



Regent Pacific Group Limited

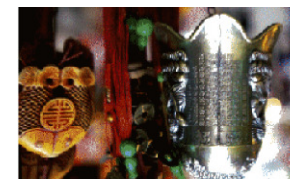
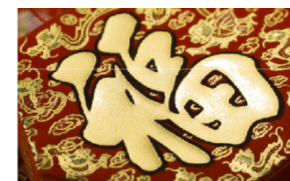
COMPANY OVERVIEW

January 2011

www.regentpac.com



1 Company Overview



Company Snapshot

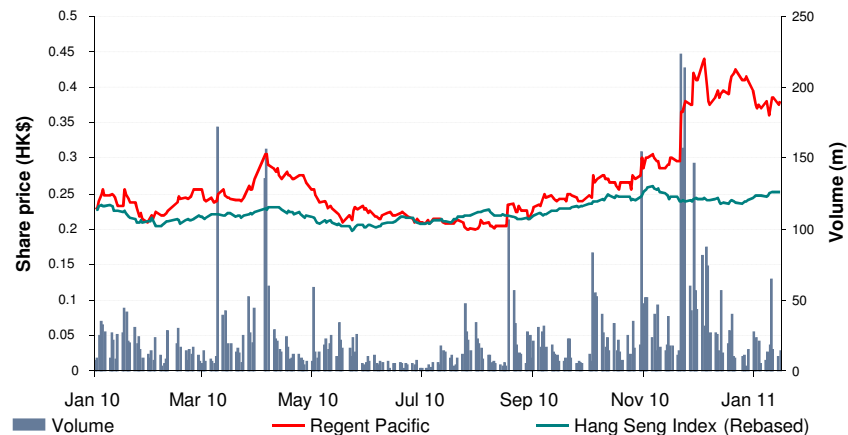


Market Statistics

Share price (18 Jan 2011)	HKD0.38 / USD0.05
52 week high – low	HKD0.44 - HKD0.20
Shares outstanding	3,911m
Market capitalisation	USD191.0m
Cash and cash equivalent (31 Dec 2010)	USD123.6m

Note: Exchange rate is USD1 = HKD7.78

Year-to-Date Share Price Performance



About Regent Pacific Group

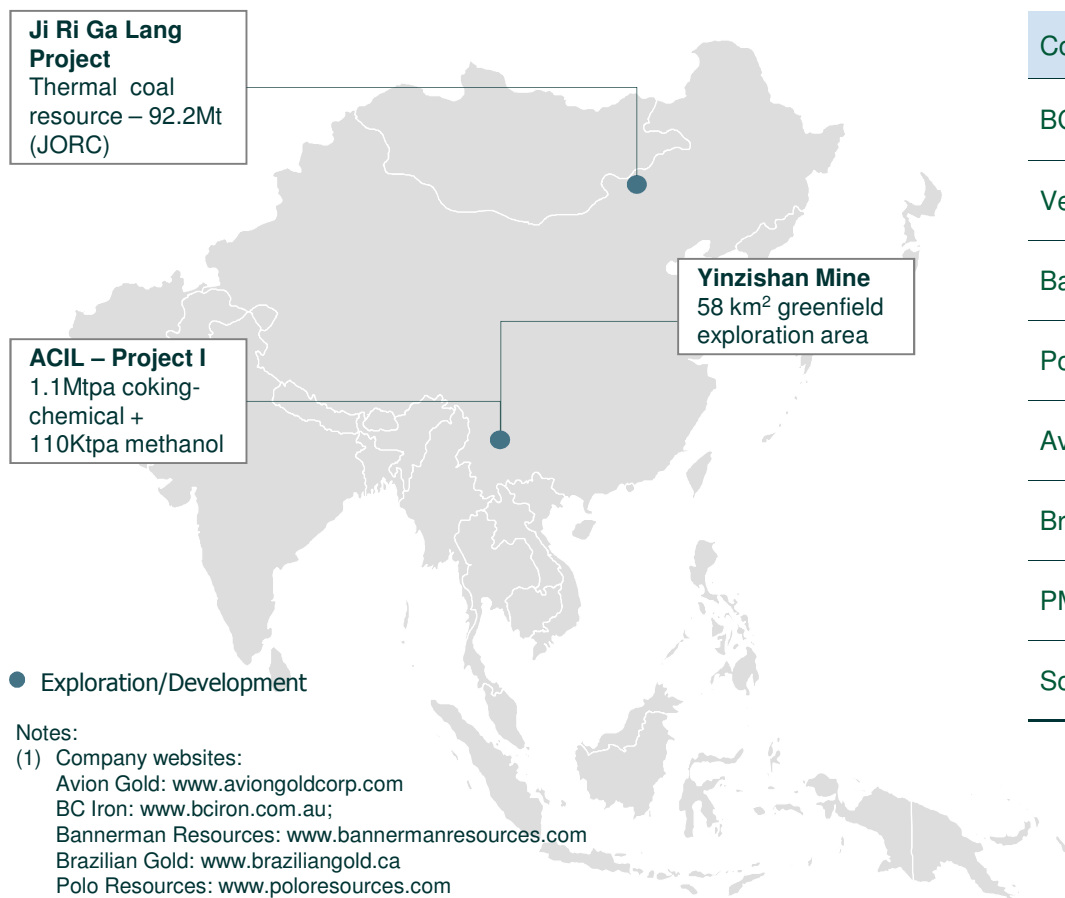
- Incorporated in the Cayman Islands in 1991 and listed in Hong Kong in 1997, Regent Pacific Group Limited (ticker: 575, “Regent Pacific”) is a diversified mining group focused on the Asia Pacific region
- Regent Pacific's principal assets are located in Yunnan Province and Inner Mongolia, China
- Major assets:
 - Base metals: Yinzishan Mine (97.54%)
 - Thermal coal: Ji Ri Ga Lang Project (51%), and ACIL – Project I (25%)
 - Other investments: equity stakes in Avion Gold, BC Iron, Bannerman Resources, Brazilian Gold, PMI Gold, Solomon Gold, Polo Resources and Venturex Resources

