MRG's Proposed Heavy Mineral Sands Acquisition in Mozambique

A world class titanium province

*Subject to Shareholder and regulatory approval

MRG Metals Ltd

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Exploration Targets: It is common practice for a company to comment on and discuss its exploration in terms of target size and type. The information in this presentation relating to exploration targets should not be misunderstood or misconstrued as an estimate of Mineral Resources or Ore Reserves. Hence the terms Resource(s) or Reserve(s) have not been used in this context in this presentation. The potential quantity and grade of resource targets are conceptual in nature since there has been insufficient work completed to define them beyond exploration targets and that it is uncertain if further exploration will result in the determination of a Mineral Resource or Ore Reserve.

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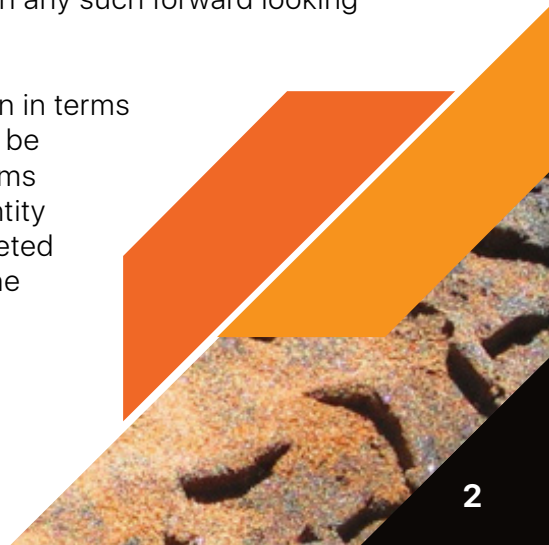


The Acquisition Highlights

A Corporate Transformation in the making...

Vendor Payments

Deal Completion	**175M shares 175M 1c options**
JORC Resource 350MT @ >5%THM*	**240M shares**
Scoping Study with positive economics & Board Decision into PFS	**480M shares****

About the "Prize" to be Delivered
Access to property in world class province
- Largest Mineral Sands project in the world 10km to the north of Corridor Central
- RIO/ Savannah Chilubane JV to the south of Corridor south
- RIO/ Savannah JV Mutamba Project to the North of Linhuane
- Surrounded by Multi-Billion dollar market cap players

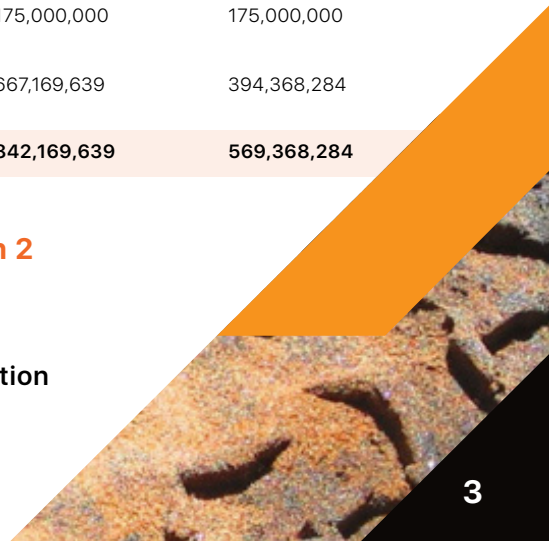
Inexpensive and effective exploration program (airborne geophysics and drilling) Rapid path to JORC Resource
Minimum prize may be conservative.

Rapid Value Uplift Potential based on Peer Comparison
Savannah Resources Mutamba Project: Reserve 451mt@6%THM; 30 year mine life; IRR23%; Pre-tax NPV(10% Disc) of US$245M **(refer slide 13)**

	Number of shares	Number of options
MRG Capital Structure Prior To the Proposed Transaction		
Number of ordinary shares and listed options held by shareholders	667,196,639	394,368,284
Total	**667,196,639**	**394,368,284**
MRG Capital Structure After the Proposed Transaction		
Number of ordinary shares and options held by the vendors	175,000,000	175,000,000
Number of ordinary shares and options held by the shareholders	667,169,639	394,368,284
Total	**842,169,639**	**569,368,284**

A successful implementation will cost about 45% of MRG's equity and US$2M over less than 2 years to generate multiple upside potential.

***THM (Total Heavy Minerals) within 24 months of completion**
****Voluntary Vendor Escrow of 240M shares until >$100M MRG market cap within 30 months of completion**



The Assets MRG are to Acquire from Sofala

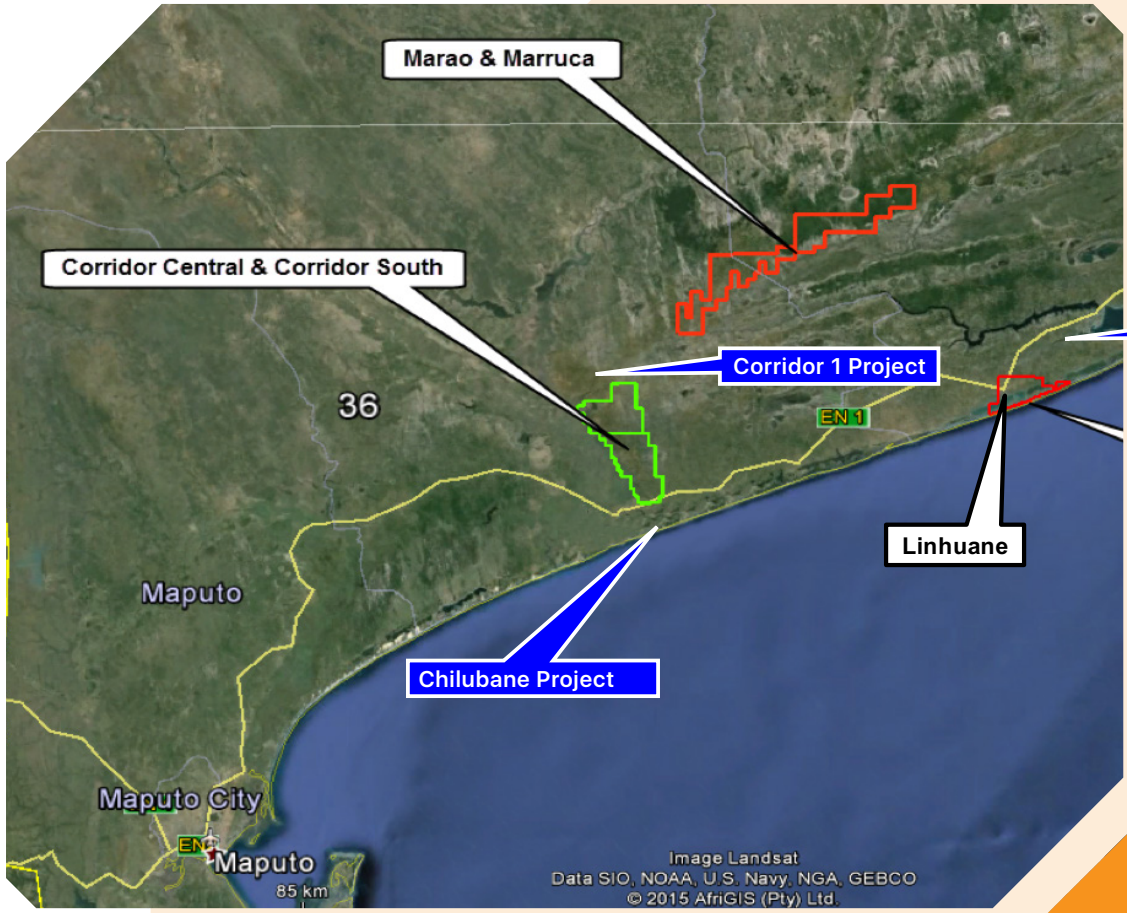
Three Exploration Areas

1 CORRIDOR CENTRAL & CORRIDOR SOUTH
(Granted)

2 LINHUANE
(Under Application)

3 MARAO & MARUCCA
(Under Application)

POTENTIAL FOR A WORLD CLASS TIER 1 HMS PROJECT



*Corridor 1 Project 10 km North - Worlds largest HMS deposit with over $1 Billion dollar committed to date
**Savannah Resources Mutamba Project (Reserve 451mt @6% THM with NPV of US 245 Million at scoping study)

