

Smart Money Accumulating Miners Anticipating Near Term Bottom  
By Jeb Handwerger

Despite the strong dollar and low commodity prices, smart money is seeking to buy miners at deeply discounted values. The savvy investor may be sensing a triple bottom in gold and a near term turning point.

Today, we hear in the news from Bloomberg rumors of [Glencore possibly taking a run at Rio Tinto](#) for \$160 billion to become the largest commodities company. Rio Tinto is known for base metals which has been hit hard due to lower growth due the global correction gphover the past three years. Glencore already purchased coal giant Xstrata for \$41 billion two years ago.

Despite coal and base metals hitting multi-year lows amidst a strong dollar and low global growth, smart money such as Glencore is positioning now for what I believe is the coming inflationary cycle. The intelligent investor is acquiring discounted miners trading at bargain valuations right now. The Glencore news follows the recent sale of Niobec from Iamgold for \$500 million, the takeout of Cayden Resources by Agnico Eagle for over \$200 million and the \$3.9 billion Osisko takeover. Take a look at the recent Hecla investment in

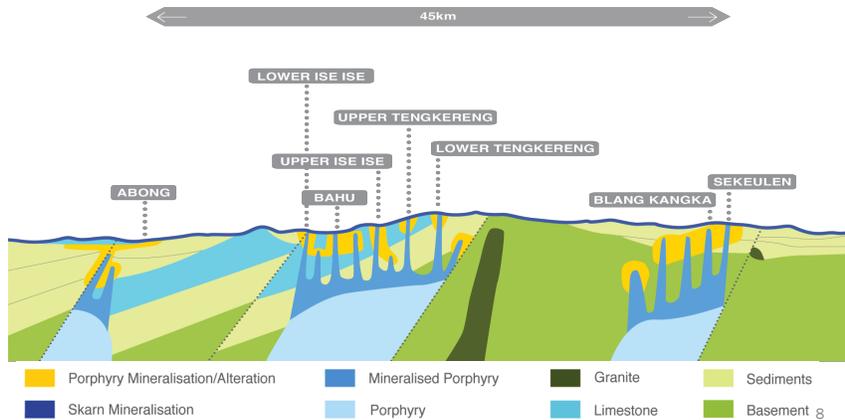
Canamex in Nevada and Waterton investment in Nulegacy. Could these recent deals signal a near term bottom?

The large miners need to replace their reserves with high grade, low cost assets. Smart money is buying the miners both large and small, while the small retail investors are panicking into cash. Expect further acquisitions not only in coal but in other strategic commodities such as uranium, niobium, rare earths, copper, graphite, lithium and precious metals. Despite all the naysayers saying they won't touch mining stocks, smart money is showing signs of accumulation. There are some places I am avoiding. I would sell all the overbought West African mining stocks due to the rising spread of Ebola. Avoid stocks in Turkey and Egypt as I believe the Middle East could continue spiraling out of control.

If you are looking to take a little risk for potentially great rewards look at Indonesia. Indonesia is coming back onto the radar of investors as mining giant Freeport McMoran resumed exports of copper last month after a newly elected pro business Prime Minister was voted in. A return to production and a better relationship with

the new pro-mining government could boost investments in Indonesia.

- ❖ Barisan Gold majority owns an entire porphyry province, initially explored by Rio Tinto in the 1990s, that contains at least 8 outcropping porphyry prospects



Freeport owns Grasberg, possibly one of the largest and richest mines in the World with about 30 billion pounds of copper

and 30 million ounces of gold reserves in the country. Grasberg is a profit machine for Freeport that is high grade and low cost. A return

to production for

Freeport and

Newmont could mean

more capital to flow

into the Indonesian

mining industry.

Indonesia has some of

the largest and richest gold-copper targets in the World.



One of the discoveries originally made by Rio Tinto in the 90's in now being developed by Barisan Gold (BG.V) who is hitting some of the best drill results I have seen in the past 20 years in this business.

[One of their last results](#) hit over 500 meters of 1.1 cu eq. near surface. Barisan owns an entire district with 8 outcropping gold-copper prospects with a 300m by 500 m porphyry zone. I expect some catalysts coming up including more drilling results which will be incorporated into a maiden NI 43-101 resource. These recent drill results demand attention from the intelligent and contrarian resource investor.

Disclosure: I own Barisan and the company is a website sponsor.

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## Bullish On Gold, Silver Bullion and Miners

- 1) Buy Gold Mining ETF (GDX) and Silver Mining ETF (SIL) (1-25-11)
- 2) **Buy Corvus Gold (KOR.TO or CORVF) Under \$2 Target \$4 (11-17-11)**
- 3) **Buy NuLegacy Gold (NUG.V) Under \$.15 Target \$.75 (2-28-13)**
- 4) **Buy Canamex (CSQ.V or CNMXF) Under \$.10 Target \$.50 (12-5-13)**
- 5) **Buy Integra Gold (ICG.V or ICGQF) Below \$.35 Target \$.75 (3-27-14)**
- 6) **Buy Barisan Gold (BG.V) Under \$.17 Target \$.55 (6-20-14)**
- 7) **Buy Red Eagle Mining (RD.V or RDEMF) under \$.33 Target \$1 (7-9-14)**
- 8) **Buy Galane Gold (GG.V) under \$.35 Target \$1 (8-29-14)**

Bullish on Critical Metals Sector

- 1) Buy Potash Corp (POT) Under \$33 Target \$50 (10-9-13)
- 2) Buy GrafTech (GTI) Under \$9 Target \$16 (10-22-13)
- 3) **Buy Ucore (UURAF) Under \$.23 Target \$1 (11-29-13)**
- 4) **Buy Western Lithium (WLCDF) Under \$.75 Target \$1.50 (3-4-14)**
- 5) **Buy Cyprium Mining (CUG.V) under \$.21 Target \$.42 (7-3-14)**

Bullish on Energy Sector

- 1) Buy UR Energy (URG) Target \$3 (10/8/10)
  - 2) Buy Denison (DNN) Under \$2.50 Target \$6 (3-16-11)
  - 3) **Buy Uranerz (URZ) Under \$3.50 Target \$7 (3-16-11)**
  - 4) **Buy Pele Mountain (GEM.V or GOLDF) Under \$.10 Target \$1 (2-29-12)**
  - 5) Buy B&W (BWC) and Fluor (FLR) On Pullbacks (12-27-12)
  - 6) Buy Uranium Participation Corp (U.TO) Under \$5 Target \$10 (10-9-13)
  - 7) Buy Cameco (CCJ) Under \$19 Target \$40 (11-1-13)
  - 8) **Buy Enterprise Group (E.TO or ETOLF) Under \$.90 Target \$2.05 (11-14-13)**
  - 9) **Buy Anfield Resources (ARY.V or ANLDF) Under \$.75 Target \$1.50 (8-19-14)**
- Bullish on Platinum/Palladium/Nickel (8-21-12)**

- 1) Buy PALL and PTM for ETF exposure.
- 2) Hold Stillwater Mining (SWC) Target \$18
- 3) **Buy Wellgreen Platinum (WGPLF) Under \$.60 Target \$1.80 (1-9-14)**
- 4) **Buy Royal Nickel (RNK.TO or RNKLF) Under \$.50 Target \$2 (1-30-14)**
- 5) **Buy Niocorp (NB.V or NIOBF) Under \$.32 Target \$2 (4-4-14)**

For questions, feedback or comments, please contact me at [jeb@goldstocktrades.com](mailto:jeb@goldstocktrades.com)

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