

Four Stocks to Watch After Trump's Critical Minerals Executive Order

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On April 15, 2025, President Donald Trump signed an executive order that could reshape the U.S. mining sector. The order launches a federal investigation into the country's heavy reliance on foreign sources for processed critical minerals-materials essential for everything from jet engines and missile systems to smartphones and electric vehicles.

The order comes amidst escalating tensions with China, which recently halted exports of several key rare earth elements. Trump's move frames this dependency as a national security threat and calls for steps to rebuild and secure domestic supply chains.

As Washington pivots toward boosting U.S. production, certain mining and processing companies stand to benefit. Here are four to watch.

Military Metals Corp. (OTCQB: MILIF):

Kicking off the list is Military Metals Corp. (OTCQB: MILIF), a focused play on one of the lesser-known but increasingly vital critical minerals: antimony. As one of the few publicly traded companies dedicated almost entirely to antimony, MILIF is advancing multiple high-grade projects in politically stable jurisdictions, including the U.S. and the European Union.

Earlier this year, the company completed the acquisition of the 100%-owned Last Chance Antimony-Gold Property in Nevada. This historic site once supported U.S. defense efforts in the early 20th century. Located just 18 kilometers from Kinross's Round Mountain mine, the property had seen little exploration since the 1980s. That is, until now. The company's team recently completed an initial site visit and is preparing for a full exploration program focused on antimony-rich quartz vein structures. Visible copper staining suggests potential for additional upside.

Internationally, MILIF is also making progress in Slovakia, where it controls two antimony-gold properties: Trojarová and Tiennesgrund. Trojarová, the company's flagship asset in Europe, has seen over 14,000 meters of drilling and hundreds of channel samples from Soviet-era exploration. SLR Consulting (Canada) is now digitizing and interpreting the data to develop a modern mineral resource estimate. A LIDAR survey of the 1.7-kilometer underground workings was completed in early April and will guide future drilling.

Tiennesgrund is set for fieldwork starting in May. The property includes historical adits that produced high-grade antimony-reported at 18 to 24 percent-along with early signs of tungsten mineralization. MILIF plans to integrate decades of archived Slovak government data with new sampling and soil surveys to identify new targets.

All of this is unfolding amid rising antimony prices, which recently reached all-time highs near \$60,000 per metric ton. Meanwhile, the White House's decision to exempt antimony from new tariffs signals its importance to U.S. national interests.

Military Metals Corp. has also applied to the U.S. Defense Industrial Base Consortium, potentially opening doors for funding under the Defense Production Act-an invaluable capital source for a junior company.

"The exemption of these minerals from tariffs reinforces the urgent need to accelerate the development of secure, reliable supply chains," said CEO Scott Eldridge. "It's a clear signal that advancing domestic and allied sources is essential."

With a focused commodity strategy, underexplored assets, and growing policy support across the Atlantic, Military Metals Corp. (OTCQB: MILIF) could be an early mover in the U.S. critical minerals market.

USA Rare Earth, Inc. (Nasdaq: USAR) is strategically positioned at the heart of America's push for mineral independence. Directly aligned with President Trump's executive order, USAR is building one of the country's most comprehensive domestic supply chains for rare earth magnets-vital components in everything from electric vehicles and defense systems to wind turbines and smartphones.

The company controls mining rights to the Round Top deposit in West Texas, one of the largest known

sources of heavy rare earth elements in the U.S. These include dysprosium and terbium-critical for high-performance magnets-as well as gallium, beryllium, and lithium-materials flagged as "strategic" by the U.S. government. In Stillwater, Oklahoma, USAR is constructing a 310,000-square-foot facility to manufacture sintered neodymium magnets. These magnets are used in electric motors, defense applications, and advanced technologies. USAR has also commissioned an Advanced Innovations Lab at the site, where it will prototype custom magnet designs and develop proprietary processes to bring production online by 2026.

"Our magnet facility sits at the center of the Trump Administration's recent critical mineral executive order," said CEO Joshua Ballard. "We're open for business."

USAR has strengthened its leadership team with the appointment of Rob Steele as Chief Financial Officer. With more than three decades of experience in finance and investment banking-raising \$28 billion across fast-growing industries-Steele will play a key role in securing the capital needed for USAR's expansion. "I strongly believe in USAR's mission of returning the rare earth mineral and magnet supply chain to America," Steele said.

With the escalating demand for high-tech manufacturing components and growing support from the federal government, USAR is well-positioned to become a key player in the U.S. critical minerals resurgence.

[Perpetua Resources Corp.](#) (Nasdaq: PPTA) (TSX: PPTA) is emerging as a significant player in the U.S. effort to secure domestic sources of strategic minerals. Through its flagship Stibnite Gold Project in central Idaho, the company is working to restore an abandoned mine site to produce both gold and the only mined source of antimony in the U.S.-a mineral vital to national defense and clean energy technologies.

The Stibnite Project is one of the highest-grade open-pit gold deposits in the country and is nearing a construction decision. The company recently secured a Final Record of Decision from the U.S. Forest Service, completed basic engineering, and started procurement for long-lead infrastructure items. It has also received significant financial backing, including a Letter of Interest for up to \$1.8 billion in financing from the U.S. Export-Import Bank and over \$70 million in Defense Production Act funding.

Antimony from Stibnite is considered essential by the Department of Defense for use in munitions and missile systems. With China, Russia, and Tajikistan currently controlling 90% of the global supply of mined antimony-China recently banned all exports to the U.S.-Perpetua's project could supply up to 35% of domestic demand during its first six years of production, directly countering foreign dominance in the supply chain.

CEO Jon Cherry emphasized, "The Stibnite Gold Project is a prime example of why critical mineral production in America needs immediate attention." With strong partnerships in place, Perpetua is aligned with both economic development and environmental restoration, making it a compelling long-term opportunity.

United States Antimony Corporation (NYSE: UAMY) is uniquely positioned to benefit from the growing push for domestic critical minerals production, particularly antimony. As one of the few vertically integrated antimony producers in the Western Hemisphere, UAMY is developing a full-cycle operation from mining to refining entirely within North America.

The company operates facilities in both the U.S. and Mexico, including its Montana base and the recently reactivated Madero smelter in Coahuila, which processes antimony concentrate into finished trioxide. UAMY is also advancing exploration at its properties in Alaska, where it controls nearly 9,000 acres of antimony and gold claims. Early sampling has revealed multiple high-grade surface targets, and fieldwork is already underway.

In 2023, UAMY grew revenue by 72% and tripled its gross profit while maintaining a clean balance sheet and increasing cash reserves to over \$18 million. With smelting infrastructure online and concentrate shipments either delivered or en route, UAMY is poised to scale production through 2025.

Strategically, UAMY is part of several federal collaborations aimed at strengthening the U.S. supply chain for antimony-based materials-critical for both ammunition and flame retardants. As China continues to restrict exports of key minerals, UAMY's importance is growing. With rising antimony prices and accelerating policy momentum, UAMY offers rare exposure to this strategically important critical mineral.

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