

## Uranium and gold, favorites of smart investors



The uranium price has broken through the magic barrier of 100 US dollars per pound. Gold price holds up bravely.

Of course, a well-positioned equity portfolio should contain a variety of stocks. In any case, investors have done everything right with gold and uranium in recent months. Uranium is more in demand than it has been for a long time, as it is part of the energy mix when it comes to carbon-free forms of energy. In 2023, more than half of the electricity generated in Germany was green electricity. That's more than ever before. In December, this figure was around 60.4 percent in Germany.

In 2023, only one percent of Germany's gross electricity generation came from nuclear power. But Germany is also a special case following its departure from nuclear energy. Experts assume that uranium could become scarce and that prices will continue to rise, as renewable energies are not (yet) ready to cover the entire global demand.

The gold price, which is holding above USD 2,000, is also pleasing investors. Although there are still outflows from gold ETFs, even greater than at the end of 2023, this cannot do much to affect gold. Perhaps it is the strong demand for gold from China that is responsible for this. And, of course, the interest rate cuts expected by the Fed over the course of the year. In addition to gold, the platinum market is also of interest. After all, according to the World Platinum Investment Council, an average platinum supply deficit of seven percent is forecast for the next five years. If less platinum were to come from Russia, the deficit would be even higher. Battery metals are also known to be in vogue.

As an investor, you could now think of **Sibanye-Stillwater** - <https://www.commodity-tv.com/ondemand/companies/profil/sibanye-stillwater-ltd/> . This is because the company produces gold and platinum metals and focuses on battery metals such as lithium. All of this in South Africa, Argentina and the USA.

Anyone looking to invest in the uranium sector will find good opportunities in the Athabasca Basin in Saskatchewan. The takeover of Consolidated Uranium by **IsoEnergy** - <https://www.commodity-tv.com/ondemand/companies/profil/isoenergy-ltd/> - is an example of this. IsoEnergy owns many very high-quality uranium projects and should gain strength as a result of the merger.

Current company information and press releases from IsoEnergy (- <https://www.resource-capital.ch/en/companies/iso-energy-ltd/> -) and Sibanye-Stillwater (- <https://www.resource-capital.ch/en/companies/sibanye-stillwater-ltd/> -).

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