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This presentation has been authorised for release by Craig Mackay, Managing Director

Unity Snapshot - "First Mover" advantage



- Intended IPO (ASX) Q3/CY2025
- Focused on the discovery of "giant" intrusion-related gold (IRG) and/or porphyry copper - gold deposits in Southeast Asia
 - ❖ Ngot Project (Cambodia): adjacent to producing +1.1Moz diorite-hosted gold mine¹
 - O'Phlay Project (Cambodia): high-grade gold vein swarm in granodiorite
 - ❖ Ta Vaeng Project (Cambodia): major porphyry-style coppergold targets associated with vegetation anomaly/altered lithocap
 - Loei Fold Belt (Thailand): working to acquire projects in the major copper-gold metallogenic and magmatic belt in mainland Southeast Asia
- Southeast Asia remains largely under-explored "First Mover" advantage





5/05/2025

History of Mining in Cambodia



- For hundreds of years Cambodians have operated small-scale "artisanal" mines for gold and gemstones
- The French discovered gold at Bo Sup Trup in 1877 and mined the deposit until 1940 (WW2)
- From mid-1960's 1993 the mining industry **disrupted for nearly 30 years** (wars, coups, Khmer Rouge, Vietnamese occupation)
- Geological archives lost or missing
- IRG potential in Cambodia first identified by Oxiana in 2006
- Okvau gold deposit only discovered in 2007 (Oxiana)
- The first <u>commercial-scale</u> gold mine in Cambodia was not opened until **2021** with commencement of production at Okvau by Emerald Resources
- Cambodia's mineral resources remain, to large extent, unexplored and undeveloped



Underground mine visit at Bo Sup Trup in 2007

Mineral Occurrences in Cambodia



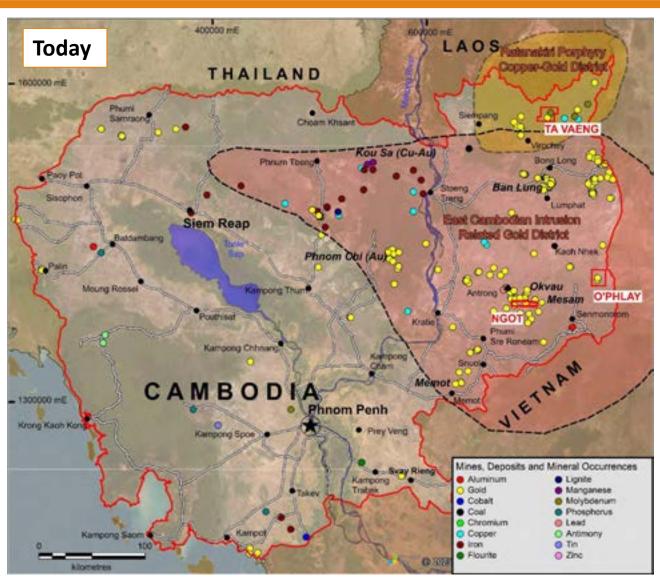
1993



1993 UN Report on Cambodian Mineral Occurrences¹

Current Cambodian Mineral Occurrences

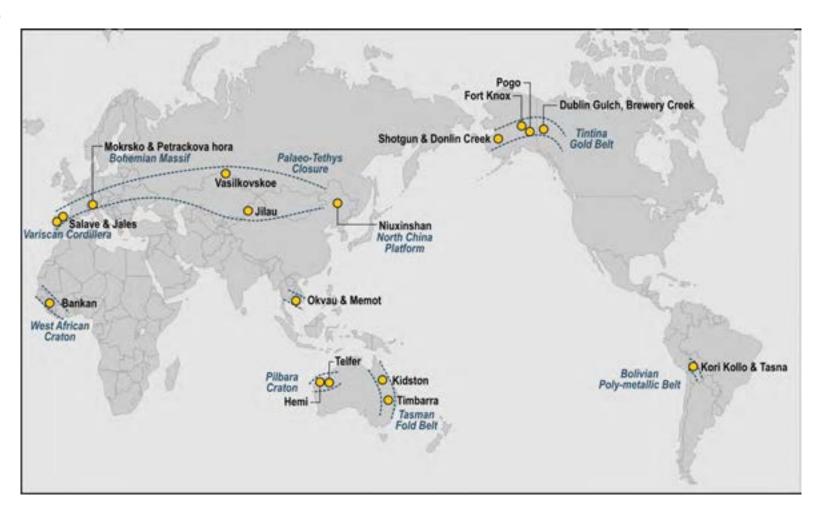
1. Atlas of Mineral Resources of the Escap Region Volume 10 Cambodia UN 1993



Intrusion Related Gold Deposits – a new opportunity



- Reduced Intrusion Related Gold (IRG)
 Deposits
- Relatively newly defined class of economically important gold deposits
- Associated with moderately reduced, I-type intrusions (e.g. diorites)
- Metal assemblage variably combining gold with bismuth, tellurium, tungsten, molybdenum, arsenic, antimony
- Reduced ore mineral assemblage typically comprising arsenopyrite, pyrrhotite and pyrite
- Characterized by large zones of parallel, sheeted, gold-bearing quartz veins
- Potential for large gold deposits (>10Moz)



- Lang and Baker (2001)
- 2. Baker (2003): Intrusion Related Gold Deposits: Classification, Characteristics and Exploration

Emerald Resources (NL) – ASX:EMR



- 2.3Mtpa Okvau Gold Mine is the only commercial mining operation in Cambodia at present
- Market capitalisation A\$2.8B¹ (A\$35M when they entered Cambodia in Feb 2016 : an increase of 80 times)
- Indicated & Inferred Mineral Resource at Okvau: 17.7Mt @ 2.0g/t gold for 1.1Moz²
- Construction "On time and On Budget" (US\$97.6M)³
- +110kozpa production (first gold pour June 2021)⁴
- One of the lowest cost producers on the ASX (AISC US\$919/oz Dec 2024 Half)⁴
- Current mine life >8 years⁴
- Emerald actively exploring for satellite gold deposits
- Indicated & Inferred Mineral Resource at Memot: 19.5Mt @ 1.65g/t for 1.04Moz gold 5



Okvau open pit January 2025 – 2.5km from the Ngot licence



Okvau processing plant

- 1. Share price 16 April 2025
- 2. Emerald Resources ASX Announcement 1 May 2017
- Emerald Resources Announcement 24 June 2021
- 4. Emerald Resources Announcement 21 September 2021
- Emerald Resources Announcement 13 December 2024

Cambodia Overview - mining friendly jurisdiction



Country Facts

17.1M

181,035km²

\$2,037Est. Nominal GDP

per capita (2024)

6.6%Est. GDP Growth

(2024)

Population (2023)

Political and social stability – last general election 23 July 2023

- Member of ASEAN
- Party to the ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA)
- Party to the Regional Comprehensive Economic Partnership (RCEP) agreement
- Tax treaty & investment treaty with Singapore

Mining Fiscal Regime & Titles

- 100% ownership, 30% corporate tax, 3% royalty (gold), import duty exemptions
- No restrictions on foreign currency convertibility and repatriation²
- Transparent exploration-mining title process
- Exploration licences granted for 3 years with 2 x 2-year renewals
- Exploration licences can be extended further (e.g. Okvau Gold Project)
- Exploration licence holders have the right to apply for a Mining licence (21 + 10 + 10 years)
- Cambodia wants more Australian companies





Prime Minister Hun Manet (Cambodia) and Prime Minister Anthony Albanese (Australia) at the 2024 ASEAN-Australia Special Summit in Melbourne (March 2024)

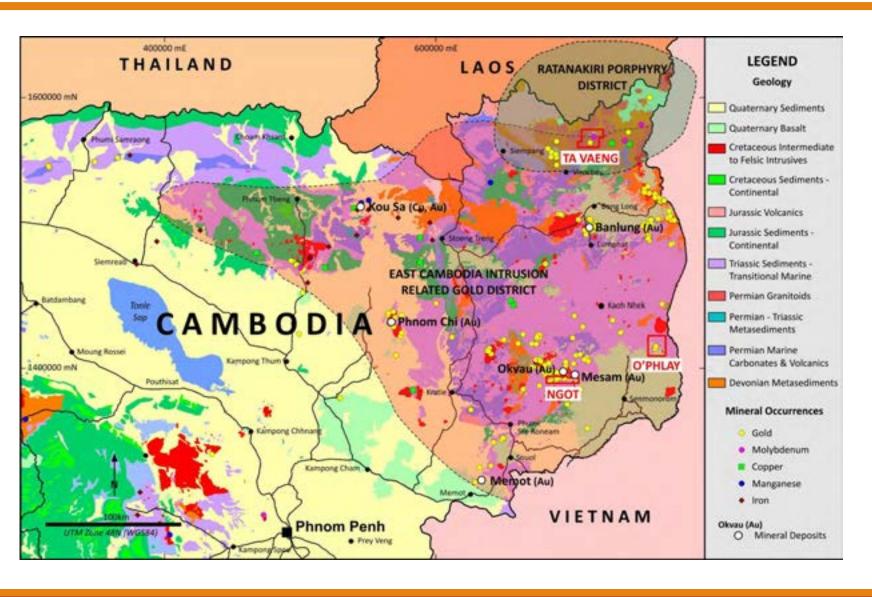
- 1. PWC Cambodia country overview https://taxsummaries.pwc.com/cambodia
 - Handbook on Investing in Cambodia 2023 Edition Australian Department of Foreign Affairs and Council for the Development of Cambodia.



