



I P O
C A P I T A L
R A I S E

June 2022

Co-Lead Managers:



vested

I HARBURY

Corporate Lawyer:

FINUCAN
LAWYERS

Investigative Accountant:

PKF

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Competent Persons Statement

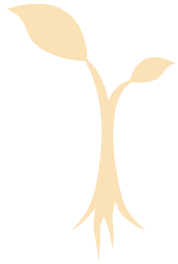
The information in this presentation that relates to a JORC resource, is based on information compiled and reviewed by Mr Lyon Barrett. Mr Barrett is a Member of the Australasian Institute of Mining and Metallurgy and is a Principle Geologist employed by Measured Group Pty Ltd. Mr Barrett has more than 20 years' experience in the estimation of mineral resources for projects both in Australia and overseas. This expertise has been acquired principally through exploration and evaluation assignments at operating mines and exploration areas. This experience is more than adequate to qualify him as a Competent Person for the purposes of Resource Reporting as defined in the 2012 edition of the JORC Code.

A person with long hair, wearing a blue floral dress, stands in a field of tall, golden-brown grass. In the background, several large wind turbines are visible against a clear sky. The entire image is overlaid with a semi-transparent teal filter.

We're meeting the growing demand for minerals critical to ensuring a carbon neutral future.

Our ESG Vision

Investment highlights



Shallow JORC resource

210Mt @ 0.39% V²O⁵ Inferred JORC resource, from surface.



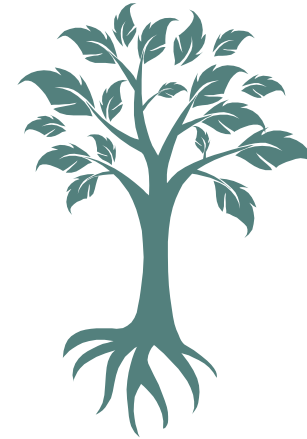
Established mining region

Supported by existing infrastructure, road, rail, power & port.



Significant government incentives

Government policy creating investment tail winds for critical minerals.




Favorable \$3.8m Enterprise Value

Raising A\$5.0m via IPO to execute a defined road map to production. Targeting construction 2025.



The energy transition is accelerating.

Mining | Scott Morrison | Scott Morrison's USA Tour
Morrison Government gives critical minerals and rare earths industry \$2 billion funding boost

 **Lanai Scarr** | The West Australian
Mon, 27 September 2021 2:00AM | [Comments](#) | [+](#)

Atlassian co-founder Mike Cannon-Brookes sells economic benefits of green investment with \$1.5b pledge

ABC Illawarra / By Justin Huntsdale

The Market Herald
FIRST WITH THE NEWS THAT MOVES MARKETS

Could vanadium batteries be the missing link to Australia's renewable future?

FINANCIAL REVIEW

Australia urged to add value to critical minerals bonanza

pv magazine

Plans for Australia's first vanadium electrolyte manufacturing facility move forward


FINANCIAL REVIEW

Rio Tinto may eventually process critical minerals, CEO Says

**CORR
CHAMBERS
WESTGARTH**

Vanadium exploration booms in North Queensland with rise of battery storage of renewable energy

ABC North West Qld / By Eric Barker

China's 2022 vanadium demand from VRFB forecast to rise 

Australia: IEA report highlights the increasing role of critical minerals in clean energy transition

Vanadium Tailwinds & Development Strategy

Vanadium Processing Pilot Plant

\$1.265m grant (*Federal Gov*) to
Brisbane Met Labs
Operating by Oct/Nov 2022

[Click here for more Info](#)

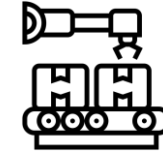
Battery Manufacturing Queensland

\$100m Federal government
commitment to develop battery
manufacturing in QLD

[Click here for more info](#)



CMG is leveraging off the
significant grants and incentives
put in place to develop domestic
production of Vanadium,
particularly for use in Vanadium
Redox Flow Batteries as a grid
scale energy solution



Vanadium Demonstration Plant

\$10m Fully funded (*QLD Gov*) to
build plant in Townsville

[Click here for more info](#)



National Battery Testing Centre (NBTC)

\$50m project and \$15m funded (*QLD Gov*) .
NBTC will look at Vanadium flow battery development &
standards.

