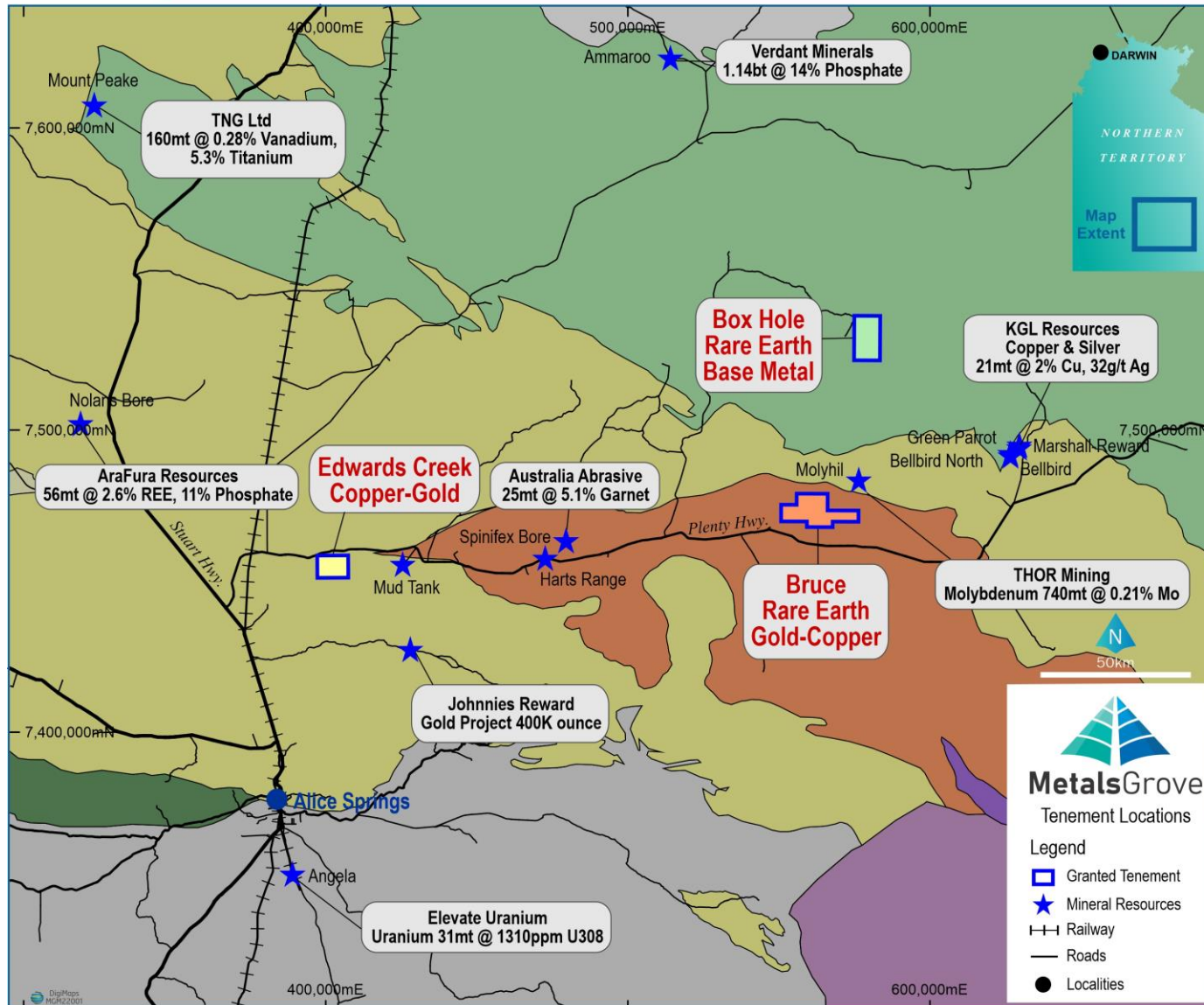
- No serious lithium exploration has been carried out within the project area.
- CSR identified simple pegmatite veins as the sources of the tin.
- Untested anomaly within the project warrants further exploration.

Upper Coondina-Lithium, Tin and Tantalum-WA



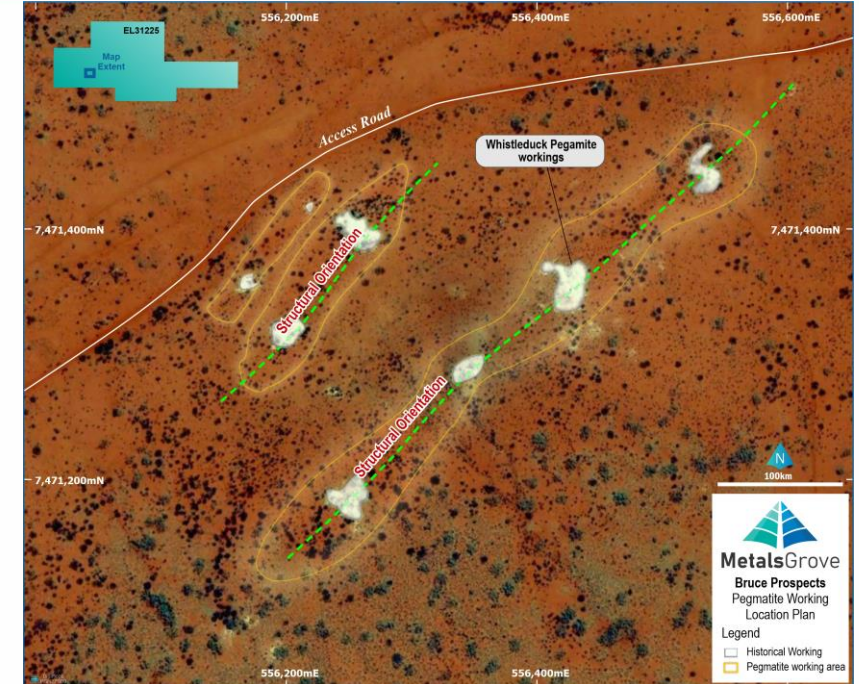
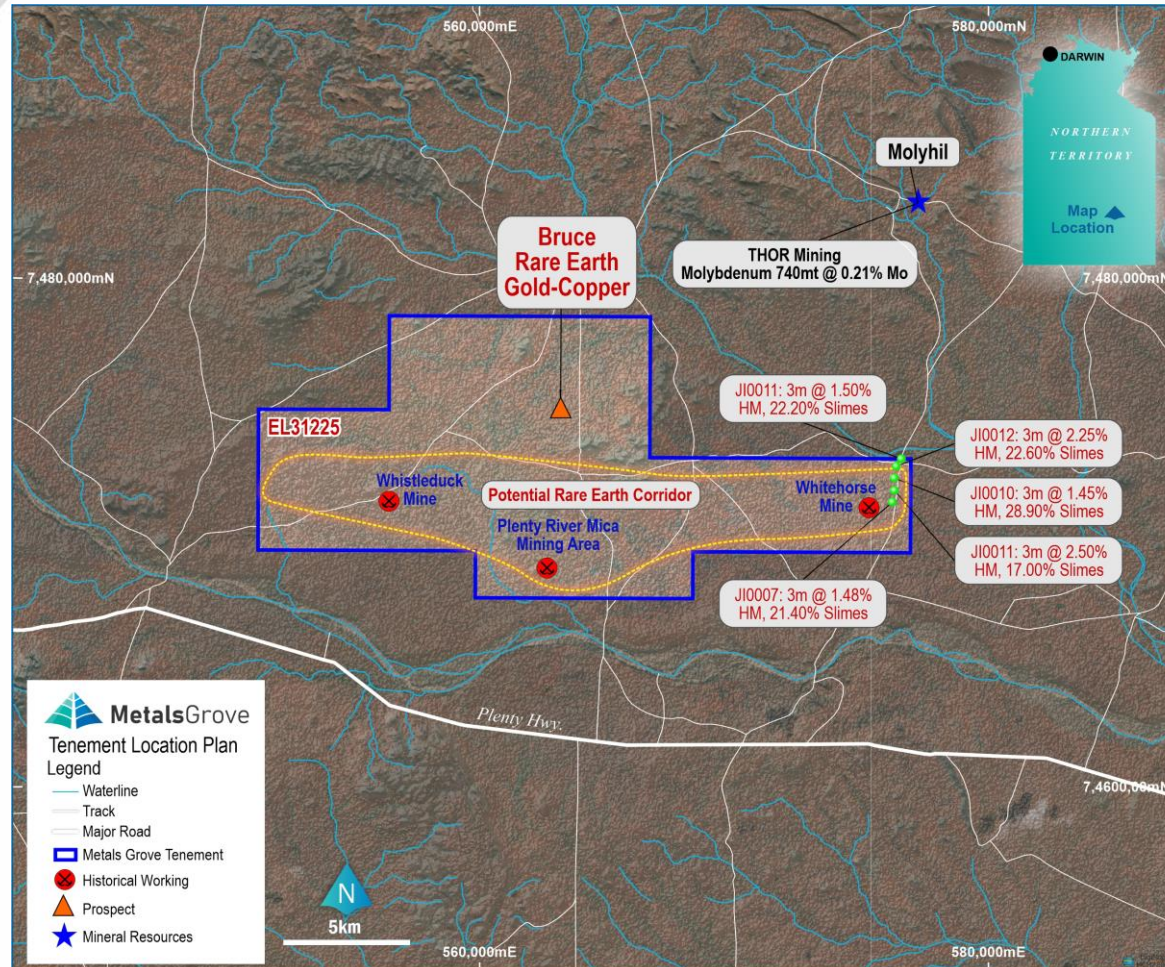
- Surface sampling at Upper Coondina has returned a number of highly anomalous lithium (Li) assays.
- Confirming the potential of the area to host lithium mineralisation.

