



Regent Pacific Group Limited



Regent Pacific Presentation COMPANY OVERVIEW

October 2010





Company Overview





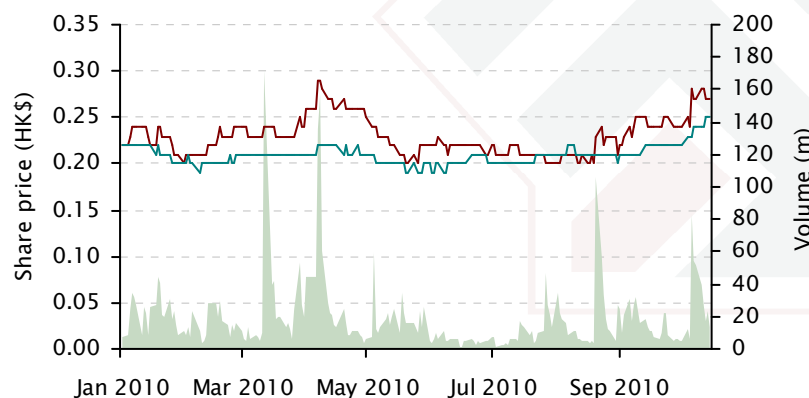
Company Snapshot

Market Statistics

Share price (18 Oct 2010)	HK\$0.27 / US\$0.034
52 week high - low	HK\$0.29 – HK\$0.19
Shares outstanding	3,911m
Market capitalisation	US\$133.7m
Cash and cash equivalent	US\$13.7m
Debt (30 Jun 2010)	None
Enterprise value ¹	US\$120.0m

Note: Exchange rate is US\$1 = HK\$7.76

Year-to-Date Share Price Performance



■ Volume [RHS] — Regent Pacific — Hang Seng Index (Rebased)

About Regent Pacific Group

- Incorporated in the Cayman Islands in 1991 and listed in Hong Kong in 1997, Regent Pacific Group Limited (ticker: 575, “Regent Pacific”) is a diversified mining group focused on the Asia Pacific region
- Regent Pacific's principal assets are located in Yunnan Province, Inner Mongolia and Xinjiang Province, China
- Major assets:
 - Base metals: Dapingzhang Mine (40%), Yinzishan Mine (97.5%)
 - Thermal coal: Ji Ri Ga Lang Project (51%), Zhun Dong Project (100%)² and ACIL – Project I (25%)
 - Other investments: equity stakes in Avion Gold, BC Iron, Bannerman Resources, Brazilian Gold, Polo Resources and Venturex Resources

Source: FactSet, Bloomberg

Notes:

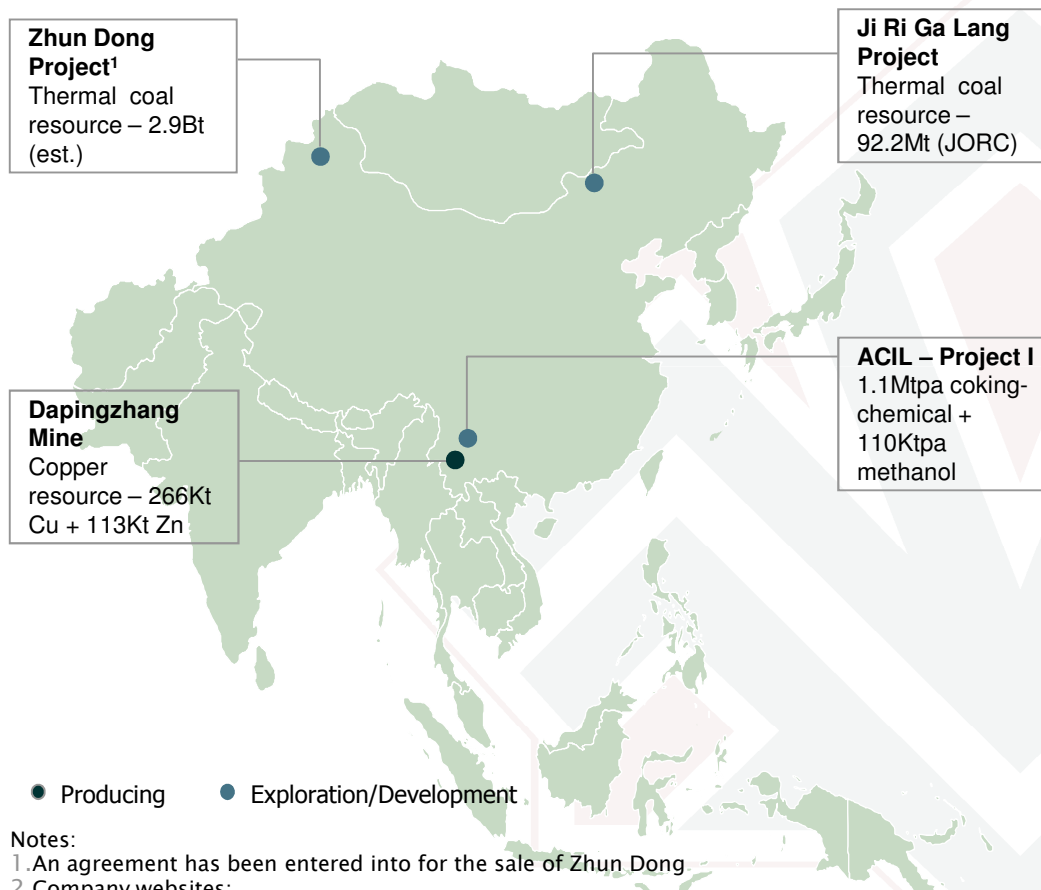
¹ Includes minority interests of US\$2.4m

