
PM SESSION

A Pacific/SE Asia flavour

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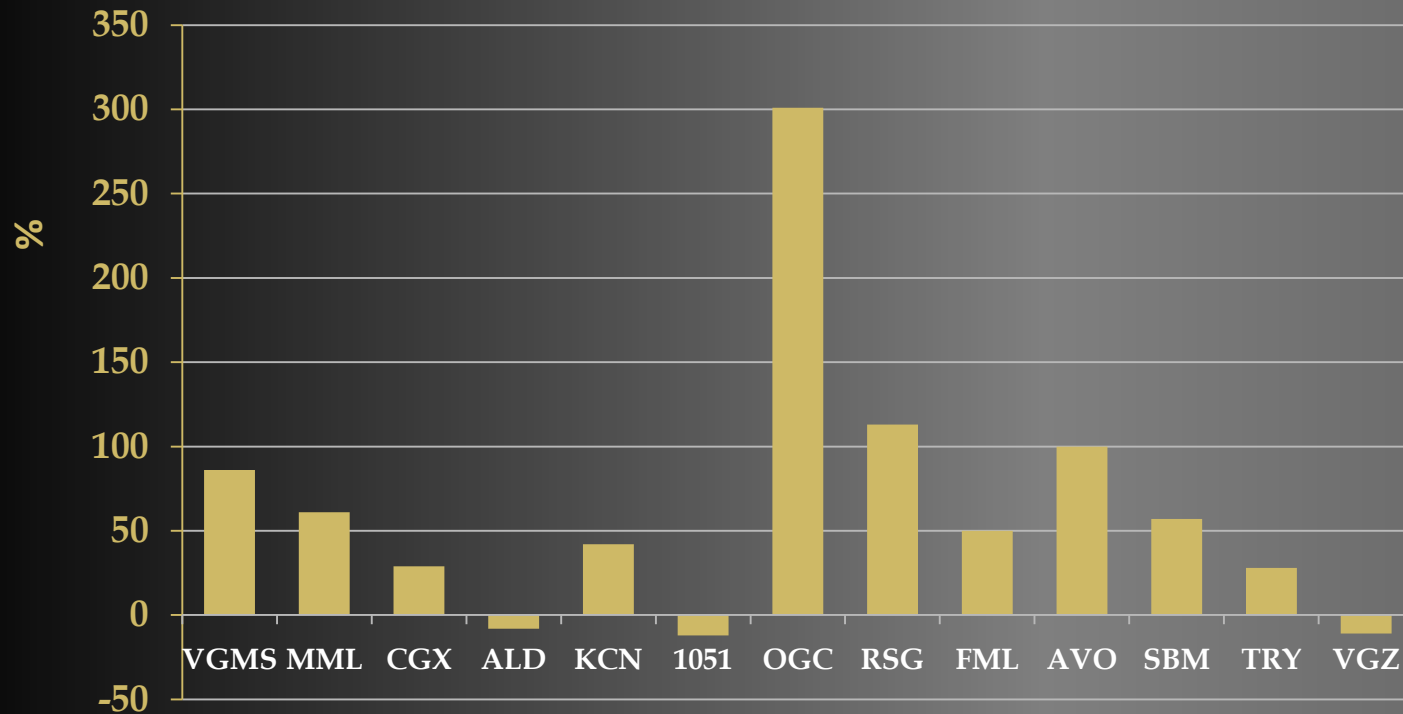


Overview of this afternoon's companies

- ▣ Most in production (60-300 koz/y) with development projects.
- ▣ Two in Development phase
- ▣ Geographic focus mainly SE Asia (Philippines, Indonesia, Thailand) or Western Australia



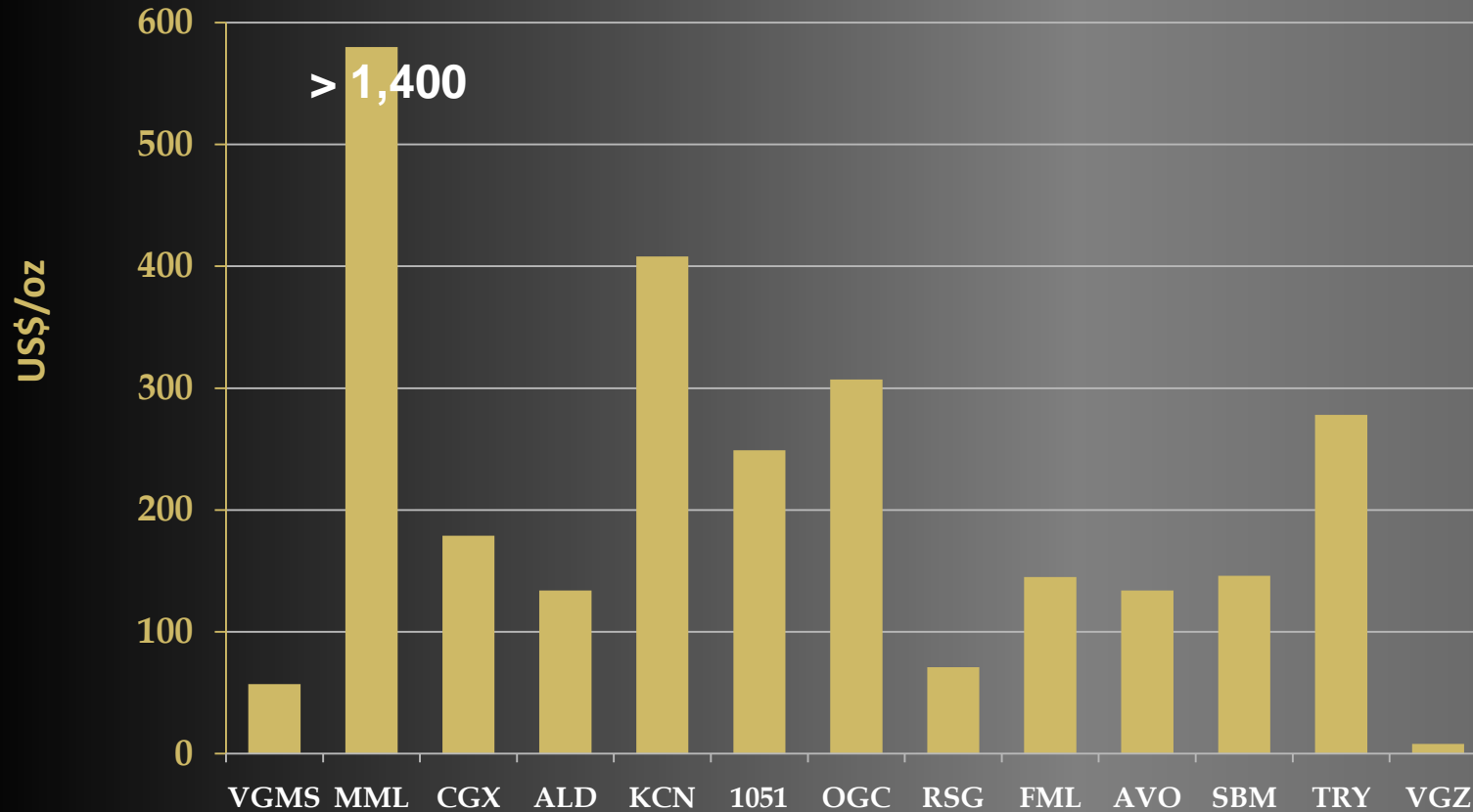
1 year performance



Source: Thomson Reuters



Simple valuations (Mkt cap/M&I resource)



Source: GFMS World Gold

