



PEAK

ASSET MANAGEMENT

Our Corporate Offering

Partnering with You

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ABOUT PEAK

Peak is a boutique investment management and corporate advisory firm specialising in servicing private and public small to medium companies by market capitalisation

We pride ourselves on providing equity capital market services to industry leading companies across a broad range of sectors

We've listed some of the best performing businesses on the ASX and Canadian stock exchanges supported by our 36,000+ Institutional, Family Office, Angel and High Net Worth investor community

In everything we do, we are co-investing right alongside you

CAPITAL RAISED TO DATE

\$1.0B+

We have taken 18 companies Public and financed private and listed companies through our investor community

We leverage our networks to provide smart capital to our clients



"From Series A to listing Peak continues to support us with their knowledge and understanding of the space we operate in"

Bridget Loudon | CEO & Founder, Expert360



ADVISORY TEAM



NIV DAGAN
Executive Director

Prior to founding Peak in 2013, Niv headed up HC Securities; spent three years growing its capital markets division and worked on the wholesale desk at Macquarie Bank, servicing a wide range of institutional, intermediary and offshore clients. Niv takes an active approach in managing client funds and is passionate about backing strong management teams that deliver shareholder value. Niv's focus is identifying great companies that are traditionally not offered to retail & institutional investors and sees a large opportunity in assisting Australian companies expand their presence in the North American markets. He currently serves as a Non-Executive Director of Terra Critical Minerals Ltd (ASX:T92) and Noviqtech Ltd (ASX:NVQ).



ALI UKANI
Partner

Ali holds a Master's Degree in Environment from the University of Melbourne. He has a prior Master's Degree in Business Management, Bachelor's Degree in Financial Markets, and is a Certified Associate in Project Management (CAPM-PMI). He has previously worked on Corporate Strategy and Business Development projects and is enthusiastic about a business and finance centric approach towards sustainability. As part of the Peak Team, Ali is responsible for driving Peak Ethical, which focuses on facilitating ESG-related investment opportunities.



LIAM RIBUSH
Investment Analyst

Liam holds a Bachelor of Business with a double major in Economics and Finance. At Peak, he supports the firm by preparing company research reports, managing internal operations, and identifying investment opportunities across public and private markets. He brings a diverse background in market research, education, and sales management, with a strong interest in sustainable innovation and emerging technologies.



SHAKHRUZ RAKHMATULLAEV
Junior Analyst

Shakhruz is completing a Bachelor of Commerce in Finance and Bachelor of Science in Chemistry at Monash University. At Peak, he works across equity research and corporate advisory, analysing ASX-listed companies across biotechnology, technology and resources. He brings broader experience in portfolio risk, thematic and sentiment analysis, and financial technology, with a strong interest in financial markets, AI and emerging technologies.

CORPORATE OFFERING

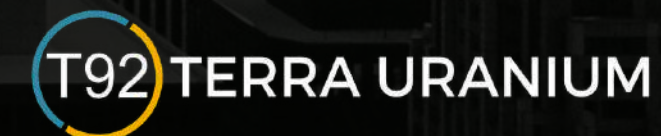
We utilise our extensive listed company experience to provide end-to-end capital raising and corporate advisory services:

- Placements, IPO's, Private capital raises to sophisticated, strategic and institutional investors
- Ongoing corporate and strategic advice
- Corporate restructuring and balance sheet financings:
 - Through our network we assist with securing assets and cheaper sources of funding
- On market investor communication:
 - Assisting with aftermarket support
 - Enhancing share price discovery
 - Investor relations

"Peak Asset were the key to the ASX listing of Terra Uranium, both during the IPO process and with post listing support. The company had a maximum raise allowed at IPO of \$7.5m and was offered about \$50m. We have consistently traded near to or above our list price with significant follow-on support for further raises as exploration results dictated"



Andrew J Vigar | Exec Chairman, Terra Uranium



OUR INVESTMENT APPROACH

PEAK

Given our co-invest mandate, we pursue corporate opportunities that we only invest in, once qualified through strict due-diligence. Aligning us with the Investor and Corporates



INVESTORS

Peak de-risks traditional high-risk investments and seek highly scalable and growing companies. Our due-diligence usually spans 4-6 months, with an investment decision made only when we are comfortable to put our own capital in right alongside you