Source: FactSet, Bloomberg

Our Asset Portfolio



Asset Locations



Notes:
 (1) Company websites:
 Avion Gold: www.aviongoldcorp.com
 BC Iron: www.bciron.com.au;
 Bannerman Resources: www.bannermanresources.com
 Brazilian Gold: www.braziliangold.ca
 Polo Resources: www.poloresources.com
 Venturex Resources: www.venturexresources.com
 (2) Percentage of ownership in Bannerman Resource is based on Bannerman's shares outstanding as announced in December 20, 2010, excluding 4m shares to be issued to Savanna Marble CC on grant of a mining licence for the Etango Project

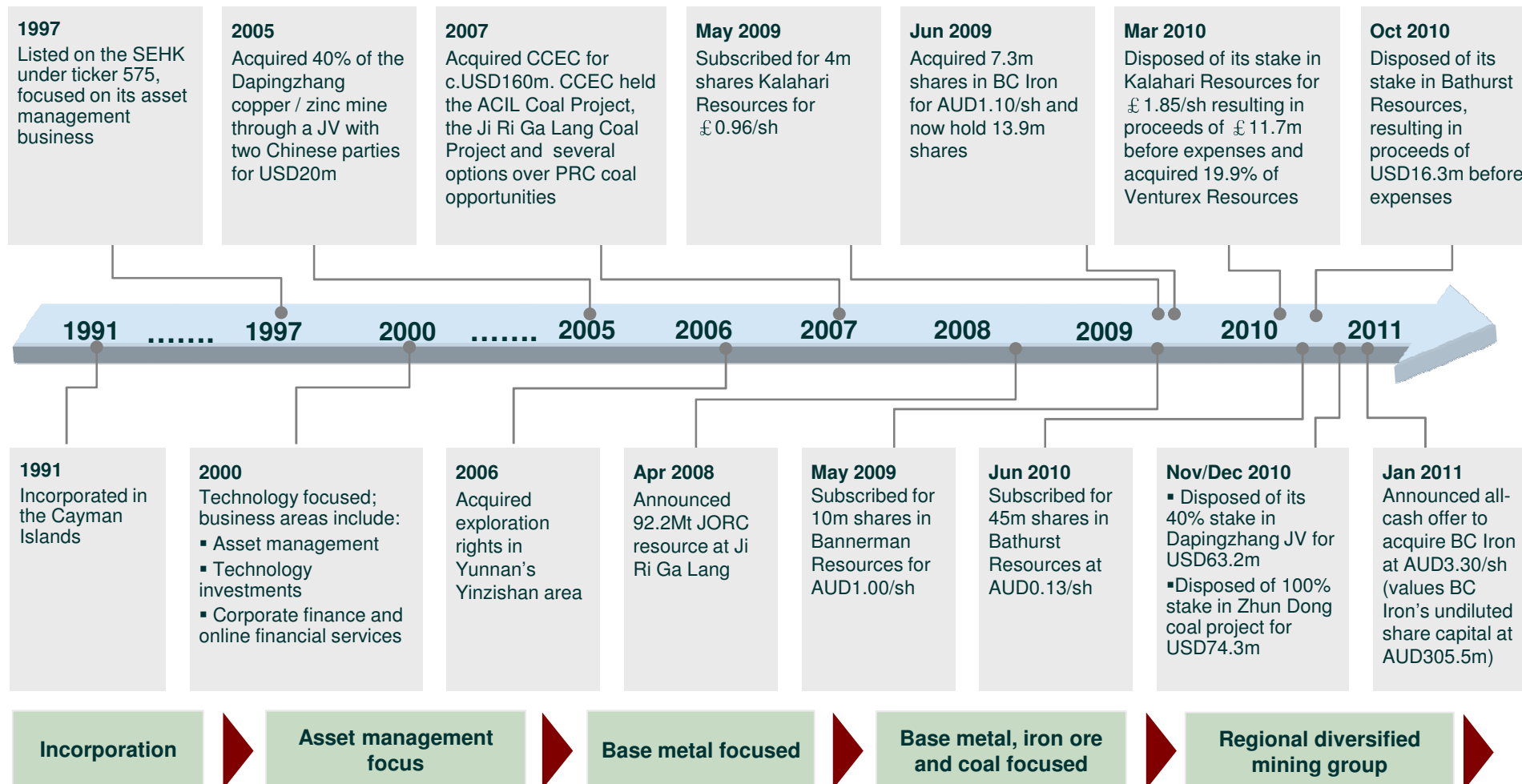
Listed Equity Investments

Company	Commodity	% interest
BC Iron	Iron ore explorer	19.87%
Venturex Resources	Copper/ lead/ zinc explorer	19.99%
Bannerman Resources	Uranium developer	4.48%
Polo Resources	Uranium / coal investments	4.00%
Avion Gold	Gold producer	1.89%
Brazilian Gold	Gold/ uranium explorer	4.87%
PMI Gold	Gold explorer	2.02%
Solomon Gold	Gold explorer	2.52%

History and Milestones

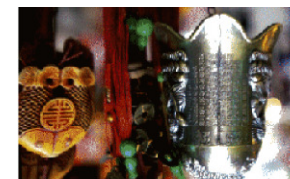
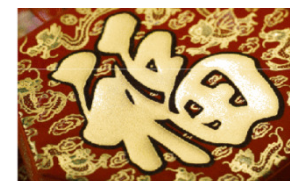


Since 2005 Regent Pacific has shifted its focus to metals and mining investments





2 Regent – The Way Forward



Our Vision



- **Building a diversified mining house** - Transforming our group to become Hong Kong's next major mid tier mining house
- **Utilising our in-house expertise** - Leveraging off our expert international and local teams to tackle 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

Delivering on objectives

- Closing the BC Iron transaction fits neatly within strategy objectives and Regent Pacific will continue to embark on this path in becoming a diversified mining company



Our Strategy



