

Regent Pacific Group Limited

Company Overview

September 2011





1 Company Overview



Company Snapshot

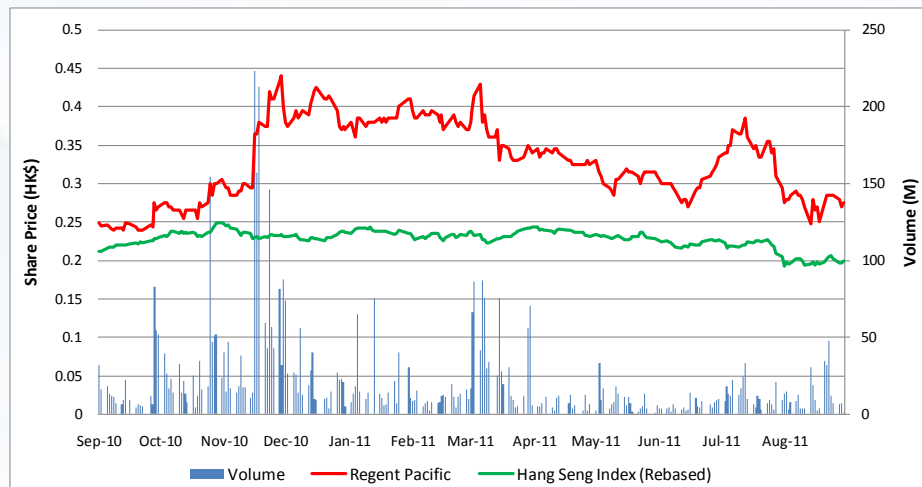


Market Statistics

Share price	HKD0.285 / USD0.04
52 week high – low	HKD0.44 - HKD0.21
Shares outstanding	3,687m
Market capitalisation price (31 st August 2011)	USD135.1m
Cash and bank balances (30 June 2011)	USD 59.7m

Note: Exchange rate is USD1 = HKD7.78

Year-to-Date (Close) Share Price Performance



Source: FactSet, Bloomberg

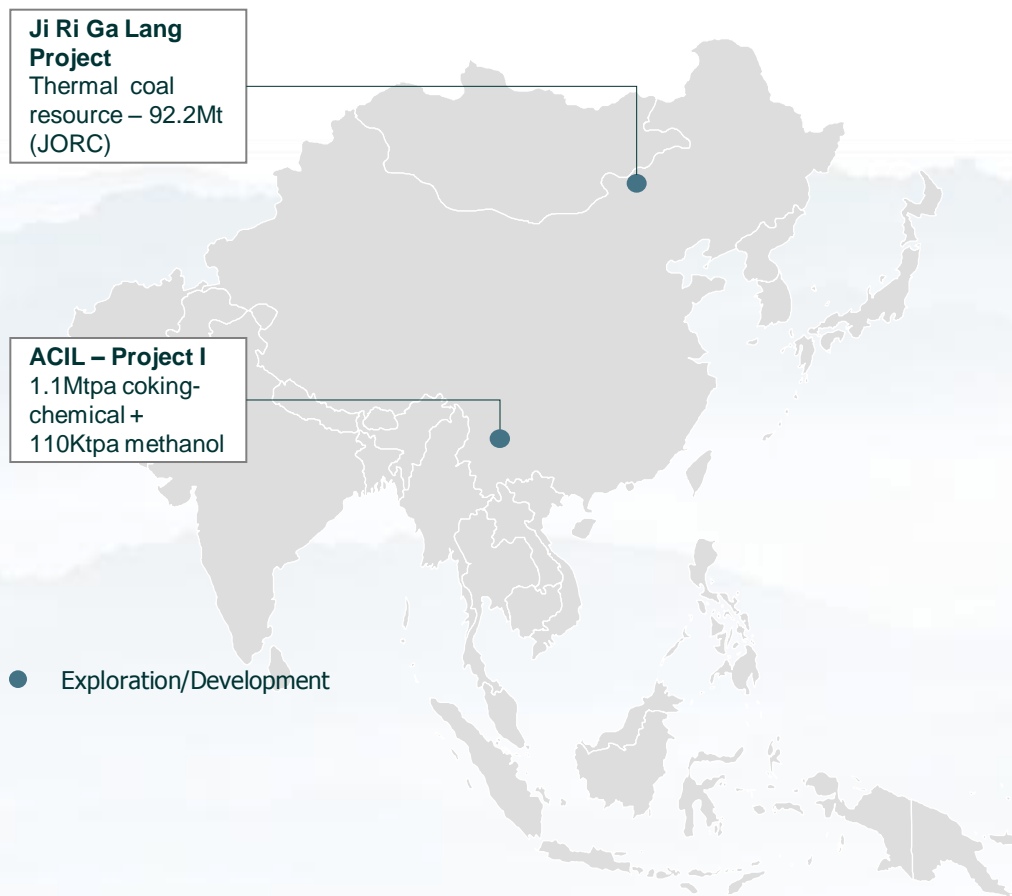
About Regent Pacific Group

- 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:
 - Thermal coal: Ji Ri Ga Lang Project (51%), and ACIL – Project I (25%)
 - Strong portfolio of listed equities