CORPORATES

Peak works closely with you across the corporate lifecycle. In addition to raising capital, we help strategically by facilitating M&A's and JV's, as well as providing strategic advisory and on-market support

"Peak was instrumental in helping us raise the capital necessary for Sweet Earth Holdings Corporation. The entire Peak team were constructive in their guidance and due diligence"



Peter Espig | CEO, Sweet Earth



Our co-investment model is part of our unique approach which separates us from the crowd

2025 IN REVIEW

50+ TRANSACTIONS

\$100M+ FUNDS ON HIN

1,250+ ACTIVE TRADING ACCOUNTS

36,000+ OVERALL INVESTOR REACH

CHANNEL PARTNERS



AND MANY MORE...

The background of the slide features a silhouette of two hikers on a mountain peak. One hiker is standing on the peak, while the other is climbing up. The sun is rising behind the hiker on the peak, creating a bright glow and lens flare. The sky is dark with some clouds. There are also some teal-colored geometric shapes in the top right and bottom right corners.

WE SEEK TO **DELIVER VALUE**
OVER THE LONG-TERM BY
ALIGNING OUR INTERESTS
AND CAPITAL WITH YOURS

**We do this by finding the most attractive and
exclusive corporate opportunities from around
the globe**

RESEARCH AND DESK NOTES

PEAK
EQUITY RESEARCH

Vital Metals Limited (ASX:VML)

30 April 2026 - Initiation of Coverage

Market Data (A\$) - As at 30 April 2026

Current Price	\$0.15
Target Price	\$0.22
52-week Range	\$0.030-\$0.410
Market Cap	\$37.18M
EV	\$33.06M
Cash	\$7.18M
Ordinary Shares	-247.88M
Unlisted Options (Various prices)	14.88M

12-Month Share Price Performance (A\$)

Company Description

Vital Metals is an Australian critical minerals company focused on the exploration and development of rare earth elements and niobium. Its flagship project is the Nechalacho Project in Canada's Northwest Territories, strategically positioned within the emerging North American critical minerals supply chain. The project hosts the large-scale Tardiff deposit, containing significant NdPr and niobium mineralisation with strong expansion potential. The company is advancing a focused strategy of resource growth, district-scale exploration and project development towards a Pre-Feasibility Study expected by February 2027.

Top 10 Shareholders

Strategic Resources Ltd	19.52%
Shenghe Resources (Singapore)	8.04%
BNP Paribas Noms Pty Ltd	7.13%
Citicorp Nominees Pty Limited	4.48%
HSBC Custody Nominees	3.06%
Kingslane Pty Ltd	1.99%
BNP Paribas Nominees Pty Ltd	1.71%
Tisia Nominees Pty Ltd	1.37%
Tunif Chan SI A/C	1.27%
HSBC Custody Nominees	1.26%
Top 20 Shareholders	56.46%

Peak Asset Management Analyst:

Liam Ribust
lir@peakassetmanagement.com.au

Key Highlights

- Nechalacho Project Mineral Resource Estimate (MRE) of 192.7Mt @ 1.3% total rare earth oxide (TREO) and 0.3% niobium pentoxide (Nb₂O₅), containing 636kt neodymium-praseodymium (NdPr) and 578kt Nb₂O₅.
- July 2025 Scoping Study delivered a post-tax NPV₅ of US\$445m and 25.5% IRR.
- AS12.47m raised in H2 CY2025 to fully fund Tardiff PFS through to completion by Feb 2027.
- Active exploration and infill drilling targeting resource growth and MRE confidence update.
- Multiple high-grade targets outside the current Tardiff MRE providing district-scale upside

District-scale NdPr and Nb System Emerging at Tardiff

Vital Metals' (ASX: VML) offers exposure to a large, high-grade rare earth and niobium system at Nechalacho. Tardiff deposit in Canada's Northwest Territories. It is underpinned by a JORC-compliant resource of 192.7Mt at 1.3% TREO and 0.30% Nb₂O₅. Recent overlimit assays from March 2026 include a peak 29.2% TREO at target 1029A and HREO enrichment up to 86.1% at its Cressy Ridge target. Alongside six new regional targets identified outside the Tardiff MRE, this indicates that Nechalacho is emerging as a district-scale critical minerals system rather than a single deposit.

