

GOLDSHORE RESOURCES INC. 公司报告

TSX.V: GSHR | OTC: GSHRF | FRA: 8X00.F

2022年4月

免责声明

Introduction

Goldshore is an emerging junior gold development company, and owns the Moss Lake Gold Project located in Ontario. Wesdome Gold Mines Ltd. is currently a strategic shareholder of Goldshore with an approximate 26% equity position in the Company. Well-financed and supported by an industry-leading management group, board of directors and advisory board, Goldshore is positioned to advance the Moss Lake Gold Project through the next stages of exploration.

Legal Disclaimer

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All information is presented in Canadian dollars unless otherwise stated, as of the date indicated on the face page of this presentation.

Galen McNamara, is the Qualified Person as defined by NI 43-101, and has prepared and approved the technical data and information in this presentation.

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打造加拿大安大略省 下一个 一级资产

一级资产标准:

- 超过1000万盎司黄金资源量(矿产总存量)
- 矿山寿命超过10年(+可能增加)
- > 年均产量超过50万盎司
- > 处在成本曲线的下半部分<\$900



齐心协力的顶级管理团队和董事会,拥有深厚的经验和创造价值的履历



安大略省是全球主要的黄金产区,拥有丰富的采矿历史,也是一个**低风险的管辖区**



在该项目20多公里长的矿产趋势带上分布多个矿床,**拥有400万盎司历史资源的勘探空**间未被开发



规划了100,000米的积极钻探和其他勘探活动



巨大的项目经济效益和未来经济潜力



过去18个月里筹集了\$5000万的资金

^{*}见附录中的免责声明和来源

管理层



首席执行官兼董事

- 在采矿和金属领域拥有超过34年的 经验,包括矿山融资、矿山开发、高 水平运营及并购
- 带领Banro Corp.经历了向私营公司 的运营转型,剥离了某些资产
- 曾任Roxgold (TSX:ROXG)的御首 席执行官,曾任Katanga Mining (TSX:KAT)的高管
- 曾在Kinross Gold (TSX:K)和Co-Steel (TSX:CEI)担任高级管理职务





Peter Flindell

勘探副总裁

- 在矿产勘探和可行性研究方面有35 年的经验
- 带领团队在东南亚、中亚、西非、中非、欧洲和中美洲发现、开发和扩建了多座金矿、铜矿
- 在基本金属和铁矿石项目上也有丰富的经验
- 在纽蒙特矿业公司任职12年,在 Avocet Mining和Signal Delta分 别任职11年和8年

Newmont AVOCET



Marlis Yassin

首席财务官、特许专业会计师、注册会计师

- 超过15年与包括采矿、科技和工业产品 在内的各行各业公司合作的经验
- 曾在多家上市公司担任高级财务管理职务,包括一家大型工业产品公司和中等规模的矿业公司
- 在德勤积累了丰富的经验,主要为自然 资源领域的上市公司提供报告、咨询和 审计服务
- 卑诗省的特许专业会计师、注册会计师, 拥有卑诗大学商学士学位





董事会



战略顾问委员会



项目位置

在安大略省一个具有高度前景的地区 进行全年勘探,项目现场附近有大量 的基础设施

探明和基本探明: 1570万盎司 金品位0.82克/吨 Detour 1 Kirkland Lake Gold 测定和指示: 1470万盎司黄金 金品位0.80克/吨 推断: 110万盎司黄金 金品位0.81克/吨 探明和基本探明: 260万盎司 金品位1.06克/吨 Rainy New Gold 黄金 River 1 测定和指示: 190万盎司黄金 金品位2.57克/吨 推断: 20万盎司黄金 金品位1.77克/吨 探明和基本探明: 730万盎司 Côté 1 金品位1.0克/吨 **IAMGOLD** 黄金 & Sumitomo 测定和指示: 1020万盎司黄金 金品位0.88克/吨 推断: 380万盎司黄金 金品位0.6克/吨 测定和指示: 147万盎司黄金 金品位1.08克/吨 Moss Lake' **Goldshore Resources**