Project Highlights-Rare Earth, Base Metal, Copper-Gold-NT



- **Project:** Arunta Project-Northern Territory.
- **Location:** 110km north of Alice Springs.
- **Size:** Approximately 320km² (EL32420, EL31225 and EL32419).
- **Interest:** 100%.
- **Access:** Via Stuart and Plenty Highways.
- DRILL READY walk-up drilling targets.
- Well connected to existing mining infrastructure.

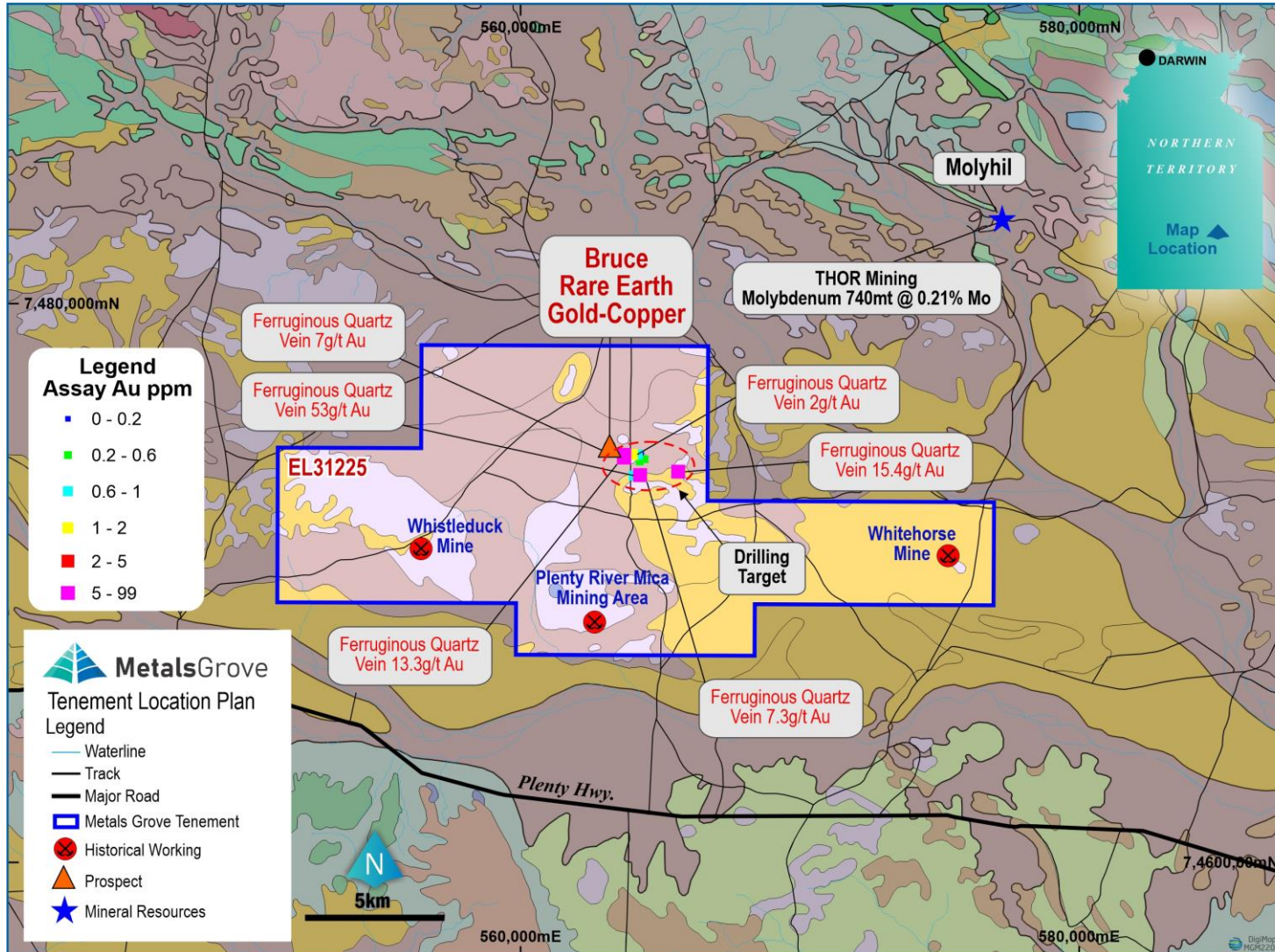
Bruce-Rare Earth, Base Metal, Copper-Gold-NT



Presence of rare earth (REE) anomalism associated with Cu-Au and base metal mineralisation has recently been demonstrated in the Arunta project (Norwest Minerals and WA1 Resources).