Robust Starter-Pit Economics and Fully Funded to PFS

The July 2025 Scoping Study outlined robust economics, with a post-tax NPV₅ of US\$445m and a 25.5% IRR based on a conservative starter-pit scenario drawing on only ~15% of the resource and assigning no value to niobium, zircon or broader district growth. VML's AS12.47m capital raise, completed in H2 CY2025, funds delivery of a Tardiff Pre-Feasibility Study targeted for February 2027, alongside value-accretive workstreams including metallurgical optimisation and infill drilling.

De-Risking and Resource Growth Over the Next 12-18 Months

VML is entering a catalyst-rich period following completion of its 2026 winter drilling program. At Tardiff, 17 infill holes were drilled for 1,824 metres to support resource conversion ahead of the PFS. Three exploration holes for 279 metres were also completed at R Zone, S Zone and Cressy Ridge, the first subsurface test of these high-grade targets. Assays are pending, with further drilling to be assessed ahead of Winter 2027. Metallurgical optimisation is also focused on unlocking value from niobium and zircon, currently excluded from the Scoping Study, alongside improved heavy rare earth recoveries, representing direct upside to project NPV and offtake terms.

Early Cash Flow and Tier-1 Jurisdiction Support Development

This near-term cash flow pathway supports the broader development of Nechalacho, one of the few advanced NdPr-rich rare earth projects in a Tier-1 jurisdiction. It is positioned to benefit from accelerating Western critical minerals policy, including the US Department of Defense's US\$110/kg NdPr floor price and supportive Canadian federal and territorial initiatives aimed at securing non-Chinese magnet feedstock, such as the recently announced \$25 billion Canada Strong Fund, a national sovereign wealth fund to co-invest in priority sectors including critical minerals.

Valuation Range: A\$0.22 - A\$0.38

We apply a stage-based risk adjustment factor of 0.6x to our base case NPV to reflect the project's current development status, alongside an 8% discount rate. This yields a risk-adjusted NPV of A\$297.95 million, implying a share price of A\$0.22 and 49% upside to the current price of A\$0.15. In our upside case, rNPV increases to A\$422.50 million, implying a share price of A\$0.38 and 154% upside. The upcoming PFS is expected to be a key de-risking catalyst, particularly through confirmation of niobium recoverability and payability, with potential to increase implied upside to ~150% in the base case and ~280% in the upside case. Fully diluted shares on issue total 792.6 million, reflecting full CAPEX funding across four equity raises.

Valuation (A\$M)	Base Case	Upside Case
Implied EV (rNPV)	297.95	422.50
Net Debt (post-funding)	120.49	120.49
Equity Value	177.47	302.01
Total Diluted Shares (M) (post-funding)	792.60	792.60
Implied Price (A\$)	0.22	0.38
Current Price (A\$)	0.15	0.15
Upside (%)	49%	154%

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Vital Metals Limited (ASX:VML)

Peer Comparisons

We assess VML's relative valuation from two perspectives: TREO, as the project's primary value driver, and niobium, reflecting its meaningful resource scale, grade and growth potential.

Figure 23: EV/Total TREO (\$/m/Mt) against ASX and TSXV-listed REE advanced explorers/developers

Company	EV/Total TREO (\$/m/Mt)
Vital Metals	13
Critica	21
American Rare Earths	21
ODS Metals	46
Defense Metals	94
Ionic Rare Earths	160
Australian Rare Earths	164
St George Mining	166
Lindian Resources	262
Hastings Technology	359
Aratara	789
Victory Metals	1297
Average	283

Source: Company Releases and Peak Asset Management Analysis as at 30 April 2026

Figure 24: Rare Earth Project Benchmarking

Source: Company and Peak Asset Management analysis as at 30 April 2026

peakassetmanagement.com.au

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BESPOKE ANALYSIS MADE SIMPLE, FOR NEW AND EXISTING INVESTORS

COMPANY OVERVIEW INCLUDING:

- KEY INVESTMENT HIGHLIGHTS
- VALUATION AND PEER COMPARISON
- RERATING CATALYSTS
- COMPANY RISKS
- MANAGEMENT AND GOVERNANCE

INDUSTRY OVERVIEW INCLUDING:

- MARKET DYNAMICS
- MARKET GROWTH
- STRATEGIC POSITIONING

Sample Research Report Prepared for ASX:VML



OLDERFLEET CAPITAL CORP.