Our Asset Portfolio



Asset Locations



Listed Equity Investments ¹

Company	Commodity	% Interest
Venturex Resources	Copper / lead / zinc explorer	25.92%
BC Iron	Iron ore Producer	22.75%
Goldrich Mining	Gold explorer	13.94%
Bannerman Resources	Uranium developer	4.63%
Brazilian Gold	Gold / uranium explorer	3.93%
Polo Resources	Uranium / coal investments	4.24%
Drake Resources	Gold explorer	4.43%
Tigers Realm Coal	Coal explorer and developer	3.49%
Avion Gold	Gold producer	2.43%
Solomon Gold	Gold explorer	2.50%
Batero	Gold / copper explorer	2.15%
Hathor Exploration	Uranium explorer	1.43%

Notes:

(1) Sourced from RPG and listed company web sites as of 31st August 2011



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, uranium, and thermal and coking coal
- **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

Our
Vision

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

- Regent Pacific continues to embark on its strategic path in divesting non-core assets, successfully managing an equities portfolio and considering investment opportunities for strategic mining assets.



Our Strategy



Near-term

- Optimise existing asset portfolio
 - Obtain mining licence and achieve commercial production at Ji Ri Ga Lang at 3Mtpa run rate
 - Continue to build on current equities portfolio, taking advantage of market conditions
 - 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)	Return (%)
Kalahari Resources	8.9	17.6	8.7	98%
Zhun Dong Project	66.6	74.2	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%
Yinzishan Mining	1.4	3.8	2.4	171%
Total	134.3	177.4	43.1	32%

Unrealised Gains/(Losses)⁽¹⁾

Asset/ Company	Investment cost (USDm)	Current investment (USDm)	Implied gain/(loss) (USDm)	Return (%)
Avion Gold	12.8	24.5	11.7	91%
BC Iron	33.4	60.1	26.7	80%
Bannerman	7.5	4.5	(3.0)	N/A
Batero	3.1	3.3	0.2	6%
Brazilian Gold	2.0	3.8	1.8	90%
Hathor	5.8	7.5	1.7	29%
Goldrich	2.5	3.5	1.0	40%
PMI Gold	2.2	1.6	(0.6)	N/A
Polo Resources	6.6	8.3	1.7	26%
Solomon Gold	3.2	1.8	(1.4)	N/A
Venturex Resources	24.2	27.2	3.0	12%
Total	103.3	146.1	42.8	41%

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

- On January 28, 2011, we paid a special interim dividend of USD10m
- Since 1997, we have paid over USD180m in dividends and returned about USD35m to shareholders through share repurchases
- We remain committed to distributing a significant portion of our future earnings as dividends

Source: FactSet, Bloomberg, company reports as at 31st August 2011

Sum of Parts Valuation



The market is not fully attributing value to our asset base and potential

	(USDm)	Per Share (HK cent)
Cash and bank balances	59.7	12.0
Marketable securities	141.6	28.6
Value of cash and marketable securities	201.3	40.6
Value of other assets less total liabilities	62.2	12.5
Net assets ⁽¹⁾	263.5	53.1
Market Capitalisation ⁽²⁾	135.1	28.5
Discount to market		46%

Note:

(1) Company Interim Report as at 30 June 2011

(2) As at 31st August 2011

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

- Quality thermal coal development assets in Inner Mongolia Province, PRC
- Solid returns from West China Coke coking and chemical operations in Yunnan, 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) 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
- Monetise Dapingzhang JV holding, Zhun Dong coal project and Yinzishan Mining Project for significant returns

Management expertise, geographical coverage and strong track record



3 Board of Directors and Management



Directors and Management



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)

Regent Pacific has brought together a strong senior management team experienced in M&A, funds management and corporate finance

David Church	<ul style="list-style-type: none"> General Counsel and Head 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
Paul Jones	<ul style="list-style-type: none"> Director - Investment 	<ul style="list-style-type: none"> Appointed Investment Director of Regent Pacific in 2011 Private Equity Fund Management from 2005-2011 Extensive prior experience in Banking and Corporate Finance 1997-2005
Frankie Wong	<ul style="list-style-type: none"> Chief Financial Officer 	<ul style="list-style-type: none"> Appointed Chief Financial Officer of Regent Pacific in 2011 Member of Hong Kong Institute of Certified Public Accountant (HKICPA), a Fellow Member of The Association of Chartered Certified Accountants Extensive prior experience with Deloitte

