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Snippet Global - 1

The mining, mineral, metal, oil and gas stocks that will be better investment options globally than the IT, AI stocks in September, 2025, under the current investment climate

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As of March 2025, the investment landscape has shifted, presenting opportunities in the mining, mineral, metal, oil, and gas sectors that may rival or surpass those in IT and AI by September 2025. Key factors influencing this trend include:

1. Commodities Demand Surge

Gold: Gold prices have reached record levels, peaking at US$2,778 per ounce in October 2024. Sustained demand, driven by geopolitical tensions and central bank policies, supports a projected average price of US$2,552 per ounce for 2025.

Uranium: The global shift towards nuclear energy has increased uranium demand. Prices are forecasted to rise to US$83 per pound in 2025, with further growth anticipated.

2. Strategic Corporate Moves

Rio Tinto (RIO): Acquired Arcadium Lithium for US$6.7 billion in October 2024, positioning itself among the top lithium producers. This strategic move aligns with the growing demand for minerals essential to the green transition.

BHP Group (BHP): Engaged in significant mergers and acquisitions, including a joint acquisition of Filo Corp. for approximately US$2.96 billion, enhancing its copper project portfolio.

3. Policy Influences

Freeport-McMoRan (FCX): The company's stock surged over 4% following President Trump's announcement of potential tariffs on copper imports, aiming to boost domestic production. This policy shift could favor U.S. - based copper producers.

Investment Considerations

Given these developments, certain mining and energy stocks may offer attractive investment opportunities by September 2025:

Triple Flag Precious Metals (TFPM): A Toronto-based streaming and royalty company involved in gold and silver, primarily in the Americas and Australia. Analysts highlight its strong earnings and high-quality asset base, with expected earnings per share growth of 22% this year.

Rio Tinto (RIO): With its strategic acquisition in lithium and a diversified portfolio, RIO is well-positioned to benefit from the increasing demand for critical minerals.

BHP Group (BHP): As the world's largest mining company, BHP's focus on copper and potash aligns with the anticipated growth in electrification and agriculture sectors.

Freeport-McMoRan (FCX): A leading U.S. copper producer that stands to gain from domestic policy shifts favoring local production.

Conclusion

While IT and AI sectors continue to grow, the current investment climate, influenced by commodity demand, strategic corporate actions, and supportive policies, suggests that mining, mineral, metal, oil, and gas stocks could offer competitive or superior investment opportunities by September 2025.

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Figure: Predictably, mining oil and gas stocks will do better than IT and Tech stocks by September, 2025.