The Mozambique Opportunity

- **Significant tenure footprint:** 100% owned, in a rich titanium sand province – with 631km² of Exploration Licences **GRANTED** and 360km² of Exploration Licences pending approval
- **Globally significant Mineral Resource potential:** defined by 35 drill holes at the Corridor Central and Corridor South tenements all showing significant mineralisation.
- **Significant opportunity to add value:** through low cost exploration activities over areas of known heavy mineral sand (HMS) mineralisation to discover large tonnage, high grade sweetspots and high unit value resources rapidly
- **Project with scale:** potential for long mine life mining asset under a number of staged mining and process scenarios. Mining and Processing all conventional
- **High calibre team:** proven history of company-making HMS discoveries and experience in Africa
- **Unique knowledge of HMS prospectivity in Mozambique:** Technical and strategic edge

World Class Neighbouring Deposits

- **Rio Tinto** is developing the Mutamba and Chilubane projects through a **JV with Savannah Resources**.
- The Government of Mozambique signed a **$500m** agreement (Dec 2013) with a Chinese firm to develop the **Corridor Sands (Deposit 1)** project immediately **northwest of Sofala tenements**. **(Less than 10 km)**
- Current updates indicate expenditure exceeding **$1 billion***
- Chinese currently producing from Chibuto and trucking ore to Maputo over 200km distance
- **Kenmare Resources** currently operates the **Moma mine** on the northeast coast of Mozambique producing 800kt of ilmenite, 50kt of zircon and 14kt of rutile per year.
- Other mineral sands explorers and developers in Mozambique include **Savannah** Resources, **Mozmin** Resources, **Regius** Resources and **Pathfinder** Minerals.

***Mining News 5 April 2018**

Sofala Management

Not only assets, but access to a quality team.

MARK ALVIN
Director

B.Sc Hons (Geol), Phd, MAusIMM, MSEG, MGSA

- 20 years experience in mine and exploration geology covering Australia, south, east and west Africa, and the USA
- 12 years African experience in titanium sand exploration and project evaluation with Rio Tinto Iron & Titanium Inc.
- 7 years specific field and project management experience in Mozambique (Portuguese language proficiency)
- Specialist in establishment and management of multi-faceted exploration teams in challenging environments
- Proven history of Tier 1 HMS discoveries in Mozambique

BRENDAN CUMMINS
Director

B.aSc Hons (Geol), MAIG, MSEG

- 20 years experience in mine and exploration geology covering southern and east Africa, Australia and China
- Strong geological knowledge of industrial mineral, precious and base metal exploration
- Specialist in developing exploration assets through resource definition and feasibility study
- Proven history of discovery of HMS deposits in east Africa

ADRIAN HILL
Director

- Chartered Accountant with 20 years experience in corporate finance and strategy, compliance and admin
- Director of Westoria Capital - resources focused investment and advisory group
- Director of ASX-listed and private unlisted mineral exploration companies
- Senior management roles in London with Credit Suisse First Boston and Natwest Markets
- Specialises in financing, structuring, evaluation and investment management
- Fellow of the Financial Services Institute of Australia

ROBERT WALKER
Legal Representative Mozambique

- Chartered Accountant with over 35 years experience in finance, taxation and auditing
- Senior Partner and Manager of PricewaterhouseCoopers in Mozambique (2001 – 2012), with oversight of multinational mining industry clients
- Member of the Institute of Chartered Accountants in England and Wales (ICAEW)
- Founding Member and current Executive Board Member of the Mozambican Institute of Accountants and Auditors
- Resident of Mozambique for 16 years with full Portuguese language proficiency

Rising Mineral Sand Market

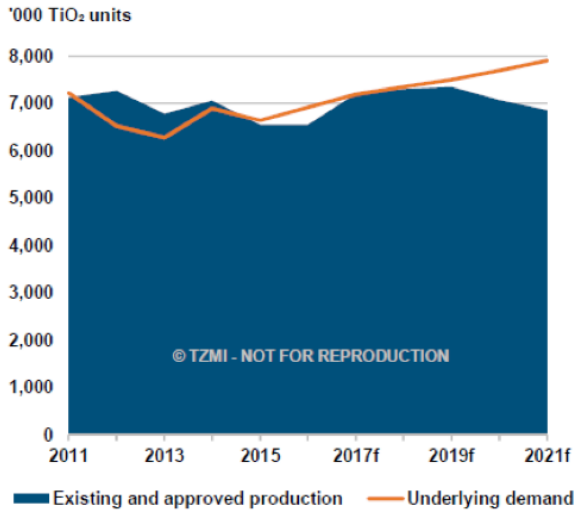
MDL

$350m MC

Sheffield Resources LIMITED

$192m MC

GLOBAL FEEDSTOCK SUPPLY/ DEMAND BALANCES AND OUTLOOK TO 2021



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MDL currently subject to takeover bids at +AUD$350 Million

BASE RESOURCES

$315m MC

KENMARE

$508m MC

Rising Mineral Sand Market

Key Drivers for Influencing the Mineral Sand Market in 2017 and beyond (Reg Adam - Artikol)

1. **Growth in end-use demand:** increased demand for paint, plastics decorative laminates and packaging paints with a serious lack of serious technical substitutes. Increase demand related to continued growing affluence of developing countries and
2. **Available mineable deposits and upgrading facilities (smelters and syn-rutile plants):** old mines drawing close to their producing lives, decreasing THM grade and lower value mineral assemblages. Larger Capital hurdles to replace or develop new mines tightening supply
3. **Industry Structure:** traditionally dominated by Iluka and Rio Tinto: the introduction of upstream vertical integration from newcomers like Tronox and Cristal who has sought their own supply has restricted the market for mineral sand suppliers relying on third party sales.
4. **GDP growth – globally and also the major economies:** The major economies including US, China, Japan, the EU, India, Brazil, Russia, Indonesia and Nigeria. Growth in GDP, in consumer incomes and in construction industry investment will have a positive impact on growth in the consumption of paint and plastics.
5. **China going Green:** Blue skies policy continues to close pigment plants and reducing the availability of environmentally acceptable TiO2 internally and externally

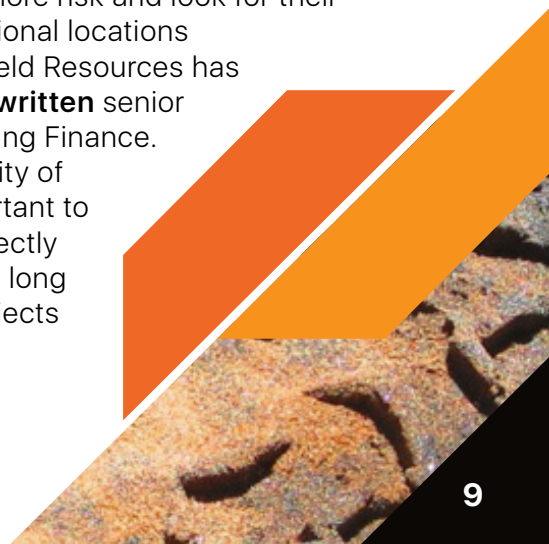
What happens as demand grows….

1. **Increased MA Activity:**
   - Iluka has been aggressive and positioning the Company for growth with a takeover offer for Kenmare Resources (Mozambique) and successful acquisition of Sierra Rutile in Sierra Leone - Both TiO2 dominant operations

   - Base Resources proposed **$100m acquisition** of Ranobe Project from World Titanium Resources

   - Evidenced by Eramet, **$288 million USD** takeover bid for Mineral Deposits Ltd, a 40% premium to prior trading.