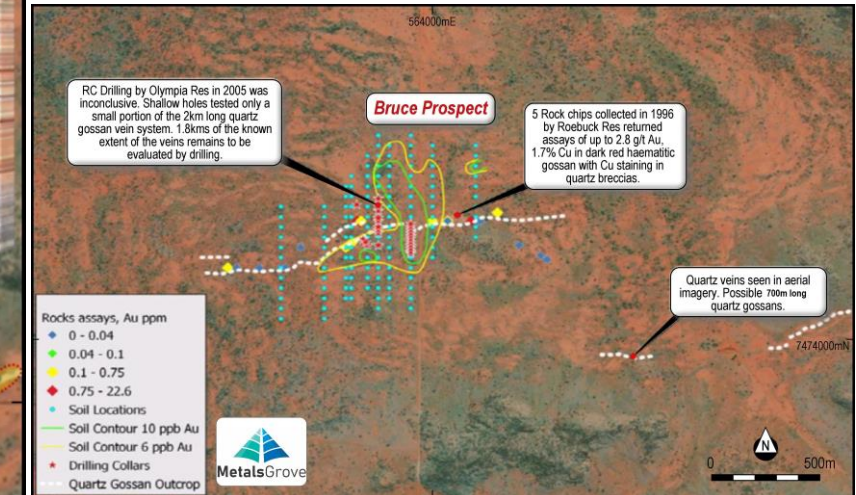
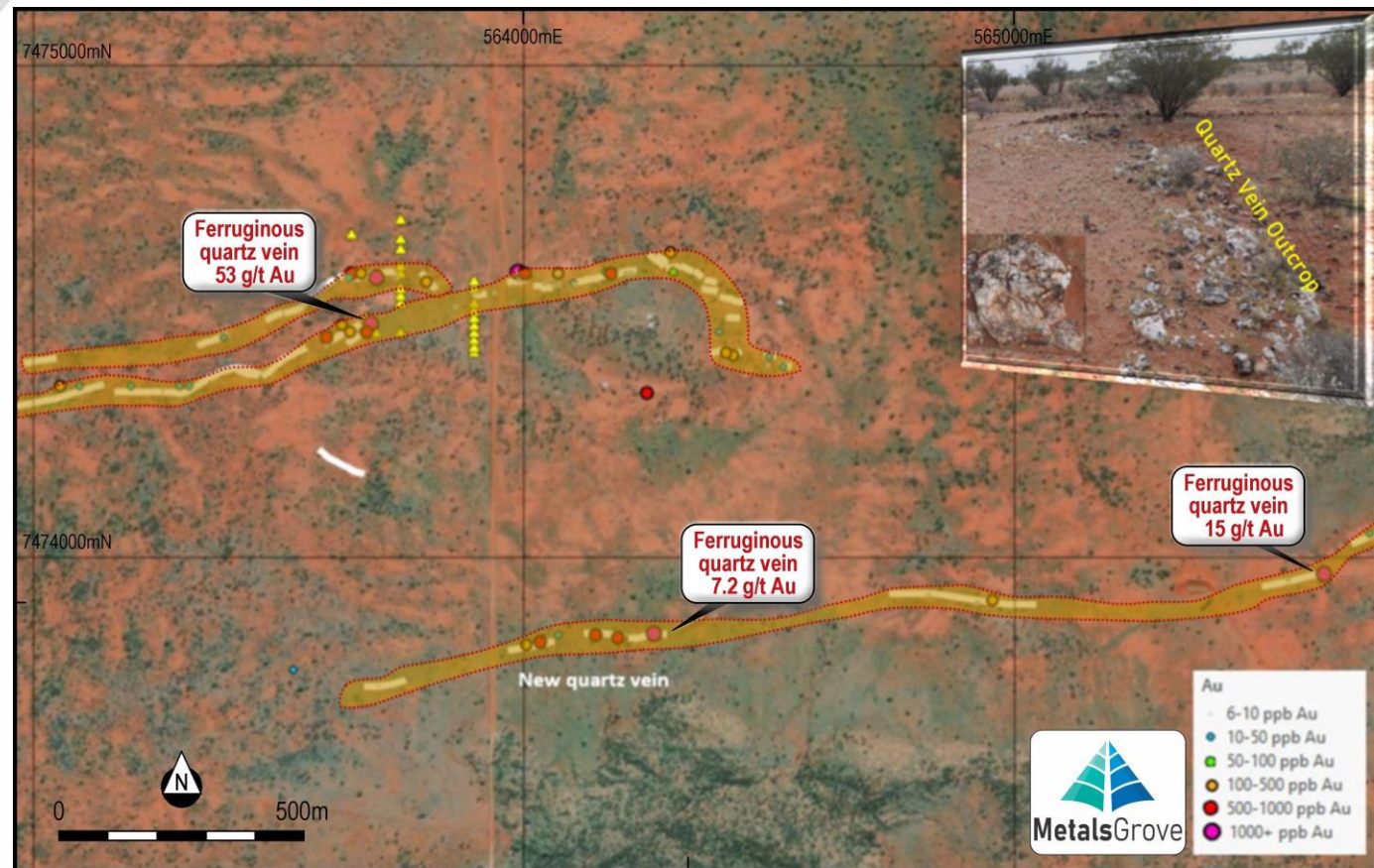
Geological mapping confirms potential for pegmatite-hosted rare earth element mineralisation, neodymium and praseodymium (NdPr), which are key components of high-performance (NdFeB) magnets for Electric Vehicle (EV).