推断: 251万盎司黄金



1来源:公司披露文件

这些信息不一定能说明Moss Lake项目的矿化情况。

*见附录中的免责声明和来源

金品位0.98克/吨

投资理论: 项目经济性

Moss Lake初步经济评估 2020; 修订自2013年-基本情况

所有\$数字为美元

项目投入/参数	结果	意见	Goldshore策略		
可开采的资源量	128,154,775 吨		扩大和提高资源规模和品质		
总包含的黄金投入	3,000,684 盎司	PERMIT	利用钻探结果提高品位或优化边际品位		
总包含的黄金产出	2,439,678 盎司		大幅增加		
矿山寿命 (不包括生产前的四年)	10 年				
矿山寿命期内品位	0.73 克/吨	边际品位0.3克/吨			
总废料	377,595,176 吨				
总OVB	76,867,692 吨				
总转移	582,617,645 吨				
总的剥采比	2.96:1 矿山寿命期内		● 将在未来的研究中进行优化		
日均矿山产量	40,000 吨		● 将在未来的研究中进行优化		
日均加工	15,000 \$1,458	基于已知的冶金测试工作	● 有待优化-将有望大幅提升		
黄金采收率 (区间)	80-85% 进料	Contract of the Contract of th	● 有待优化-有望大幅增加至约95%		
广山寿命期内平均运营现金成本 \$922 每盎司产量			● 将根据新的经济状况进行更新		
"一级资产"状态的框架			将在未来的研究中进行优化,重点是在资源量更新时大幅提高产		

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投资理论: 项目经济性

关键的项目经济产出2020; 修订自2013年-基本情况

关键数据:

可开采的资源量 128,154,775吨 总包含的黄金投入 3,000,684盎司 总包含的黄金产出 2.439.678盎司

当前金价: \$1.950 敏感的黄金价格 \$1,546 \$1,600 \$1,700 \$1,800 \$1,900 \$2,000 \$2,100 \$2,200 \$2,300 \$2,400 \$2,500 \$3.34 \$4.53 \$5.72 \$6.91 \$8.10 \$9.29 \$10.5 \$11.7 \$12.9 \$14.1 \$15.3 亿 亿 亿 亿 亿 亿 亿 亿 亿 亿 亿 税后 (2020) Goldshore估测市值@0.3 \$1.00 \$1.36亿 \$1.72亿 \$2.07 \$2.43 \$2.79 \$3.15_{{Z} \$3.51亿 \$3.87 \$4.23 \$4.59 倍净现值 亿 亿 亿 亿 亿 税前净现值 2020 \$27.41Z \$6.03亿 **\$8.17**亿 \$10.3亿 \$12.5亿 \$14.6亿 \$16.7亿 \$18.9亿 \$21.0亿 \$23.2亿 \$25.3亿 税前净现值 2013 \$3.5317 \$4,4017 \$6.5417 \$8.6817 \$10.917. \$12.377 \$15.1亿 \$17.217 \$19.417 **\$21.5**亿 \$23.717 18% 21% 27% 43% 46% 50% 24% 30% 33% 36% 40% 内部收益率 税后 (2020) 税前内部收益率 2020 24% 28% 32% 52% 56% 60% 64% 48% 税前内部收益率 2013 17% 19% 23% 27% 47% 51% 55%

推测的未来交易区间

可比公司

市值 /归属资源量 加元/盎司黄金当量		\$12	\$21	\$20	\$25	\$54	\$37	\$25	\$44	\$77	\$83	\$171
		Goldshore Resources	Troilus Gold	First Mining	Moneta Porcupine	Mayfair Gold	Treasury Metals	Integra Resources	Perpetua Resources	Maple Gold Mines	Probe Metals	Marathon Gold
旗舰项目		Moss Lake	Troilus	Springpole	Porcupine	Fenn-Gib	Goliath / Goldlund	Delamar	Stibnite	Douay Gold	Val-d"Or East	Valentine Lake
位置		安大略省	魁北克省	」 安大略省	」 安大略省 	安大略省	安大略省	」 」 愛达荷州	□ □ 爱达荷州 □	 魁北克省	 魁北克省	纽芬兰和拉布拉 多省
阶段	7370N	资源量	初步经济评估	」 预可行性研究 	 初步经济评估	资源量	初步经济评估	 初步经济评估	可行性研究	」 」 资源量) 资源量	可行性研究
市值	加元	\$4900万	\$1.68亿	\$1.92亿	\$2.05亿	\$1.17{Z	\$9100万	\$1.13亿	\$3.50{Z	\$1.06{Z	\$2.86亿	\$7.06 _{[Z}
测定和指示	千盎司黄金当 量	1,474	4,960	6,794	3,967	2,078	1,965	3,940	6,628	211	866	3,140
推断	千盎司黄金当 量	2,515	3,150	2,951	4,399	75	528	507	1,338	1,176	2,558	1,000
测定和指示资源品位	黄金当量品位 克/吨	1.08	0.87	1.01	0.89	0.92	1.1	0.71	1.56	1.52	1.85	1.72
推断资源品位	黄金当量品位 克/吨	0.98	0.84	0.58	0.89	0.62	0.72	0.56	1.15	1.03	2.04	1.7