2. **Increase in risk profile:** traditionally conservative majors and companies will accept more risk and look for their next acquisition in non traditional locations
3. **Projects get funded:** Sheffield Resources has secured a **US$200m underwritten** senior debt facility from Taurus Mining Finance.
4. **Offtake Agreements:** security of product becomes very important to end users. Willingness to directly invest in projects and secure long term offtake for the right projects



Sofala & HMS in Mozambique

- Sofala Resources established to secure prospective exploration projects in Mozambique. Company directors have an **intimate knowledge of the mineral sands** potential of the country, providing Sofala with a **strategic competitive advantage**.

- Mozambique is a developing country with an emerging exploration and mining industry. It has an extensive 2,700km-long coastline that has proven to be highly prospective for large **titanium and zircon heavy mineral sand deposits**.

- Modern HMS exploration commenced in the late 1980s, with discovery of deposits in Nampula (**Namalope and Moebase** deposits) and Gaza Provinces (**Corridor Sands** deposit). Tenure for HMS has been held by Western Mining Corporation & BHP Billiton (Corridor Project), Gencor, Anglo American, Iscor, Iluka Resources and Rio Tinto (various projects in Mozambique).

- **Recent positive scoping study by Savannah Resources/ RT JV on the Mutamba Mineral Sands Project based on a Mineral Resource of 450mt @ 6.0% THM and provides company making analogue for MRG.**

AIM: SAV – Savannah Resources PLC Scoping Study 30 May 2017

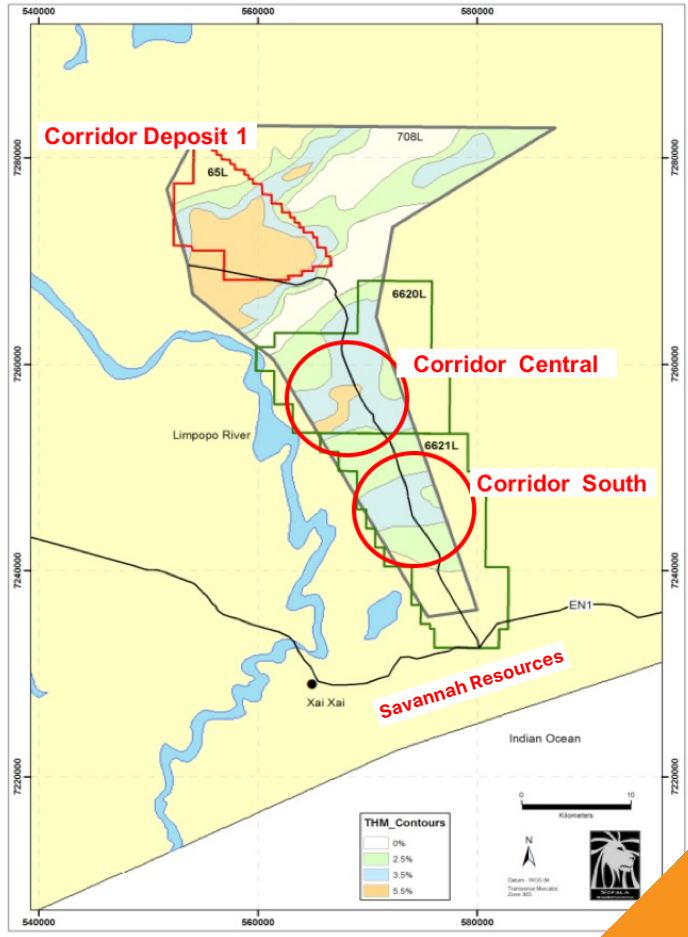
Corridor Projects

Strategic location

- Corridor Deposit 1 – located **10km north, +$1 Billion** recently committed to develop
- Savannah/ Chilubane Deposit – located **10km south**

First-pass RC drilling completed at the Corridor Central and Corridor South projects has yielded impressive total heavy mineral (THM) intervals that include:

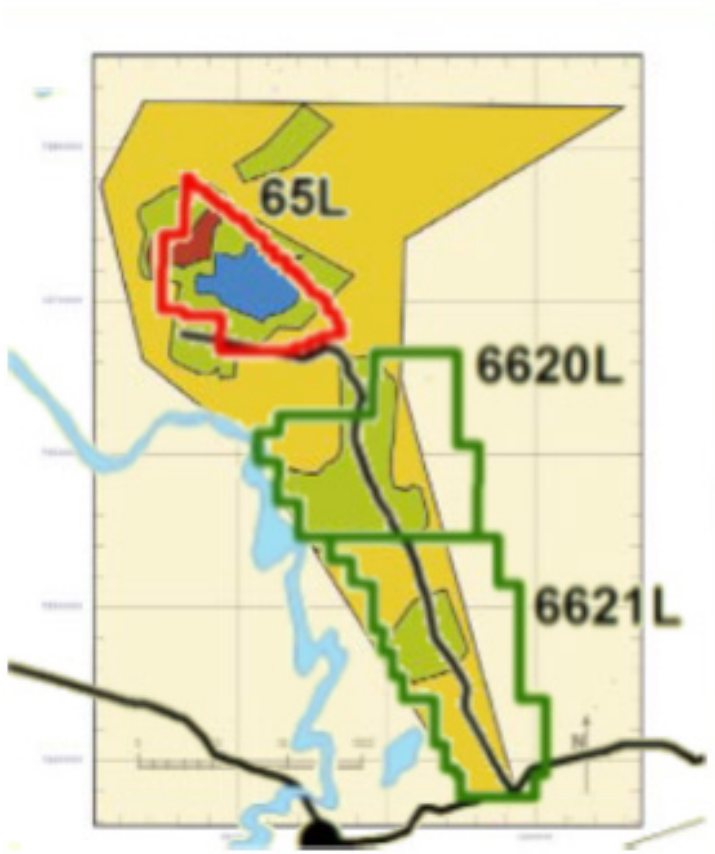
- Corridor Central comprises 179km2 covering palaeodunes known to host significant HMS mineralisation
- Very large high grade core with downhole grades up to 14% THM with high grades from surface to 60m, extending over an area of 5.5km x 1.2km
- Corridor South comprises 208km2 covering palaeodunes known to host significant HMS mineralisation
- Large high grade core with downhole grades up 7.4% THM extending over an area of 6.5km x 4.5km



Corridor Sands Deposit 1

Case Study

- Sofala Resources' Corridor Projects are located immediately south of the world class Corridor Deposit 1 (License 65L)
- Deposit 1 has 2.7 billion tonnes of JORC-compliant Measured and Indicated resources at 7% THM
- These resources comprise 107Mt of ilmenite - globally significant, potential +100 year mine life