Bruce-Rare Earth, Base Metal, Copper-Gold-NT



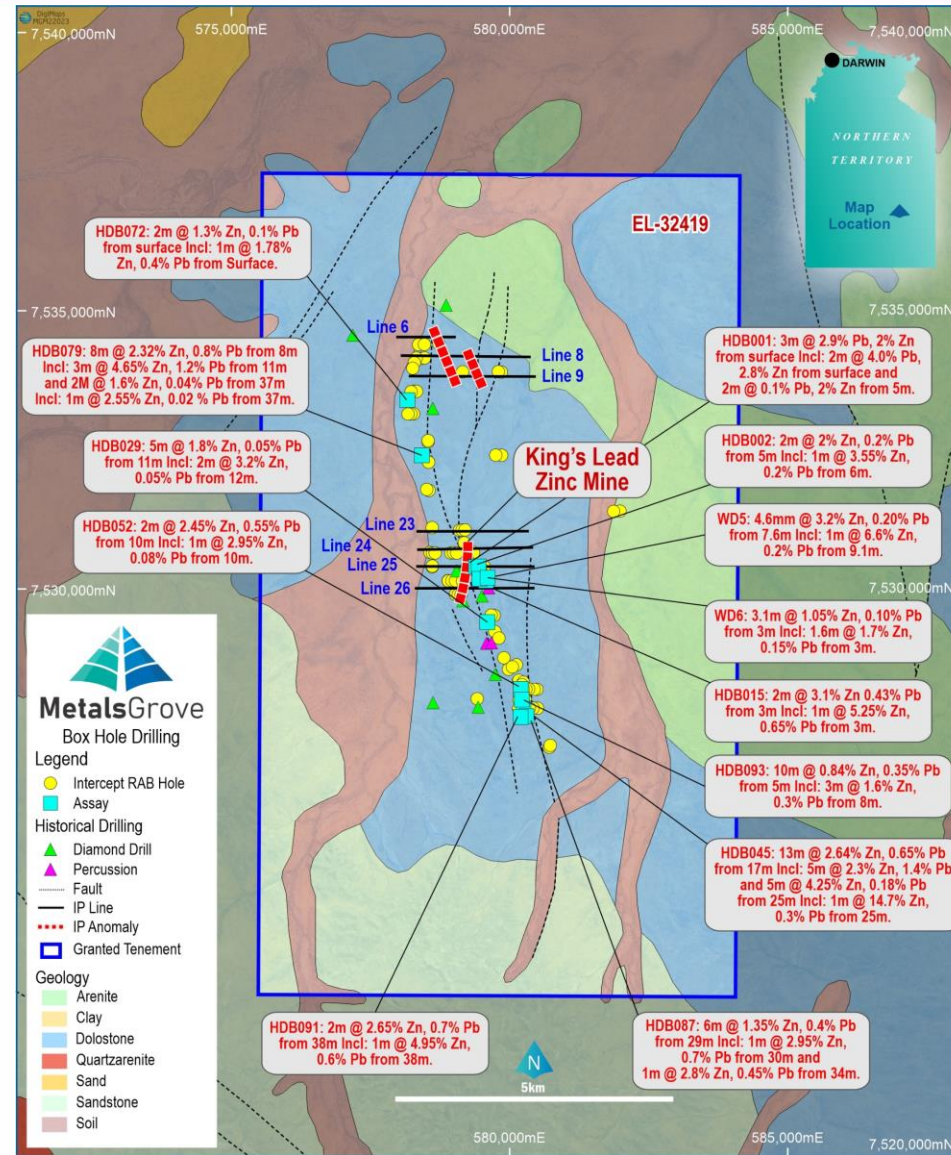
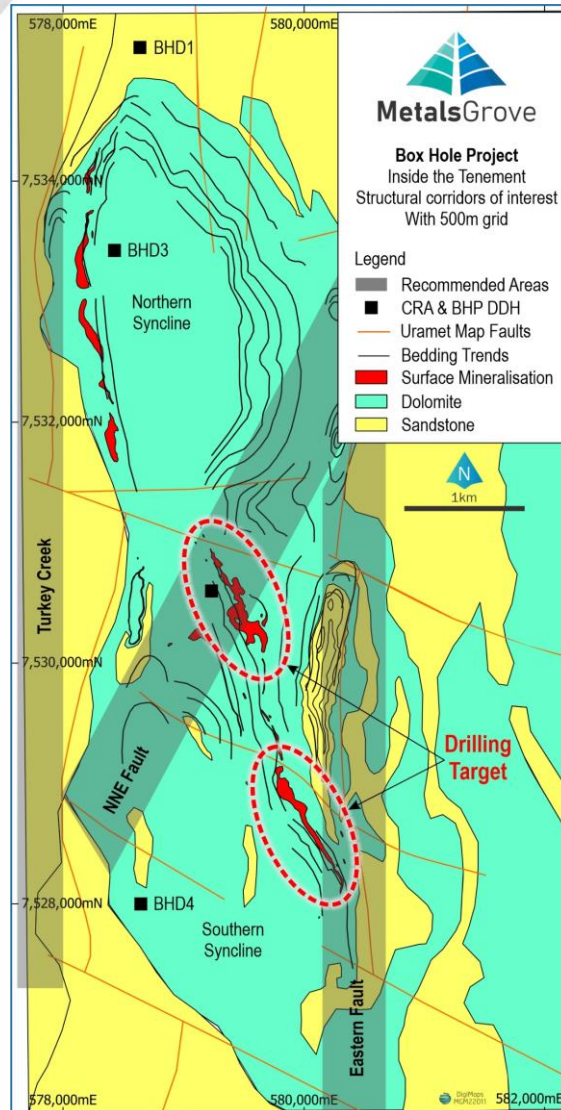
- Project (EL31225) covers an area of 127km².
- Shallow historic workings along the main quartz vein.
- Two previous drill traverses partially tested central portion of vein system.
- Interconnected gossanous quartz veins extend for over 1km within sediments.

Bruce-Rare Earth, Base Metal, Copper-Gold-NT



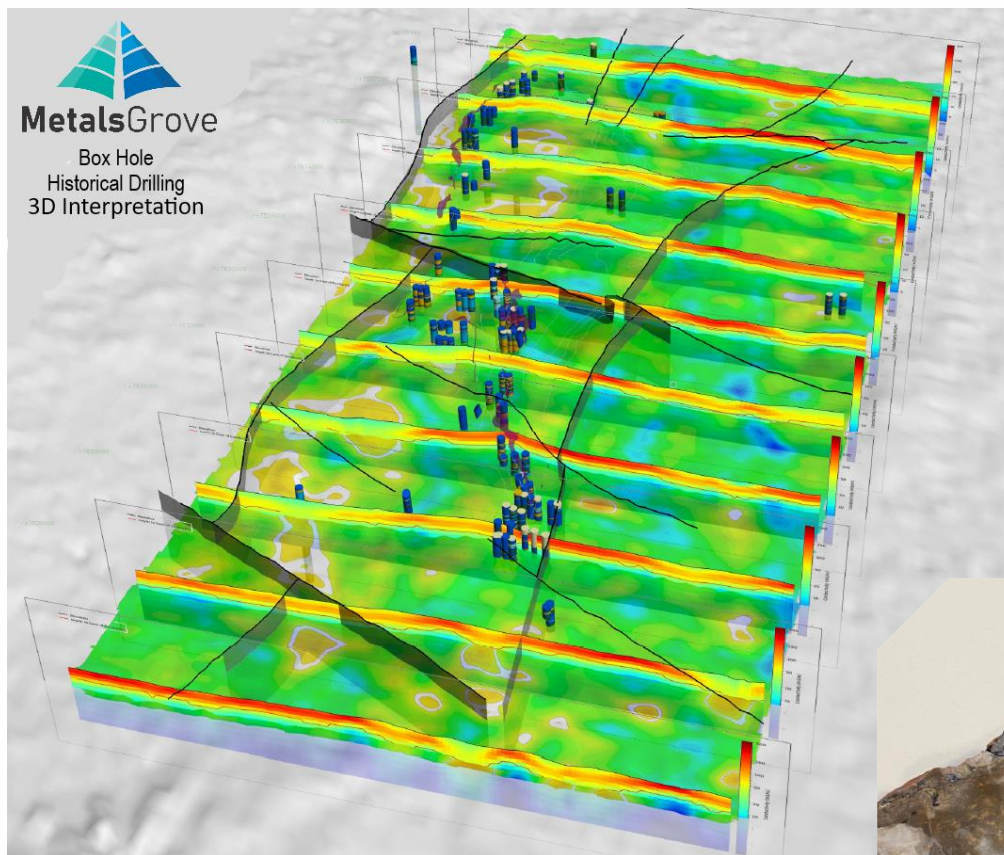
- Rock chip sample taken by the Northern Territory Geological Survey assayed **53 g/t Au¹** and **1.70% Cu**.
- Recent geological mapping located ferruginous gossanous quartz vein assay returned values up to **15.26 g/t Au** and **7.24 g/t Au³**.
- Mineralisation system is 1-2m wide and extends up to approximately 600m giving a total strike length of 2.1km.³
- Several historical pegmatite workings located within the project area.

Box Hole –Rare Earth and Base Metals-NT



- Project (EL32419) covers an area of 127km² located approximately 250km northeast of Alice Springs in the Northern Territory.
- CSIRO generated 3D geological model was developed to assist exploration targeting.
- Prospective for large tonnage carbonate hosted lead-zinc mineralization.
- Style of mineralization similar to Blendeveale in the Kimberley region, WA.
- Potential for neodymium and praseodymium (NdPr), which are key components of high-performance (NdFeB) magnets for Electric Vehicle (EV).