市值截至2022年3月29日

资料来源:公司网站、简报和43-101技术报告

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资本结构

代码

TSX.V: GSHR OTC:GSHRF 8X00.F

普通股总数

1.355亿股* **

当前自由流通

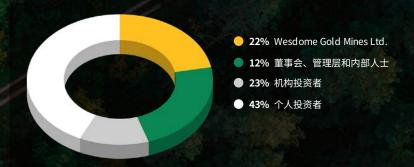
7010万股*

截至: 2022年2月20日

* Goldshore的所有普通股以及向Wesdome发行的Goldshore股票都受到12个月至36个月的转售限制(第一批股票在交易日起四个月后解禁)。

认股权证**	500万份 **
期权**	880万份 已授予 (3年的行权计划)
现金 (截至2022年4月6日)	\$2210万

股东构成



^{**} 基于2022年3月16日完成\$1000万融资的预估值。

Moss Lake拥有398万盎司的历史 黄金资源量,拥有大量的基础设施, 是一个地区规模的采矿营地*

11号公路/Yonge Street – Trans-Canada高速公路

/ 公路、铁路、人员、承包商、水、天然气供应、政府

4 电力-项目现场电费\$0.10/千瓦时

IRIS LAKE 指示: 138万盎司、1.1克/吨 推断: 175万盎司、1.1克/吨 **HAMLIN LAKE** EAST COLDSTREAM 指示: 9万盎司、金品位0.85克/吨 推断: 76万盎司、0.78克/吨 已知的矿化趋势带 10公里

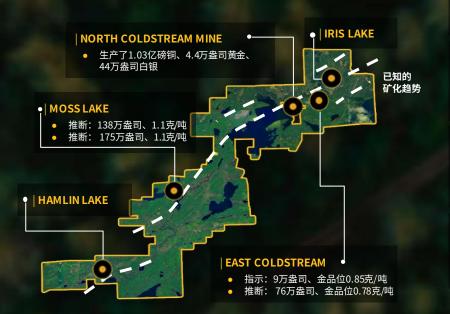
NORTH COLDSTREAM MINE

44万盎司白银

• 生产了1.03亿磅铜、4.4万盎司黄金、

*见附录中的免责声明和来源

Moss Lake历史钻孔亮点¹



Moss Lake矿床*

- 1983年至2017年期间,376个钻孔共钻探了108,000米
- ◆ 金品位1.44克/吨的72.8米矿段89-172 ◆ 金品位1.30克/吨的178.6米矿段87-100
- 金品位1.19克/吨的163.1米矿段87-101

Iris Lake前景区*

- 2011年进行了5600米的侦察钻探
- 金品位11.4克/吨的7.9米矿段Ⅱ-11-02● 金品位1.2
- ◆ 金品位254克/吨的0.5米矿段∥-11-12

金品位1.28克/吨的29.7米矿段||-11-20

East Coldstream矿床*

- 1988年至2017年期间139个钻孔钻探了38,000米
- 金品位4.86克/吨的27.3米矿段c-10-15
- 金品位1.12克/吨的111.3米矿段c-10-16

Hamlin Lake[™]

- 2008年至2011年期间26个钻孔钻探了9000米
- 金品位0.90克/吨、铜0.35%的150.7米矿段 HAM-11-74

*见附录中的免责声明和来源

1钻孔的结果基于0.3克/吨的黄金边际品位,可能包括最多达10米的内部稀释。 此处披露的与钻探结果有关的数据均为历史数据。本公司或合资格人士尚未核实这些数据,因 此投资者不应过分依赖这些数据。本公司未来的勘探工作将包括对这些数据的验证。 第12页