Critical Minerals Group is working with NBTC to supply
vanadium battery precursor material.

[Click here for more info](#)



Today

Development

Passionate ESG focused team developing a range of critical mineral projects required to **decarbonise the future.**

Initial focus on developing the **Julia Creek Lindfield Vanadium** project.

Further developing the **Cloncurry Lorena Surrounds & Figtree Creek Copper Gold** projects.



Tomorrow

Production

Producer of **multiple critical mineral deposits.**

Downstream opportunities exploring **vanadium batteries** development and other renewable technologies

Utilising **solar, wind, and hydrogen** to support **mining operations.**

Investing in a range of critical mineral projects to add to CMG's portfolio.

Board & Management



Alan Broome. AM

Chairman

-
- Extensive Mining & Board experience
 - NED of DDH1 (ASX: DDH)
 - Emeritus Chairman of Austmine
 - Chairman of Strategic Minerals Plc (AIM: SML.L)
 - Advisory Council to the CSIRO's Mineral Resources Sector
 - Chairman of New Age Exploration (ASX: NAE)
 - Awarded the Order of Australia (AM) for services to mining



Scott Drelincourt

Managing Director

-
- Geologist and Founding Director
 - Proven executive with 16 years industry experience
 - 6 years experience working on Julia Creek Vanadium projects
 - Extensive resources experience from Greenfields exploration and early stage development through to mining operations



Art Malone

Non-Exec Director

-
- Senior Energy and Resources Executive.
 - 15 years managing large scale projects in the resource sector.
 - Director of CopperCorp Pty Ltd an unlisted Cloncurry Copper Gold exploration project.
 - Managing Director of Peak Helium

Board & Management Cont.



Adam Purse

Chief Financial Officer

-
- Chartered Accountant with over 20 years experience in accounting, finance and mergers and acquisitions.
 - A legal adviser on initial public offerings and ASX matters.
 - Extensive accounting experience at top tier firms including KPMG
 - CFO experience for ASX listed companies including Peter Warren Automotive Holdings Ltd (PWR.ASX) through its IPO in 2015.



Toni Myers

Company Secretary

-
- Toni is an experienced corporate lawyer drawing on over 12 years of practice within the legal industry. Toni has held a broad range of roles from private practice (both in top tier and boutique firms) through to government and inhouse roles.
 - Toni has aided companies by advising on and assisting with various Corps Act, Listing Rules and regulatory compliance for multiple junior exploration companies.



We believe that vanadium has a critical role to play in the future of energy.

Vanadium consumption in batteries is forecasted to grow at an average compound rate of 41% per year from 2022 to 2031.

Source: Guidehouse Insights (2022) White Paper; Vanadium Redox Flow Batteries, Identifying Market Opportunities and Enablers

VRFB battery technology

Vanadium is playing an emerging role large scale energy storage via **Vanadium Redox Flow battery** technology.

18% of world resources

Australia holds **18% of the world's Vanadium resources** but current production levels are negligible.

Source: Outlook for Selected Critical Minerals, Australia 2021, Australian Government, Department of Industry, Science, Energy and Resources

Global recognition

Australia is ranked globally as No. 3 for Vanadium resources.

Source: Outlook for Selected Critical Minerals, Australia 2021, Australian Government, Department of Industry, Science, Energy and Resources