5/05/2025

Unity's Cambodian Projects (85% Unity)

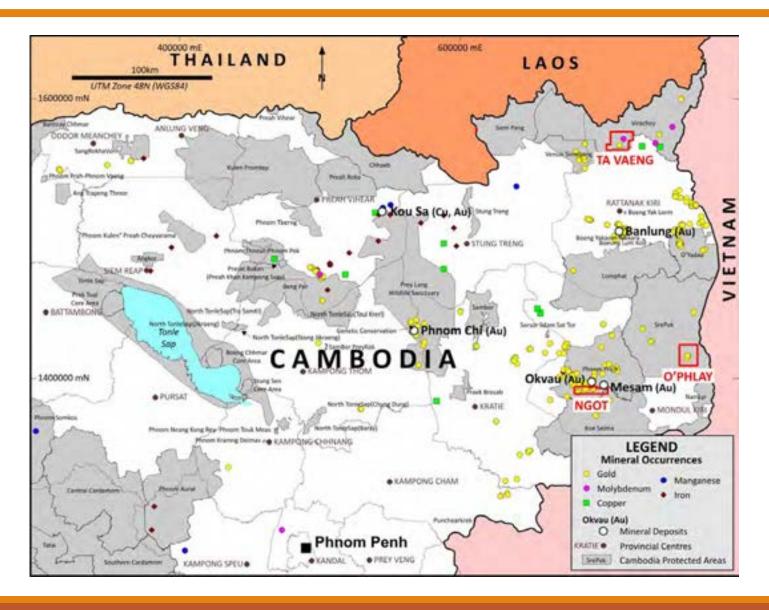




- Ngot Project (Gold)
- O'Phlay Project (Gold)
- Ta Vaeng Project (Copper, Gold)

Protected Areas - can be re-zoned for mining

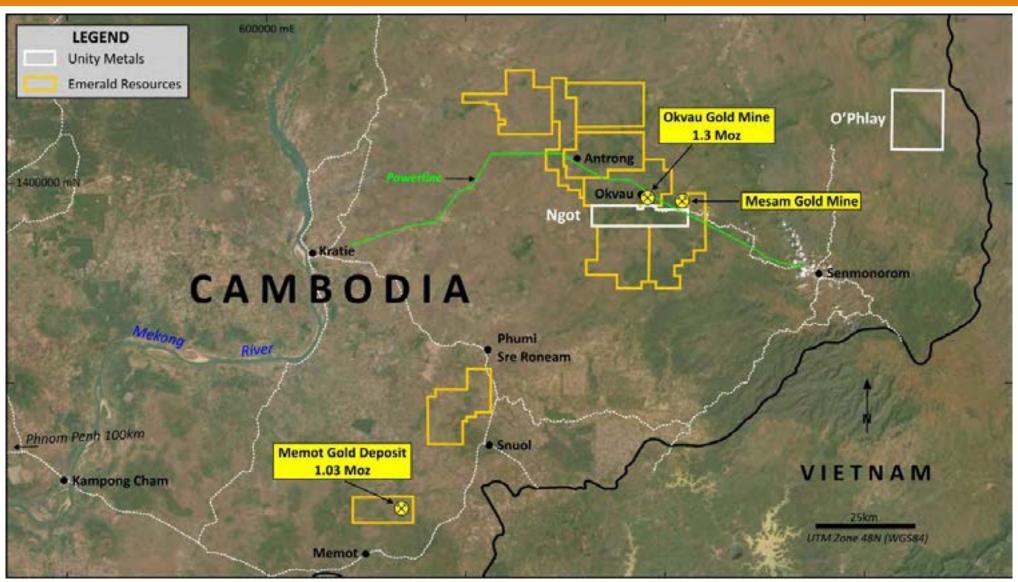




- Unity exploration licences & licence application located within (or partially within) Ministry of Environment (MOE) protected areas (pale grey on map)
- Cambodian government seeks a balance between conservation & development
- Exploration subject to completion of Initial Environmental & Social Impact Assessment (IESIA)
- Exploitation subject to Final Environmental & Social Impact Assessment (FESIA) & Feasibility Study
- Cambodian Government can re-zone protected areas to "Sustainable Use" to allow mining licences to be granted
- 11.5km² of protected area re-zoned for the Okvau Gold Mine (adjacent Ngot Project)

Ngot Gold - Unity is surrounded by Emerald





Ngot Gold - sitting on the Okvau Mine fence





5/05/2025

Ngot Gold - directly adjacent operating gold mines









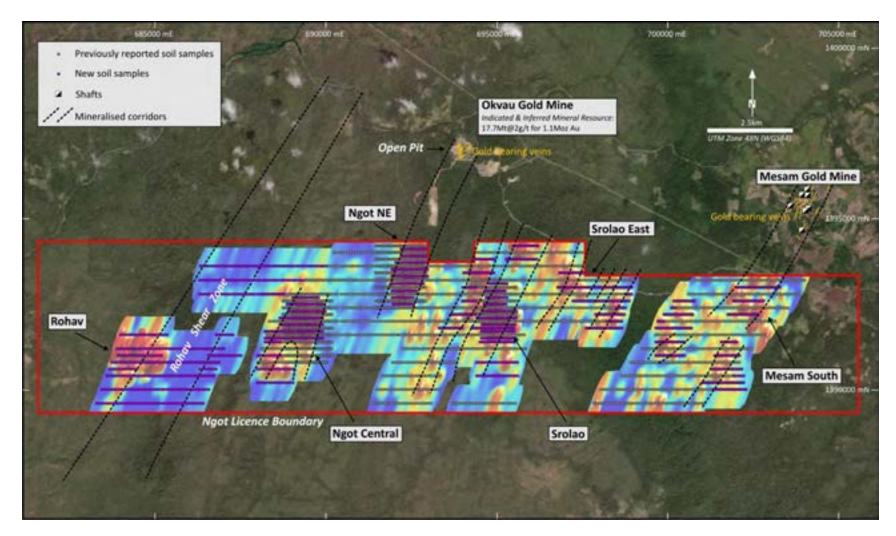
Unity's exploration team at Ngot

- Exploration licence granted 4th August 2023¹ (area 112.4km²)
- Directly south of Cambodia's two largest gold mines:
 - Emerald Resources (ASX:EMR) Okvau Gold Mine Indicated & Inferred Mineral Resource of 17.7Mt @ 2.0g/t gold (1.1Moz²)
 - Mesam Gold Mine High-grade Chinese underground operation
- Located in MOE protected zone (Phnom Prich Nature Reserve)
 Okvau in the same protected area
- Mineralisation within Ngot is similar to the intrusion-related gold (IRG) style of mineralisation at the Okvau & Mesam mines
- Prospective, Cretaceous poly-phase intrusions and structures hosting Okvau & Mesam extend into Ngot
- First systematic surface sampling recently completed:
 - Geological mapping
 - 4,138 soil samples
 - 346 rock chip samples
 - 10.9km IP geophysical survey

- Ngot licence document provided in Appendix A
- 2. Emerald Resources ASX Announcement 1 May 2017

Ngot Gold - first systematic exploration delivers



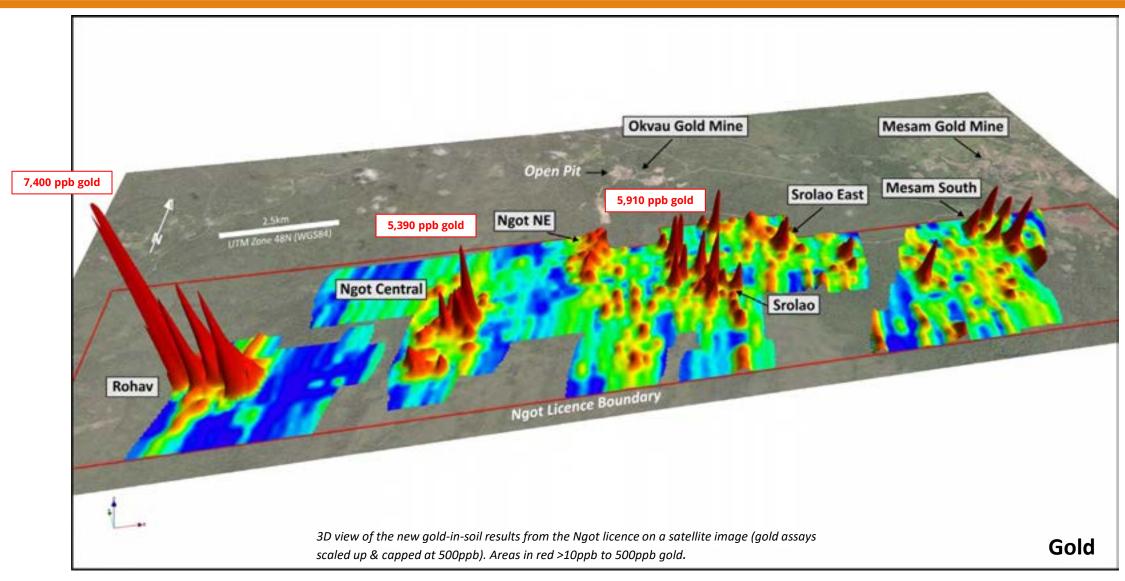


Gridded image of gold-in-soil results on satellite imagery

- Multiple, major gold-in-soil anomalies – cumulative strike length >17km
- Anomalies lie in mineralised corridors extending from operating gold mines (Okvau & Mesam)
- Prospective diorite host rocks widespread (areas of thicker vegetation)
- Priority target areas include:
 - Rohav Prospect
 - Ngot Central Prospect
 - Ngot NE Prospect
 - Srolao Prospect
 - Mesam South Prospect

Ngot Gold - soil results in 3D



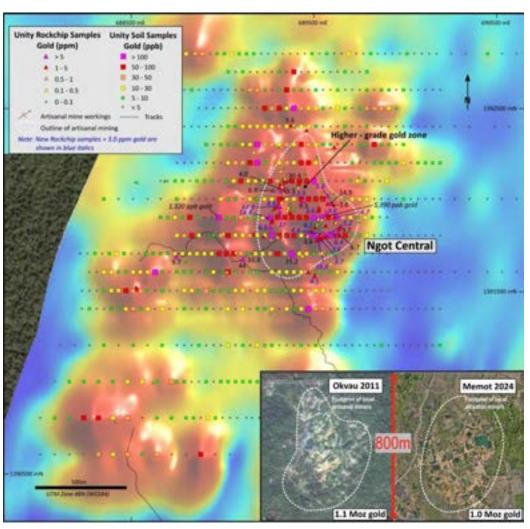


Ngot Central Prospect - largest & strongest anomaly





Gold-bearing, banded, quartzarsenopyrite veins hosted in weathered diorite



Gridded image of gold-in-soil results at Ngot Central at the same scale as the footprints of artisanal mining at Okvau and Memot gold deposits.

