

TORO ENERGY LIMITED

**An Emerging Australian
Uranium Producer**

INVESTOR PRESENTATION

29 JANUARY 2013



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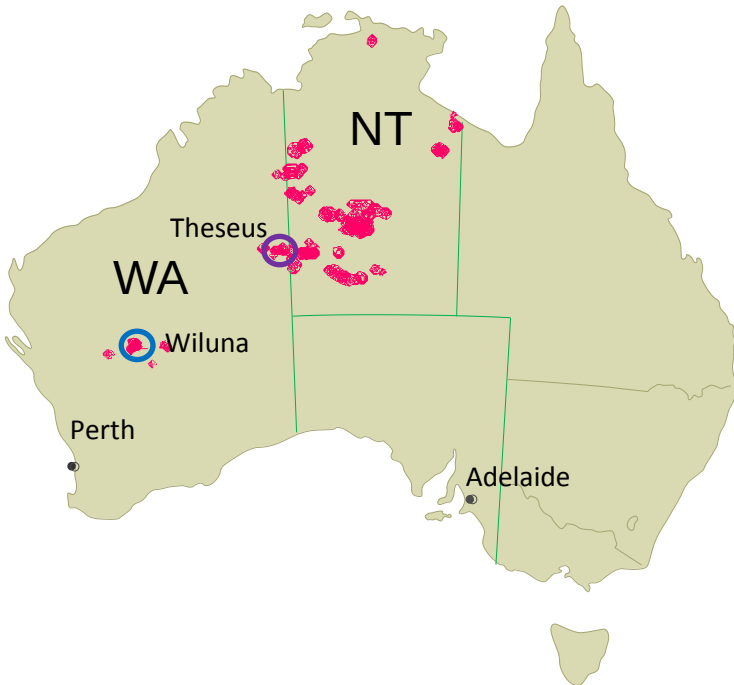
Corporate Overview



Corporate Overview

TORO ENERGY LIMITED

Toro's Australian Tenement Footprint



- **100% Wiluna Uranium Project (WA)**
 - 53.6mlbs U_3O_8 calcrete resource*
 - WA State approval received
 - **Federal Government decision Q1 2013**

- **100% Theseus Uranium Project (WA)**
 - Greenfield discovery in new area
 - Initial resource 6.9mlbs U_3O_8 established*
 - **Potential ISR operation**

Capital Structure

- 1042m shares on issue (ASX code: TOE)
- 57m options on issue (unlisted)
- A\$0.115 Share Price (18 Jan)
- A\$120m Market Capitalisation
- A\$4.7m cash (31 Dec)
- A\$12.0m Convertible Loan (Macquarie Bank)#
- Total Toro Energy resources 60.5 mlbs U_3O_8 *
- A\$115m Enterprise Value (EV/lb A\$1.90/lb)

12 Month Share Price Graph





“To become a significant sustainable uranium mining company focusing on developing a top tier exploration and production profile in the global uranium mining sector.”

- **Wiluna Uranium Project & Region**

- WA Ministerial environmental approval received
- One of the few projects globally capable of production from 2015
- 54mlb (24,200 tonnes) U_3O_8 total regional JORC resource*