Steady forecast growth

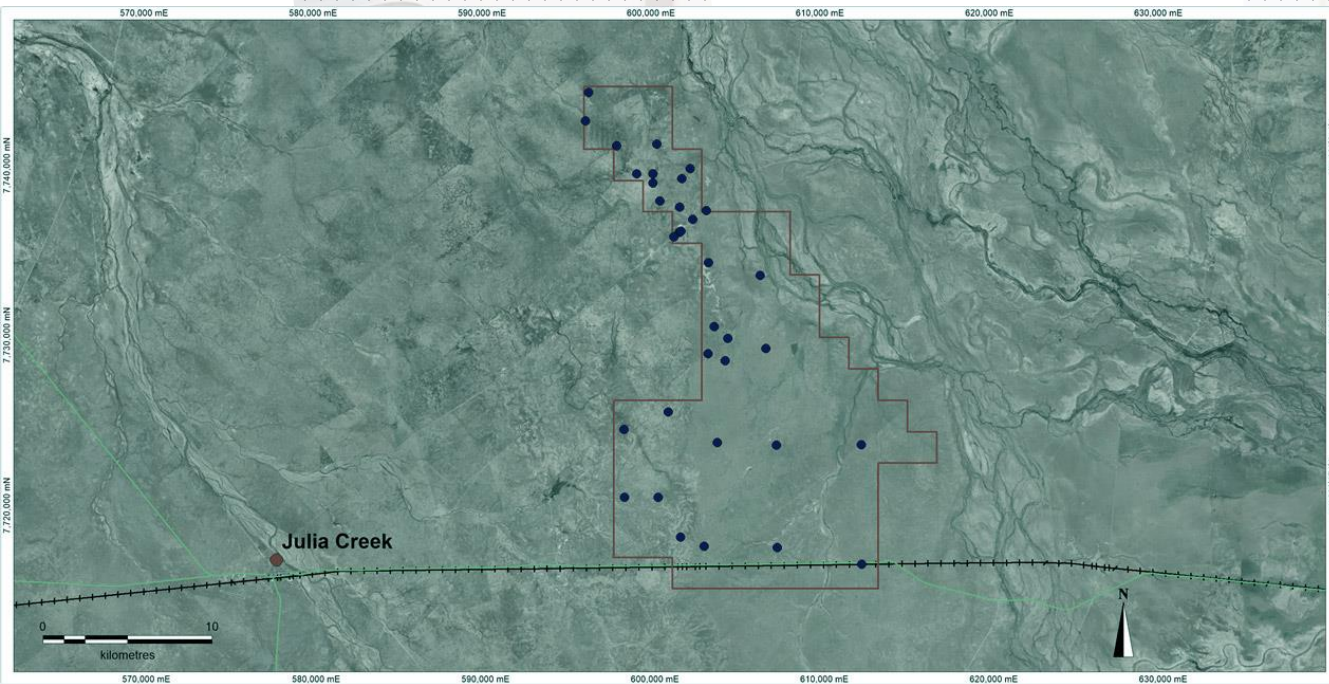
Global Battery Energy Storage System Market size is expected to grow from USD 4.4 billion in 2022 to USD 15.1 billion by 2027, at a CAGR of 27.9%

Source: <https://www.bloomberg.com/press-releases/2022-02-25/battery-energy-storage-system-market-worth-15-1-billion-by-2027-exclusive-report-by-marketsandmarkets>

Lindfield Inferred JORC

VANADIUM PROJECT

The Lindfield Vanadium resource is our flagship project, ready to develop and meet the growing demand for this critical mineral.





Inferred JORC

Inferred JORC resource of 210Mt with a grade of 0.39% V₂O₅. The site has 44 drill holes within the tenement.



Shallow

Shallow resource starting at surface.