在早期的钻孔中 发现了巨大的横 向资源扩展潜力

400mRL -从103.3米钻获金品位6.30克/吨的58.85米矿段。 其中包括: - 从103.3米钻获金品位61.1克/吨的4.35米矿段 - 从139.0米钻获金品位8.76克/吨的9.30米矿段 从359.0米钻获金品位3.33克/吨19.0米 金品位超过1.0克/吨的矿段 金品位在0.5-1.0克/吨之间的矿段 金品位在0.3-0.5克/吨之间的矿段 历史钻孔 2013年黄金模型 (金品位> 0.3克/吨) 100米 报告了1个未切割的检测矿段

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关于MOSS LAKE

Moss Lake岩芯棚和营地









环境、社会、治理(ESG)



建立良好关系

与原住民代表持续沟通和公开对话,建立支持性和富有成效的关系。 期待2022年第二季度签署勘探协议



支持当地社区

注重优先考虑本地企业,并在可能的情况下,优先考虑原住民民企业 和关系。

- 一只专注参与社区事务的团队
- 物流团队完全由原住民社区成员组成



环境足迹

与原住民社区相关顾问开始进行环境基线研究。



地球物理航空VTEM勘测



服务:

直升飞机VTEM/磁力勘测



3,400

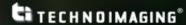
航线公里,勘测整个矿 区土地



在Moss Lake前景区上方航 线**间隔50米**



整个项目区上方航线间隔 100米



服务:

