

Mining Companies Print Record Profits As Gold Hits \$4,000 Milestone

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Equity Insider News Commentary - Issued on behalf of Rua Gold Inc.

While gold's breach of \$4,000 per ounce grabbed headlines this week^[1], the real story is unfolding in mining company balance sheets. Production costs have barely budged even as gold surged over 50% in 2025, creating what industry insiders call "windfall margins" where nearly every price increase drops straight to the bottom line^[2]. Federal Reserve rate cuts and relentless central bank buying have removed the ceiling on gold's upside^[3], putting companies like [Rua Gold Inc.](#) (TSXV: RUA) (OTCQB: NZAUF), [Scorpio Gold Corp.](#) (TSXV: SGN) (OTCQB: SRCRF), Thesis Gold Inc. (TSXV: TAU) (OTCQX: THSGF), [Gold X2 Mining Inc.](#) (TSXV: AUXX) (OTCQB: GSHRF), and [Kesselrun Resources Ltd.](#) (TSXV: KES) (OTCQB: KSSRF).

With central banks snapping up 900 tonnes annually and Wall Street forecasting \$4,900 gold by late 2026^[4], the structural drivers supporting this rally show no signs of reversing. The math is simple: stable all-in sustaining costs plus soaring gold prices equals profit margins expanding at nearly twice the rate of gold's price appreciation, creating a rare window where established producers and early-stage developers alike can generate exceptional returns for shareholders positioned ahead of the next leg higher.

RUA GOLD Inc. (TSXV: RUA) (OTCQB: NZAUF) recently delivered exceptional high-grade results back in September from its expanding Auld Creek project, including standout intercepts of 17m at 9.8g/t AuEq and 8m at 8.9g/t AuEq. These latest results demonstrate significant strike extension of the current resource, positioning the company for substantial resource growth by year-end. The company has also made promising regional discoveries, with rock chip samples grading 14g/t gold found over 30km south of Reefton.

"These drill results from Auld Creek have significantly expanded the scale and potential of the project and put us well on the way to growing the resource base as we announced last month," said Robert Eckford, CEO of RUA GOLD. "Importantly, the mineralized system has been extended both vertically and along strike and remains open in all directions."

The company recently announced a major expansion to its Reefton drill campaign, mobilizing a third rig and targeting over 4,000 metres of new drilling at Auld Creek to grow the gold-antimony resource above 300,000 ounces by year-end. RUA GOLD also has a third rig drilling at targets across the remainder of the district, focusing on highly ranking prospects highlighted by its VRIFY AI targeting process.

With momentum building and results accelerating, RUA GOLD just announced an ambitious Q4 conference schedule that will showcase the company's high-grade gold-antimony story to institutional investors across three continents. The executive team will present at six major mining investment events spanning Munich, New York, Sydney, New Zealand, and Zurich throughout October and November.

"We're excited to showcase RUA GOLD on this global stage and connect with some of the top minds in mining investment," said Eckford. "With antimony supply tightening and gold reaching further record highs, RUA GOLD is positioned to be the next explorer transitioning to developer in New Zealand."

The conference circuit kicked off at Munich Mining Conference on October 3-4, where CFO Zeenat Lokhandwala presented to over 1,000 German retail investors. The schedule continues with the Metals & Mining Virtual Investor Conference (October 7-9), Hidden Gems Conference in New York (October 20-21), and the International Mining and Resources Conference in Sydney (October 21-23), where COO Simon Henderson will represent RUA GOLD within the New Zealand pavilion. The tour concludes with the West Coast Minerals Forum in New Zealand (October 30) and the prestigious Swiss Mining Institute Conference in Zurich (November 20-21).

The Reefton Goldfield is a historically prolific district that produced more than 2 million ounces at grades up

to 50 g/t. RUA GOLD now controls 120,000 hectares (roughly 95%) in the area and has confirmed multiple stacked mineralized shoots at Auld Creek, including previous standout intercepts of 2.1 m at 64 g/t AuEq (5.5 g/t gold and 13.1% antimony).

Antimony continues to be a major tailwind for the company's positioning, with prices surging past US\$50,000 per tonne in 2025 following China's export restrictions. New Zealand has formally designated it as a critical mineral, adding further significance to RUA GOLD's dual-commodity profile. Surface samples have returned over 40% Sb, and several drill holes exceed 8%, grades rarely seen this early in a project's development cycle.

On the North Island, drill access applications have been submitted for RUA's Glamorgan project in the Hauraki Goldfield, home to the 10 Moz Martha mine. Glamorgan's 4 km gold-arsenic anomaly has been refined using VRIFY's DORA AI engine, with drilling expected to begin in Q4.