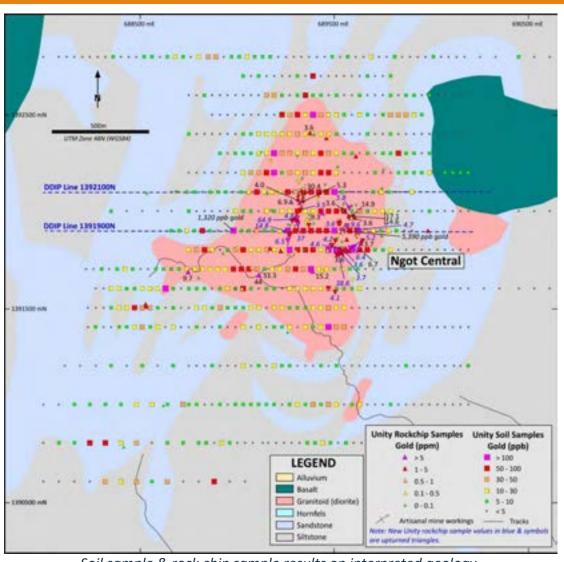
- Gold mineralisation associated with sheeted & stockwork quartz ± arsenopyrite veins
- Hosted within a 1.5km x1km diorite intrusion
- Historical & active artisanal mine pits (mainly in saprolite)
- Strong, coherent 2.8km x 1km gold-in-soil anomaly (>10ppb; maximum 5,390ppb gold)
- Unity rock chip sampling returned assays up to64.9g/t gold
- 4.5 line-km dipole-dipole
 IP survey

Ngot Central Prospect – stacked gold veins in diorite





New artisanal workings on shallow dipping, stacked, banded, high-grade gold veins hosted in weathered diorite (2m below surface)



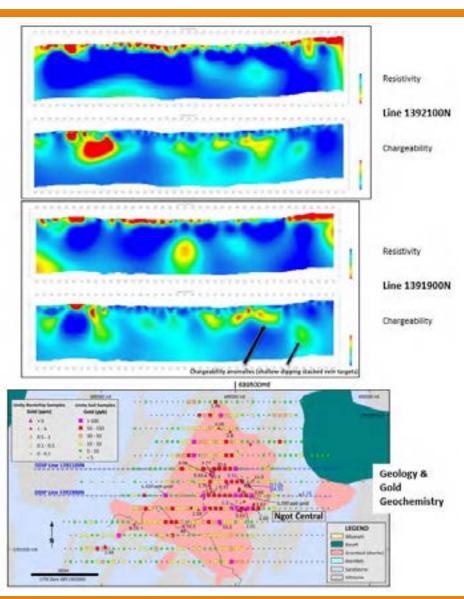
Soil sample & rock chip sample results on interpreted geology

Ngot Central Prospect - IP survey results



2D inversions of IP Lines 1392100N & 1391900N at Ngot Central: **Top**: Inversion Resistivity Vs Depth section with colour range 150 Ohm-m (red) to 2500 Ohm-m (blue). **Bottom**: Inversion Chargeability Vs Depth section with colour range 0.0 mV/V (blue) to 25.0 mV/V (red). Note: the IP images and the geology figure below are at the same scale and aligned on the same eastings.

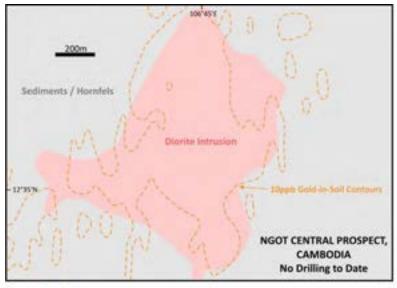
Soil sample & rock chip sample locations/results & IP survey lines on interpreted geology.



- Strong, shallow-dipping chargeability anomalies in eastern portion of the diorite intrusion
- Stacked vein targets
- Same area as high-grade veins recently exposed in artisanal workings (up to 17.1g/t gold)
- Coincident with the peak of the gold-in-soil anomaly
- Strong, shallow (360m wide) chargeability anomaly in the west (new area)

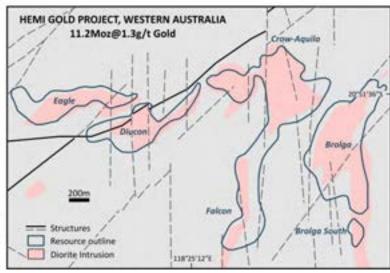
Ngot Central Prospect – IRG Gold Deposit Benchmarking **Unity**







147'72'W Major ore - controlling shears -5chlst 64°59'N FORT KNOX GOLD MINE, ALASKA 11.5Moz@0.4g/t Gold (incl. >9Moz Gold Produced)



- Ngot Central gold anomaly comparable in size & intensity to Okvau
- Ngot Central diorite intrusion comparable in size to Okvau & Tier 1 deposits (Fort Knox & Hemi)
- Ngot mineralisation style similar to Okvau, Fort Knox & Hemi

- Emerald Resources ASX announcement 1 May 2017: Okvau DFS Delivers Ore Reserve of 907,000oz, Emerald to Become +100,000ozpa Gold Producer (Indicated & Inferred Mineral Resource: 17.68Mt @ 2.0g/t gold for 1.14Moz gold).
- Emerald Resources ASX announcement 31 October 2017: Quarterly Report to 30 September 2017.
- Emerald Resources ASX Announcement 18 July 2024: Noosa Mining Conference Presentation (311Koz produced to date - 114Koz in past 12 months).
- Emerald Resources ASX Announcement 31 August 2023: Annual Mineral Resource and Ore Reserve Statement (Okyau March 2023 - Measured, Indicated & Inferred Mineral Resource: 12.8Mt @ 2.4g/t gold for 990Koz gold).
- Kinross 17 January 2024: Kinross Fort Knox Pours Nine Millionth Ounce.
- Kinross 14 February 2023: Fourth-Quarter & Full-Year Results (Fort Knox Proven & Probable Reserve: 136.6Mt @ 0.4g/t gold for 1.6Moz gold + Measured, Indicated & Inferred Mineral Resource: 89.5Mt @ 0.3g/t gold for 0.9Moz gold).
- Kinross 2015: Fort Knox Mine NI43-101 report (Proven & Probable Reserve: 163.8Mt @ 0.4g/t gold for 2.4Moz gold + Measured, Indicated & Inferred Mineral Resource: 85.4Mt @ 0.4g/t gold for 1.0Moz
- Kinross 2028: Fort Knox Mine NI43-101 report.
- De Grey Investor Update September 2024.

Rohav Prospect - mineralised zone under cover

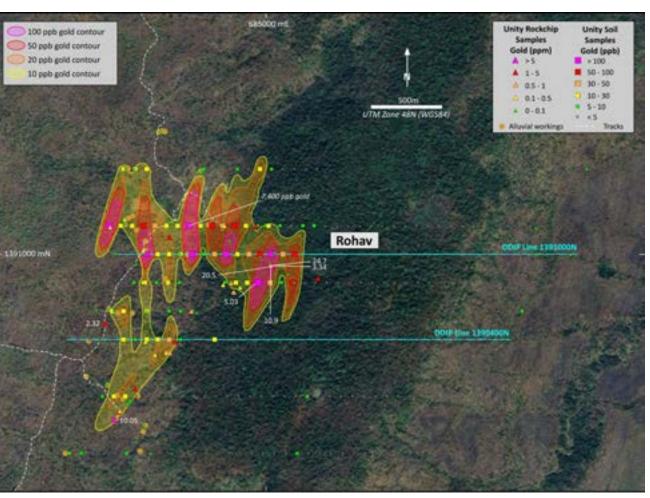




Vietnamese artisanal mine workings



Naturally contaminated creek



Soil sample gold contours on a satellite image – the thicker, green vegetation is associated with the basalt cover

- Stacked gold-bearing quartz + sulphide veins hosted in sediments (over ~2km)
- Covered by basalt (Rohav Plateau)
- NNE-trending regional shear zone
- Strong 2.3km x 1.5km gold-in-soil anomaly (>10ppb; maximum 7,400ppb gold)
- Unity rock chip assays up to 24.7g/t gold, 206g/t silver
- 6.4 line-km dipole-dipole IP survey – broad resistivity anomaly beneath the basalt (silicification?)