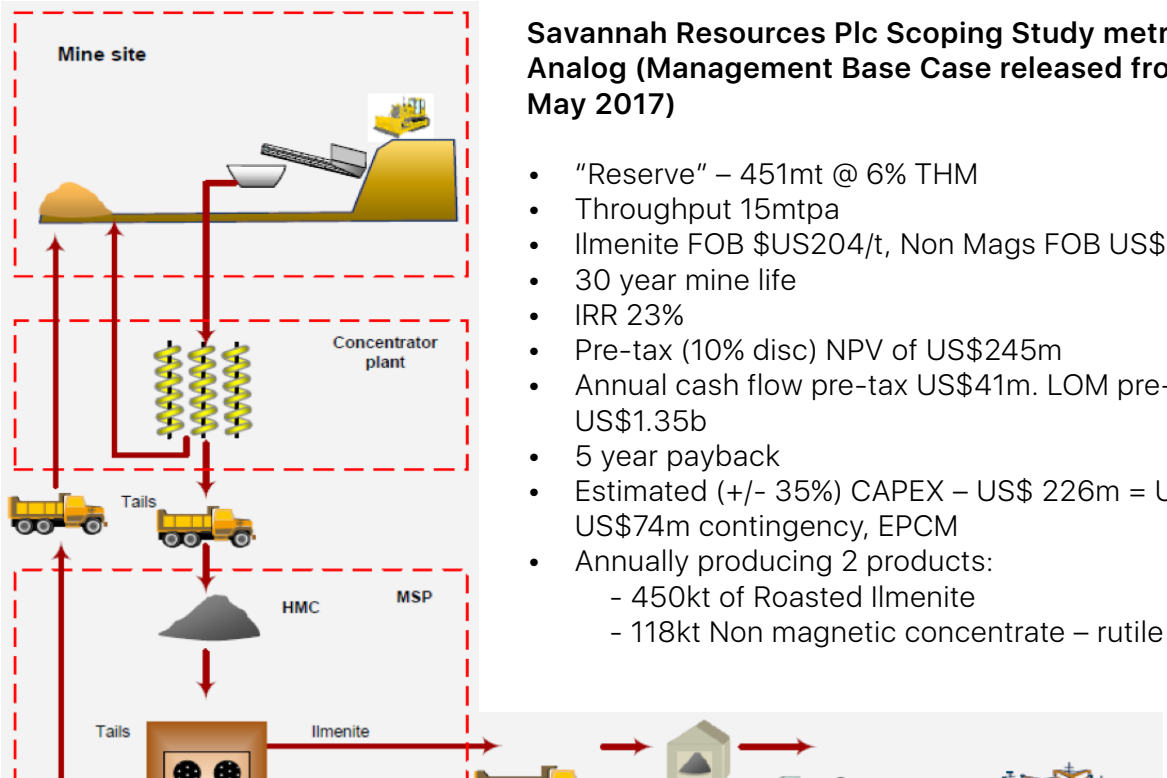


Mineral Resources

	Million Tonnes	Total Heavy Mineral	Ilmenite	Zircon	Rutile	Silt
		%	%	%	%	%
Measured & Indicated Resources						
West Block	1,765	7.47	4.14	0.15	0.02	16.4
East Block	908	7.18	3.80			19.0
Inferred Resources						
Other areas	13,920	4.9				
Total	**16,593**	**5.3**				

Taken from WMC Resources Ltd fact sheet for the Corridor Sands Project

Corridor Project Direct Analogue for MRG



Savannah Resources Plc Scoping Study metrics - Potential Analog (Management Base Case released from SAV on 30th May 2017)

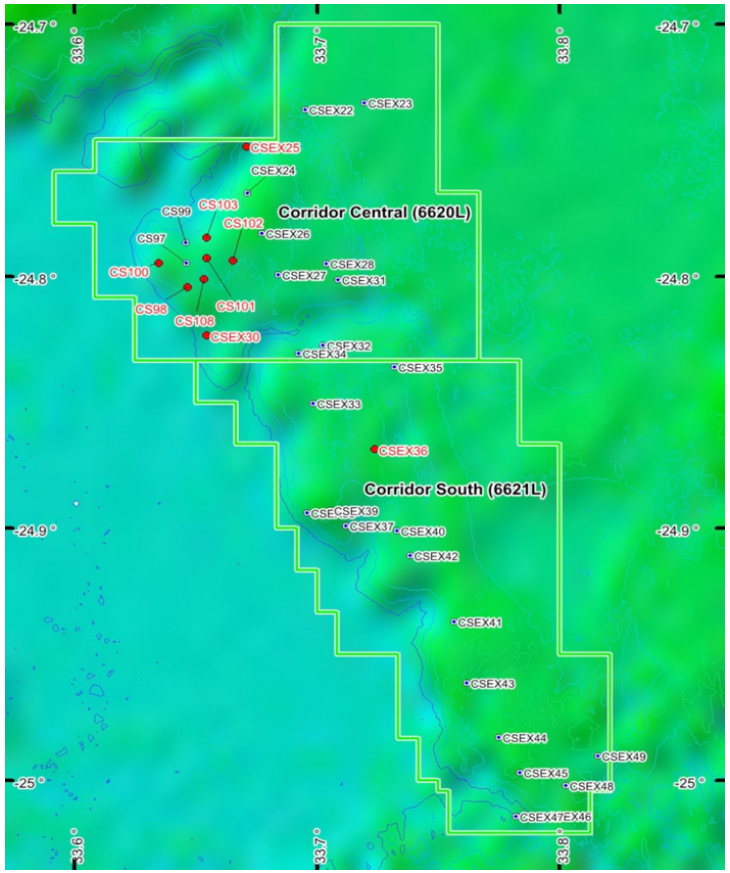
- "Reserve" – 451mt @ 6% THM
- Throughput 15mtpa
- Ilmenite FOB $US204/t, Non Mags FOB US$275/t
- 30 year mine life
- IRR 23%
- Pre-tax (10% disc) NPV of US$245m
- Annual cash flow pre-tax US$41m. LOM pre-tax cashflow US$1.35b
- 5 year payback
- Estimated (+/- 35%) CAPEX – US$ 226m = US$152m + US$74m contingency, EPCM
- Annually producing 2 products:
  - 450kt of Roasted Ilmenite
  - 118kt Non magnetic concentrate – rutile and zircon

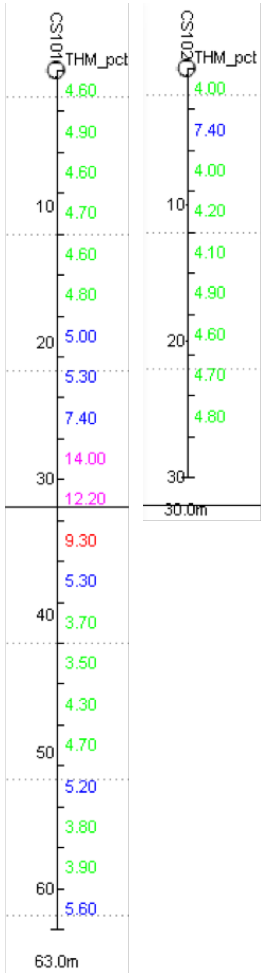
Note: Savannah current market cap of circa $100 million AUD with 20% project ownership at this time

Corridor Projects – total drill database (1999-2002)

(Refer ASX announcement 11 May 2018)