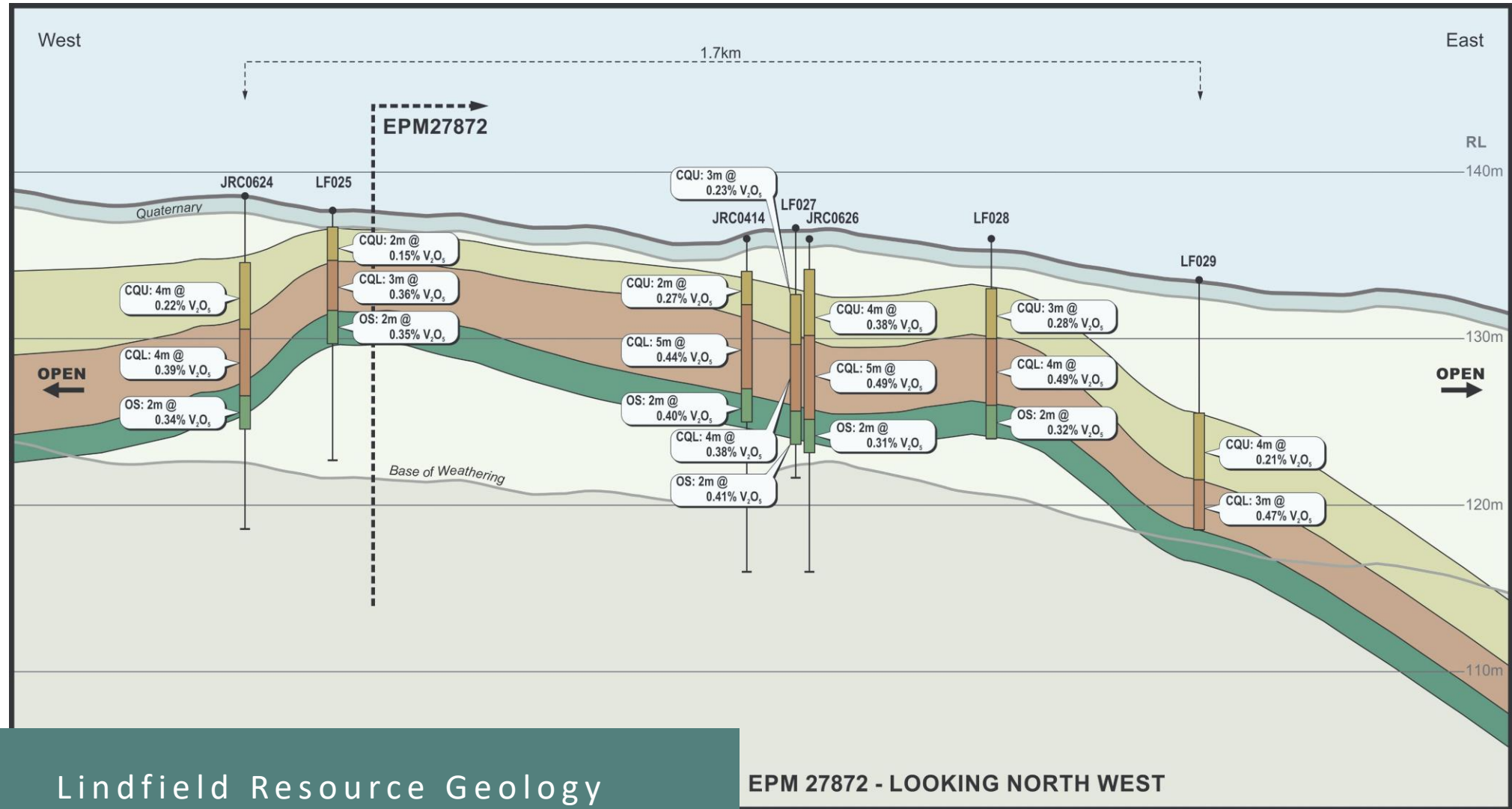
Potential HPA & Mo

Additional potential resources; HPA (High Purity Aluminum) and Mo (Molybdenum) present in drill assays.



Limited contaminants

Limited contaminants (for batteries) such as titanium from hard rock deposits lowering processing costs.



Location & infrastructure

295km² tenement in the North West Mineral Province of Queensland located 30km from Julia Creek.

Surrounded by advanced vanadium projects including Multicom Resources' St Elmo Project (Mining Lease) and QEM Limited.