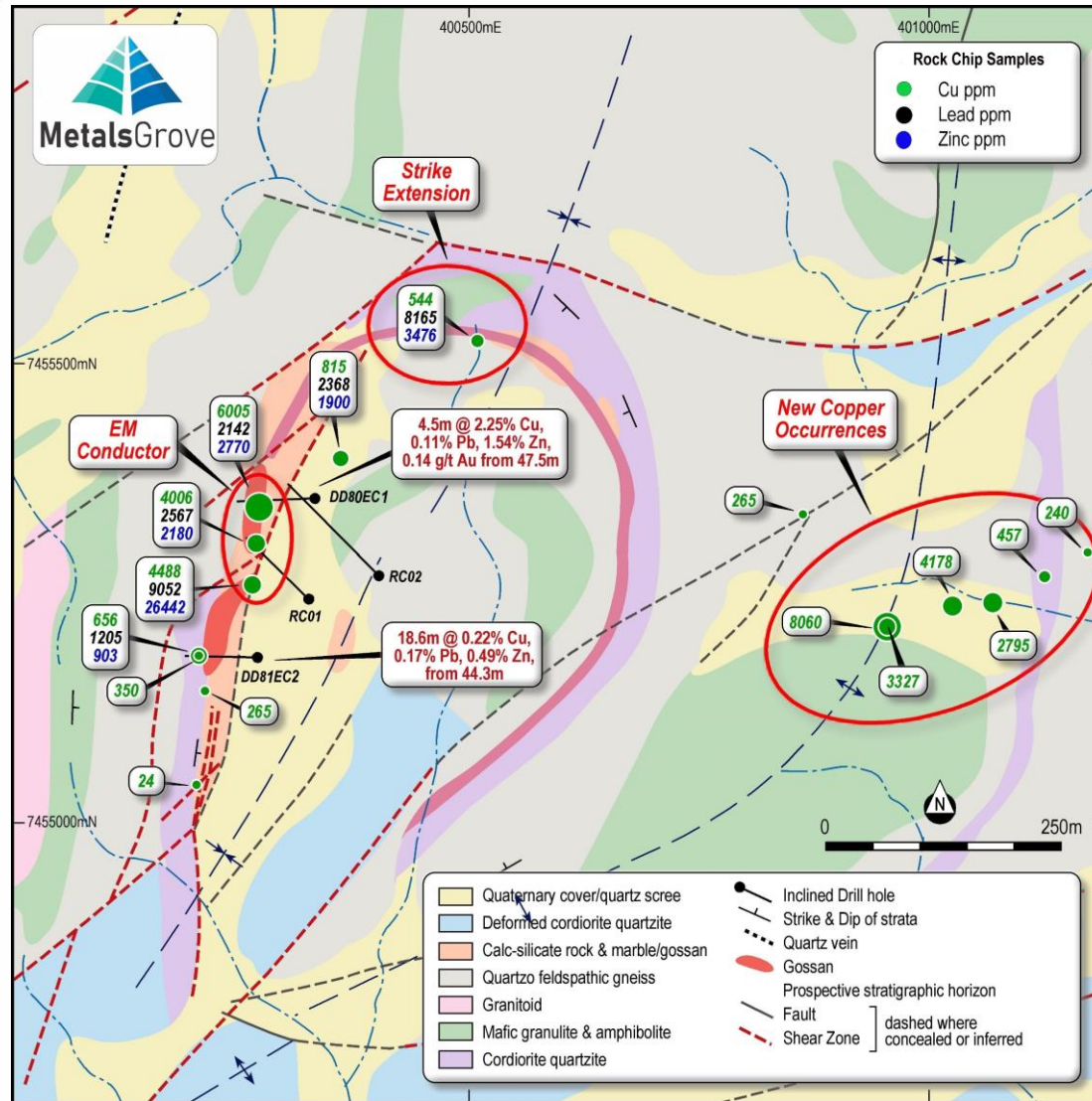
Box Hole –Rare Earth and Base Metals-NT



- King's working historically mined 15t of galena with an average grade of 66% Pb, 58.50 g/t Ag and 0.43% Bi.¹
- Central Pacific Minerals 1971-73: 9 RC holes Best intersections:
 - WD5: 4.60mm @ 3.2% Zn, 0.2% Pb from 7.6m Incl: 1m @ 6.6% Zn, 0.2% Pb from 9.10m.
- Intercept Minerals 2007-2013: 94 RAB holes. Best intersections:
 - HDB029: 5m @ 1.8% Zn, 0.1% Pb from 11m Incl: 2m @ 3.2% Zn, 0.1% Pb from 12m.
 - HDB045: 13m @ 2.7% Zn, 0.7% Pb from 17m Incl: 5m @ 2.3% Zn, 1.4% Pb and 5m @ 4.3% Zn, 0.2% Pb from 25m Incl: 1m @ 14.7% Zn, 0.3% Pb from 25m.
 - HDB079: 8m @ 2.3% Zn, 0.8% Pb from 8m Incl: 3m @ 4.7% Zn, 1.2% Pb from 11m and 2M @ 1.6% Zn, 0.1% Pb from 37m Incl: 1m @ 2.6% Zn, 0.02 % Pb from 37m.
 - HDB087: 6m @ 1.4% Zn, 0.4% Pb from 29m Incl: 1m @ 3.0% Zn, 0.7% Pb from 30m and 1m @ 2.8% Zn, 0.5% Pb from 34m.
 - HDB093: 10m @ 0.9% Zn, 0.4% Pb from 5m Incl: 3m @ 1.6% Zn, 0.3% Pb from 8m.