Drillhole locations and average THM grade summary
Every hole is mineralised

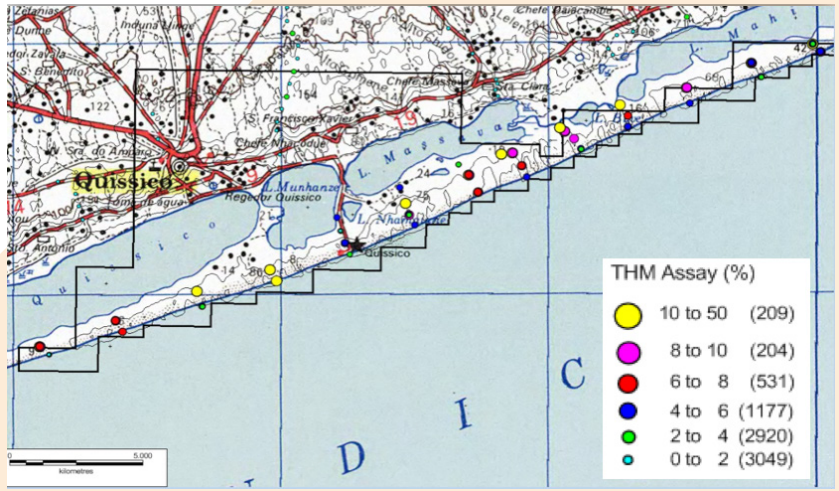


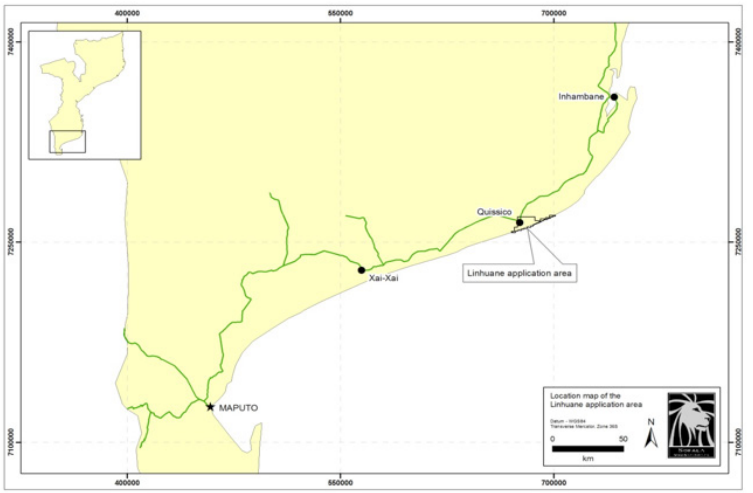


Hole Id	Drill hole THM intersect (no cuts)	Hole depth
CS97	48m @ 3.7% THM	48
CS98	54m @ 4.0% THM	54
CS99	40m @ 3.2% THM	40
CS100	36m @ 5.2% THM	36
CS101	63m @ 5.8% THM	63
CS102	27m @ 4.7% THM	30
CS103	48m @ 4.5% THM	48
CS108	42m @ 4.4% THM	42
CSEX22	93m @ 3.6% THM	93
CSEX23	75m @ 3.4% THM	75
CSEX24	54m @ 3.7% THM	90
CSEX25	60m @ 4.6% THM	75
CSEX26	69m @ 3.5% THM	81
CSEX27	90m @ 3.5% THM	90
CSEX28	66m @ 2.4% THM	90
CSEX30	48m @ 4.4% THM	63
CSEX31	30m @ 3.9% THM	75
CSEX32	81m @ 3.6% THM	87
CSEX33	30m @ 3.1% THM	81
CSEX34	42m @ 3.4% THM	78
CSEX35	18m @ 1.7% THM	78
CSEX36	48m @ 4.5% THM	75
CSEX37	42m @ 3.3% THM	75
CSEX38	24m @ 3.1% THM	60
CSEX39	42m @ 3.7% THM	60
CSEX40	72m @ 3.5% THM	84
CSEX41	87m @ 3.1% THM	87
CSEX42	78m @ 3.0% THM	84
CSEX43	60m @ 2.3% THM	78
CSEX44	54m @ 2.7% THM	75
CSEX45	78m @ 2.3% THM	78
CSEX46	66m @ 2.1% THM	66
CSEX47	30m @ 1.5% THM	63
CSEX48	87m @ 3.1% THM	87
CSEX49	87m @ 2.5% THM	87
	Total drill stats 35 holes for	2476
	Average hole depth	71

Linhuane Exploration Project

- **Linhuane project (7423L)** is located in Inhambane Province, and comprises 113km2
- Includes **20km strike of prospective palaeodunal feature**, defined by 100m topographic contour, adjacent to the present coast
- Immediately south of RIO/ Savannah JV Mutamba Project





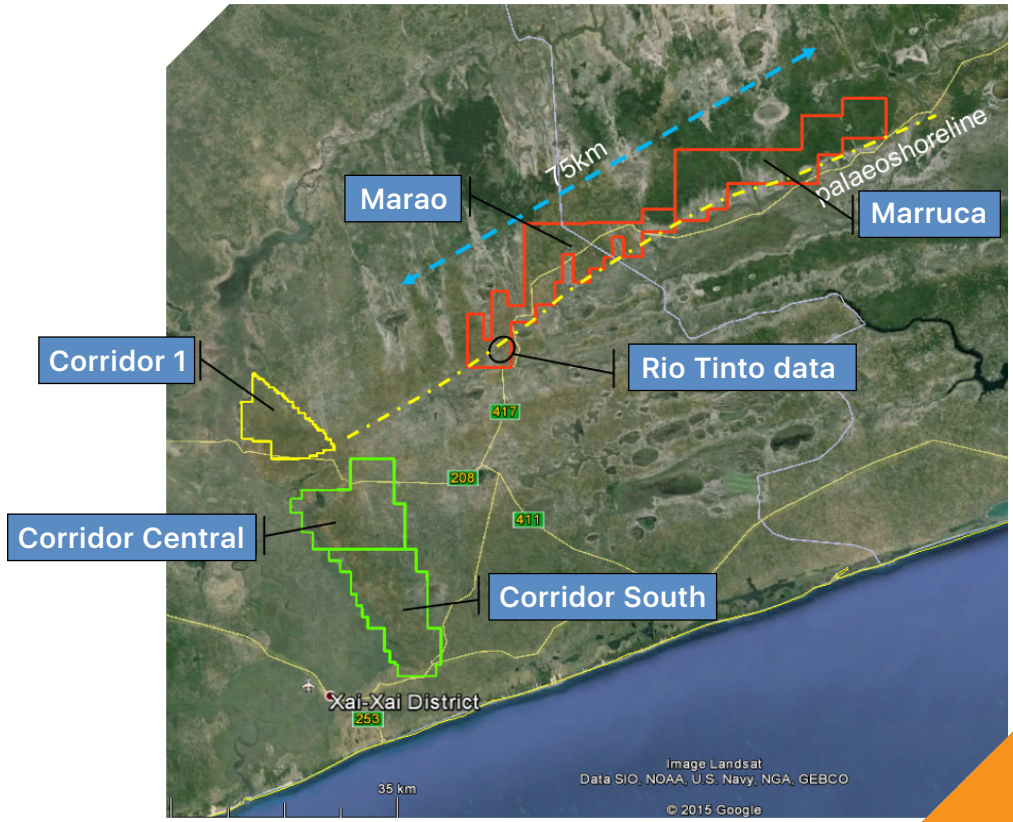
- Open file reports indicate Rio Tinto conducted shallow reconnaissance exploration drilling within the license. Auger drill holes 500m apart on drill traverses 3km apart
- Summary results show very continuous zones of very high grade **THM** to depths of **10m** ranging from **5% to 25%** THM
- No drilling information below 10.5m depth

(Refer ASX announcement 11 May 2018)

Marao and Marruca Exploration Projects

- Open file reports show Rio Tinto undertook shallow reconnaissance exploration on a small portion of 6842L
- Grades between 1.5%-2.0% THM from surface to a maximum of 10.5m downhole, ending in 2.0% THM
- Significant result includes 9m @ 2.85%THM with slimes typically 10% or less
- Surface mineralisation extends up to 7km along strike with drillholes 1km apart along main vehicular tracks
- Combined **prospective palaeodunal strike length of 75km**, inland from an interpreted palaeoshoreline
- Extent of mineralisation was never systematically tested at depth or along strike

(Refer ASX announcement 11 May 2018)