Power

Mains grid access for power

Rail & Roads

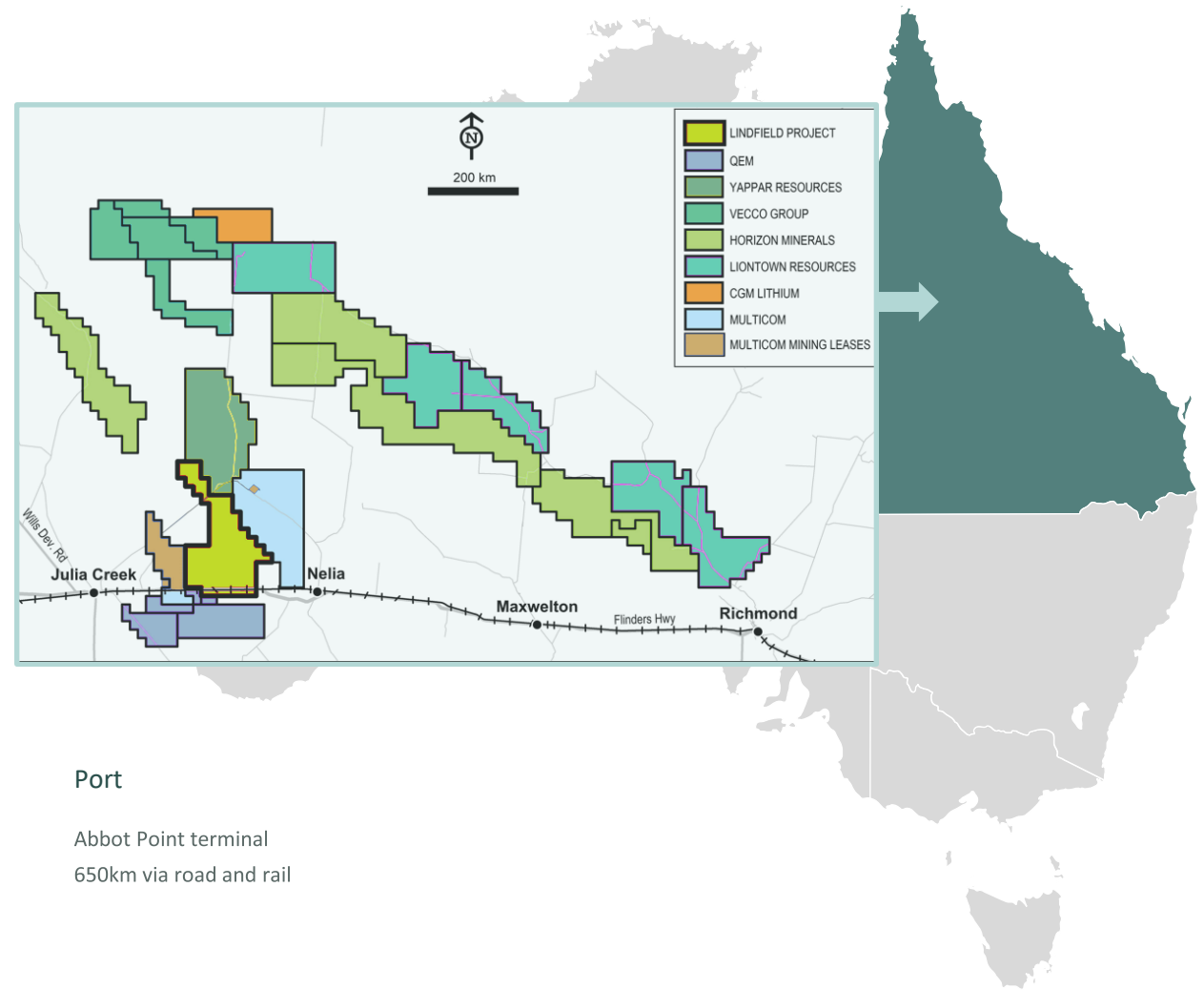
Intersected by rail system and Flinders Hwy