Ngot NE Prospect - trends towards the Okvau pit

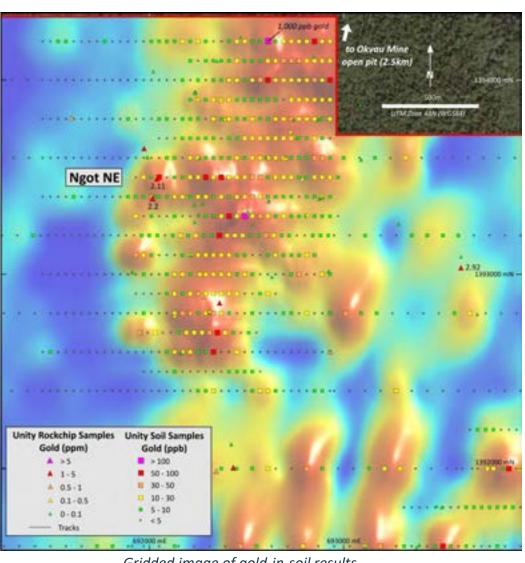




Quartz-arsenopyrite breccia mineralisation assaying 2.2g/t gold



View of the Okvau Gold Mine from Naot NE



Gridded image of gold-in-soil results

- Lies within the Okvau Mine **Corridor** which extends **~7.1km** through Ngot
- Directly adjacent to Okvau mining licence boundary
- Gold mineralisation associated with quartz ± arsenopyrite veins & vein breccias
- Hosted in diorite & along diorite/sediment contact
- Outcrop sparse
- Coherent 2km x 0.7km goldin-soil anomaly (>10ppb; maximum **1,000ppb gold**)
- Unity rock chip sampling returned assays up to 2.2g/t gold

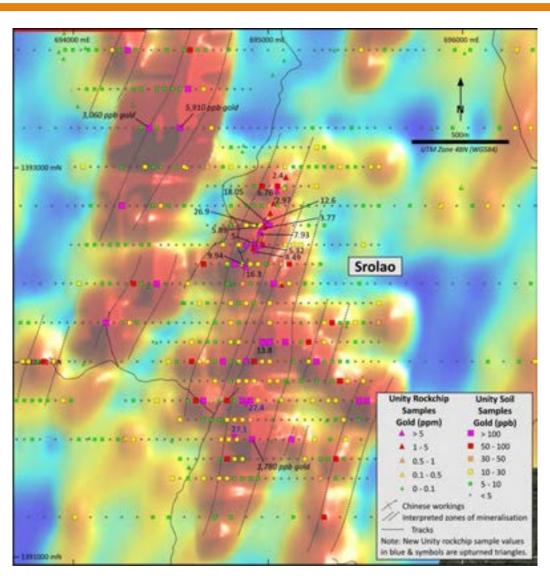
Srolao Prospect - emerging stacked vein system





Sheeted quartz-arsenopyrite mineralisation hosted in sediments

Gridded image of gold-in-soil results



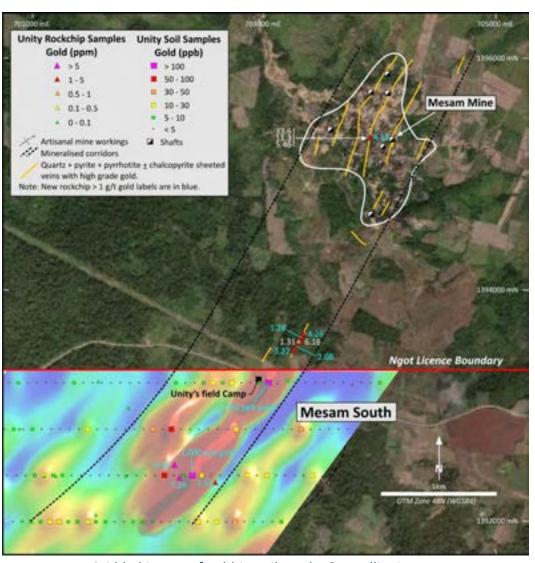
- Gold mineralisation associated with sheeted quartz + arsenopyrite veins
- Hosted in sediments
- Recent Emerald RC drilling along strike (1.9km NNE)
- Historical Chinese & current artisanal workings
- Potential for wide mineralised zones (>80m)
- Stacked gold-in-soil anomalies, each extending over 1km
- Maximum soil result 5,910ppb
- Unity rock chip samples returned up to 27.4g/t gold

Mesam South Prospect - direct mine lode extensions





Mineralisation located 200m north of Ngot boundary assaying 6.2g/t gold, 202g/t silver & 1.3% copper

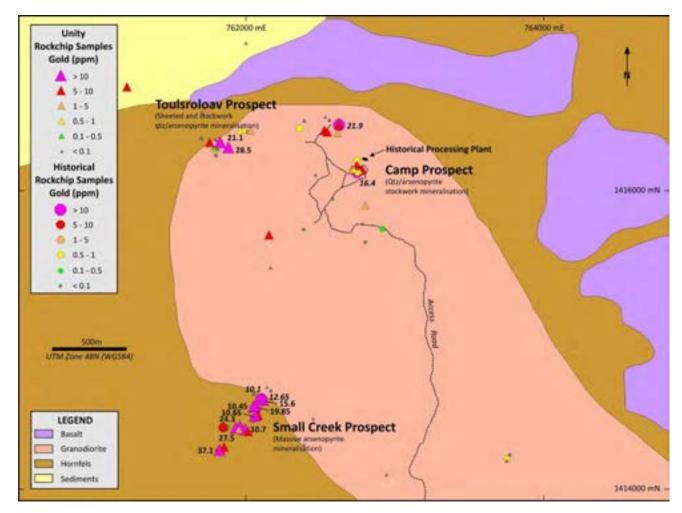


Gridded image of gold-in-soil results & satellite imagery

- Lies within the Mesam Mine Corridor which extends ~5.4km through Ngot
- Gold mineralisation associated with sheeted quartz + pyrite + pyrrhotite ± chalcopyrite veins
- Extensive basalt cover
- 1.6km x 0.5km gold-in-soil anomaly in Ngot (>10ppb; maximum 2,810ppb gold)
- Artisanal pits 200m north of Ngot licence (Unity sample returned 6.2g/t gold, 202g/t silver & 1.3% copper)
- Unity rock chip sampling in Ngot returned assays up to9.4g/t & 7.1g/t gold

O'Phlay Gold - another IRG opportunity



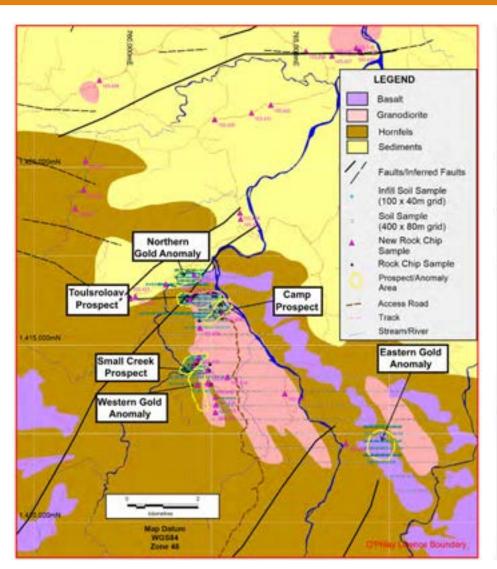


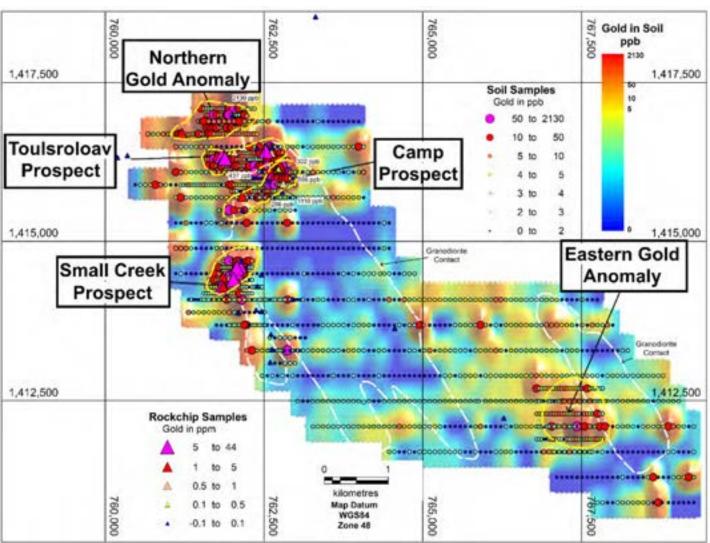
- O'Phlay licence document provided in Appendix B
- 2. Oxiana Ltd: Project Submittal Summary November 2008
- 3. OZ Minerals Ltd: Project Submittal Summary Update January 2010

- Exploration licence granted 4th August 2023¹ (area 195.6km²)
- Located in MOE protected area (SrePok).
- Historical mining operation (Gold Metal Group) & limited exploration
- Intrusion-Related Gold (IRG) style mineralisation
- Broad zones (up to 40m wide) of sheeted & stockwork quartz + arsenopyrite vein mineralisation
- Unity rock chips (58 samples) up to 37.1g/t gold
- Historical Oxiana/OZ Minerals rock chip sampling returned gold grades up to 16.4g/t gold^{2,3}
- Soil sampling on 400m x 80m and 100m x 40m grids (1,503 samples)
- Significant gold-in-soil anomalies (peak assay of 2,130ppb gold) associated the mineralization in historical mining areas and a new area in the north (which remains open)

O'Phlay Gold – soil sampling results

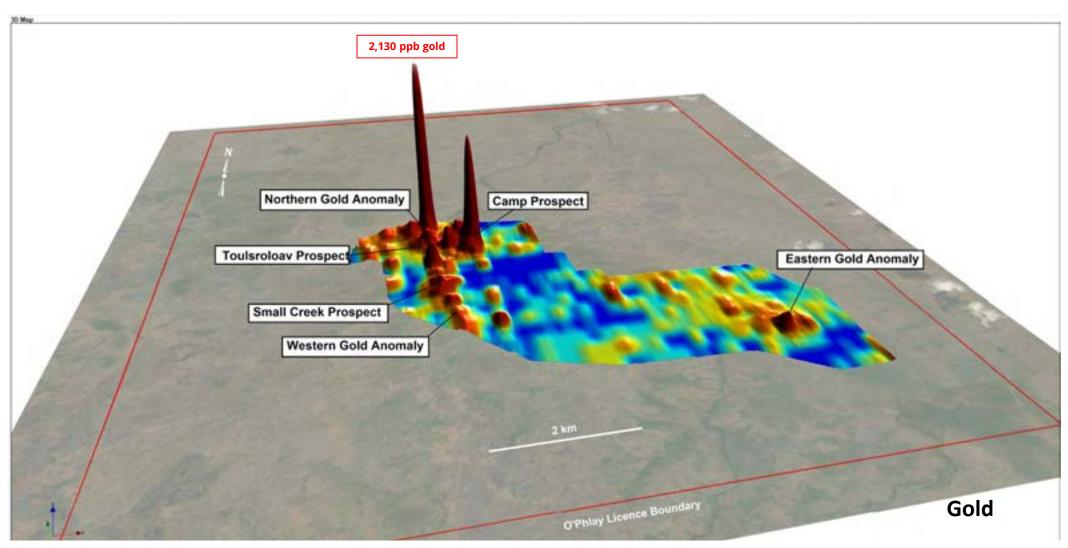






O'Phlay Gold - soil results in 3D





3D view of gold-in-soil results from the O'Phlay licence on a satellite image (gold assays scaled up & uncapped). Areas in red >10ppb to 2,130ppb gold.