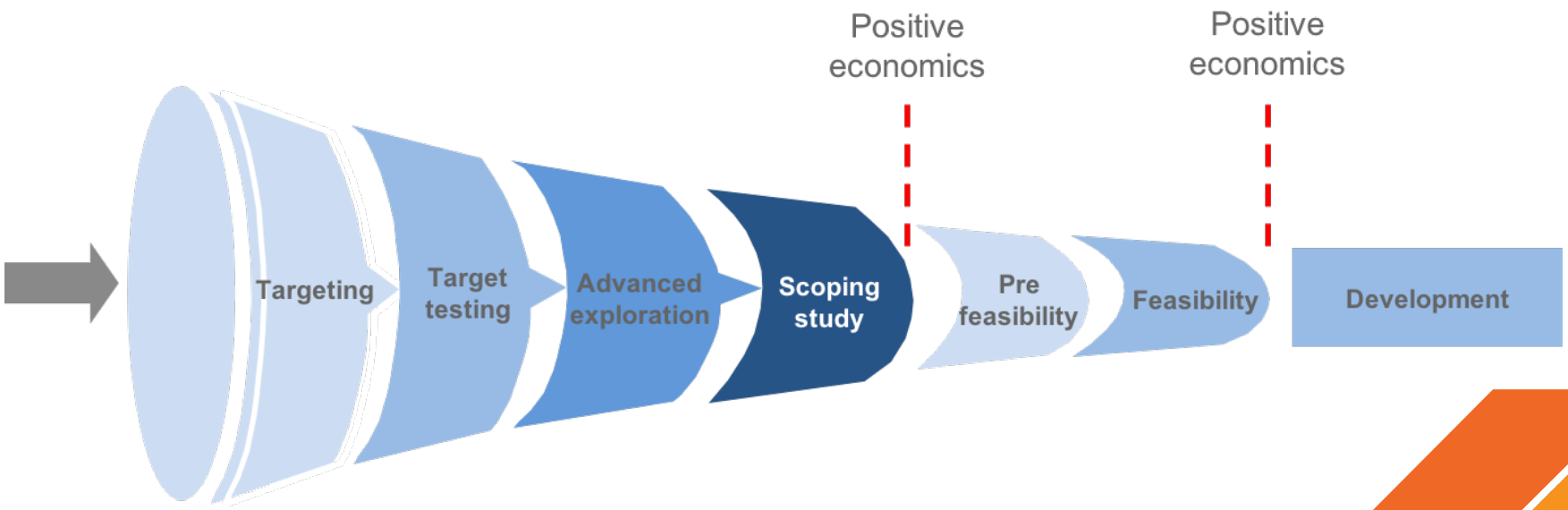
Peer Comparison – Clear Tier 1 Pedigree

Owner	Project	Status	Resource - all categories (Mt)	Key Parameters		Mineral Assemblage % THM			Insitu Ilmenite (Mt)	Insitu Rutile (Mt)	Insitu Zircon (Mt)
				Heavy Mineral (%)	Slimes (%)	Ilmenite (%)	Rutile (%)	Zircon (%)			
Mineral Deposits	Grand Cote	Operation	1030	1.7		75	2.5	10.6	13.1	0.44	1.9
Base Resources	Kwale	Operation	152.7	4.74	26	51.0	13.0	6.0	3.69	0.94	0.43
Kenmare Resources	Moma	Operation	7,160	2.90		81.9	1.9	5.8	170	3.9	12
Mineral Commodities	Tormin	Operation	2.7	49.50		21.4	1.4	6.9	0.28	0.019	0.092
Tronox	Namakwa	Operation	686.1	7.23		40.1	2.6	9.7	19.9	1.3	4.8
Anhui Foreign Economic Construction Group	Corridor Sands - Deposit 1	Developm't	16,593	5.3	16.4	53			318		
World Titanium Resources	Ranobe	Developm't	959	6.10	4.22	72.2	2.3	5.6	42.2	1.34	3.27
Mineral Commodities	Xolobeni	Feasibility	346	5.00		54.6	3.0	3.0	9.44	0.52	0.52
Sofala Resources	Corridor Central & South	Explorat'n	TBD	4-7.5	20	>55	>0.3	>2	TBD	TBD	TBD

Notes: Corridor Sands Deposit 1 data from Southern Mining Corporation Annual Report 2000. Projects with Operation, Feasibility, or Development status will have measured and indicated JORC-compliant mineral resources. Source is company websites. Sofala's exploration target will be further developed, but parameters are known from drill data that extends the entire length of the project areas, with mineralisation extending from surface to >90m below surface, & representative mineral assemblage data. Density assumed as 1.8

Development Strategy

- Enhance shareholder value through rapid delineation and development of ore deposits
- Apply the specialist knowledge of HMS in Mozambique
- Operate in a socially responsible way that is both beneficial and sustainable to the Mozambican community and environment



Proposed Exploration Plan

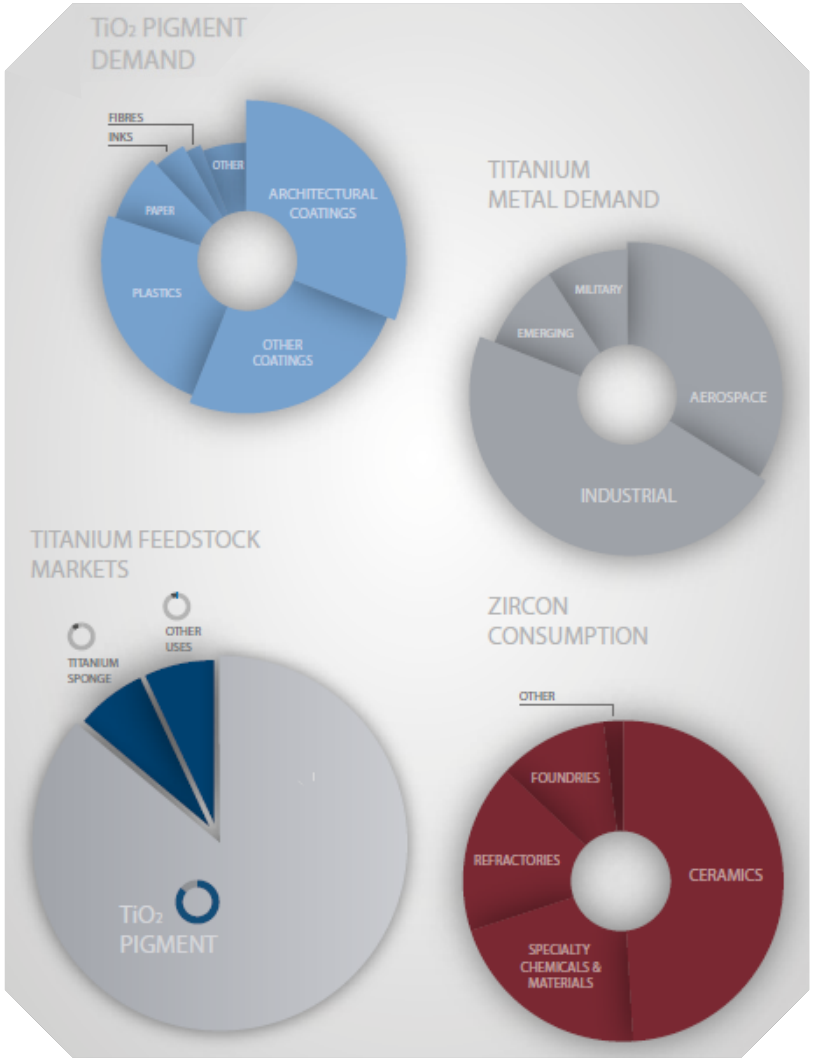
Activity	Cost (US)	Timing (months)
Airborne magnetic/ radiometric/ topographic survey **(Commence July, 2018)**	**$100k**	**1 month**
Aircore drilling to define zones of high rutile + zircon and high grade HMS at the high priority Corridor Projects (5000m) - (includes drill, assay and local staffing, vehicles **(Commence Q3 2018 and ongoing)**	**$750k**	**9 months**
AC drilling and Auger drilling across other exploration targets - **Q3** (2500m)	**$400k**	**6 months**
Metallurgical Testwork - Minibulk samples post AC phase	**$50k**	**2 months**
Resource Estimation - JORC compliant indicated + inferred	**$40k**	**3 months**
Metallurgical Testwork - 5-10t representative sample for benchscale testing, material performance, product characterization, roasting performance upgrading and marketability.	**$160k**	**4 months**
Scoping Study	**$250k**	**6 months**
Tenure payments, administration and exploration Management	**$250k**	**Ongoing**
TOTAL	**$2m**	**24 months**

Results will guide budgets and timing but are anticipated to finalise Scoping Study/Preliminary Economic Assessment costs at the Corridor Projects

Drill campaigns and associated results to be ongoing and in parallel with results provided to market throughout timeline.

Why Heavy Minerals?

