

# Proactive Investors Clients Top Performers



## Early pacesetters in the shareholder returns stakes Monday, 13 September 2010

**ALLAN Trench identifies the early leaders who have posted impressive share price gains since the end of June for each of nine commodity groupings across the 200-strong Top Resources Stocks 2010 watchlist.**

The honour roll is a lengthy one. Here are those companies on *Strictly Boardroom's* watchlist that led the field for the 2010-11 financial year to end August across each of the commodity groupings.

In **Gold** – the prizes for the financial year to date go to Andean Resources (up 47% to the end August before the release of takeover offers for the company), to **Integra Mining** (up 42%, also seen as a takeover play) and to explorers **Auzex Minerals** (42%) and Austral Gold (39%).

In **Copper/lead/zinc**, the honours thus far go to minnow China Yunnan Copper Australia (up 65%); to South Australian copper-gold explorer Rex Minerals (65%) and not wishing to be left out, also to 2009 standout stock Sandfire Resources (58%). **Thundelarra Exploration** has also set the bourse racing, up 78% to end August from end June courtesy of strong drilling results.

The eclectic group of companies classified as **Diversified** miners and explorers have achieved several impressive performances. Chief among these were **Brumby Resources** (up 117% on encouraging manganese and gold results), Sandfire's near neighbour Talisman Mining (up 95%) and copper-gold company **Exco Resources** (up 94%).

About Proactive Investors

**Uranium** has had a fair share of share price action too. **NGM Resources'** (not on the *Strictly Boardroom* watchlist) receipt of a bid from Paladin Energy has seen its share price rise 69% to end August.

**Oil & Gas** companies are struggling to make headway this year, with **Elixir Petroleum** (31%) and Karoon Gas Australia (12%), the best performers on the watchlist across a quiet sector.

**Coal Fe Resources** has more than doubled its share price (141%) followed by takeover target **Continental Coal** (66%) among **Coal** stocks.

**Iron ore** companies have generally had a quiet start to the new financial year – perhaps related to the ongoing uncertainties over Labor's future tax grab.

The standout company of course was Mauritania-focused Sphere Minerals (up 107%), again showing the benefits of corporate appeal in lifting a share price as Xstrata unveiled a \$2.50 per share cash offer for the company.

Finally, the rest of the Periodic Table, assigned to the **Other metals/minerals** category in the *Strictly Boardroom* watchlist, has had some star performers.

Tin hopeful Kasbah Resources delivered a pretty impressive 80% gain in the two months to end August – matching the rise of **Lynas Corporation** which rode the rare earth metals investment wave some 80% higher.

**Arafura Resources** posted a 73% gain providing further evidence that rare earths are now firmly on the investment radar across Australia.