² Zhun Dong is contracted to be sold



Our Asset Portfolio

Asset Locations



Notes:

- 1. An agreement has been entered into for the sale of Zhun Dong
- 2. Company websites:
- 3. Avion Gold: www.aviongoldcorp.com
 BC Iron: www.bcion.com.au;
 Bannerman Resources: www.bannermanresources.com
 Brazilian Gold: www.braziliangold.ca
 Polo Resources: www.poloresources.com
 Venturex Resources: www.venturexresources.com

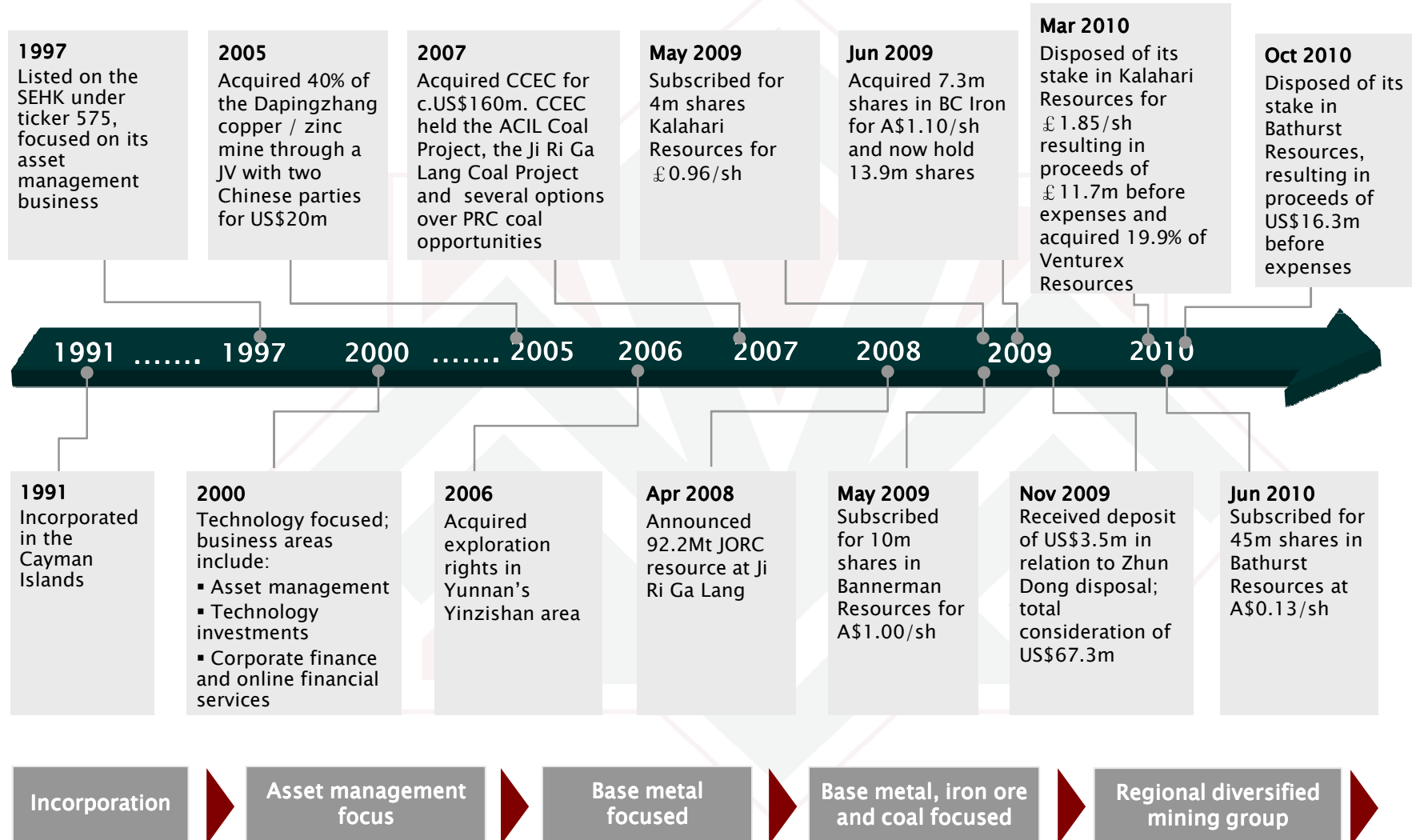
Listed Equity Investments

Company	Commodity	% interest
BC Iron	Iron ore explorer	16.53%
Venturex Resources	Copper/ lead/ zinc explorer	19.99%
Bannerman Resources	Uranium developer	3.91%
Polo Resources	Uranium / coal investments	4.22%
Avion Gold	Gold producer	1.12%
Brazilian Gold	Gold/ uranium explorer	5.64%



History and Milestones

Since 2005 Regent Pacific has shifted its focus to metals and mining investments





Regent – The Way Forward





Our Vision

Our Vision

- **Building a diversified mining house** - Transforming our group to become Hong Kong's next major mid tier mining house
- **Utilizing our in-house expertise** - Leveraging off our expert international and local teams to conquer difficult markets, deliver results and achieve global recognition
- **Pursuing growth opportunities** - Acquiring, exploring and developing strategic mining assets covering our targeted commodities of copper, gold, iron ore, thermal coal / coking coal and uranium
- **Creating shareholder value** - generate strong shareholder value and returns by serving as a platform for growth and a cultivator of high quality, accretive mining assets across Asia-Pacific



What We Are Doing

Building a HK based mid tier mining house

- Taking advantage of SEHK's strong liquidity and demand for resources equities