Water

Available surface water

Port

Abbot Point terminal
650km via road and rail

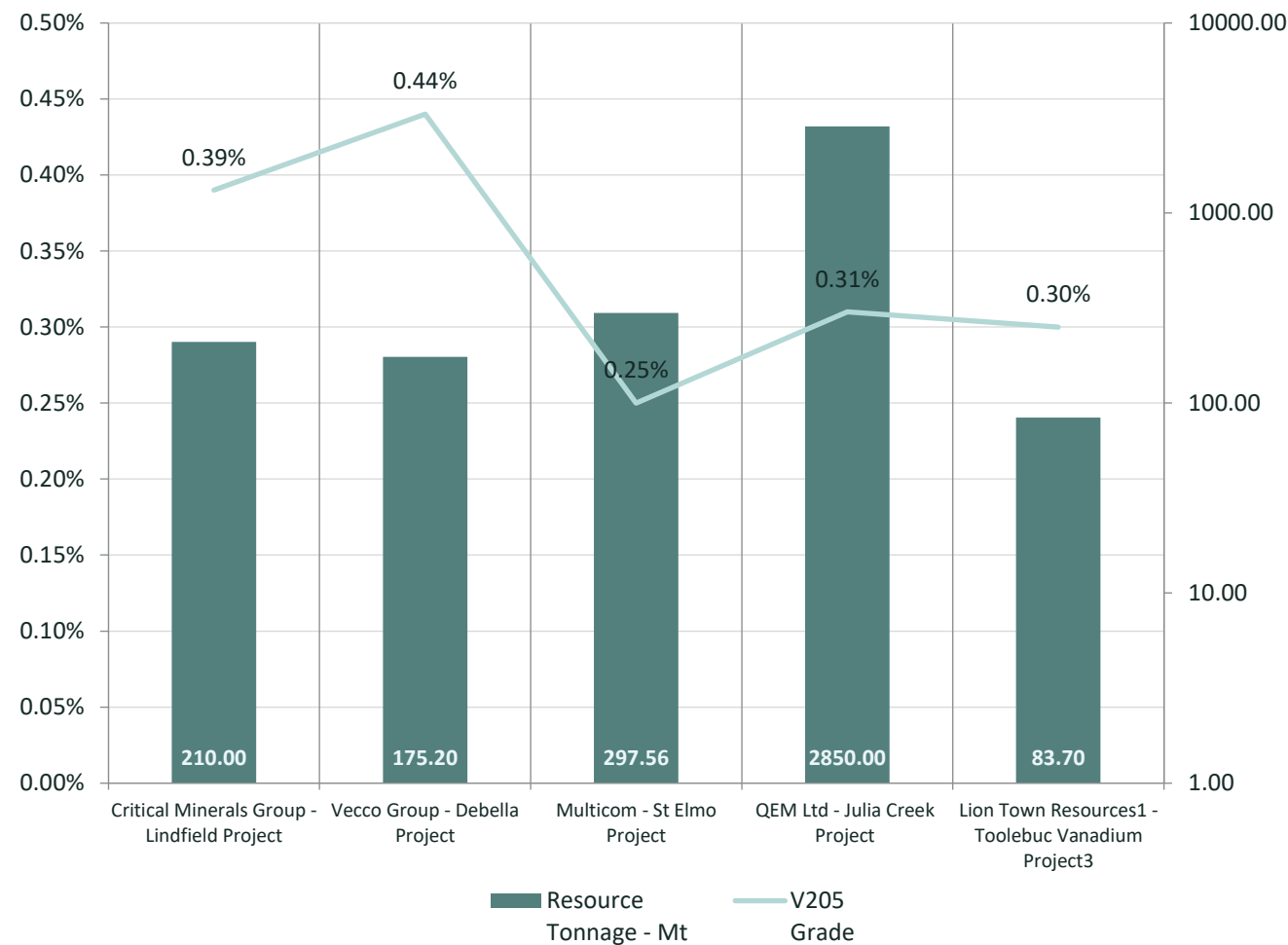


Peer comparison

CMG achieved a 0.39% V²O⁵ on a first pass JORC resource.

Targeted drilling planned for 2022 to increase deposit grade, tonnage and JORC category.

Shallower and or higher grade then peers.