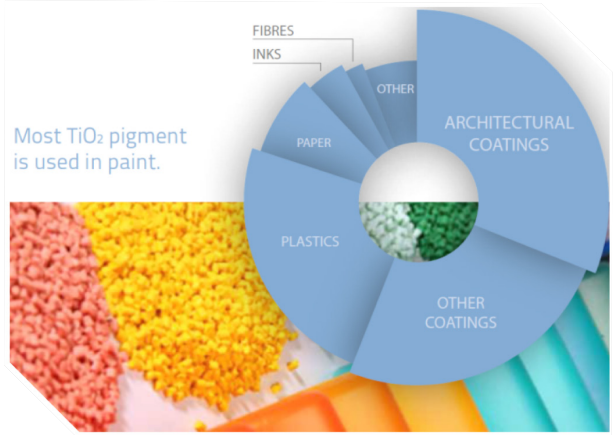
- The **mineral sands industry** involves mining heavy mineral sand (HMS) identified in fossil beach and river environments. These deposits are primarily exploited for their titanium and zircon mineral content.
- Titanium minerals are commonly referred to as **titanium feedstocks**. Key titanium feedstocks include: ilmenite, rutile and leucoxene. Ilmenite can also be refined to produce feedstocks with higher titanium dioxide (TiO2) content such as high titania slag and synthetic rutile.
- **Zircon** is generally a smaller part of the HM suite, and attracts a higher price than titanium feedstocks. As a result, zircon provides a significant financial contribution to mineral sands operations.
- Titanium feedstocks are characterised by two primary product chains: **TiO2 pigment and the titanium metal sector**. TiO2 pigment production accounts for almost 90% of global titanium feedstock consumption. Titanium metal manufacture is the second primary feedstock consumer, while the balance of supply is used to produce welding electrode fluxes and titanium-based chemicals.

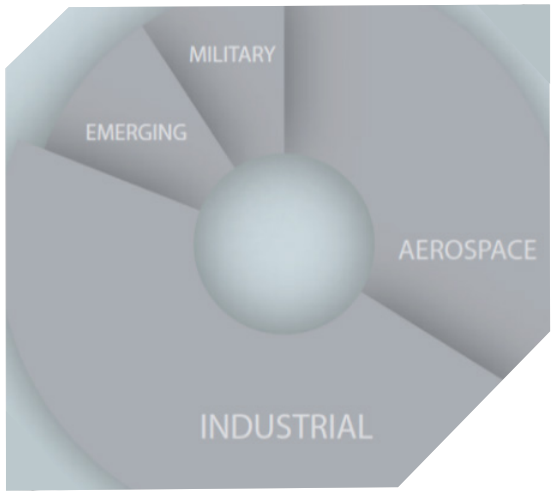


Source: TZMI titanium and zircon value chains, 2013

TiO2 Feedstock Usage

- **TiO2 is considered a 'quality of life' product** - its consumption increases as disposable income rises. It is predominantly added to high-quality surface finishes for opacity, brightness and whiteness. When incorporated in applications such as paint and coatings, TiO2 pigment extends the product life by absorbing and reflecting ultraviolet radiation that generally accelerates decomposition. It is non-toxic and inert to most chemical reagents.

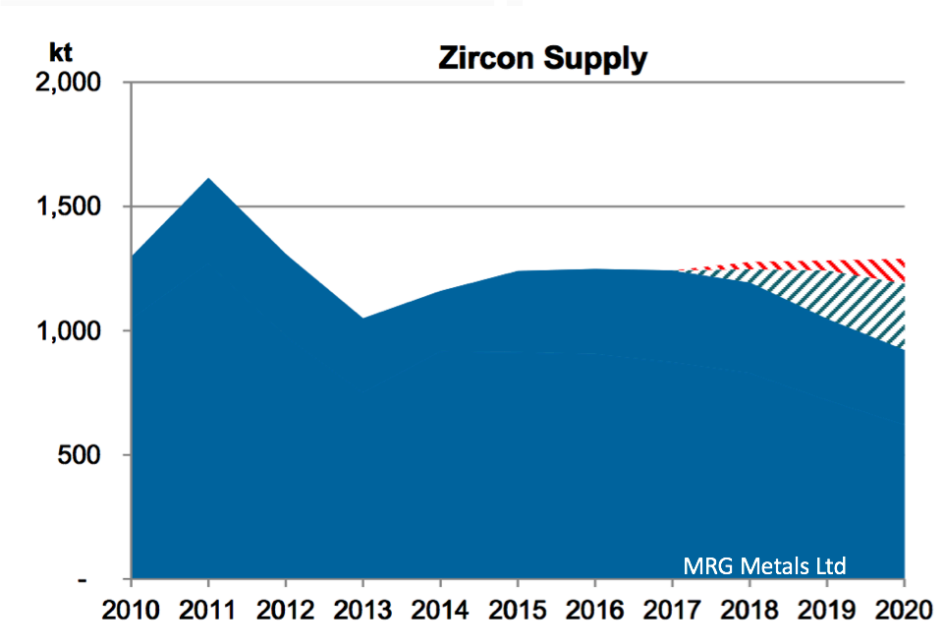




- Titanium metal is the **fourth most common structural metal** in use. It is made from titanium feedstock and is sought for its corrosion-resistance, which makes it resilient against acids, aqueous alkali and halogen gases.
- Titanium has **greater strength and a higher melting point** than most other light metals. It has the highest strength-to-weight ratio of any metal. Commercial titanium has tensile strength as strong as common steel alloys while being 45% lighter.
- Titanium's elevated melting point makes it **preferred for a range of applications.**

Source: TZMI titanium and zircon value chains, 2013

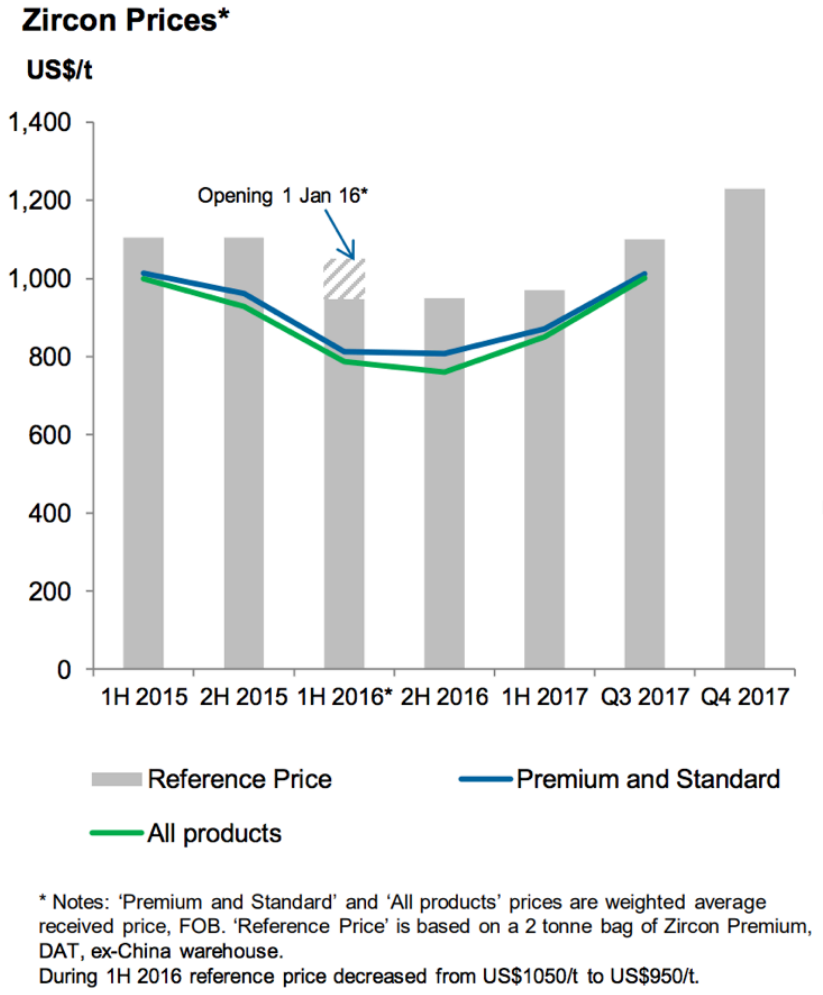
Zircon Market Supply Characteristics



- Zircon from existing producers declining due to depletion and decline in grade and assemblage
- Minor producers not sufficient to fill structural supply gap
- Inventory largely held in the hands on Iluka – can and will fill gap
- New zircon production dependent on co-product zircon from yet to be built TiO2 mines

Source: Iluka
***Zircon production from 2016 onwards excludes any finished inventory held at 31 December 2015 but includes zircon**

Evidenced by recent market dynamics



* Notes: 'Premium and Standard' and 'All products' prices are weighted average received price, FOB. 'Reference Price' is based on a 2 tonne bag of Zircon Premium, DAT, ex-China warehouse.
During 1H 2016 reference price decreased from US$1050/t to US$950/t.