O'Phlay Gold - intense stockwork vein mineralisation





Intense stockwork quartz-arsenopyrite veins hosted in granodiorite at Camp Prospect



Unity channel sampling of stockwork mineralisation at Camp Prospect

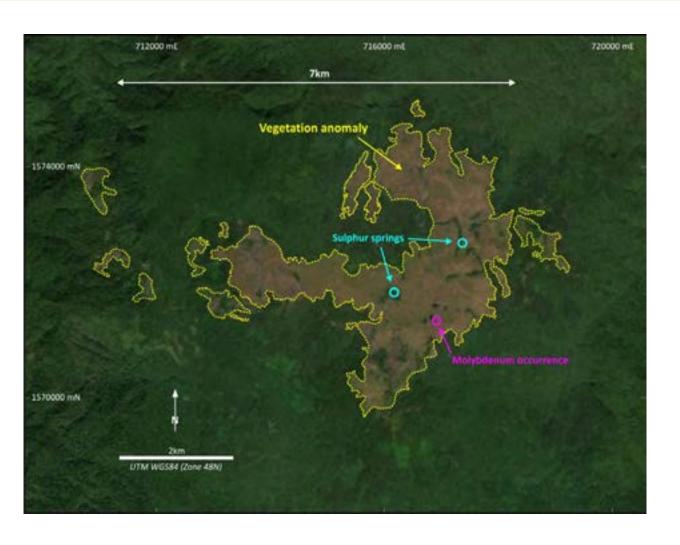




Chinese gold plant at O'Phlay, now abandoned. Historical Oxiana sampling of the concentrates returned up to 432g/t gold

Ta Vaeng Copper & Gold - a target of considerable scale Unity





- Unity exploration licence application (area 199km²)
- Situated in MOE protected area (Virechy National Park)
- Oxiana had strong interest in the area (application lodged 2007)
- Large altered volcanic package (massive, vuggy & granular silica with pyrophyllite-dickite-diaspore-andalusite-topaz) an interpreted lithocap
- **7km x 5km** vegetation anomaly believed to be due to hydrothermal alteration above intrusive system
- Sulphur-rich springs
- Recorded molybdenum occurrence
- The scale of the system and the intensity of the alteration suggests potential for sizable mineral deposit (Unity is targeting copper-gold)
- No drilling has ever been conducted
- IESIA study completed & Inter-Ministerial Meeting approval received on 17 August 2023. Waiting final approval by Ministry of Environment

Ta Vaeng Copper & Gold - intriguing vegetation anomaly **Unity**







5/05/2025

Thailand Overview – re-emerging mining jurisdiction



Country Facts

65.9M

Population

(2024)

513,120km²

\$7,812 Est. Nominal GDP

per capita (2024)

2.7%

Est. GDP Growth (2024)



Gold mine reopens after 6 years

- Last general election 14 May July 2023 return to democratic rule following military coup d'etat in 2014
- Member of ASEAN
- Party to the ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA)
- Party to the Regional Comprehensive Economic Partnership (RCEP) agreement
- Tax treaty & investment treaty with Singapore

Mining Fiscal Regime & Titles

- 100% ownership, 20% corporate tax, 2.5% royalty (gold), import duty exemptions
- No restrictions on foreign currency convertibility and repatriation²
- Transparent exploration-mining title process
- Special Prospecting Licences (SPL's) granted for 5 years
- SPL's can be extended further
- SPL holders have the right to apply for a Mining Licence (30 + 30 years)

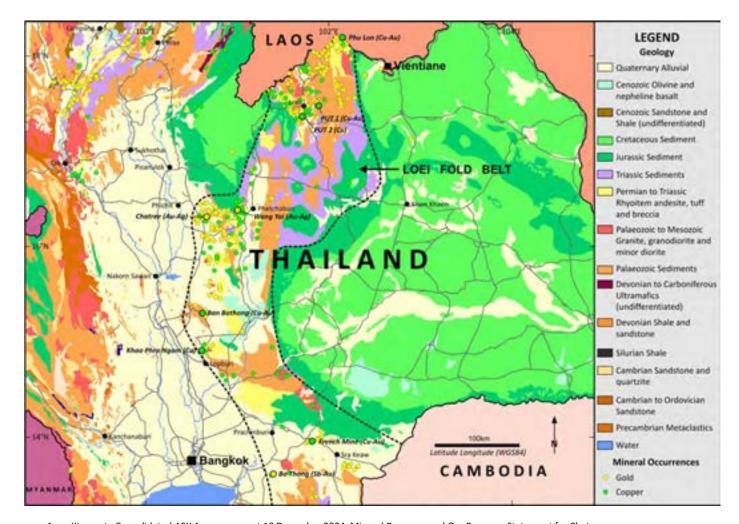


Chatree Gold Mine owned by Kingsgate Consolidated reopened in March 2023 following an international arbitration lawsuit under the Thailand – Australia Free Trade Agreement. The mine had been ordered closed in 2016 by the former military junta. Chatree is the largest gold mine in Thailand

PWC Thailand country overview - https://taxsummaries.pwc.com/thailand

Loei Fold Belt (Thailand)





- Kingsgate Consolidated ASX Announcement 19 December 2024: Mineral Resource and Ore Reserves Statement for Chatree Gold Mine including A-Pit Area – December 2024
- 2. Kingsgate Presentation 30 October 2024
- 3. PanAust ASX Announcement 27 May 2014: PanAust 2013 Annual Reveiw

- Unity plans to acquire copper-gold licences in the Loei Fold Belt (LFB) well advanced
- Unity Mineral (Thailand) Co., Ltd established
- Surapol Udompornwirat appointed a director
- LFB the major copper-gold belt in mainland Southeast Asia
- Porphyry copper-gold and intrusion-related gold mineralisation
- The metal endowments of the largest deposits in the LFB include:
 - Chatree (Thailand): 5.6Moz gold, 41.4Moz silver^{1,2}
 - Phu Bia (Laos): 1,203Kt copper, 4.3Moz gold, 33.9Moz silver³
- Little systematic exploration in the Thai portion of the LFB for 10 - 20 years
- Rio Tinto has recently recommenced exploration in the LFB (Laos portion)





5/05/2025

Corporate Summary (Pre-IPO)



Capital Structure

A\$17.9M

"Market Cap" at A\$0.15/Share

A\$17.6M

Enterprise Value **A\$0.3M**

Cash Balance (15 Apr 2025)

2014

Year of Incorporation

Nil

Debt

119.2M

Shares on Issue

8.5M*

Options & Partly Paid shares

190

No. of Shareholders

Major Shareholders

Directors & Management 20.4%

LOWELL RESOURCES FUNDS MANAGEMENT

Beevers / WHiS 5.7%

Shareholding Distribution

Australia 61.5%

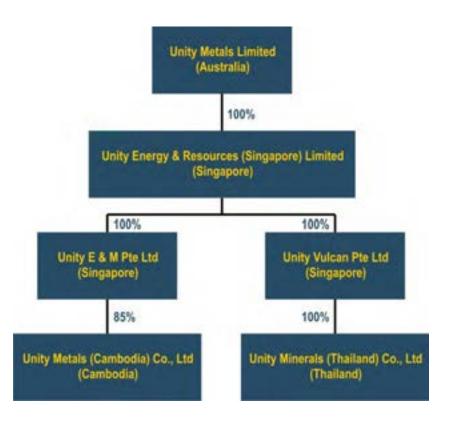
UK 35.0%

Cambodia 2.4%

Others 1.1%

9.6%

Corporate Structure*



^{*}Shares in Unity Energy & Resources (Singapore) Limited are to be swapped for shares in Unity Metals Limited (Australia). Unity Metals Limited (Australia) is the entity that will be utilized for the planned ASX listing

^{*}Options & Partly Paid Shares: 7.4M, US\$0.20 – US\$0.30 conversions, expire May 2025 – May 2026 Broker Options: 1.125M, A\$0.14, expire Mar 2027

Board & Management - extensive Asian experience



Board



Mr Andrew Wright (Non-Executive Chairman)

Highly experienced lawyer. Consultant with an international law firm having been a senior partner of a leading commercial law firm and built one of the best known resource teams in the UK. He led the first dual AIM listing.