- Regent Pacific has assembled an expert in-house team dedicated to identifying strategic mining assets across Asia-Pacific

Growth by M&A

- Seeking bulk commodity, base metal, gold and uranium assets in the Asia Pacific region
- Pursuing acquisitions accretive to shareholders
- Three strategic regional offices charged with identifying projects/assets with short to long term value
- Regent Pacific has a highly credentialled in-house M&A and execution team to deliver results

Adopting a diversified resources model

- Building an Asia Pacific diversified resources portfolio comprising of bulk commodities, base metals, gold and uranium
- Identifying and addressing specific shortages of resources in our targetted commodities

Optimising existing coal properties

- Supporting growth opportunities in respect of our ACIL investment
- Planning for 3Mtpa thermal coal production at Ji Ri Ga Lang
- Significantly upgrading our indicated thermal coal resources at Zhun Dong to over 1Bt thermal coal (JORC) by 1Q11

Expanding production at Dapingzhang

- Expanded production capacity to 4,400ktpa from 2,500ktpa in early 2010





Our Strategy

Near-term

- Optimise existing asset portfolio
 - Focus on expansion plan at Dapingzhang mine
 - Obtain mining license and achieve commercial production at Ji Ri Ga Lang at 3Mtpa run rate
 - Significantly upgrading our indicated thermal coal resource at Zhun Dong to over 1Bt (JORC)
 - Monetising non-core liquid investments



Dapingzhang Processing Plant

Mid-term

- Growth by accretive acquisitions
 - Focus on select regional acquisition opportunities of greenfield exploration sites or operating mines in bulk commodities, base metals and gold
 - Identify and acquire strategic assets at differing stages of the value chain
 - Generate a pipeline of accretive projects that will deliver returns to shareholders over a sustained period