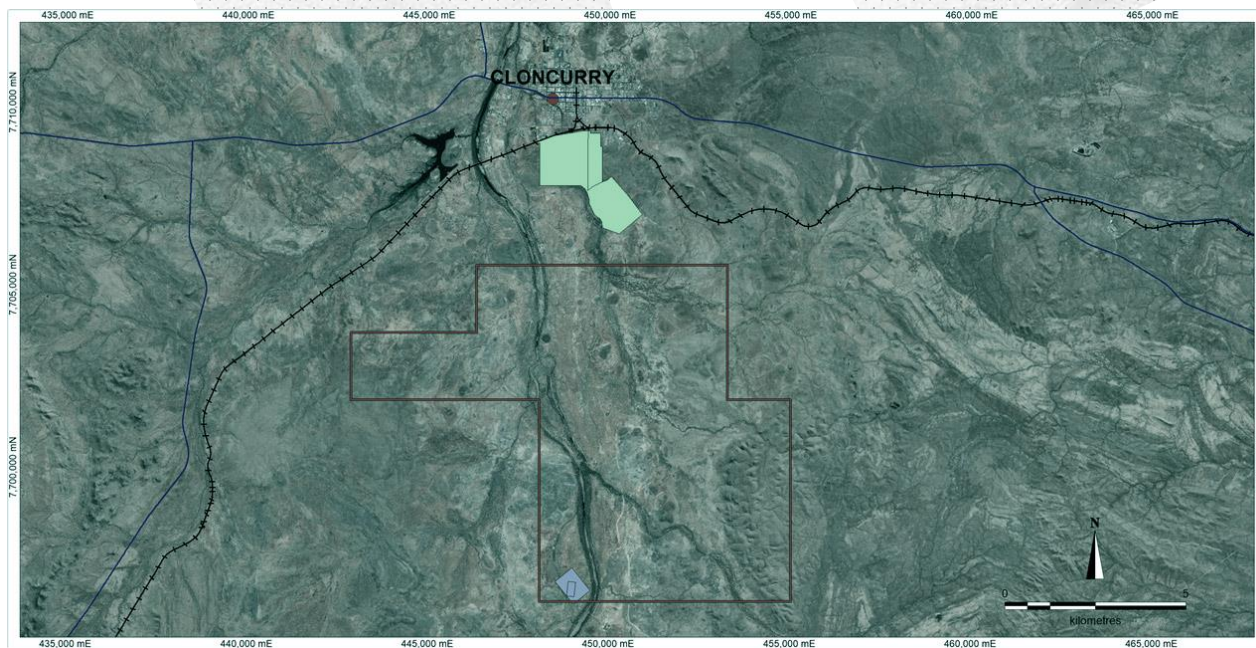
Development timeline

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Figtree Creek

COPPER-GOLD PROJECT

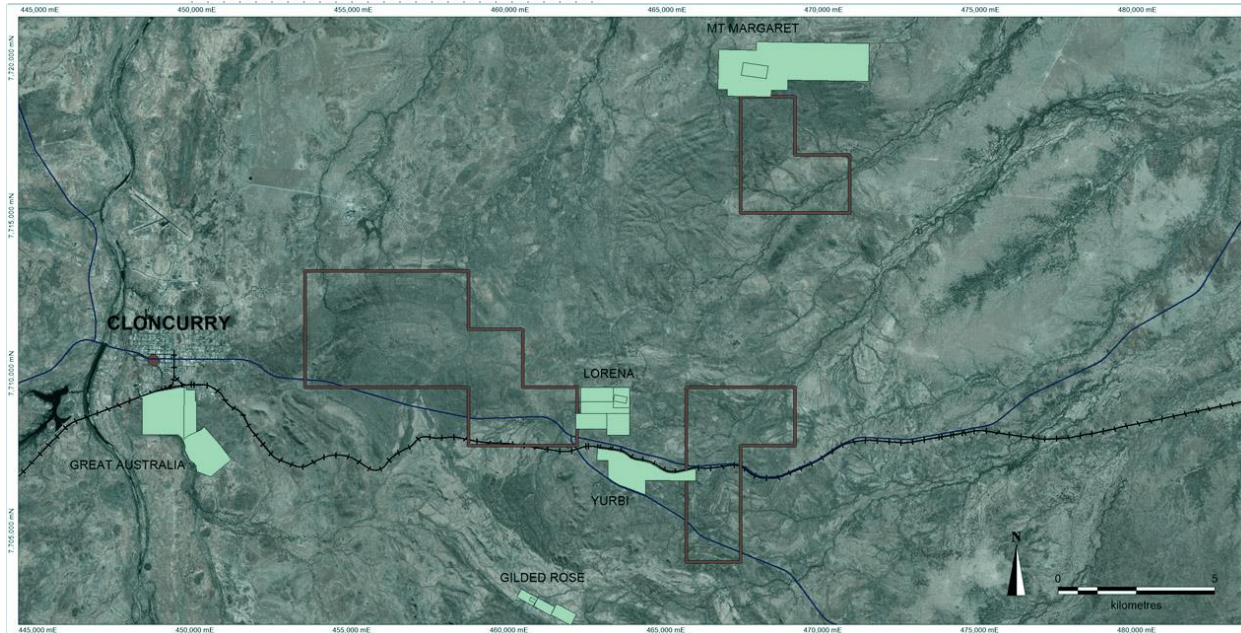
- A **70km² greenfield exploration tenement** containing a historical mining lease.
- Located 2km south of the Great Australia Mine which has a JORC resource of **1.68Mt@ 2.29% Cu** and **0.23g/t Au**.
- Magnetic anomalies in the south being similar to that of the Great Australian Mine.
- Underexplored due to alluvial cover.
- Existing surface samples within the tenement show copper and gold anomalies.