Near-term

- Optimise existing asset portfolio
 - Obtain mining licence and achieve commercial production at Ji Ri Ga Lang at 3Mtpa run rate
 - Monetising non-core liquid investments

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	Investment cost (USDm)	Net proceeds (USDm)	Actual gain (USDm)	Rate of Return (%)
Kalahari Resources	8.9	17.6	8.7	98%
Zhun Dong Project	66.7	74.3	7.6	11%
Dapingzhang JV	51.0	63.2	12.2	24%
Bathurst Resources	5.5	16.3	10.8	196%
Canaco Resources	0.9	2.3	1.4	156%
Total	133	173.7	40.7	31%

Unrealised Gains/(Losses)⁽¹⁾

Asset/ Company	Investment cost (USDm)	Current investment (USDm)	Implied gain /(loss) (USDm)	Rate of Return (%)
Avion Gold	5.7	13.9	8.2	144%
BC Iron	23.2	54.8	31.6	136%
Bannerman	6.8	7.8	1.0	15%
Brazilian Gold	2.0	2.4	0.4	20%
PMI Gold	2.2	1.8	(0.4)	N/A
Polo Resources ⁽²⁾	5.9	7.5	1.6	27%
Solomon Gold	3.1	3.6	0.5	16%
Venturex Resources	10.7	13.4	2.7	25%
Total	59.6	105.2	45.6	77%

Source: FactSet, Bloomberg, company reports as at 3 Jan 2011

Notes:

(1) As of 31 December 2010

(2) Polo unrealised gain includes receipt of USD3.7m dividend paid in 2010

Deliver shareholder returns

Development of projects

- Progressing the mine licence for Ji Ri Ga Lang

Delivering a re-rating of the share price

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

Commitment to dividends

- Since 1997, we have paid over **USD170.5m in dividends** and **returned over USD25m to shareholders** through share repurchases
- In 2010, we have **delivered USD5m of dividends** to our shareholders
- On January 28, 2011, we will pay a **special interim dividend of USD10m**
- We remain committed to distributing a significant portion of our future earnings as dividends