Long-term

- Build Hong Kong's next major mining house
 - Develop a mid tier diversified resources company focused on bulk commodities, base metals and gold in the Asia Pacific region with a portfolio of operating and greenfield assets



HK based diversified mining house



Our Track Record in Creating Value

Realised Gains

Asset/ Company	Initial investment (US\$m)	Net proceeds (US\$m)	Actual gain (US\$m)	IRR (%)
Kalahari Resources	13.3	17.6	4.3	32.3%
Zhun Dong Project ¹	22.5	69.3	44.8	208%
Bathurst Resources	5.5	16.3	10.8	194%
Total	41.3	103.2	59.9	145%

Unrealised Gains/(Losses)

Asset/ Company	Initial investment (US\$m)	Current investment (US\$m)	Implied gain/(loss) (US\$m)	IRR (%)
Avion Gold	2.9	3.1	0.2	6.9%
BC Iron	16.1	29.3	13.2	81.9%
Bannerman Resources	5.6	3.1	(2.5)	N/A
Bathurst Resources	1.4	2.2	0.8	57.1%
Brazilian Gold	2.1	2.5	0.5	23.8%
Polo Resources	7.0	6.5	3.2	45.7%
Venturex Resources	11.5	11.6	0.1	1.0%
Canaco Resources	0.5	1.1	0.6	120%
Total	47.1	59.4	16.1	34.2%

Source: FactSet, Bloomberg, company reports as at 18 Oct 10

Note:

¹ Zhun Dong is contracted to be sold

² Bathurst unrealised gains includes rights issue shares to be issued at A\$0.30/sh

³ Polo unrealised gain includes receipt of US\$3.7M dividend paid in 2010

Deliver shareholder returns

Development of projects

- In conjunction with our JV partners, we operate one of the lowest cost VMS open pit mines in the world
- Significantly upgrade indicated thermal coal resources to over 1Bt at Zhun Dong (JORC)

Delivering a re-rating of the share price

- We continue to actively build our relationships and profile with potential strategic partners and investors

Commitment to dividends

- Since 1997, we have **paid over US\$170.5M in dividends** and **returned over US\$25M to shareholders** through share repurchases
- In 2010, we have **delivered US\$5m of dividends** to our shareholders
- We remain committed to distributing a significant portion of our future earnings as dividends

Considering capital returns

- Looking to return US\$20M by way of dividend and through a share buy-back programme



Sum of Parts Valuation

The market is not fully attributing value to our asset base

Asset/ Company		(US\$m)	Per Share (HK cent)
Net cash		13.7	2.72
Marketable securities		65.2	12.94
Pending sales proceeds ¹	▪ Zhun Dong Project	69.3	13.75
Value of cash, marketable securities and pending sales proceeds		148.2	29.41
Value of other investments		96.77	19.20
Total		244.97	48.61
Market capitalisation (as of 18 Oct 2010)		133.7	26.53

Source: FactSet, Bloomberg, company reports as at 18 October 2010

Note:

¹ Zhun Dong is contracted to be sold



Why We Will Succeed

1

Strong credentialed Board and management with significant mining and corporate finance expertise

- Co-Chairman, James Mellon: over 20 years investment and asset management experience and in Asia and abroad, including with GT Management plc and the Thornton Group
- Co-Chairman, Stephen Dattels: Former Executive VP Corporate Finance and Director of Barrick Gold Corporation
- CEO, Jamie Gibson: direct investment specialist (ex-Clifford Chance, KPMG and PwC)
- Regent Pacific has now assembled a world class team of M&A, technical and project managers dedicated to maximising value from existing assets and identifying new strategic opportunities

2

Diversified commodity and geographical coverage

- Dapingzhang Cu/Zn mine in Yunnan Province, PRC
- Quality thermal coal development assets in Inner Mongolia Province and Xinjiang Province, PRC
- Equity interests in companies with base metal, gold, iron ore and uranium assets in Australia, North America and Namibia
- Offices in Hong Kong, Beijing (PRC), Yunnan (PRC) and Jakarta (Indonesia)

3

Past success and track record

- Significant prior experience through Dapingzhang operations
 - Achieved commercial Cu/Zn concentrate production and completed concentrate delivery ahead of schedule
 - Ability to fund production capacity increase with internal cash flow
- Track record in growing the Company's asset portfolio through strategic investments in companies with copper, bulk commodities, gold and uranium exposures