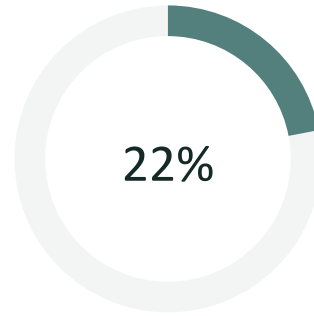
Lorena Surrounds

COPPER-GOLD PROJECT

- A 51km² greenfield exploration tenement situated in the Pumpkin Goldfield.
- Southern tenement 2km from the Lorena gold mine which contains 200,000t @8.4g/t Au, and north east of the Gilded Rose gold deposit of 143,500t@ 4.2g/t Au.
- The northern group is located to the immediate south of Glencore's Mt Margaret copper mine (55Mt @ 0.77% Cu and 0.23g/t Au).
- Existing drilling shows analogy typical to the IOCG (Iron Oxide Copper Gold) mineralisation in the region.

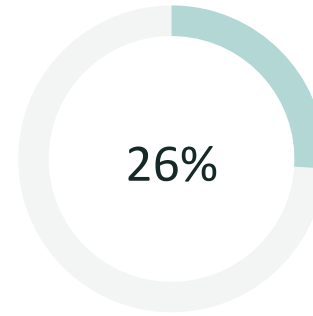


Use of funds



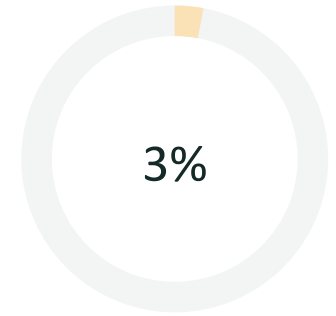
**Drilling program and surface
sampling**

A\$1,155,000



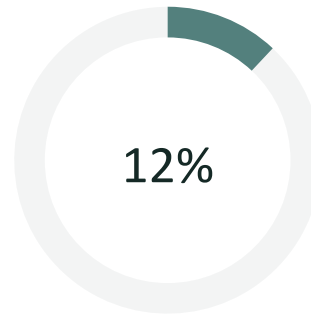
**Engineering and scoping
studies**

A\$1,340,000



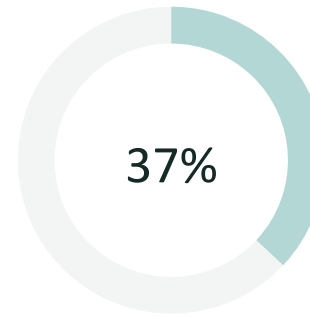
Environmental

A\$135,000



Estimated expenses of the Offer

A\$643,000



Working capital

A\$1,909,000

Offer details

Offer Price per Share	\$ 0.20
New Shares to be issued under the offer	25,000,000
Existing Shares on Issue at date of Prospectus	16,955,000
Conversion of Convertible Notes	2,125,000
Total Share on Issue at date of Prospectus	44,080,000
Total Options on Issue at the date of Prospectus	8,368,333

Gross proceeds from the Offer ¹	\$ 5,000,000
Indicative market capitalisation ² (undiluted)	\$ 8,816,000
Indicative enterprise value (undiluted)	\$ 3,816,000

Dates are estimates and subject to change

Shareholder	# Shares	% Shares
Founders' Shares	10,020,000	22.73%
Management & Board	510,000	1.156%
Seed Shareholder Shares	6,425,000	14.57%
Convertible Note Shares (upon Conversion)	2,125,000	4.82%
New shareholders under the Offer	25,000,000	56.71%
Total number of Shares on issue following the Offer	44,080,000	100.00%

Lodgment of Prospectus (Expected date)	25 th May 2022
Offer Opens (Expected date)	2 nd June 2022
Offer Closes (Expected date)	8 th August 2022
Settlement	15 th August 2022
Shares begin trading on ASX	22 nd August 2022

How to invest

Critical Minerals Group Ltd

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