Mr Craig Mackay (Managing Director & Founder)

Exploration geologist with 38 years experience working in SE Asia, West Africa, Australia, Canada, Chile, Sweden & SW Pacific islands. Previous positions with major resource companies. He was the Managing Director of an ASX-listed Golden Rim Resources for 15 years. Multiple gold discoveries (collective inventory of 13 million ozs), including the Balogo Intrusion Related Gold deposit in West Africa.



Mr Gilbert Rodgers (Corporate Director & Founder)

Chartered Accountant and has been involved in the mining industry for more than 30 years. Previous Managing Director of Unity (8 years). Also, previously an executive director for a number of ASX listed companies.



Mr Mark Ashall (Non-Executive Director)

Managing Director of a UK property development and asset management group. Long and successful history of operating in SE Asia holding senior management positions with Swire Group (Hong Kong) and Indochina Assets (Cambodia, Vietnam and Myanmar). Trustee of ISF, a charity which provides education to 700 underprivileged children in Cambodia.



Ms Natalie Teo (Company Secretary)

Ms Teo is an experienced company secretary and has provided corporate advisory, company secretarial and financial reporting services to both ASX and unlisted public companies as well as private companies. Ms Teo is a Chartered Secretary and an Associate of the Governance Institute of Australia. She is currently the secretary to several ASX-listed entities.

Senior Management



Mr Shane Hibbird (Exploration Manager)

Exploration geologist with over 35 years experience working in Australia, SE Asia, China, Mongolia and West Africa. He was the Exploration Manager for Renaissance Minerals when they acquired Okvau in Cambodia in 2013 and he managed the work that increased the resource to over 1Moz that led to Okvau becoming an operating mine in 2021.



Mr Graham Moir (General Manager – Cambodia & Thailand)

More than 40 years experience in the resources industry with 24 years in oil & gas and 18 years in mining exploration in Cambodia and Laos. Previously Cambodia country manager for Oxiana & Oz Minerals & Cambodia country representative for Pan Australian/Phu Bia Mining. Involved in both the exploration & construction phases of the Okyau Gold Project.



Mr Surapol Udompornwirat (Director – Unity Minerals (Thailand) Co., Ltd.)

Exploration and mine geologist with over 40 years experience working in Thailand, Laos and Malaysia. Previously Co-Managing Director of Metal Tiger Exploration and Executive Vice President of Akara Mining (the Thai subsidiary of Kingsgate Consolidated). Currently Managing Director of Primex Mining Consultants and Secretary General/Vice President of the Mining Industry Council of Thailand.



Mr Scott Bishop (Consulting Geologist)

Exploration geologist with 38 years experience working in Australia, India, Cambodia, US and Canada. Long-term, on-going working relationship (employee & consultant) with Rio Tinto Exploration for 23 years. Seven years on Cambodian mineral project research, acquisition and exploration.



Mr Jaydee Ammugauan (Project Geologist)

Exploration geologist with over 20 years experience working in Cambodia, Philippines, Australia, Indonesia, Uganda and Central Asia. More than 14 years experience in Cambodia including previous Senior Geologist positions for Angkor Resources (TSX-V) and Southern Gold (ASX).

















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Pre-IPO Offer



Overview

- Unity is seeking to raise approximately A\$1.0 million via the issue of 6.67 million new fully paid ordinary shares in the Company ("New Shares") via a Pre-IPO capital raising ("Pre-IPO Offer").
- The Company reserves to right to take oversubscriptions at its discretion
- New Shares will be offered at A\$0.15 per New Share
- Intention to list Unity on the Australian Securities Exchange (ASX)
 Q3/CY2025
- Canaccord Genuity (Australia) is acting at Lead Manager to the proposed
 IPO. JS First and Bacchus Capital Advisers (UK) are acting as Co-Managers







Pro-forma Capital Structure	Shares		
Pro-tornia Capital Structure	m	%	
Existing Shareholders	119.2	94.7	
• Pre-IPO	6.7	5.3	
Total	125.9	100.0	

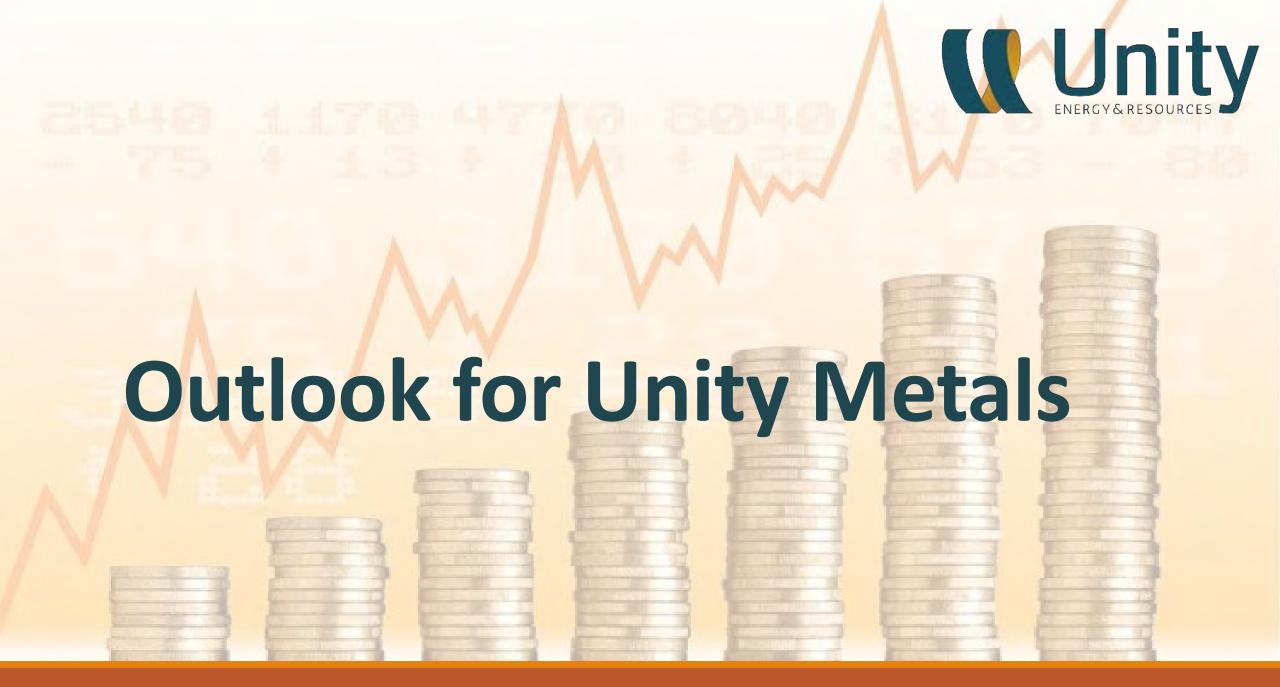
• In addition, the Company has 8.53m Options & Partly Paid Shares on issue

Sources & Uses of Funds

Source of funds	A\$m
Equity capital raise	1.0
Total	1.0
Use of funds (Pre-IPO Offer)	A\$m
To support Cambodian exploration, fund new business development in Thailan prepare for an IPO	d and
Cambodia Exploration (surveying, sampling, assaying)	0.3
Thailand New Business Development (licence review & acquisition)	0.3
Corporate expenses	0.1
IPO/fundraising costs	0.3
Total	1.0

Major Existing Shareholders

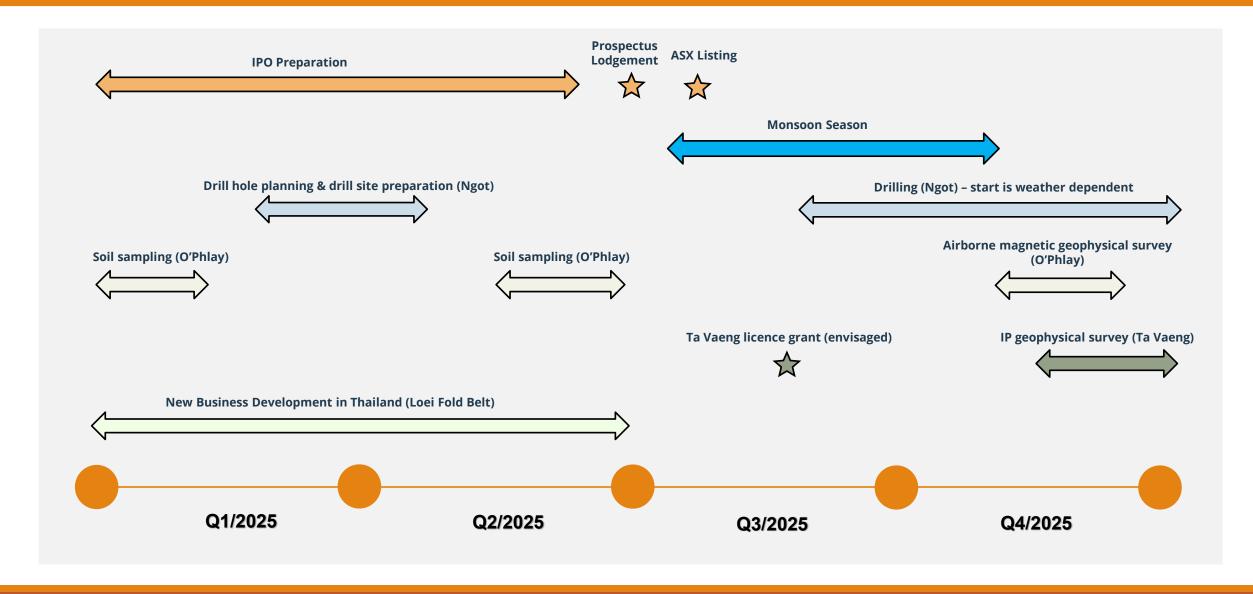
Directors and Management	20.4%
LOWELL RESOURCES FUNDS MANAGEMENT	9.6%
Beevers / WHiS	5.7%