Management expertise, geographical coverage and strong track record



Asset Overview





Base Metals

Dapingzhang Mine

Dapingzhang JV Overview

- World class volcanogenic massive sulphide (“VMS”) deposit located in southwest Yunnan Province in China, ~500km from Kunming, the Provincial capital
- The Group holds a 40% equity interest through a Sino-foreign equity JV with 2 Chinese partners
- 5 exploration licenses and 1 mining license with land holdings totalling 106.791km²
- Open pit operation
- Current capacity: 1.5Mtpa
- Mine life of at least 15 years
- 3 processing plants on site with 2 stage crushing, multiple mills and floatation circuits
- Commenced production of separate copper and zinc concentrates in May 2008
 - Concentrates are sold to smelters under off-take agreements
 - Credits are received for gold and silver concentrates
- 2010 forecast production of 7,200t Copper metal and 7,000t Zinc metal

Reserves and Resources¹

Ore (Mt)	Grade				Contained Metals				
	Cu (%)	Zn (%)	Au (g/t)	Ag (g/t)	Cu (Kt)	Zn (Kt)	Au (Kt)	Ag (Kt)	
111b	11.7	0.9%	1.4%	0.2	8.2	108.0	43.7	24.7	964.9
122b	7.2	1.0%	1.3%	0.3	8.5	70.4	30.2	17.0	611.1
Total Reserves	18.9	0.9%	1.3%	0.2	8.3	178.4	73.9	41.7	1,576.0
Total Resources	33.9	0.9%	1.3%	0.2	7.8	266.0	113.0	60.0	2,353.0

Note:

¹ Reserves and Resources as at 30 June 2009 and approved by Yunnan provincial government on 22 December 2009; According to the Chinese Mineral Reporting Standard with copper cut-off grade greater than 0.4%

Asset Location





Base Metals Yinzishan Mine

Yinzishan JV Overview

- 97.5% owned and operated VMS deposit
- Located ~500km south south-west of Kunming and 76km from Simao
- The tenements overlay the same types and ages of volcanic rocks which host the VMS mineralisation at Dapingzhang
- The previous owner of the small Yinzishan underground mine was mining volcanogenic copper-rich stringer-type and processing it in a nearby 100tpd mill
- Power and water are available in the immediate vicinity
- Exploration Update:
 - A fieldwork program involving geological mapping of surface exposures of volcanic rock and underground workings and the collection of rock samples for geotechnical examination has been undertaken
 - Geophysical surveys over a 3km² area have identified 3 large anomalies
 - An exploration drilling program of approximately 5,000m utilising 2 diamond drill rigs was also undertaken with diamond drilling now focussing on identified targets

Asset Location





Coal Ji Ri Ga Lang

Ji Ri Ga Lang Overview

- Located in north north-west of Xilinhot, Inner Mongolia
- Equity interest of 51% (up to 100%)¹
- Open cut, truck and shovel thermal coal project
- Total JORC compliant resources of 92Mt
- Planned production rate of 3Mtpa
- Mine life of over 25 years
- Low cost open cut mining operation at strip ratio of less than 1:1 with a 25 metre seam
- Potential market: power stations in Inner Mongolia
- The project team is currently liaising closely with key government agencies and making good progress for the conversion of the exploration license to a mining licence

Resources (JORC²)

	Measured (Mt)	Indicated (Mt)	Inferred (Mt)
Seam 5	69.9	10.0	79.9
Seam 5L1	2.2	0.0	2.2
Seam 5L2	1.1	1.0	2.1
Seam 5L3	7.0	1.0	8.0
Total	80.2	12.0	92.2

Notes:

- 1 Remaining 49% equity interest to be acquired when the mining licence has been issued to the JV Company
- 2 Previously verified by SRK

Asset Location





Coal

ACIL – Project 1 and Zhun Dong

ACIL – Project 1 Overview

- Through Amerinvest Coal Industrial Holding (ACIL), the Company holds 25% equity interest in West China Coking and Gas Company
- Production capacity: 1.1Mtpa coke, 110Kt methanol, 30Kt coal tar, 9Kt crude benzol and 8Kt ammonium sulphate
- West China Coke also has a 13.14% interest in Yunnan Daiwei, a private company with an annual production capacity of 500Kt synthetic ammonium
- 1H 10 production: 500Kt coke, 36Kt methanol, 15Kt tar, 4.1t ammonium sulphate and 4.6Kt crude benzol