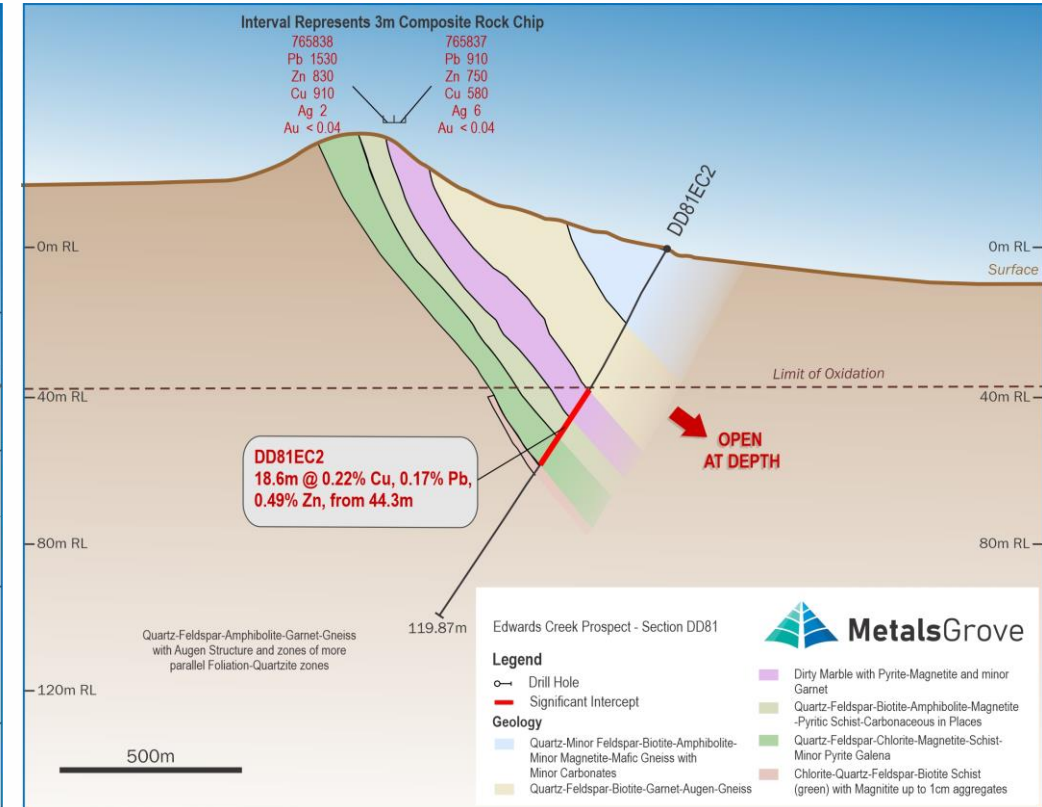
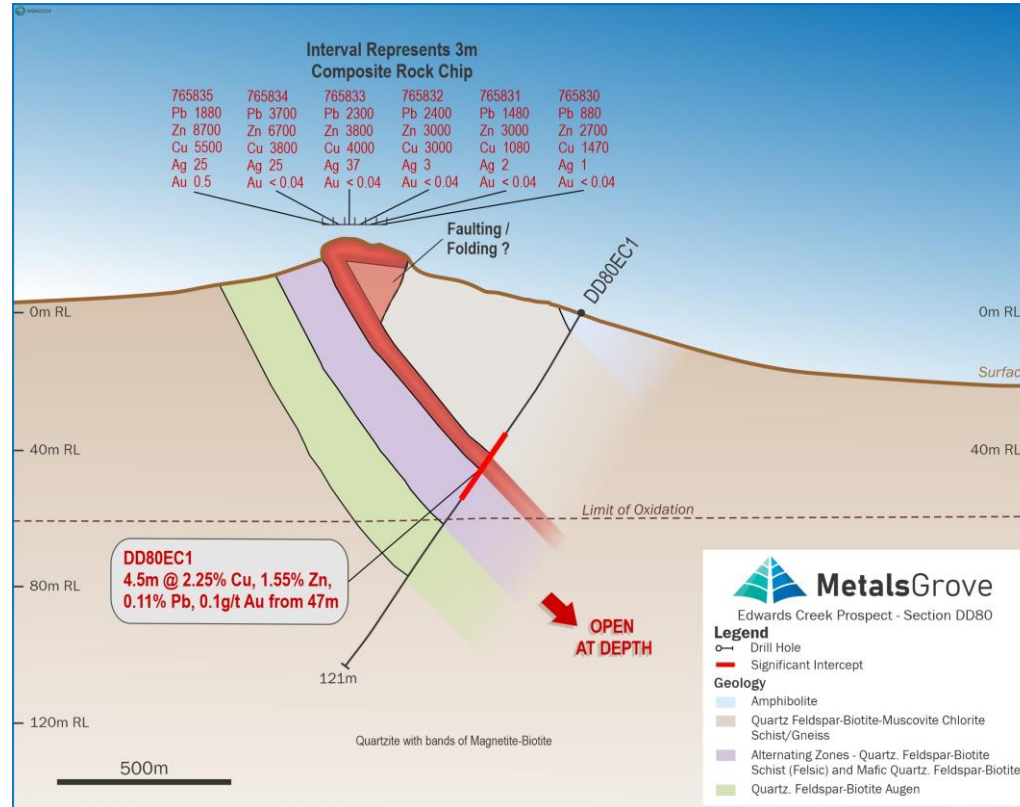


Edwards Creek-Copper and Gold-NT



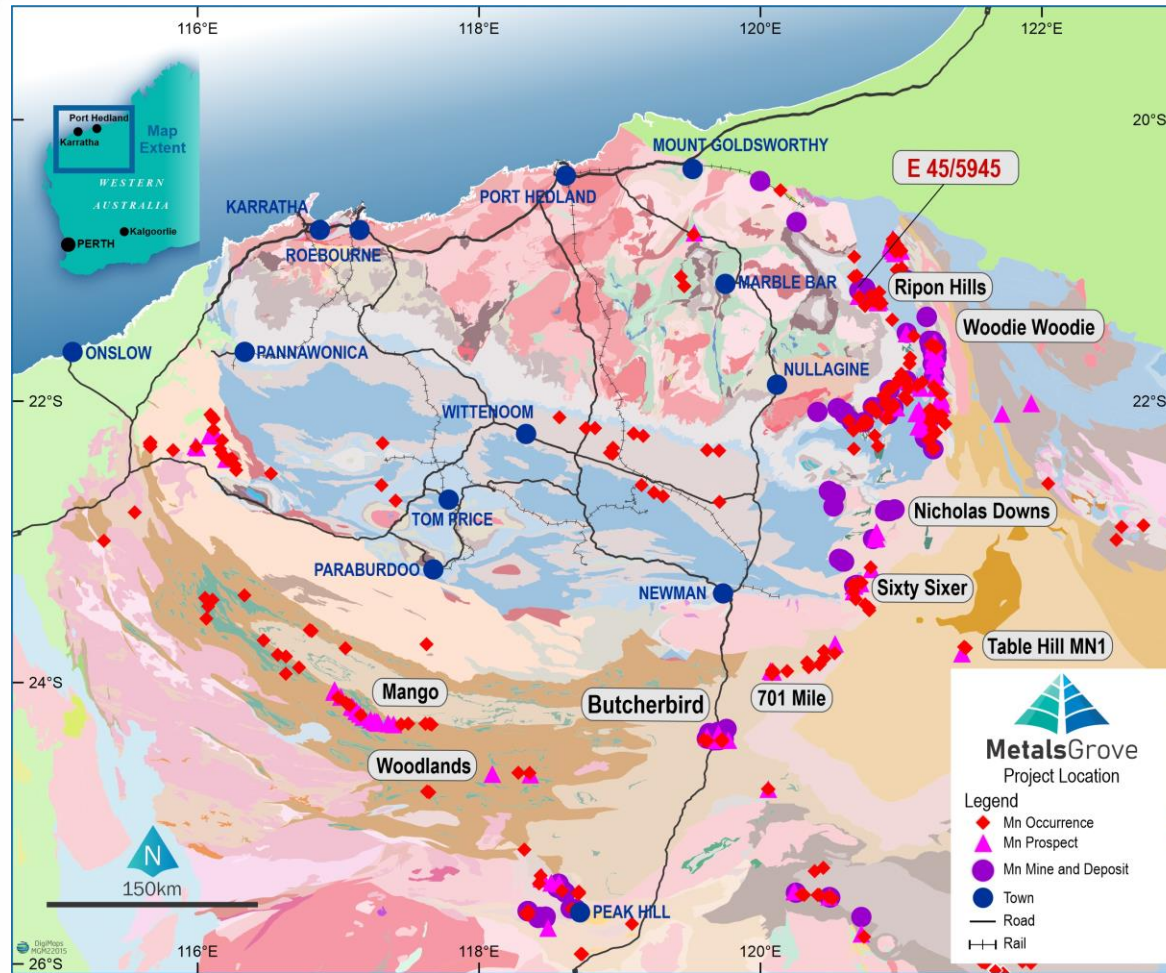
- EdwardsProject (EL-32420) covers 76km².
- Newly discovered malachite stained ironstone unit returned a maximum value of 0.81% Cu.²