5/05/2025

Indicative Timetable (12 Months)





Key Takeaways





NEW & RARE OPPORTUNITY

- Granted exploration licences in Cambodia that are un-explored or under-explored
- Ground directly adjacent to operating mines and/or existing mineral deposits



POTENTIAL FOR A DISCOVERY OF SCALE

- Intrusion-related gold & porphyry copper-gold districts (Tier 1 deposit potential) in Cambodia and Thailand
- Intrusions & structures that host the 1.1Moz Okvau gold deposit extend directly into Ngot
- Multiple "Okvau-scale" gold anomalies have been discovered at Ngot



EMERGING MINING JURISDICTIONS

- Cambodia has had a turbulent history only 20 years of modern exploration/mining history
- First commercial gold mine in Cambodia is only 3.5 years old & is a big success
- Thailand emerging from a decade of military rule exploration and mining of substance has re-commenced
- Governments highly supportive of Unity, transparent licencing



FAVOURABLE MARKET CONDITIONS

- Outlook for the gold price is positive (Goldman Sachs/JP Morgan forecast: US\$3,100 US\$3,300 in 2025)
- Market support of ASX companies operating in Cambodia (Emerald >A\$2.8b market capitalisation)



CLEAR PATHWAY TO MONETISE

- Unity plans to list Unity on ASX to provide shareholders with liquidity
- Mandates executed with Canaccord, Bacchus & JS First to support an IPO
- Projects lie in strategic locations M&A potential



CHEAP ENTRY POINT

- Participation in pre-IPO & IPO raisings offers ground floor entry
- Directors & management have considerable skin in the game
- Respected institutional investors, such as Lowell Resources Fund, are already invested in Unity



Thank You

Unity Metals Limited

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Perth, WA, 6005

Cambodia: 4A Street 36R, Khan Russey Keo,

Phnom Penh, Cambodia

For General Enquiries:

Craig Mackay, Managing Director Unity Metals

Email: craig@unitymetals.com.au

Telephone: +61 418 397 091

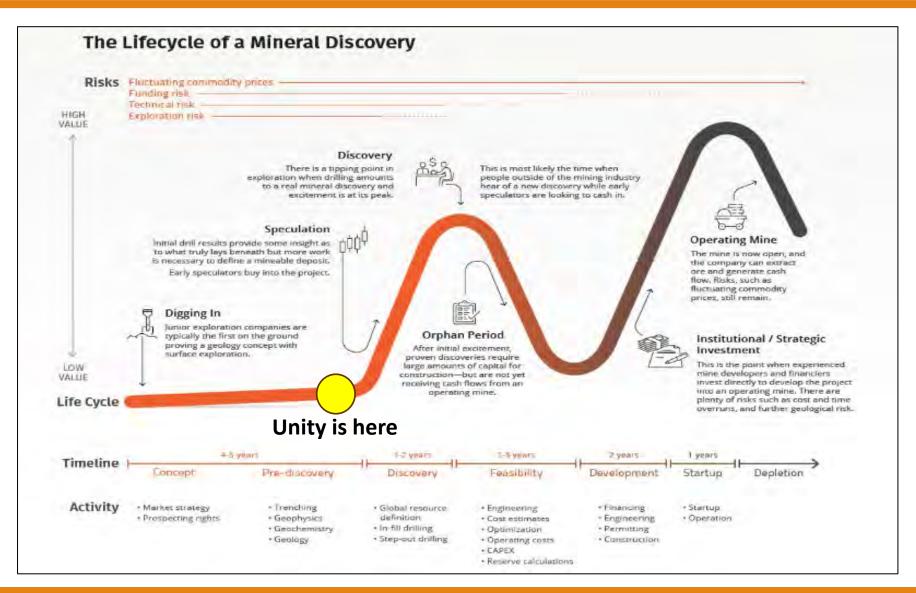




5/05/2025

The Lassonde Curve





Pierre Lassonde founder of Franco Nevada (one of the first gold royalty companies and now the largest in the world at CAD38 billion).

Emerald (ASX:EMR) share price performance





De Grey (ASX:DEG) share price performance





Predictive Discovery (ASX:PDI) share price performance Unity





March 2025



Granted Unity Licences

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Appendix A: Ngot Exploration Licence





ព្រះពទិាសាចក្រកម្ពុទា ទាត សសនា ព្រះមហាក្យត្រ

អាជ្ញាបណ្ណស្វែខរុកអា (អំលោម:) ដេមប្រើក្រសួទវ៉ា និទនាមកាល

- បានឃើញរដ្ឋចម្មនុញ្ញនៃព្រះរាជាណាចក្រកម្ពុជា
- បានឃើញព្រះរាជក្រឹត្យលេខ នសភកស០៩១៨/៩២៨ ពុះថ្ងៃទី ០៦ ខែ កញ្ញា ឆ្នាំ២០១៨ ស្តីពីរាប់តែងតាំងរាជរដ្ឋាភិបាល ខែព្រះរាជាណាចក្រកម្ពុជា
- បានឃើញព្រះរាជក្រមលេខ ឧសរភាម/០៦១៨/០១២ ចុះថ្ងៃទី ២៨ ខែ មិថុនា ឆ្នាំ២០១៨ ដែលប្រកាសឲ្យច្រើឡាប់ស្ថិតី ការរៀបចំ និងការប្រព្រិត្តទៅនៃឥណៈនេះមន្ត្រី
- បានឃើញព្រះរាជក្រមលេខ ឧសភាមេខាច១៣/០១៧ ចុះថ្ងៃទី០៩ ខែធ្នូ ឆ្នាំ២០១៣ ដែលប្រកាសឲ្យប្រើច្បាប់ស្ថិពីការ បង្កើតក្រសួងដី និងថាមពល
- បានឃើញព្រះរាជក្រមលេខ ឧសភាម/០៧០១/០៩ ចុះថ្ងៃទី១៣ ខែកក្កជា ឆ្នាំ២០០១ ដែលប្រកាសឲ្យប្រើច្បាប់ស្តីពីការ គ្រប់គ្រង និងធ្វើអាជីវកម្មជនបានជី
- បានឃើញព្រះរាជព្រមលេខ នសពោមបេ៦១៨០៩ ចុះថ្ងៃទី២១ ខែមិថុនា ឆ្នាំ២០១៨ ដែលប្រកាសឱ្យប្រើច្បាប់ស្តីពីវិសោធនកម្ម ខែព្យាប់ស៊ីពីភាពគប់គ្រង និងការធ្វើអាជីវកម្មជនធានជីវ
- ្ត ពុះឃើញអនុក្រីព្យលេខ ១៣៧ អនក្រ.បក ចុះថ្ងៃទី៣១ ខែតុលា ឆ្នាំ២០១៨ ស្ថិតីការរៀបចំ និងការប្រព្រឹត្តទៅរបស់ក្រសួងដែ ទិនបាអុលល
- ជានយើញអនុក្រិត្យលេខ ៧២ អនក្រ.បក ចុះថ្ងៃទី០៥ នៃឧសភា ឆ្នាំ២០១៦ ស្តីពីការគ្រប់<mark>គ្រងអាជ្ញាបណ្ណស្វែងរុករក និង</mark> អាជ្ញាបណ្ណឧស្សាហកម្មអាជីវកម្មនេខានង៊ែ
- យោងលិខិតស្នើសុំ ចុះថ្ងៃទី១៩ ខែកក្កដា ឆ្នាំ២០២៣ របស់ក្រុមហ៊ុន យុនីទី មេចល (ខេមបុឌ) ឯ.ក

เหมียน

ម្នេះការ ១៖ ជួល់អាជ្ញាបណ្ណស្វែងរុករកឱ្យក្រុមហ៊ុន ផ្ទេីខី មេផល (នេមបុនា) ឯ.ក (LINITY METALS (CAMBODIA)

CO. LTD.) មានរបស់យថ្នានថ្នះលេខ៤A ខ្លាំងា៦អាភូមិបិងសាឡាង សង្កាត់ឬស្បីតែវ ខណ្ឌឬស្បីរីជារាជធានីភ្នំពេញ
ដើម្បីធ្វើប្រតិបត្តិការស្វែងប្រាក់ដែលហៈ ស្ថិតនៅតំបន់ភ្នំព័ត ស្រាកែវសីមា និងស្រុកពេជ្រាដា ខេត្តមណ្ឌលគិរី
ដែលវាណត់ដោយនិយាមភាគាមដំណាក់កាលសុតលភាព ខិតបានកំណត់ក្នុងផ្នែកនីមួយ។ នៃនាជ្ញាបណ្ណនេះ។

ម្រែករះ ២៩ ក្រុមហ៊ុន យុនីធី មេចយ (ខេមបុខា) ជី.គ (UNITY METALS (CAMBODIA) CO., LTD.) ប្រជៃណីពករ ប្រតិបត្តិការស្វែងក្រោកប៊ីលោហៈ ស្របខាមបទឲ្យញញ្ញិនិច្ចក្រាសស្តីពីលក្ខខណ្ឌបន្ថែម ខែអាជ្ញាបណ្ណស្វែងកេរក ប្រតិបត្តិការស្វែងក្រោយ នេះប្រក ចុះថ្ងៃទី ១៤ ខែ សីហា ឆ្នាំ២០២៣ ច្បាប់ និងលិនិតបទផ្ទានគតិបត្ត ក្នុកព័ត្តភាពសាលា

ម្រះការ នារ ចាមពលខេត្តមណ្ឌលគឺវី និងប្រធានក្រុមហ៊ុន យុទិធី មេផល (មេមបុខា) រិ.ក (UNITY METALS (CAMBODIA) CO., LTD.) ត្រូវអនុវត្តតាមការកិច្ចរៀង១ខួន ចាប់ពីថ្ងៃចុះហត្ថលេខាតទៅ។