At-the-Market Funding Solutions

At Your Discretion - On Your Terms

PEAK's ATM facilities offer listed companies with a capital raising solution that is flexible and cost effective. Companies can activate the ATM facility at their discretion by specifying a floor-price, maximum subscription amount and activation period for the sale of securities.

We offer two set-up structures including a **zero set-up fee option**, to provide companies with flexibility at no upfront cost of capital

Activation

Company must provide a formal activation notice with a floor price and a maximum \$ value of shares to be sold, the company can elect to de-activate the facility at any time

Transfer of Funds

Olderfleet Capital will transfer proceeds from the sale of shares to the company, less fees owing

01

02

03

04

05

Set-up

ATM subscription deed executed and collateral shares to be transferred to Olderfleet Capital, under the company's placement capacity

Execution

Olderfleet Capital runs an algorithm to get the best price per share with minimal impact on share price and the day's trading

Standby and Ready to go again

Company can elect to issue more shares and re-activate facility at a future date



PEAK
ASSET MANAGEMENT

INVESTOR CONFERENCES

Going beyond capital to bring exposure to our portfolio companies



**The journey doesn't end at
listing**

**We are in the driver's seat, as
your company moves
forward**

OUR TRACK RECORD : VENTURE & PRE-IPO



Sector: Green Hydrogen and UHPQ

Raise: \$1.5m @ \$20m pre-money valuation



Sector: Biotech (AI for Stroke Detection)

Raise: \$1m @ \$6m pre-money valuation, most recent round at \$114m valuation



Sector: Net-zero Hydrogen

Raise: \$1.25M @ \$7M pre-money under secured convertible note, facilitated RTO into ASX:RNE



Sector: Recruitment/SaaS

Raise: \$200k @ \$8m pre-money valuation, introduced lead investor



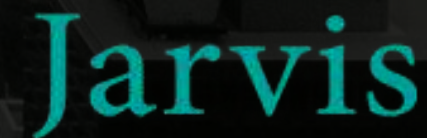
Sector: SaaS

Raise: \$1.5M Raised at \$2M ARR



Sector: Healthcare/SaaS

Raise: Pre-IPO \$1.2M Raised at \$4M pre-money. IPO 2020 TSXV at 3x



Sector: Consumer Discretionary

Invested \$150,000. Merged with Whizz Cleaning. On track IPO Q2 2021 at 5x investment



Sector: Pharma/Biotech

Raise: \$150k invested at seed and brought in North American investors

OUR TRACK RECORD : BIOTECH & LIFE SCIENCES



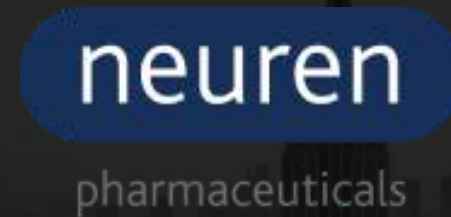
Sector: Biotech (Kidney disease)

Raise: \$800k sub-underwritten entitlement offer at \$0.08 per share with a 1:1 option



Sector: Biotech/Pharma

Raise: IPO cornerstone and Placement, \$5M Raised. Entry Price \$0.35



Sector: Pharma/Biotech (Rhett Syndrome)

On-market purchase between \$1.20-\$1.50



Sector: Biotech/Pharma

Cornerstoned Placement, \$350k sub-underwriting Entry Price \$0.06 with 1:1 ILAO



Sector: Biotech (Fibrosis & CAR-T)

Raise: Underwritten Rights Offer \$3.15M Raised. Entry Price \$0.025with 1:2 1ADOA



Sector: Biotech (TBI)