Zhun Dong Project Overview

- 100% owned thermal coal project
- Located 200km north-east of Urumqi, Xinjiang
- Underground mine with open cut potential
- 4 adjoining exploration licenses covering 118 km²
- Estimated 2.9Bt resources, with Indicated Resources of 266Mt and Inferred Resources of 880Mt
- Commenced 2010 exploration program, involving drilling 27 holes covering ~21,200 metres at a total cost of ~US\$3.65m
- The Company entered into a share purchase agreement to divest the project for US\$69.3m

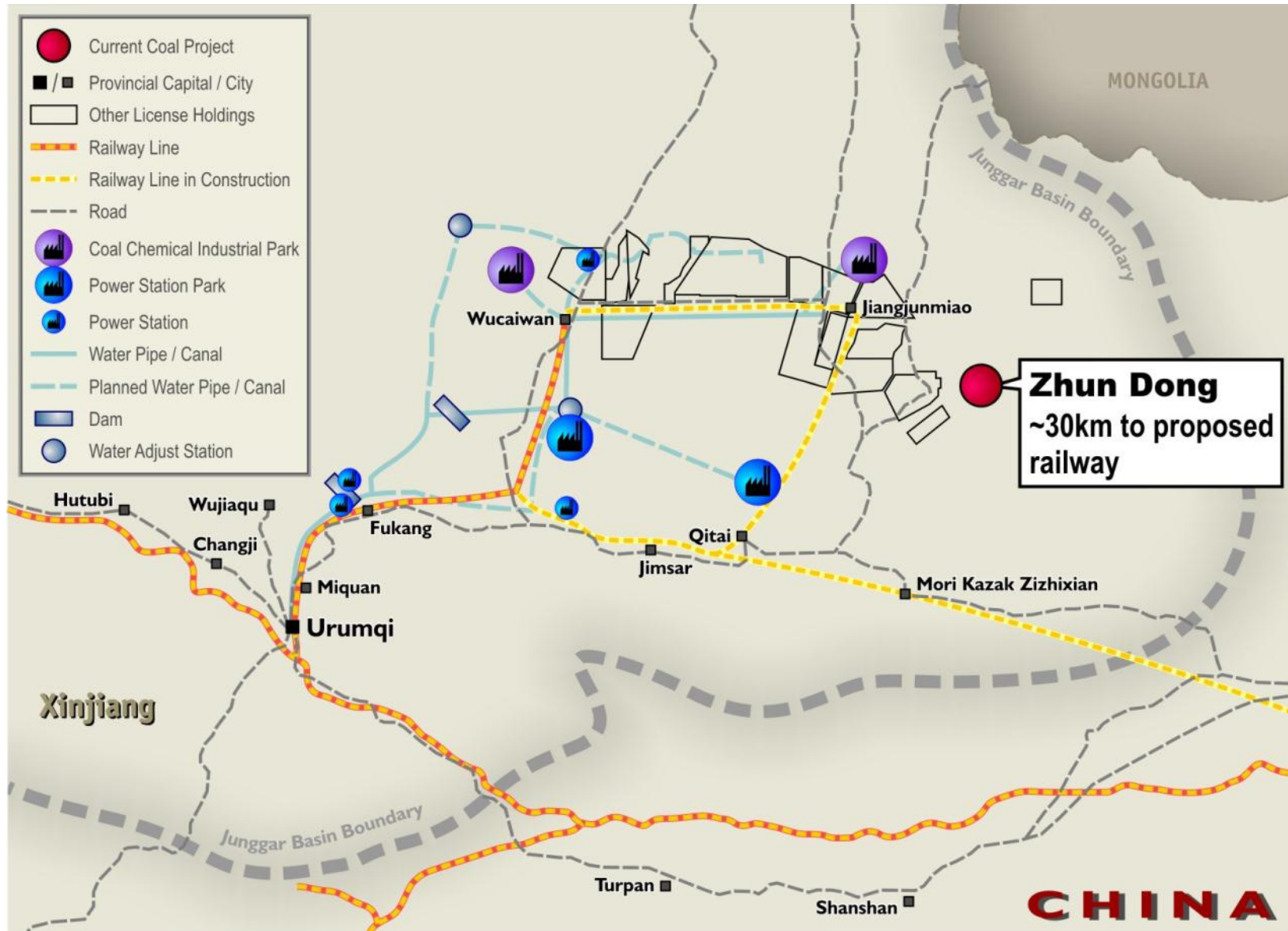
Asset Location





Zhun Dong

Regional Location and Infrastructure Links





Indonesian Coverage

Indonesian Technical Team







- Regent Pacific has an office in Jakarta housing an expert and dedicated team of internationally and locally trained specialists
- Regent Pacific's Indonesian team consists of technicians having both expatriate and local experience in project development, operations management, resource development, exploration and mine planning
- Regent Pacific's Indonesian team diligences Indonesian projects on the ground, critical to conducting business in Indonesia
- Acquiring a quality Indonesian asset is just a question of when, not if. Regent Pacific is uniquely positioned to capitalise on Indonesian opportunities

Office Location (Balikpapan)





Other Investments

Company	Commodity	Key Assets	Market Cap (US\$m)	EV (US\$m)	% Interest	Mkt Value of Investment (US\$m)
 BC IRON LIMITED	• Iron ore explorer	• Nullagine Iron Ore Project	176.8	160.5	16.53%	29.3
 VENTUREX RESOURCES LIMITED	• Copper/ lead/ zinc explorer	• Whim Creek VMS Copper/ Zinc/ Lead Project • Various exploration projects in Australia and Brazil	57.8	51.6	19.99%	11.6
 BANNERMAN RESOURCES LIMITED	• Uranium developer	• Etango Uranium Project	80.1	73.0	3.91%	3.1
 Polo Resources	• Coal/ uranium investments	• Stakes in 8 Uranium/coal companies • Coal JV with Peabody	148.9	126.5	4.22%	6.5
 AVION GOLD CORPORATION	• Gold producer	• Tabakoto and Segala Gold Mines	280.7	251.3	1.12%	3.1