Edwards Creek-Copper and Gold-NT



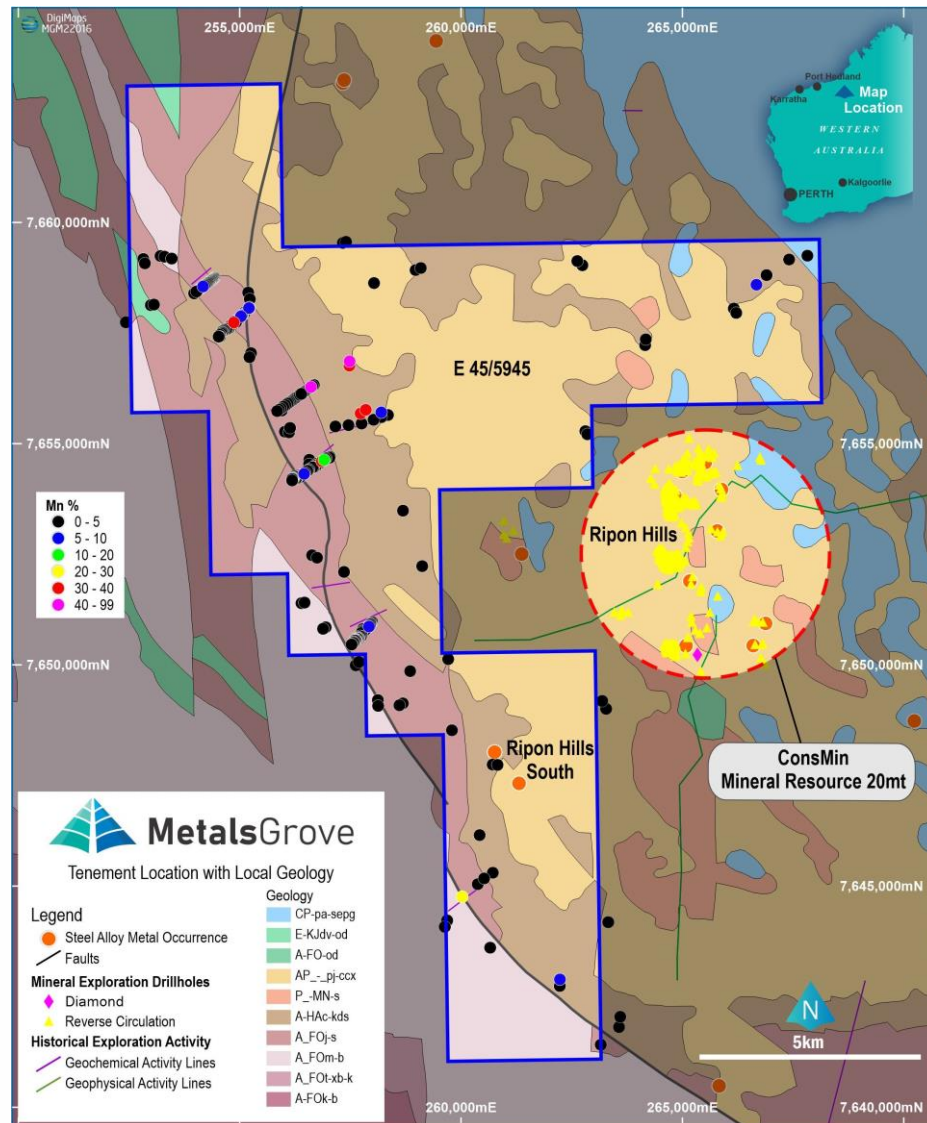
- DD80EC1 drilled by CRAE in 1980s intersected 4.5m @ 2.25% Cu, 0.11% Pb, 1.54% Zn, 0.14 g/t Au from 47m.¹
- DD81EC2 drilled by CRAE in 1980s intersected 18.6m @ 0.22% Cu, 0.17% Pb, 0.49% Zn, 0.14 g/t Au from 44.3m.¹

Project Highlights-Manganese-WA



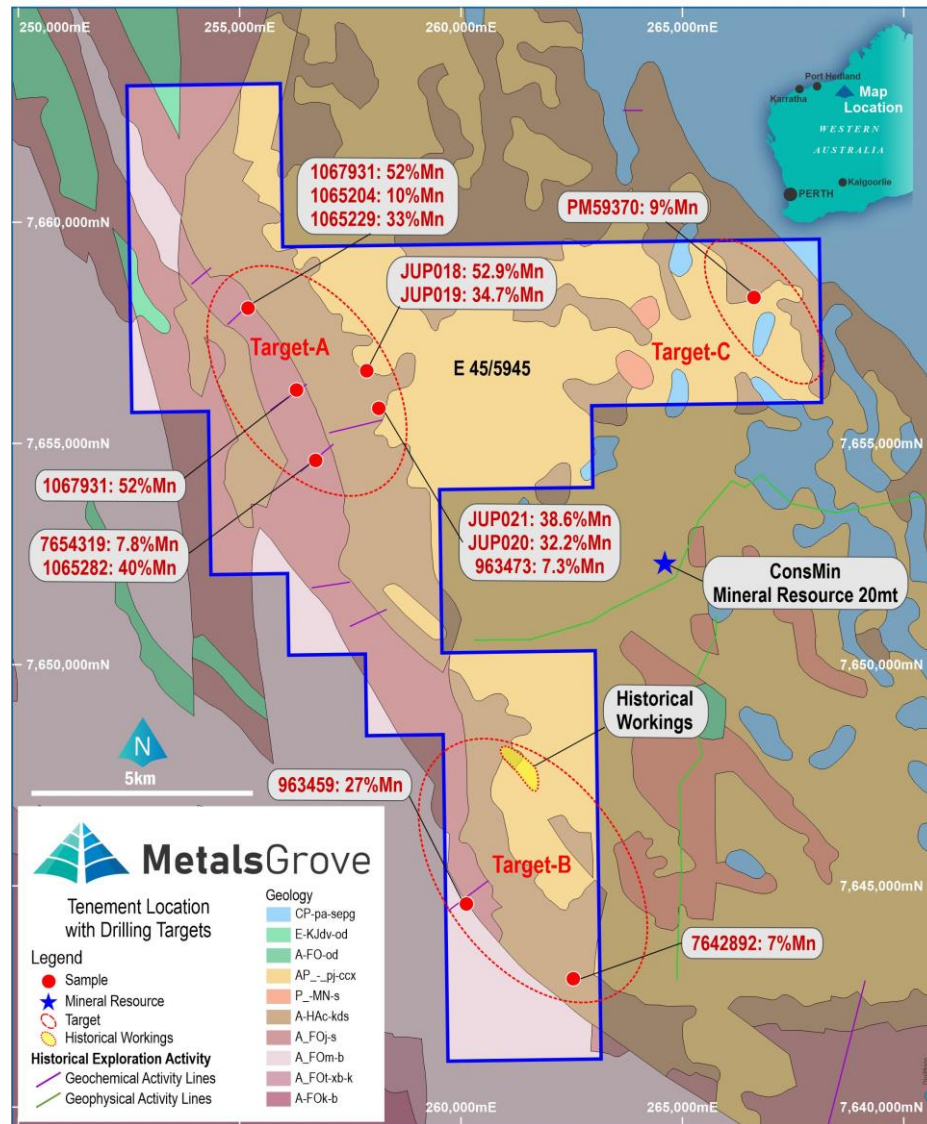
- **Project:** Woodie Woodie North (Ripon Hills) – Western Australia.
- **Location:** Situated in the East Pilbara region of Western Australia approximately 400km south of Port Hedland and 95km east of Marble Bar.
- **Size:** Approximately 14,400 ha (E45/5945).
- **Interest:** 100%.
- **Access:** All-weather Ripon Hills Road that ensures continued site access.
- Manganese is a critical ingredient in steel production and Electric Vehicle (EV) engineering.
- DRILL READY walk-up drilling targets.
- Well connected to existing mining infrastructure.

Woodie Woodie North-Manganese-WA



- Significant surface geochemistry was completed in the project area.
- Nearby mining project demonstrated manganese (Mn) mineralisation and similar geology in the project area.
- The tenement areas contain manganese outcropping stratigraphy and it has a historical working within the project area.
- Manganese mineralisation at the Woodie Woodie North Project occurs in the Jeerinah Formation Carawine Dolomite and parts of the Manganese Subgroup.