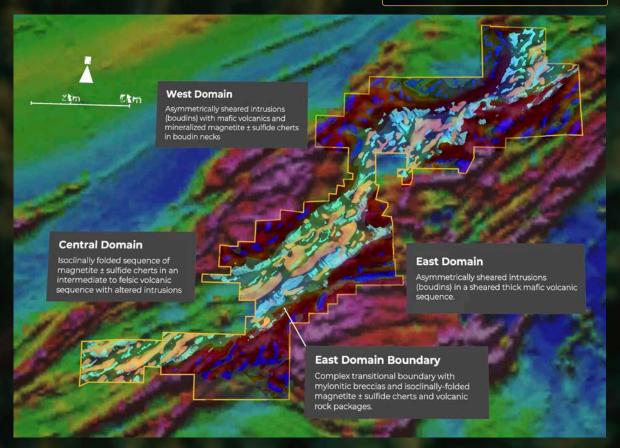
处理勘测数据并生成三维靶区模 型

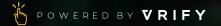


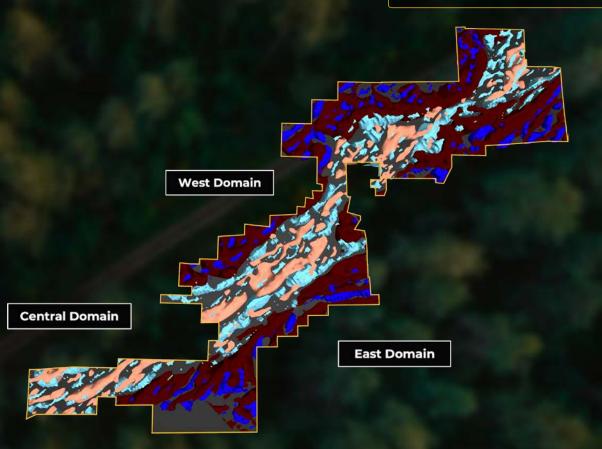
深度穿透和

精确的三维测量的**优势**



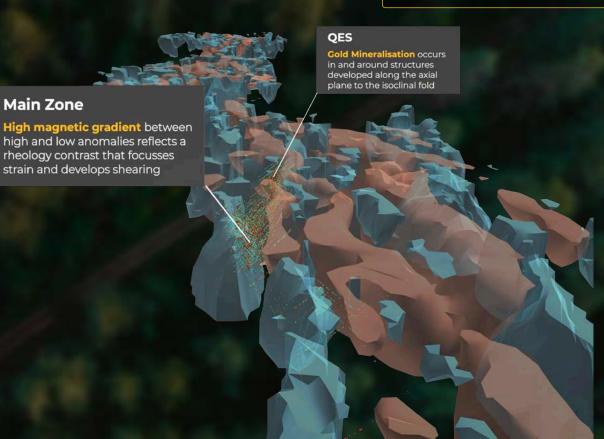


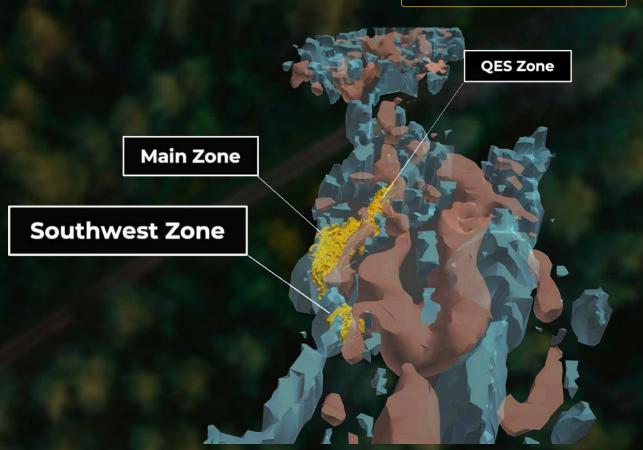














Moss Lake各靶区 的走向长度从2.5公 里扩大到11公里

Chargeability anomalies caused by bedrock pyrite mineralization hint at the fertility of structural zones between high and low magnetic bodies Chargeability anomalies caused by muskeg and lake sediments have been removed but also mask bedrock pyrite mineralization

关于MOSS LAKE

POWERED BY VRIFY

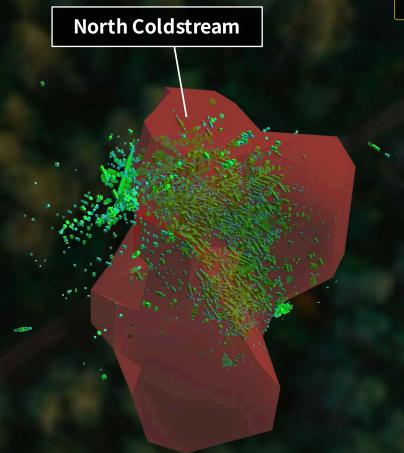
最近的VTEM勘查显示了29个未钻探过的高度优先靶区,并且扩大了前景区范围



关于MOSS LAKE

最近的VTEM勘查显示了29个未钻探过的高度优先靶区,并且扩大了前景区范围

Moss Lake各靶区 的走向长度从2.5公 里扩大到11公里





20世纪40年代和50年代开发的地下矿井 1957年至1967年间开采 开采了270万吨矿化物



历史上生产了 **4.4万盎司黄金**



_{历史上生产了} **44万盎司白银**

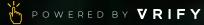


历史上生产了 **1.02亿磅铜**



历史钻探结果显示 **钴品位0.2-0.5%**

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Moss Lake各靶区 的走向长度从2.5公 里扩大到11公里

Moss Lake Targets East Coldstream Targets Au 黄金潜力

Ag 白银潜力 Cu

Co

Goldshore / Moss Lake工作安排表



*资源量估测、PEA和PFS取决于钻探和其他基 探活动的结果。

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Goldshore的机遇



强大的管理层、技术团队和董事会,有深厚的经验和创造价值的履历



安大略省的低风险管辖区,有丰富的采矿历史



钻探重点是沿着20多公里的矿产趋势带上的**三个关键区** 域



航空地球物理勘测显示了**多个铜和黄金靶区**。未来还有 发现铜和钴的潜力。



目标是更新**数百万盎司黄金资源量**,且有显著的增长潜力



有吸引力的经济效益和估值,股份结构紧凑。对 金价上涨有显著的杠杆作用

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Goldshore Resources Inc.
TSX.V:GSHR | OTC:GSHRF | 8X00.F