 BRAZILIAN GOLD CORPORATION	• Gold/ uranium explorer	• Maues Gold Project • Boa Vista Gold Project • Rae Uranium Project	44.5	34.1	5.16%	2.5
Total			788.8	697.0		56.1

Source: Bloomberg, FactSet, as at 18 October 2010



Board of Directors and Management





Board of Directors

Regent Pacific's Board of Directors has significant experience in corporate finance and global mining related investments

Name	Position	Biography and Relevant Experience
James Mellon	<ul style="list-style-type: none"> Non-Executive Co-Chairman 	<ul style="list-style-type: none"> Has been a Director of Regent Pacific since July 1991 Over 20 years' investment experience in Asia. He specialises in the development and restructuring of international investment vehicles Also a director in Charlemagne Capital, Emerging Metals and Red Dragon
Stephen Dattels	<ul style="list-style-type: none"> Non-Executive Co-Chairman 	<ul style="list-style-type: none"> Appointed as non-executive Co-Chairman of the Board on 12 February 2008 Former Executive VP Corporate Finance & Director of Barrick Gold Corporation Extensive track record of managing successful mining projects, including co-founder of UraMin Inc
Jamie Gibson	<ul style="list-style-type: none"> Executive Director and Chief Executive Officer 	<ul style="list-style-type: none"> Joined Regent Pacific in 1996 and was appointed CEO in 2002 Significant experience in corporate finance, direct equity investments and structuring emerging market investment products Ex-Clifford Chance, KPMG and PWC (formerly Coopers)
Fion Yan	<ul style="list-style-type: none"> Chief Financial Officer 	<ul style="list-style-type: none"> Appointed Chief Financial Officer of Regent Pacific in 2010 Certified Public Accountant of Chinese Institute of Certified Public Accountants, a Fellow Member of The Association of Chartered Certified Accountants of the United Kingdom and a Fellow Member of Certified Internal Audit Extensive prior experience with PWC



Senior Management

Regent Pacific has now assembled a world class team of M&A, technical and project managers