ក. តំបន់អាថ្មាចល្អស្លែទ្រោកនិចសុពលភាពនៃអាថ្មាចល្អស្វែទគ្រាគ

្រាល់ន័យមេកាម្រាំផ្នែកលើប្រព័ន្ធ UTM_WGS1984_Zone_48N)
អាជ្ញាបណ្ណស្វែងក្ររកនេះមានសុពលភាព ៣(បី) ឆ្នាំ ៣ប់ពីថ្ងៃទី __0.1 AUG 2022 __ដល់ថ្ងៃទី _____0.1 AUG 2022

តំបន់អាញបណ្ណស្វែតក្រភេះនេះមានថ្ងៃជីទំហំ ១១២,៤០ (មួយរយជប់ពីកក្បៀសសែសិច) គឺខ្យាំមីត្រកូឡា ដោយកំណត់ និយាមកាដុចនាងក្រោម៖

ចំណាច	អាប់ស៊ីស	MINESHIN	ចំណុច	មេរក់ស្ពីស	SHIEDIES
A	681581	1394323	F	697581	1394324
В	692970	1394326	G	697581	1393324
C	692970	1393720	H	705581	1393324
0	694350	1393720	1	705581	1389324
E 694350	1394326	J	681581	1389323	



ថ្ងៃសុក្រ ភាពបាន ខែទុខមាន ឆ្នាំថោះ បញ្ជាពីកា ស ២៤៦៧ ធ្វើនៅក្រុកម្នាញ ម៉ែន នៃ សិច្ចា ឆ្នាំ២០២៣

អាជ្ញាបណ្ណស្វែងត្រវត្តស្វេបានពន្យារបន្តសុខលភាព ២ (ពីរ) ឆ្នាំ ចាប់ពីថ្ងៃទី និងវ៉ តំបន់ភាជាបណ្តាស់ងក្រាសនេះមានថ្ងៃដីទំហំ និងវ

ស៊ីយៈសែម ដល់ថ្ងៃទី និងកំណត់និយាមកានាងក្រោម រ

ចំណុច	មេត្តក្នុងក្នុងក្នុងក្នុងក្នុងក្នុងក្នុងក្នុង	HICKS	ចំណុច	មាច្ចិត្តបា	HICHES
		iğ ığıstr	ខែ រថនានីភ្នំពេញ ថ្ងៃ	ឆ្នាំ ទី ខែ ខ្មេមទ្រី្ត	រ.ស ឆ្នាំ២០

Appendix B: O'Phlay Exploration Licence





ព្រះពថាសាចគ្រកម្ពុជា ជាត សសចា ព្រះមហាក្យត្រ

मुक्ति हैं वर्ष अवतः Ministry of Mines and Energy (ब्राइट विकास स्ट्री, अवस्थित अवस्थ

អាជ្ញាមណ្ណស្វែលគ្រះគ (វ៉ែលោមា:) ខ្មេមស្ត្រីគ្រសុខរ៉ែនិចថាមកល

- បានឃើញផ្នេចម្ចនុញ្ញនៃព្រះរាជាណាចក្រកម្ពុជា
- បានឃើញព្រះរាចក្រឹត្យយេខ ឧសភគល០៩១៨/៩២៤ ចុះថ្ងៃទី ០៦ ខែ កញ្ញា ឆ្នាំ២០១៨ ស្តីពីការតែងតាំងរាជរដ្ឋាភិបាល ខែនេះរាជាណាចក្រកម្ពុជា
- បានឃើញព្រះរាជក្រមាលន ឧសភាមហេង១៨/០១២ ចុះថ្ងៃទី ២៨ ខែ មិដុនា ឆ្នាំ២០១៨ ដែលប្រកាសឲ្យប្រើច្បាប់ស្តីពី ការរៀបចំ និងការប្រព្រឹត្តទៅនៃគណៈរដ្ឋមន្ត្រី
- បានឃើញព្រះរាជ្យមេលេខ ឧសភាមា១២១៣/០១៧ ចុះថ្ងៃទី០៩ ខែក្នុ ឆ្នាំ២០១៣ ដែលប្រកាសឲ្យប្រើច្បាប់ស្ថិតិការ បង្កើតក្រសួងជី និងថាមកល
- បានឃើញព្រះរាជក្រមលេខ ឧសភេម/០៧០១/០៩ ចុះថ្ងៃទី១៣ ខែកក្កដា ឆ្នាំ២០០១ ដែលប្រកាសឲ្យប្រើច្បាប់ស្តីពីការ គ្រប់គ្រង និពធ្វើអាជីវកម្មជនបានដែ
- បានឃើញព្រះរាជក្រមាលន ឧសារតេមបង១៥/០៩ ចុះថ្ងៃទី២១ ខែមិថ្មនា ឆ្នាំ២០១៤ ដែលប្រកាសឱ្យប្រើច្បាប់ស្តីពីវាសាធរកម្ម ខែច្បាប់ស្តីពីការគ្រប់គ្រង និងការធ្វើវកម្មធនធានម៉
- បានឃើញអនុក្រឹក្សលេខ ១៣៧ អនក្រ.បក ចុះថ្ងៃទី៣១ ខែកុលា ឆ្នាំ២០១៨ ស្តីពីការរៀបចំ និងការប្រព្រឹត្តទៅរបស់ក្រសួងដី និងថាមេលេ
- បានឃើញអនុក្រិត្យលេខ ៧២ អនក្រ.បក ចុះថ្ងៃទី០៤ ខែឧសភា ឆ្នាំ២០១៦ ស្តីពីការគ្រប់គ្រងអាជ្ញាបណ្ណស្វែងរួចភា និង អាជ្ញាបណ្ឌនស្តាហិកម្មអាជីវកម្មជនជាន់ពី
- យោងលិនិកស្នើសុំ ចូះថ្ងៃទី១៩ នៃកក្កដា ឆ្នាំ២០២៧ របស់ក្រុមហ៊ុន យុនីពី រមពល (ខេមបុខា) ឯ.ក

BUITUR

មួមការ ១៖ ថ្នល់អាជ្ញាចណ្ណស្វែងការកឱ្យក្រុមហ៊ុន យុខីធី មេចល (ខេមបូឌ) ឯ.ក (UNITY METALS (CAMBODIA)

COLLID.) មានអាសយជ្ញានឲ្យៈលេខ៤A ផ្លូវតាមកភូមិបឹងសាឡាង សង្កាត់បូស្ស៊ីដែរ ខណ្ឌបូស្ស៊ីដែរ វាជានីភ្នំចេញ
ដើម្បីធ្វើប្រតិបត្តិការស្វែងការដែលហេះ ស្ថិតនៅតំបន់រូបក្រុយ ស្រុកចេញជាជា និងស្រុកកោះវិញភ ខេត្តបណ្ឌលគិវិ ដែលកំណត់ដោយនិយាមកាតាមដំណាក់កាលសុធលាភាព ដុចបានកំណត់ក្នុងផ្នែកនីមួយៗ នៃអាជ្ញាបណ្ណនេះ។

អាចបាន យុវិធី មេលា (នេមបុនា) ឯ.ក (UNITY METALS (CAMBODIA) CO., LTD.) ប្រព័ធិបើការប្រការប្រជាពេល ប្រជាពេល ប្រជាពិល ប្រជា

ម្នេចតា នាយកខុទ្ធកាល័យ អគ្គនាយកជនបានបី អគ្គាធិការនៃអង្គាធិការៀន អគ្គនាយកកិច្ចការទុទៅ ប្រធានបន្ទឹរថៃ និង ចាមពលខេត្តមណ្ឌលពីវី និងប្រធានក្រុមហ៊ុន យុនីថិ មេនយ (ខេមបុឌា) ឯ.ក (UNITY METALS (CAMBOOIA) CO., LTD.) គ្រងអនុវត្តតាមការកិច្ចមៀងបន្តន ចាប់ពីថ្ងៃចុះហត្ថលេខាកទៅ។

ក តំបន់ពេទ្ធាបណ្ណស្ងៃនគ្រាគនិនសុពលភាពនៃពេទ្ធាបណ្ណស្ងៃនគ្រាគ

(រាល់និយាមការ្រៅផ្នែកលើប្រព័ន្ធ UTM_WGS1984_Zone_48N)
អាជ្ញាបណ្ណស្វែងរុការកនេះមានសុខលភាព ៣(ថី) ឆ្នាំ ចាប់ពីថ្ងៃទី <u>0 1 AUG 2023</u> ដល់ថ្ងៃទី <u>0 1 AUG 2025</u> កំបន់អាជ្ញាបណ្ណស្វែងរុកកានេះមានស្វែធីទំហំ ១៩៤.៦០ (មួយរយៈកៅសិចប្រាំភ្លៀសហុគសិច) គីឡូម៉ែត្រក្រឡា ដោយ កំណត់និយាមកាន់ចនាងប្រាម៖

ចំណុច	เกย์หนึ่งเ	HIGHES	ចំណុច	អាច់ស៊ីល	HIGHER
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អាជ្ញាបណ្ណស្វែងរុករកព្រវបានពន្យារបន្តសុពលភាព ២ (ពីវ) ឆ្នាំ ចាច់ពីថ្ងៃទី <u>ដល់ថ្ងៃទី</u> តំបន់អាជ្ញាបណ្ណស្វែងរុកកេនេះមានថ្ងៃតីទំហំ<u>ពី និងកំណត់និយាមកានាងក្រោម</u> ៖

อัสภาย	រពប់មន្តីស	нисивя	តូរជាព	អាច់ស៊ីល	HHERITA
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