With \$14 million in cash and a leadership team behind US\$11 billion in prior exits, RUA GOLD is well-positioned to deliver meaningful discovery growth across both islands.

CONTINUED… Read this and more news for RUA GOLD at:

<https://equity-insider.com/2025/04/24/others-found-1911-g-t-here-before-now-a-proven-11b-mining-team-is-back-to-fini>

In other industry developments and happenings in the market include:

Scorpio Gold Corporation (TSXV: SGN) (OTCQB: SRCRF) has announced a maiden mineral resource estimate at its 100%-owned Manhattan District in Nevada, comprising 18,343,000 tonnes grading 1.26 g/t gold for 740,000 oz contained gold in the inferred category. The company also disclosed a historical mineral resource estimate covering satellite deposits at Black Mammoth, April Fool, Hooligan, Keystone, and Jumbo totaling 1,652,325 tonnes grading 5.89 g/t gold for 303,949 oz contained gold.

"The Maiden MRE represents the starting point for the newly consolidated 100%-owned Manhattan District, and does not yet incorporate any 2025 drilling by the Company," said Zayn Kalyan, CEO of Scorpio Gold. "The estimates also highlight the high-grade nature of the gold mineralization, with grade being the key factor that distinguishes Manhattan from other open-pit assets in Nevada. Scorpio Gold's objective is to build a multi-million-ounce resource at a grade that sets it apart from peers - an objective we are well positioned to pursue with the team and capital in place."

The maiden resource incorporates over 92,000 metres of historical drilling across more than 1,300 drillholes and does not yet include the company's 2025 drilling program, which remains underway. An NI 43-101 technical report detailing the mineral resource estimate will be filed on SEDAR+ and the company's website within 45 days.

Thesis Gold Inc. (TSXV: TAU) (OTCQX: THSGF) has reported drilling results extending mineralization at the Bingo Zone of its Lawyers-Ranch Project in British Columbia, with drillhole 25BNGDD002 intersecting 89.30 m of 1.10 g/t Au from surface, including 12.00 m of 2.31 g/t Au, 3.47 g/t Ag, and 0.24% Cu beginning at 71.00 m downhole. The mineralization in this hole extends 30 m beyond currently modeled mineral resource domains and was abandoned ending in mineralization due to ground conditions, further emphasizing expansion potential.

"Our work at Ranch this year continues to underscore the project's potential beyond what is captured in the 2024 PEA," said Ewan Webster, President and CEO of Thesis Gold. "Drilling at Bingo emphasizes that there is still room for growth in the Ranch portion of the resource. In addition, the IP survey has opened up an entirely new perspective on the central portion of Ranch."

The company has completed an 86 line-kilometer induced polarization geophysical survey that has identified several compelling new targets beyond the resource zones. These exploration efforts build on the strong economics outlined in the 2024 Preliminary Economic Assessment, which demonstrated an after-tax NPV (5%) of C\$1.28 billion, an IRR of 35.2%, and a 2.0-year payback period at US\$1,930 gold and US\$24 silver, with updated project economics expected in Q4 2025 through a Prefeasibility Study.

Gold X2 Mining Inc. (TSXV: AUXX) (OTCQB: GSHRF) has entered into a definitive agreement to acquire all issued and outstanding common shares of Kesselrun Resources Ltd. (TSXV: KES) (OTCQB: KSSRF), with each Kesselrun shareholder receiving \$0.02 in cash and 0.2152 of a Gold X2 share per Kesselrun share held. The transaction will result in Gold X2 acquiring a 100% interest in Kesselrun's high-grade Huronian Gold Project, a past-producing mine strategically located adjacent to Gold X2's Moss Gold Project in Northern Ontario, with existing Kesselrun shareholders owning approximately 4.13% of the combined entity.

"The acquisition of Kesselrun Resources will mark a pivotal step forward for Gold X2 as we continue to consolidate a very prospective gold belt in Ontario," said Michael Henrichsen, President and CEO of Gold X2. "By bringing the Huronian project under our umbrella, we are positioning Gold X2 with multiple opportunities for potential resource growth and development synergies alongside our flagship Moss Gold Project. We look forward to unlocking the full potential of this regional land package and creating long-term value for all of our shareholders."

The transaction is expected to close on or about November 27, 2025, subject to Kesselrun shareholder approval (requiring at least 66⅔% of votes cast), court approval, and applicable regulatory approvals including TSXV approval. Gold X2 has also agreed to pay \$2,000,000 in outstanding Kesselrun debt to certain creditors and provide a \$500,000 interest-free bridge loan to fund transaction costs, with the boards of both companies having unanimously approved the deal and directors and officers of Kesselrun holding approximately 9.75% of outstanding shares entering into voting support agreements.

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SOURCES CITED:

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