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STRICTLY BOARDROOM:

Uranium returns

Monday, 8 March 2010

IN recent weeks *Strictly Boardroom* has revealed annualised shareholder returns for ASX-listed copper, gold, nickel and zinc companies. You guessed the subject for this week. Here comes a comparable analysis for uranium. Allan Trench lists the top-performing uranium juniors ranked by share price gain over the past year.

Strictly Boardroom

Uranium juniors remain popular among Australian investors. Although the heady days of 2006, when uranium IPOs came to market thick and fast, are now long gone, there is no shortage of Australian Securities Exchange-listed contenders targeting next-generation uranium production.

This week *Strictly Boardroom* pulled together a list of 50 ASX-listed resource companies with a material uranium focus in their asset portfolio.

No doubt with further digging, the list could have been extended further. But 50 contenders are more than enough to get a handle on how the Australia-listed uranium sector has performed over the past year.

The news is pretty good for those investors backing uranium as a green energy source.

Despite a period when yellowcake prices have been subdued, at least when compared to recent years, and with the short-term market outlook one of adequate supply*, the good news for uranium investors is that equity returns across the junior uranium sector as a whole were very strong indeed.

As in the mainstream metal markets covered in recent weeks, ASX-listed uranium hopefuls posted a median return of around 100% for the year through to end-February 2010.

Also similar to the other metals, the distribution of shareholder returns in uranium was asymmetric. That is, while some uranium juniors did move backwards (slightly), a greater number delivered gains well in excess of 100% to their shareholders – with the average return hitting an impressive 140%.

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So who were the standout performers? Here are the uranium companies for which the annual gain exceeded 100%.

On *Strictly Boardroom's* list, the membership of the Uranium 100 Club measured some 23 companies**.

1. UraniumSA 1145%
2. Acclaim Exploration 450%
3. Thundelarra Exploration 372%
4. Encounter Resources 320%
5. United Uranium 300%
6. Callabonna Uranium 300%
7. Royal Resources 290%
8. Impact Minerals 250%
9. Desert Energy 245%
10. Mantra Resources 221%
11. A-Cap Resources 209%
12. Astro Resources 200%
13. Marmota Energy 197%
14. Berkeley Resources 181%
15. Extract Resources 161%
16. Southern Uranium 156%
17. Enterprise Metals 150%
18. Marenica Energy 143%
19. NuPower Resources 123%
20. Crossland Uranium Mines 122%
21. Burey Gold 120%
22. Uramet 120%
23. Alara Resources 112%

Roll on uranium – or perhaps that should be roll front uranium?

Good hunting.

Allan Trench is an Adjunct Professor at the Western Australian School of Mines and a Non-Executive Director of several resources companies. He is the Perth representative for CRU Strategies, the consulting division of independent metals & mining advisory CRU Group (allan.trench@crugroup.com).

** Uranium: What Price Next Generation Supply? CRU Analysis, alison.parums@crugroup.com*

***Share prices as at March 11, 2009, through to February 26, 2010. Strictly Boardroom's uranium register does not claim to be comprehensive, so any uranium companies omitted from the 100 Club are encouraged to get in touch.*



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