欲了解更多信息,请联系

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活动预告

17-18	VRIC – Cambridge House
5月	加拿大卑诗省温哥华
7-8	121 Investment Conference 美国纽约州纽约市





PDAC Mining Conference 加拿大安大略省多伦多











前瞻性声明

Forward-Looking Information

This presentation contains "forward looking statements" regarding the Company within the meaning of applicable securities legislation including statements as to future events, results and plans. Forward-looking statements are sometimes but not always identified by such words as "targeted", "can", "will", "anticipates", "projects", "expects" "intends", "likely", "plans", "should", "could" or "may" or grammatical variations thereof. These include, without limitation, statements with respect to: the Company's use of available funds mining operations, anticipated mineral recoveries, projected quantities of future mineral production interpretation of drill results and other technical data; anticipated development, expansion and exploration activities, viability of the Company's projects and properties; completion of proposed transactions and financings, and the terms of such transactions and financings; the acquisition of additional property rights, possible events, conditions or financial performance that is based on assumptions about future economic conditions and courses of action; the strategic plans, timing, costs and expectations for the Company's future exploration on its properties; information with respect to grades from sampling results and drilling results and the accessibility of future exploration activities at the Company's properties. These forward-looking statements reflect the Company's current beliefs and are based on information currently available to the Company and assumptions the Company believes are reasonable. The Company has made various assumptions, including, among others, that: the historical information related to the Company's properties is reliable; the Company's operations are not disrupted or delayed by unusual geological or technical problems; the Company has the ability to explore and develop the Company's properties; the Company will be able to raise any necessary additional capital on reasonable terms to execute its business plan; the Company's current corporate activities will proceed as expected; general business and economic conditions will not change in a material adverse manner, budgeted costs and expenditures are and will continue to be accurate, and the effects of by COVID-19 on the operations of the Company will remain consistent with the Company's expectations.

Actual results and developments may differ materially from results and developments discussed in the forwardlooking statements as they are subject to a number of significant risks and uncertainties, including: public health threats; fluctuations in metals prices, price of consumed commodities and currency markets; future profitability of mining operations; access to personnel; results of exploration and development activities, accuracy of technical information; risks related to ownership of properties; risks related to mining operations, risks related to mineral resource figures being estimates based on interpretations and assumptions which may result in less mineral production under actual conditions than is currently anticipated; the interpretation of drilling results and other geological data; receipt maintenance and security of permits and mineral property titles, environmental and other regulatory risks; changes in operating expenses; changes in general market and industry conditions; changes in legal or regulatory requirements; and other risk factors set out in the Company's public disclosure obcuments. Although the Company has attempted to identify significant risks and uncertainties that could cause actual results to differ materially, there may be other risks that cause results not to be as anticipated, estimated or intended. Certain of these risks and uncertainties are beyond the Company's control Consequently, all of the forward looking statements are qualified by these cautionary statements, and there can be no assurances that the actual results or developments will be realized or, even if substantially realized, that they will have the expected consequences or benefits to, or effect on. the Company.

The information contained in this presentation is derived from management of the Company and otherwise from publicly available information and does not purport to contain all of the information that an investor may desire to have in evaluating the Company. The information has not been independently verified may grove to be imprecise, and is subject to material updating, revision and further amendment. While management is not aware of any misstatements regarding any industry data presented herein no representation or warranty, express or implied, is made or given by or on behalf of the Company as to the accuracy, completeness or fairness of the information or opinions contained in this presentation and no responsibility or liability is accepted by any person for such information or opinions. The forward-looking statements and information in this presentation speak only as of the date of this presentation and the Company assumes no obligation to update or revise such information to reflect new events or circumstances, except as may be required by applicable law. Although the Company believes that the expectations reflected in the forward-boking statements and information are reasonable, there can be no assurance that such expectations will prove to be correct. Because of the risks, uncertainties and assumptions contained herein, prospective investors should not readforward-boking information as guarantees of future performance or results and should not place undue reliance on forward-boking information. Nothing in this presentation is, or should be relied upon as, a promise or representation as to the future.