Group Responsibility	Name	Position	Biography and Relevant Experience
	David Church	<ul style="list-style-type: none"> General Counsel and Director of Mergers and Acquisitions 	<ul style="list-style-type: none"> Joined Regent Pacific in September 2008 Qualified and has practiced as a solicitor in Australia, with Clayton Utz, and in the UK and Hong Kong, with Linklaters Over 10 years public and private M&A and corporate finance experience, having worked on and structured leading cross border transactions across Europe and Asia
	Benjamin Lane	<ul style="list-style-type: none"> Principal Mining Engineer 	<ul style="list-style-type: none"> Has worked with Regent Pacific since August 2007 Mining Engineering degree with Honours from the University of NSW Over 10 years experience in the Australian mining industry including positions encompassing iron ore, coal, copper and zinc for both greenfield and brownfield developments
	Garrick Medham	<ul style="list-style-type: none"> General Manager – Technical Service 	<ul style="list-style-type: none"> Has worked with Regent Pacific since August 2008 Mining Engineering degree with Honours from University of NSW, a Graduate Diploma in Finance from The Securities Institute and holds Register Mine Manager Certificates for Western Australia and New South Wales Over 20 years experience in the mining industry from roles in corporate, coal, gold and nickel plus working throughout Australia and in Japan, Indonesia and Papua New Guinea
	Kaiqiang Fan	<ul style="list-style-type: none"> Chief Geologist and Head of Exploration 	<ul style="list-style-type: none"> Joined Regent Pacific in October 2005 A Master of Science degree in Mineral Exploration from Queen's University, Canada in 1995 and a member of the Australasian Institute of Mining and Metallurgy (AusIMM) Over 20 years of experience in the mineral exploration and mining industry
	Adam Miethke	<ul style="list-style-type: none"> Geology Manager 	<ul style="list-style-type: none"> Joined Regent Pacific in January 2010 Applied Science degree with First Class Honours in Geology from Queensland University of Technology, a MBA from Curtin University and a Member and Chartered Professional of the Australian Institute of Mining and Metallurgy (MAusIMM C.P.) 10 Years experience in the exploration and mining industry, including iron ore, gold, platinum, base metals and mineral sands



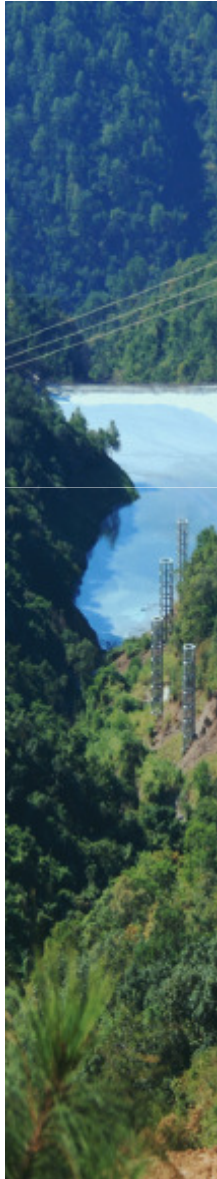
Senior Management Continued

Regent Pacific has now assembled a world class team of M&A, technical and project managers

	Name	Position	Biography and Relevant Experience
China Responsibility	Ben Bian	<ul style="list-style-type: none">General Manager – PRC Coal	<ul style="list-style-type: none">Joined Regent Pacific in January 2007Bachelor of Science degree from Fudan University, China20 years experience working within China, including roles in directorships and senior management with specialisation in coal-chemical technologies, investment management, government communications and policy interpretationBian Wei has significant corporate structuring and establishment experience in China
Indonesia Responsibility	Michael Redman	<ul style="list-style-type: none">General Manager – Indonesia	<ul style="list-style-type: none">Joined Regent Pacific in August 2008Holds an Associate Diploma in Electrical Engineering, Mining Engineering degree with Honours at the University of NSW and a Master's degree in Applied Finance from University of NewcastleHas 15 years in various management, mining, environmental and maintenance positions in Australian open pit coal mines and associated manufacturing industries



Disclaimer

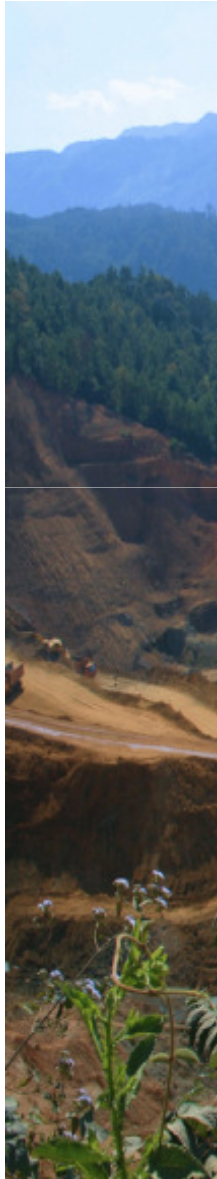


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