Woodie Woodie North-Manganese-WA



- Surface sampling at Woodie Woodie North (Ripon Hills) has returned a number of highly anomalous manganese (Mn) and cobalt (Co) assays (up to 52% Mn and 540ppm Co).
- Confirming the potential of the area to host high-grade manganese mineralisation.

Use of Funds

Funds raised in IPO to be utilised in the next 24 months to enhance shareholder value through:

- a focus on exploration and development of the Upper Coondina, Woodie Woodie North and Arunta projects
- undertake drilling and exploration programs to increase the mineral resources

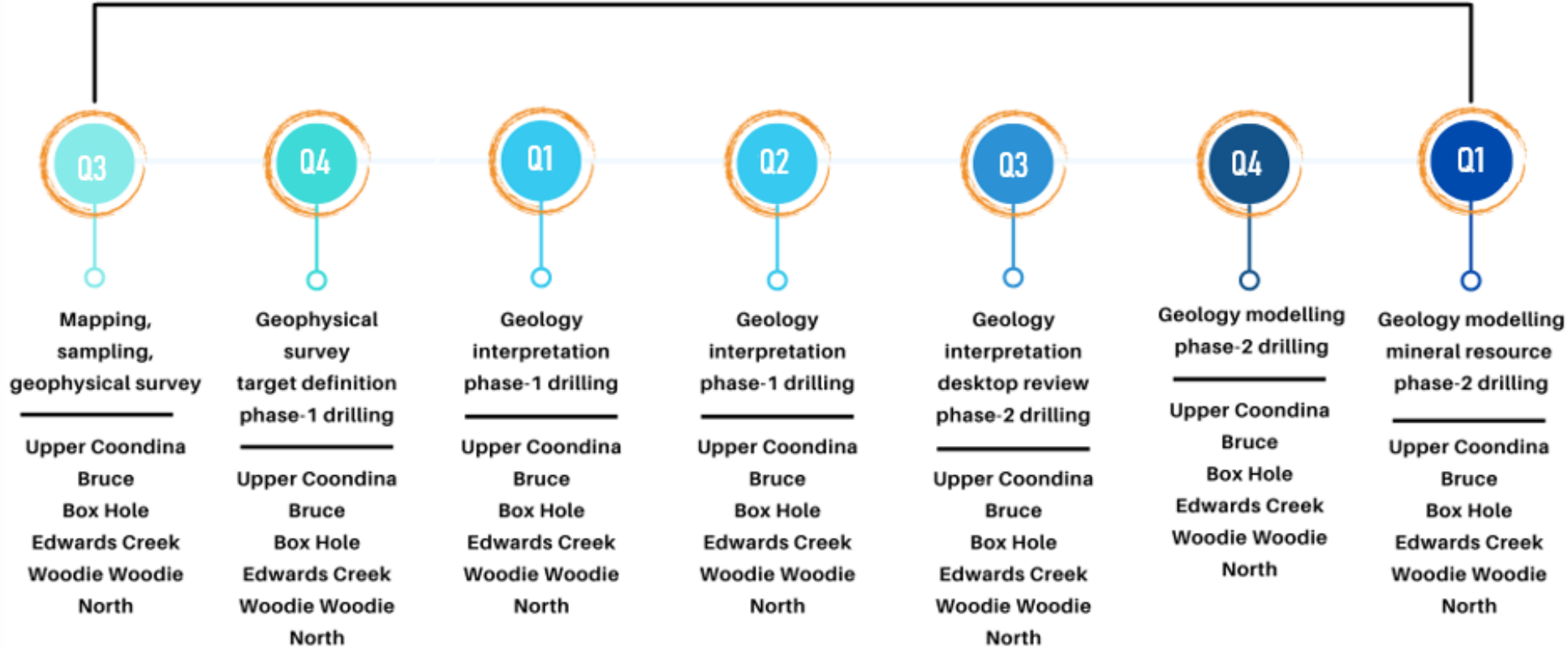
	Min Subscription (\$5M)				Max Subscription (\$7M)			
	Year 1	Year 2	Total	% of Funds	Year 1	Year 2	Total	% of Funds
Existing Cash Reserves			\$460,865	8.4%			\$460,865	6.2%
Funds Raised from the Public Offer			\$5,000,000	91.6%			\$7,000,000	93.8%
Total			\$5,460,865	100.0%			\$7,460,865	100.0%
Upper Coondina	\$657,000	\$685,000	\$1,342,000	24.57%	\$920,000	\$980,000	\$1,900,000	25.47%
Bruce	\$582,000	\$617,000	\$1,199,000	21.96%	\$789,000	\$828,000	\$1,617,000	21.67%
Box Hole	\$178,000	\$195,865	\$373,865	6.85%	\$225,000	\$250,865	\$475,865	6.38%
Edwards Creek	\$170,000	\$180,000	\$350,000	6.41%	\$230,000	\$265,000	\$495,000	6.63%
Woodie Woodie North	\$173,000	\$188,000	\$361,000	6.61%	\$245,000	\$270,000	\$515,000	6.90%
Cash Settlement-SHH and TLPL	\$60,000	\$0	\$60,000	1.10%	\$60,000	\$0	\$60,000	0.80%
Estimated costs of the offer	\$603,712	\$0	\$603,712	11.06%	\$732,264	\$0	\$732,264	9.81%
Working capital	\$323,644	\$323,644	\$647,288	11.85%	\$570,868	\$570,868	\$1,141,736	15.30%
Administration costs	\$262,000	\$262,000	\$524,000	9.60%	\$262,000	\$262,000	\$524,000	7.02%
Total	\$3,009,356	\$2,451,509	\$5,460,865	100.0%	\$4,034,132	\$3,426,733	\$7,460,865	100.0%

As with any budget, intervening events (including exploration success or failure) and new circumstances have the potential to affect the manner in which the funds are ultimately applied

Exploration Program

EXPLORATION AND DEVELOPMENT PLAN

CY-2022 AND CY-2023



Sustainable Development and ESG

MetalsGrove recognise that our future is intertwined with society, the economy, and the environment, and we owe it to those interests and stakeholders to ensure a lasting impact.

Economic

Dedicated to responsible economic development through transparent tax contributions, employment, and shared returns.



Social

Dedicated to contributing actively to any connected community and generating value.



Environment

Dedicated to accelerated decarbonisation through cutting-edge production technology, reduced costs, and a smaller environmental footprint.



Governance

Dedicated to leading standards and frameworks of corporate governance. Our top priority is to commit to the highest levels of rigor in business ethics and governance.



DIRECTORS

Richard Beazley Non Executive Chairman
Sean Sivasamy Managing Director/CEO
Haidong Chi Non Executive Director

COMPANY SECRETARY

Jack Rosagro

REGISTERED OFFICE

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PROPOSED ASX CODE: MGA

References

1. Shree Mineral Limited's (ASX:SHH) ASX announcement "Farm-in and Joint Venture with Territory Lithium Pty Limited to explore for gold and base metals" dated 30 June 2020.
2. Shree Mineral Limited's (ASX:SHH) ASX announcement "Results Confirm Prospectivity At Edwards Creek and Bruce Projects" dated 10 August 2021.
3. Shree Mineral Limited's (ASX:SHH) ASX announcement "New Gold Mineralised Quartz Veins Discovered at Arunta Project " dated 15 November 2021.