Front-running project with Federal Govt decision anticipated Q1

- **Theseus Uranium Project**

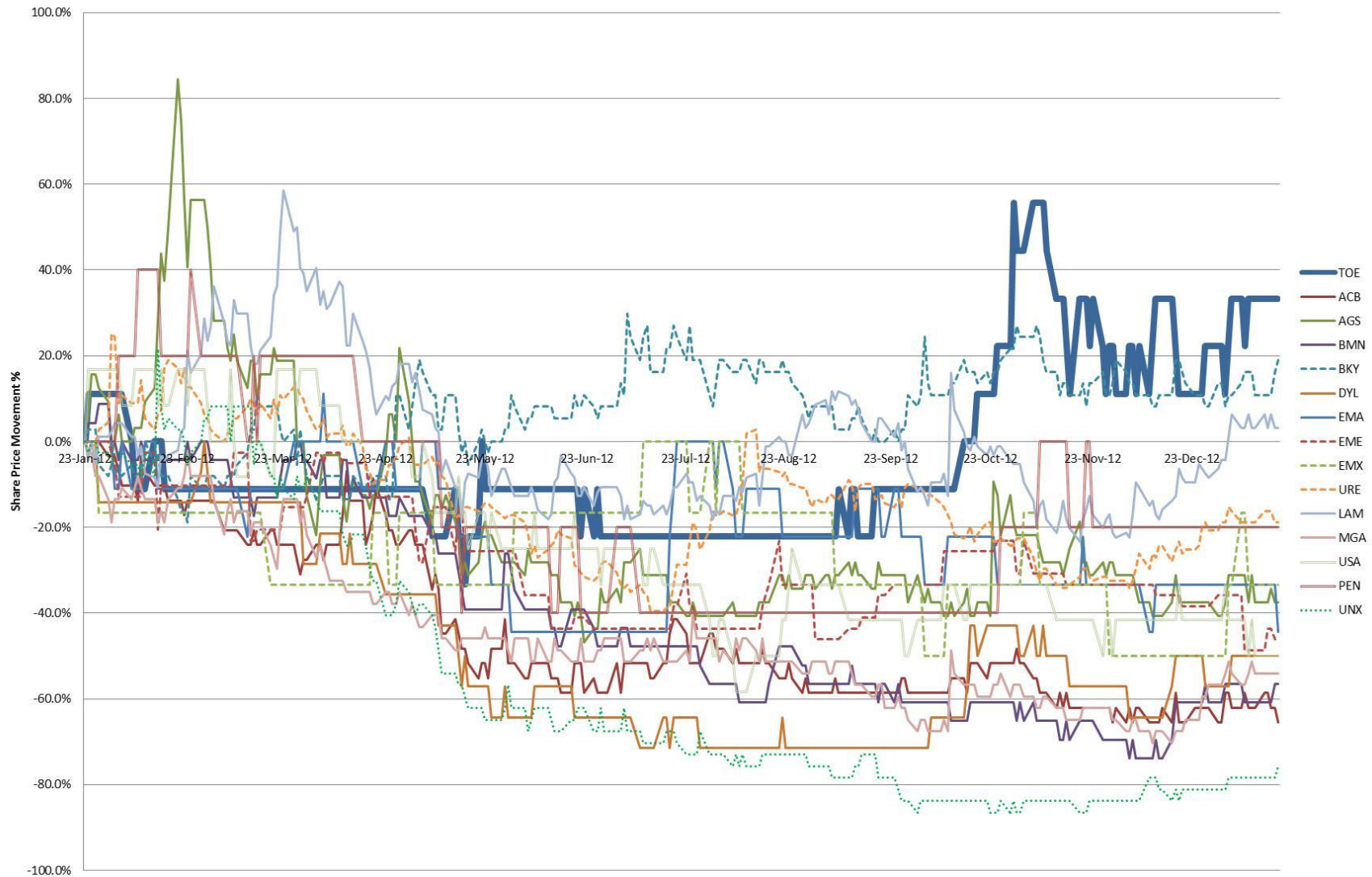
- Exciting discovery in greenfield exploration of new uranium province
- High grade tenor (up to 1% pU_3O_8) with potential acid ISR extraction[#]
- Exploration target range (ETR) 28 - 40mlbs (12,600-18,200t) U_3O_8 *

Initial resource 6.9 mlbs U_3O_8 (6.3mt @ 493ppm U_3O_8)*

Peer Share Price Comparison



Peer Share Price Comparison - Detail



Key Achievements over 12 months



Toro Energy has had a significant year of progress which has seen:

- Full Pilot process plant completed for Wiluna project
- Share purchase plan for existing shareholders raises \$5m
- Asset sales of non-core tenements
- Phase 1 of Definitive Feasibility Study – Process Engineering completed
- Theseus drilling program indicates high grades and ISR potential
- WA Govt approval of the Wiluna Uranium Project
- Initial Theseus Inferred Resource – 6.9mlbs U_3O_8 bringing total Toro Energy resources to 60.5mlbs U_3O_8 *
- 44% share price increase in difficult market
- Access to \$13m cash, with additional \$4m subject to Wiluna approval

Nuclear Power & Uranium Market



Electricity Demand & Nuclear Power



Electricity generation in developing Asia is expected to triple in the next 20 years

World total net electricity generation from central producers, by region and country, 2007 and 2030, in Terawatt-hours

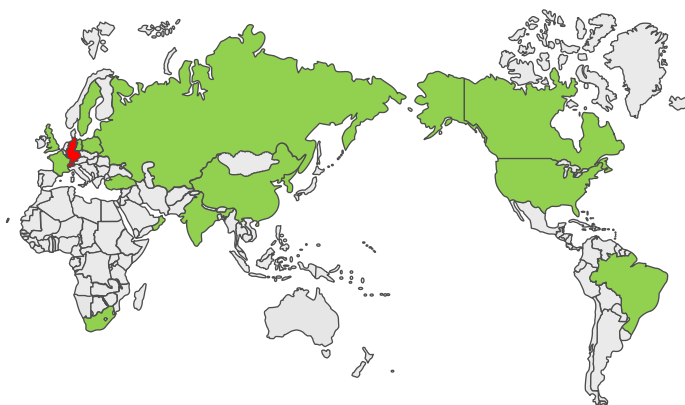
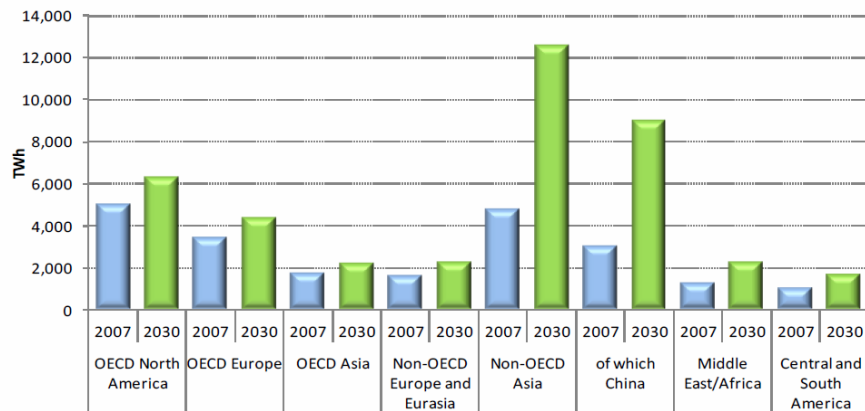