Senior Technical Management



Regent Pacific has now assembled a world class team of technical and project managers

Name	Position	Biography and Relevant Experience
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 25 years experience in the mining industry with various roles in corporate, coal, gold and nickel plus working throughout Australia and in PRC, 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, Graduate Diploma in Applied Mathematics from University of Southern Queensland, Western Australian Quarry Manager Certificate and Member of Australian Institute of Mining and Metallurgy 15 years experience in the Australian mining industry including positions encompassing iron ore, coal, copper and zinc for both greenfield and brownfield developments.
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



4 Asset Overview



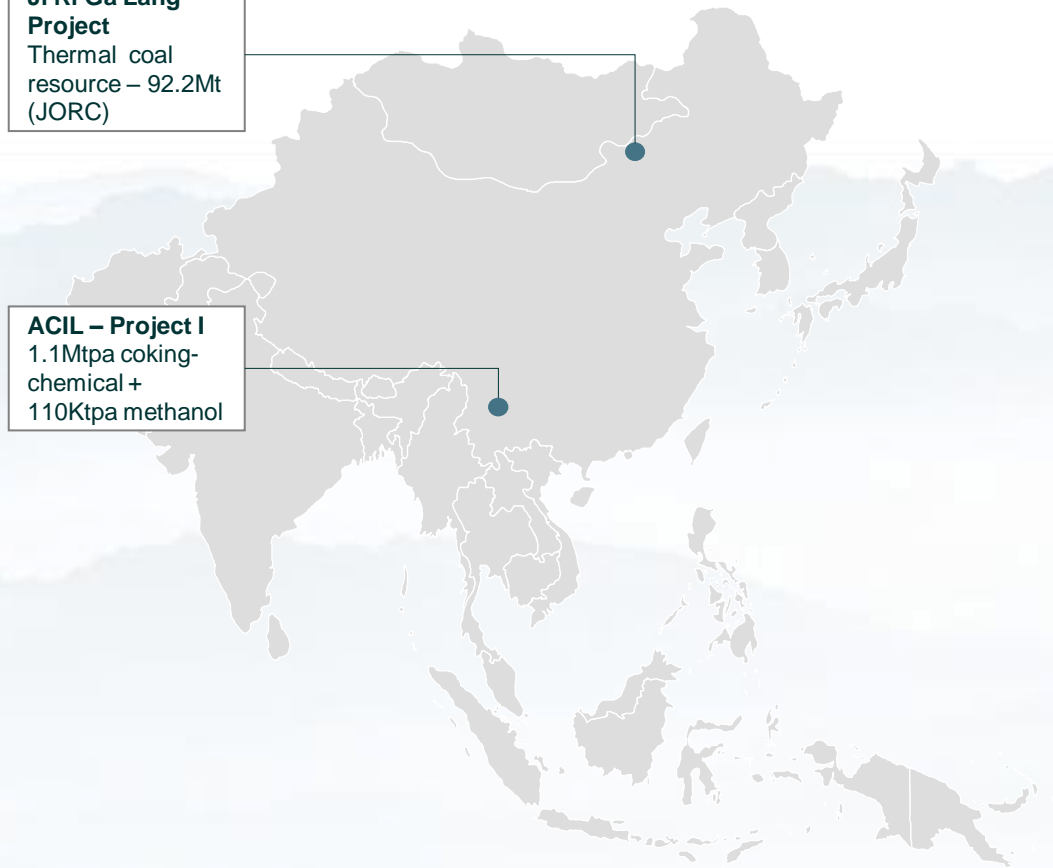
Our Asset Portfolio



Asset Locations

Ji Ri Ga Lang Project
Thermal coal resource – 92.2Mt (JORC)

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



Major Listed Equity Investments



HATHOR
EXPLORATION LIMITED



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 11 production: 450Kt coke, 38Kt methanol, 14Kt tar, 3.1t ammonium sulphate and 4.0Kt crude benzol

Asset Location

ACIL – Project 1
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
- Looking to acquire quality Indonesian assets.
- Regent Pacific's Indonesian team diligences Indonesian projects on the ground, critical to conducting business in Indonesia
- Regent Pacific is uniquely positioned to capitalise on Indonesian opportunities

Office Location (Jakarta)