Sum of Parts Valuation



The market is not fully attributing value to our asset base

	(USDm)	Per Share (HK cent)
Net cash	123.6	24.6
Marketable securities	122.5	24.3
Value of cash and marketable securities	246.1	48.9
Value of other investments	48.5	9.6
Total	294.6	58.5
Market Capitalisation	191.0	38.0
Discount		35%

Source: FactSet, Bloomberg, company reports as at 18 January 2011

Note: Exchange rate is USD1 = HKD7.78

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

- Yinzishan Cu/Zn exploration targets in Yunnan Province, PRC
- Quality thermal coal development assets in Inner Mongolia 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), Simao, Yunnan (PRC) and Jakarta (Indonesia)

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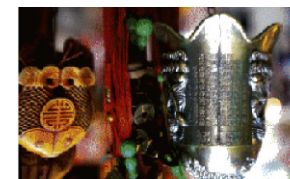
Past success and track record

- 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
- Monetise Dapingzhang JV holding and Zhun Dong coal project for significant returns

Management expertise, geographical coverage and strong track record



3 Asset Overview



Base Metals

Yinzishan Mine



Yinzishan JV Overview

- 97.5% owned and operated VMS deposit
- Located ~500km 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 the neighbouring Dapingzhang mine
- 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 focusing 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 licence to a mining licence

Mineral Resource Estimate (JORC⁽²⁾)

	Measured (Mt)	Indicated (Mt)	Total (Mt)
Seam 5	69.9	9.7	79.6
Seam 5L1	2.2	0.5	2.6
Seam 5L2	1.1	0.7	1.8
Seam 5L3	7.0	1.2	8.2
Total	80.2	12.1	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, and from rounding some totals may not balance.

Asset Location



Coal

ACIL – Project 1



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

Asset Location

ACIL – Project I
1.1Mtpa coking-chemical
+ 110Ktpa methanol



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 (Jakarta)



Other Investments



Company	Commodity	Key Assets	Market Cap (USDm)	EV (USDm)	% Interest	Market Value of Investment (USDm)
 BC IRON LIMITED	▪ Iron ore explorer	▪ Nullagine Iron Ore Project	330.8	299.3	19.87%	65.7
	▪ Copper/lead/zinc explorer	▪ Whim Creek VMS Copper/Zinc/Lead Project ▪ Various exploration projects in Australia and Brazil	81.9	75.6	19.99%	16.4
	▪ Uranium developer	▪ Etango Uranium Project	192.1	184.9	4.48%	8.6
	▪ Coal/uranium investments	▪ Stakes in 8 Uranium/coal companies ▪ Coal JV with Peabody	203.5	143.1	4.00%	8.1
	▪ Gold producer	▪ Tabakoto and Segala Gold Mines	658.9	662.8	1.89%	12.5
	▪ Gold/uranium explorer	▪ Maues Gold Project ▪ Boa Vista Gold Project ▪ Rae Uranium Project	47.2	40.8	4.87%	2.3
	▪ Gold explorer	▪ Asankrangwa Gold Belt ▪ Ashanti Gold Belt	119.1	116.2	2.02%	2.4
 Solomon Gold	▪ Gold explorer	▪ Mt Perry Project ▪ Rannes Project ▪ Guadalcanal Project ▪ Fauro Island Project	137.0	136.8	2.52%	3.5
Total			1,770.5	1,659.5		119.5

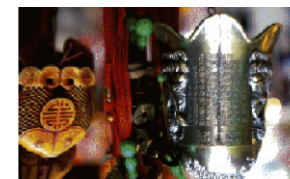
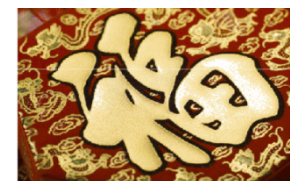
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Notes:

(1) Percentage of ownership in Bannerman Resource is based on Bannerman's shares outstanding as announced in December 20, 2010 filing and excluding 4m shares to be issued to Savanna Marble CC on grant of a mining licence for the Etango Project



4 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)
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

Senior Management



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

	Name	Position	Biography and Relevant Experience
Financial Control	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
Technical/Engineering	Garrick Mendham	<ul style="list-style-type: none"> Director – Technical Services 	<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
	Michael Redman	<ul style="list-style-type: none"> General Manager – Indonesia 	<ul style="list-style-type: none"> Joined Regent Pacific in August 2008 Holds 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 Newcastle Has 15 years in various management, mining, environmental and maintenance positions in Australian open pit coal mines and associated manufacturing industries
	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

Senior Management (Cont.)



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

	Name	Position	Biography and Relevant Experience
Geologists	Adam Miethke	<ul style="list-style-type: none"> ▪ Principal Geologist 	<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
	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

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