Latest entry price \$0.02, on-market purchase



Sector: Pharmaceuticals

Latest entry price \$0.035 with a 1:1 listed option



Sector: Medicinal Cannabis

Raise: Placement \$6.6M Raised. Entry Price \$0.033 with 1:2 listed option

OUR TRACK RECORD : TECHNOLOGY



Sector: Solar BIPV

Raise: \$4m placement at \$0.50 per share with a 1:13 option



Sector: Blockchain based tracking and tracing

PEAK is the largest shareholder



Sector: Technology Materials

Raise: Placement \$4.5M Raised. Entry Price \$0.0135 with 1:1 Listed Option



Sector: Digital Twin

Raise: Placement and Rights Offer. Entry Price \$0.075 with 1:1 REMO



Sector: Cybersecurity & AI

Raise: Placement \$1.7M @ \$0.01 per share with 1:3 option & \$1.5M @ \$0.007 per share



Sector: Communications

Raise: Placement \$5.3M @ \$0.25 with 1:3 Option & \$5M @ \$0.44 with 1:4 Option



Sector: AI & Communications

Raise: Placement \$4.5M Raised. Entry Price \$0.033 with 1:1 UNTO



Sector: Gaming

Raise: Placement \$1.5M Raised. Entry Price \$0.015 with 1:2 FFGO

OUR TRACK RECORD : TECHNOLOGY

The Swift logo features the word "swift" in a white, lowercase, sans-serif font. A small teal dot is positioned above the letter 'i'.

Sector: Communications

Raise: Placement \$1.84M
Raised. Entry Price \$0.008

The Hydrix logo consists of the word "hydrix" in a white, lowercase, sans-serif font. The letter 'x' is stylized with a blue and teal gradient.

Sector: Medical Technology and
Defence

Raise: \$8.183M Raised. Entry Price
\$0.05 with 1:1 Listed Option

The Spenda logo features the word "spenda" in a white, lowercase, sans-serif font. A small blue and yellow icon is positioned above the letter 'd'.

Sector: Fintech

Raise: \$6M Raised. Entry Price
\$0.004 with 1:1 Listed Option

The X2M Connect logo features a stylized blue and teal 'X' icon followed by the text ">X2M" in a white, sans-serif font, with "CONNECT" in a smaller font below it.

Sector: AI & Data Centres

Raise: Joint-led \$3M @ \$0.004 per
share with 1:1 X2MOA and 1:4
Bonus Share



Sector: Robotics

Raise: Joint-led \$4M @ \$0.115
per share with 1:1 Listed
Option

OUR TRACK RECORD : RESOURCES AND MINING



Sector: Resources (Uranium)

IPO \$7.5M Raised @ \$0.20
Latest round: \$500k @ \$0.16



Sector: Resources Uranium)

Raise: Placement \$1.5M
Raised Entry Price \$0.007
with 1:1 listed option



Sector: Resources (Lithium)

IPO \$8M Raised Entry price
\$0.20



Sector: Resources (Gold)

Raise: Placement \$2.5M
Raised. Entry Price \$0.032
per share



Sector: Resources (Magnesium)

Placement \$3M @ \$0.025 with
1:2 LMGO & \$11.5M @ \$0.10
with 1:4 LMGO



Sector: Resources (Gold & Copper)

Raise: Placement \$250k
Entry Price \$0.03 with 1:1
option. Bought \$500k on
market post



Sector: Resources (Rare Earths)

Raise: Placement \$2M raised
JLM Entry Price \$0.0075 with
a 1:1 listed option



Sector: Resources (Gold)

Raise: Placement \$150,000 at
\$0.01 with 1:2 option.

OUR TRACK RECORD : RESOURCES AND MINING



Sector: Resources (REE, Copper & Gold)

Raise: Placement \$1.47M Raised. Entry Price \$0.04



Sector: Resources (Copper & Magnetite)

Raise: Placement \$1.2M Raised Entry Price \$0.01 with 1:2 listed option



Sector: Resources (Lithium)

Raise: Placement \$2M Raised. Entry Price \$0.018 per share



Sector: Resources (Graphite)

Raise: Placement \$2.5M @ \$0.02 with 2:3 CDTOA & \$3.6M @ \$0.03 with 1:3 CDTOA



Sector: Resources (Copper)

Raise: Placement \$2.75M Raised. Entry Price \$0.20 per share



Sector: Resources (Graphite)

Raise: Total \$23.14M Raised. Latest Entry Price \$0.007 with 1:1 VRCOB



Sector: Resources (Lithium & REE)

