

VSA Dispatch from The Secret Lair 6



Our Dear Leader wishes to stress that he has not been travelling to his second home nor does he need an eye-sight test. Despite all the Cummings and Goings, he is fighting fit and fundamentally adhering to Government Guidelines. In fact, he is getting fitter by the day as he has been cycling to the Command Control Centre so that he can oversee all operations. He has been cycling on some of the newest technology that VSA has and refutes any suggestion that VSA is behind in technological advances due to his supreme leadership. He insists that this modern cycle machine could outmanoeuvre anything produced globally.

[PLEASE could somebody make him an offer he can't refuse for this bike!]



Launch of the China Mining Club

VSA is also delighted to launch this week “The China Mining Club” in Partnership with Hyve Plc (who run the African Mining Indaba) and VSA's partners Moshe Capital and Koala Mining. The Club will serve as a portal between East and West connecting mining companies with Chinese investors as well as strategic and industrial partners.



The main event of the Club will be an annual conference in Beijing which follows the hugely successful pilot conference that was run last year both in Beijing and Shanghai. This year the conference will have to be a combination of physical and online due to travel restrictions. The Chinese investors will attend physically, and Western mining companies will present online, both pre-recorded and also live on a big screen. A more intimate meeting and match making capability will also be offered by the Club.

The club will also offer much more as can be found on its website www.china-miningclub.com Additional benefits include:

- A video blog for each company will be posted on the Club Website and for Company use for marketing and promotional purposes
- B- Annual Podcasts posted in English and Chinese
- All distributed to the Koala Mining Wechat Groups accessing over 600 mining investors
- A page in English and Chinese on each company on the China Mining Club Website
- Regular intelligence updates on the Chinese political and economic landscape for mining
- And when travel restrictions are listed regional drinks receptions in London, Toronto, Johannesburg and Perth

Membership will only cost US\$5000 in our first year which should be compelling for all mining companies as China is so critical to the sector.



VSA Podcasts

Andrew's new role as a Media supremo and Director General of VSA continues with his Podcasts which can now be found [here](#): These Podcasts can easily be accessed on iPhone and Spotify

Highlights include the now daily 5 minute morning Miner with Paul Renken the VSA In house geologist with news of the day together with Podcasts with [NQ Minerals](#), [Strategic Minerals](#), [Xpediator](#), [Tokenise](#), [South China Securities](#), [Vulcan Energy Resources](#) and [Phynova](#).

VSA expands into the Technology Sector

VSA is expanding. We are now making strides in developing a tech sector specialism as an addition to our already very active leading position in Transitional Energy. Phil Smith, a top ranked technology analysts has recently joined VSA and a number of new mandates have already been won across a range of technology areas. We are delighted to have won the joint brokershship of Ethernity Networks Ltd (LON:ENET) a 5G AIM quoted company and this builds on work undertaken with Blu Wireless a private UK 5G Company backed by ARM. We are also raising growth funds for Samarkand a privately owned very successful and fast growing E commerce platform powering sales of retail brands into China and also Onpro based in the Middle East who have leading technology for connecting HR requirements and Governments.

We expect to be able to announce further mandate wins in this sector over the summer and into the Autumn as at VSA we see this sector along with Transitional Energy as the 2 key sectors where there will be Government support for turbo boosting the recovery and also very good investment opportunities.

China update - a report from our Shanghai office

The street-stall and small-store economy:

Street vendors and the informal economy are an often overlooked but important source of employment and culture and Premier Li Keqiang has said it is part of China's livelihood just as much as larger, high-end businesses. Encouragingly this aspect of the economy is returning to normal and cities around China started allowing people to set up roadside booths or food stalls on streets over the weekend.

Night markets and food stalls can be opened in designated areas in parks, public squares and empty spaces as long as they don't interrupt traffic. The vendors had been banned to keep the cities clean, and their return is expected to help increase people's incomes and revive local economies hit hard by the novel coronavirus outbreak. It isn't exactly the same as normal as they also have to pass environmental protection assessments.

Larger companies are also looking to capitalise on the reopening of street stalls with the Hong Kong-listed company Wuling Motors releasing a new "street stall" van. Wuling's share price has skyrocketed with the market value up from HK\$500m to nearly HK\$2bn. According to Wuling, the order volume for the first day exceeded the sales volume of the entire preceding month.



Pictures of street stalls in some cities:

Other private ventures are adapting to support the recovery. VSA Capital is currently acting for a number of clients in the e-commerce space and in China the country's leading e-commerce platforms are also lending a helping hand, offering services from inventory support to accessible financing backed by technologies. Alibaba, JD, Suning and PDD are providing support by interest-free loans, free cold chain refrigerated inventory services and other channels. This is a huge growth area, in our view.

For more information, or to join in with our podcasts, get in touch with the team below, or your usual VSA contact.

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