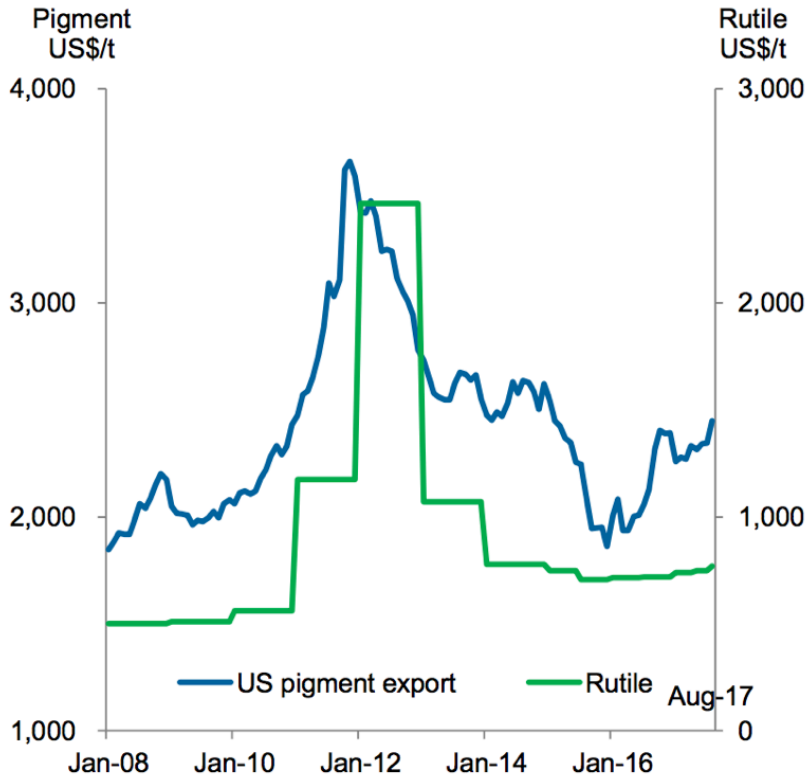
PRICING

- H1 2017 weighted average premium and standard received price up 7% relative to H1 2016
- Increase to Reference Price of US $130/t to US$1,100/t from 1 July 2017 announced
- Further price increase of US$130/t to US$1,230/t announced for 6 months from 1 October 2017
- "Inducement" pricing minimal with realized FOB price approaching reference price

SUPPLY AND DEMAND

- Reflects
  - Underlying market conditions
  - Restocking from depleted levels
- Increased demand for premium products
- Moderate market growth expected
- Limited ability for existing producers to respond in short term

High Grade Feedstock Market



Source: TZMI and Iluka

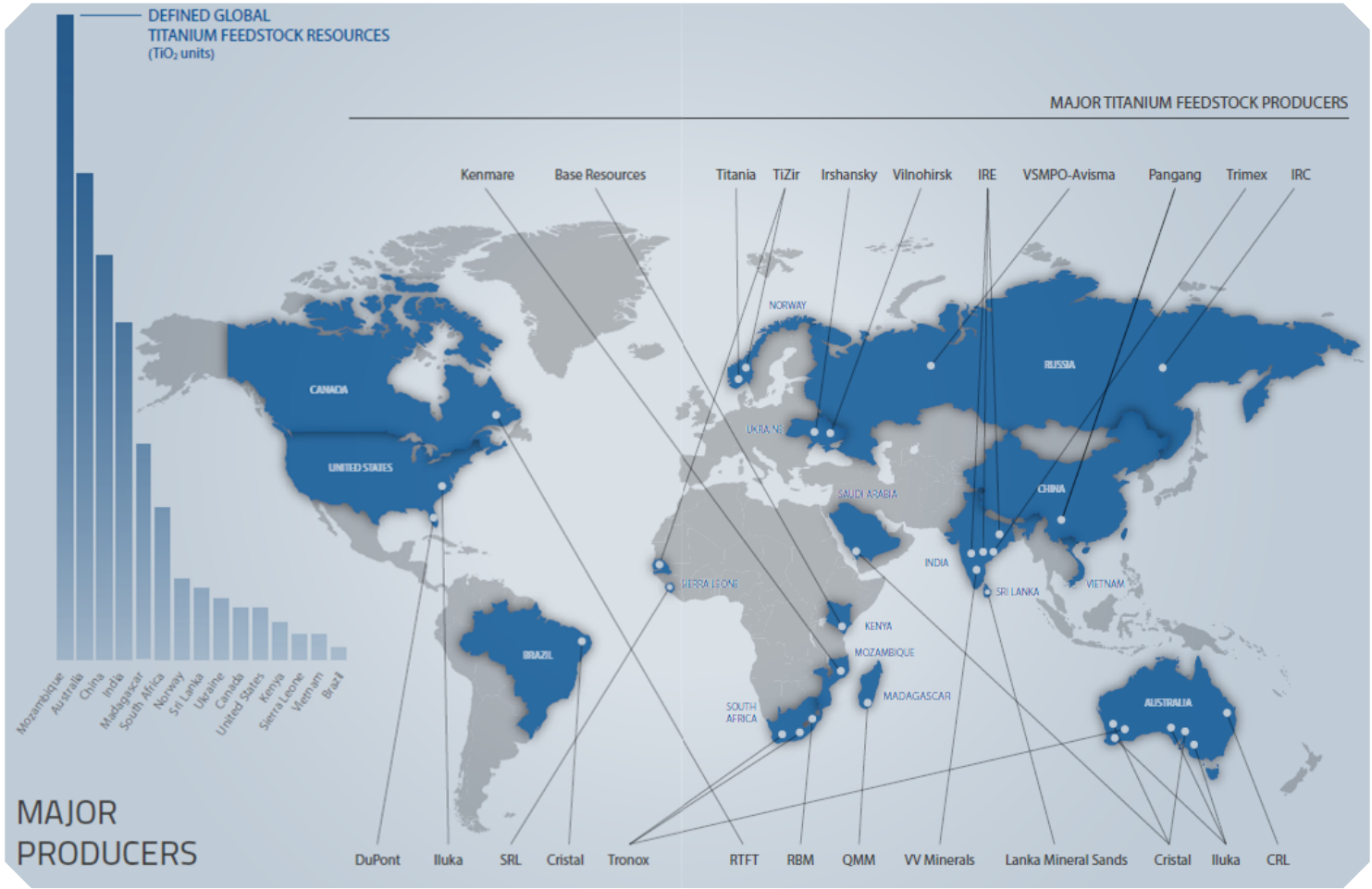
PRICING

- H1 2017 rutile prices up 4% relative to H1 2016
  - 40% of SRL's 2017 rutile production volumes (~60kt) contracted at fixed prices for 2017
- Successful implementation of US$70-100/t increase effective 1 July on uncontracted rutile volumes
- Pigment prices up ~10% since beginning of 2017
  - typical lag of 6-12 months to feedstock price

PIGMENT MARKET UPDATE

- Broad-based, continuing improvement in chloride pigment market
  - commentary of above trend demand
  Continued restocking of depleted pigment inventories
  - feedstock demand expected to exceed underlying market conditions
- Potential for pigment plants to increase high grade feed (rutile and synthetic rutile) to deliver higher plant output

Global Titanium Feedstock Pedigree



Australia and Africa are the largest titanium feedstock producing regions. They also produce more than half the global zircon production. **Mozambique a great opportunity.**

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