Raise: Placement \$2.25M Raised. Entry Price \$0.0115 with 1:2 Option



Sector: Resources (Lithium & Copper)

Raise: Raised A\$1.75M at \$0.006 with a 1:1 listed options

OUR TRACK RECORD : RESOURCES AND MINING



Sector: Resources (Lithium)

**IPO \$5.75M Raised @ \$0.20
with 1:4 AS2O & \$2.6M @
\$0.35 with 1:3 AS2O**



Sector: Resources

**Raise: Placement \$1.65M
Raised. Entry Price \$0.006
with 1:1 ESROB**



Sector: Resources (Phosphate)

**IPlacement \$2.1M raised. Entry
price \$0.01 with 1:2 listed
option**



Sector: Resources (Gold)

**Raise: Placement \$2.3M
Raised. Entry Price \$0.026**



**Sector: Resources (Lithium &
Graphite)**

**Placement \$1.5M @ \$0.0015 with
1:1 MLSOC & \$7.8M @ \$0.078 with
1:1 MLSOD**



**Sector: Resources (Gold &
Lithium)**

**Placement and entitlement
offer shortfall placed raising
\$450k**



Sector: Resources (Graphite)

**Raise: Placement \$4.8M @
\$0.0025 with 1:2 SBRO & \$2M
@0.01 with 1:1 listed option**



Sector: Resources (Copper)

**Raise: Placement \$4.6M JLM
Raised. Entry Price \$0.025
per share with 1:2 listed
option**

OUR TRACK RECORD : RESOURCES AND MINING



Sector: Resources (Lithium & Niobium)

Raise: Placement \$2.4M
Raised. Entry Price \$0.07
with 1:1 PNNO



Sector: Resources (Gold & Silver)

Raise: Placement \$2M
Raised. Entry Price \$0.0125
with 1:2 option



Sector: Resources (Copper & Gold)

Raise: Placement \$3M
Raised. Entry Price \$0.016
with 1:2 option



Sector: Resources (Copper & Gold)

Raise: Placement \$1.97M @
\$0.014 per share with 1:2
option & Joint-led \$4M @
\$0.0115 per share



Sector: Resources (Gold & Lithium)

Raise: Placement \$1.105M
@\$0.0065 per share & \$3.75M
@0.01 per share



Sector: Resources (Helium)

Raise: Co-Managed Placement.
\$12M Raised. Entry Price \$0.029

OUR TRACK RECORD : ENERGY



Sector: Oil & Gas/ Hydrogen

Raise: Placement \$933k @
\$0.03 with 1:1 LIOO & \$5.8M
@ \$0.08 with 1:2 LIOOA



Sector: Oil & Gas

Raise: Placement \$7.7M @
\$0.045 per share with 1:1
BASO & Joint-led \$3M @
\$0.063 per share



Sector: Oil & Gas

Raise: Placement \$500k
Entry Price \$0.016 with 1:2
TEGO



Sector: Oil & Gas

Raise: Total \$2.5M Raised.
Latest Entry Price \$0.0015



Sector: Construction & Clean Energy

Raise: Shortfall \$4.348M @ \$0.035
with 1:2 EDEO

OUR TRACK RECORD : MERGERS & ACQUISITIONS



Sector: Resources (Gold)

Facilitated 100% acquisition of four advanced gold projects in SA and WA, and raised \$1.75M



Sector: Resources (Uranium)

Facilitated the 100% acquisition of Uranium project in SA



Sector: Resources (Uranium)

Facilitated 100% acquisition of the Harrier Uranium Project encompassing 131km2 in eastern Canada



Sector: Resources (Lithium & Copper)

Facilitated the 100% acquisition of Parabolic Lithium, Li projects in Brazil



Sector: Resources (Uranium & Copper)

Corporate advisors to the Grand Codroy acquisition and Entitlement offer raising \$1.4M



Sector: Resources (Lithium & Copper)

Facilitated the 100% acquisition of Perseverance Lithium, Li projects in Brazil



Sector: Oil & Gas, White H2

Facilitated the 100% acquisition of King Energy Ltd



Sector: Healthcare

Facilitated the 100% acquisition of Nextract Pty Ltd, and raised \$1M

Let's Talk!

WWW.PEAKASSETMANAGEMENT.COM.AU

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