Listed Equities Portfolio



Company	Commodity	Key Assets	Market Cap (USDm)	EV	% Interest	Market Value of Investment (USDm)
 BC IRON LIMITED	▪ Iron ore producer	▪ Nullagine Iron Ore Project	264.3	241.9	22.75%	58.6
 AVION GOLD CORPORATION	▪ Gold producer and explorer	▪ Tabakoto and Segala gold mines, Mali and exploration Burkina Faso	1,010.7	1,028.8	2.43%	26.0
 VENTUREX RESOURCES LIMITED	▪ Copper/lead/zinc explorer/developer	▪ Whim Creek and Panorama VMS Copper /Zinc / Lead Project, Australia. Gold exploration Brazil	104.8	101.5	25.92%	25.6
 HATHOR MINERALS	▪ Uranium explorer	▪ Saskatchewan uranium exploration Projects	531.4	507.0	1.43%	7.6
 TIGERS REALM COAL	▪ Coal explorer and developer	▪ Coal exploration /development projects in Russia and Columbia	175.4	124.5	3.49%	5.2
 Polo Resources	▪ Coal/uranium investments	▪ Stakes in uranium/coal companies	196.8	145.4	4.24%	5.1
 BANNERMAN RESOURCES	▪ Uranium developer	▪ Etango uranium Project, Namibia	96.7	87.0	4.63%	4.0
 BRAZILIAN GOLD CORPORATION	▪ Gold/uranium explorer	▪ Brazilian gold exploration	97.3	74.6	3.93%	3.8
 BATERO GOLD CORP COLOMBIA	▪ Gold and Base Metals explorer	▪ Columbian porphyry gold / copper exploration	158.3	147.8	2.15%	3.4
 GOLD RICH MINING COMPANY	▪ Gold explorer	▪ Gold exploration projects Alaska	25.3	25.5	13.94%	3.4
 Solomon Gold	▪ Gold explorer	▪ Gold exploration projects in the Solomon Islands and Queensland	73.7	52.6	2.50%	2.2
Total			1,770.50	1,659.50		144.9

Source: Bloomberg, FactSet, and RPG as at 31 August 2011

Disclaimer



The information contained in this presentation has been prepared using the information available to Regent Pacific Group Limited (“Regent”) at the time of preparation and may not include all relevant information regarding Regent or its assets, including projects or companies in which Regent is interested or potentially interested. These materials have been prepared for general information purposes, and are not, and should not be construed as an offer to sell, or solicitation of an offer to buy any securities. In particular, these materials are not, and should not be regarded as, an advertisement, invitation or document which is or contains an invitation to the public: (a) to enter into or offer to enter into (i) an agreement to acquire, dispose of, subscribe for or underwrite securities of Regent, or (ii) a regulated investment agreement; or (b) to acquire an interest in or participate in, or offer to acquire an interest in or participate in, a collective investment scheme. These materials are not an offer of securities for sale in the United States. Securities of Regent may not be offered or sold in the United States absent registration or an exemption from registration. Regent is not making a public offering of securities in the United States.

Information contained and opinions expressed herein have been compiled in good faith by Regent from a number of internal and external sources (including research and other reports published by third parties together with information provided by Regent) and have not been independently verified. No representation or warranty, expressed or implied, is made and no reliance should be placed on the accuracy, fairness, correctness or completeness of the information presented or contained in these materials. Regent, its affiliates, advisers, officers or representatives accept no liability whatsoever for any loss howsoever arising from any information presented or contained in these materials. The information presented or contained in these materials is subject to change without notice and its accuracy is not guaranteed. In all cases, recipients should conduct their own investigation and analysis of Regent, its assets and management. Words such as “expects”, “intends”, “plans”, “projects”, “believes”, “estimates”, and similar expressions are used to identify such forward-looking statements. The forward-looking information has not been prepared with a view towards compliance with published guidelines of the U.S SEC, the Hong Kong Stock Exchange, or the GAAP of the PRC, Hong Kong or any others jurisdictions for the preparation and presentation of projected or forecasted or pro forma information. Nor has any certified public accountant audited or reviewed the forward-looking statements or compiled them under such published guidelines.

Disclaimer (Cont.)



Any forward-looking statement is subject to known and unknown risks, uncertainties, assumptions and other factors, some of which are beyond Regent's control, including, but not limited to: geopolitical uncertainty, political and economic instability, uncertain legal enforcement and risk of corruption where mining operations are located; changed in, and the effects of, the laws regulations and government policies affecting Regent's, uncertainties related to raising substantial additional financing to make all necessary investment and complete proposed mining projects; uncertainties related to the accuracy of estimates of mineral reserves and mineral resources and Regent's estimated of future production and future total cash costs of production; uncertainties and costs related to exploration and development activities, feasibility studies that provide estimates of expected or anticipated economic returns from a mining project; uncertainties related to expected production rates timing of production and the total cash costs of production; and changes in general economic conditions, the financial markets and the demand and market price for coal. Actual results or developments may materially differ from those expressed or implied by forward-looking statements in this presentation.

Because of these risks, uncertainties, assumptions and factors, the forward-looking events and circumstances discussed in these materials might not occur in the way Regent makes the forward-looking statements referred to in these materials as at the day of the presentation and undertakes no obligation to update these statements. All forward-looking statements are expressly qualified in their entirety by this cautionary statement. You should not rely in anyway on any forward-looking information.