To the extent any forward-looking statement in this presentation constitutes "future-oriented financial information" or "financial outlooks" within the meaning of applicable Canadian securities laws, such information is being provided to demonstrate the anticipated market penetration and the reader is cautioned that this information may not be appropriate for any other purpose and the reader should not place undue reliance on such future-oriented financial information and financial outlooks. Future-oriented financial information and financial outlooks, as with forward-looking statements generally, are, without limitation, based on the assumptions and subject to the risks set out above. The Company's actual financial position and results of operations may differ materially from management's current expectations and, as a result, the Company's revenue and expenses. The Company's financial projections were not prepared with a view toward compliance with published guidelines of international Financial Reporting Standards and have not been examined, reviewed or compiled by the Company's accountants or auditors. The Company's financial projections represent management's estimates as of the dates indicated thereon.

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免责声明和来源

* Moss Lake Historical Mineral Resource & Historical Production

The reader is cautioned that the referenced "historical mineral resource" estimates are considered historical in nature and as such is based on prior data and reports prepared by previous property owners. A qualified person has not done sufficient work to classify the historical estimates as current resources and Goldshore is not treating the historical estimates as current resources. Significant data compilation, re-drilling, re-sampling and data verification may be required by a qualified person before the historical estimate on the Project can be classified as a current resource. There can be no assurance that any of the historical mineral resources, in whole or in part, will ever become economically viable. In addition, mineral resources are not mineral reserves and do not have demonstrated economic viability. Even if classified as a current resource, there is no certainty as to whether further exploration will result in any inferred mineral resources being upgraded to an indicated or measured mineral resource category.

Sources:

- Poirier, S., Patrick, G.A., Richard, P.L., and Palich, J., 2013. Technical Report and Preliminary Economic Assessment for the Moss Lake Project, 43-101 technical report prepared for Moss Lake Gold Mines Ltd.
- McCracken, T., 2011. Technical Report and Resource Estimate on the Osmani Gold Deposit, Coldstream Property, Northwestern Ontario, 43-101 technical report prepared for Foundation Resources Inc. and Alto Ventures Ltd.
- Schlanka, R., 1969. Copper, Nickel, Lead and Zinc Deposits of Ontario, Mineral Resources Circular No. 12, Ontario Geological Survey, pp. 314-316.

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该项目的历史 矿产资源量和 产量

	 指示资源量			- - 推断资源量 ^{历史}			
矿床	吨	黄金克/吨	金盎司	吨	黄金克/吨	金盎司	
Moss Lake矿床* (2013	3年的资源量估测)						
露天矿潜力	39,795,000	1.1	1,377,300	48,904,000	1.0	1,616,300	
地下开采潜力				1,461,100	2.9	135,400	
Moss Lake汇总	39,795,000 1.1		1,377,300 50,364,000		1.1	1,751,600	
East Coldstream矿房	₹* (2011年资源量位	5测)					
East Coldstream汇总	3,516,700	0.85	96,400	30,533,000	0.78	763,276	
加起来汇总	43,311,700	1.08	1,473,700	80,897,000	0.98	2,514,876	
项目	吨	铜% 黄金〕/吨		铜磅	金盎司	银盎司	
North Coldstream矿	床* (1902-1967)						
历史产量	2,700,0000	1.89 0.56	5.59	102,000,000	44,000	440,000	

Moss Lake矿床的资源量估测是基于露天矿0.5克/吨的黄金边际品位和地下资源2.0克/吨的黄金边际品位

East Coldstream矿床的资源量估测是基于0.4克/吨的黄金边际品位

*见附录中的免责声明和来源

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Moss Lake 收购条款



收购条款:

- 交易完成时现金支付\$1250万(已完成)
- 价值\$1950万的股份或融资后Goldshore已发行股份的30%,以较高者为准(已完成)
- 在交易结束后的一年内,购买价值\$500万Goldshore的股票
- 在完成初步经济评估、预可行性研究或在交易结束后2.5年内,购买价值\$750万的Goldshore股票
- 可行性研究完成后或交易结束后4年内,购买价值\$750万的 Goldshore的股票

净熔炼所得权利金(NSR):

• 授予Wesdome 1.0%的净熔炼所得权利金,并规定自交易完成后4 年内回购*

^{*} Goldshore可以在36个月内以\$300万现金加\$200万Goldshore股票购回1%的NSR。在36个月和48个月之间,Goldshore可以以\$550万现金加\$200万Goldshore股票回购1%的NSR。

在早期的钻孔中 发现了 巨大的 横向资源

扩展潜力



在早期的钻孔中 发现了 巨大的 横向资源 扩展潜力