Exhibit 1

Existing and projected nuclear power plants and capacity, 2012 vs 2020

Region	2012e Operating	Net Capacity (GWe)	Net New Builds	2020e Net Capacity (GWe)	% Share New Capacity
Asia & Mid East	71	47	94	147	78%
E Europe & Russia	69	50	19	69	15%
Western Europe	119	114	-9	109	0%
North America	124	114	4	120	4%
S America & Africa	7	5	4	33	4%
Total	390	330	112	455	

Source: UxC, Morgan Stanley Research. e=Morgan Stanley Research estimates.

Key nations indicating continuing support for nuclear:

China
South Korea
USA, UK

India
Russia
UAE

Current Nuclear Picture

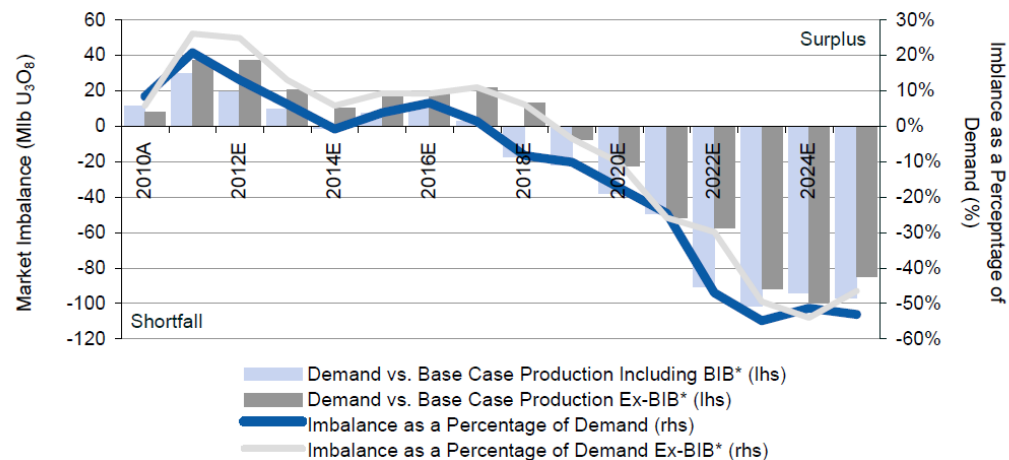
435 Operable
65 under construction
167 firmly planned
>300 proposed

International Atomic Energy Agency reported in August 2012 that nuclear power capacity will grow 30% - 100% by 2030.

Supply/Demand Imbalance

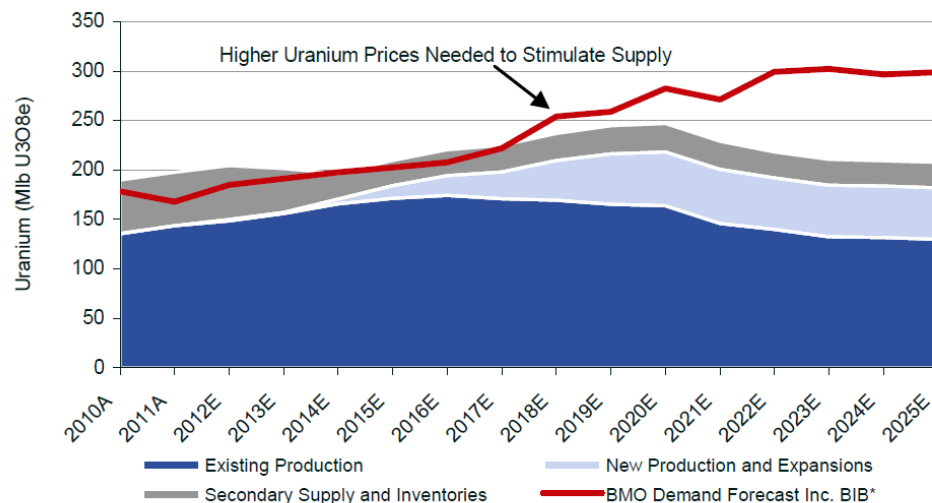


Fig 27: Uranium Supply/Demand Balance (U_3O_8)



Source: BMO Capital Markets, *BIB = Buffer Inventory Build

Fig 1: Uranium Supply/Demand Outlook (Mlb U_3O_8)



Source: BMO Capital Markets, *BIB = Buffer Inventory Build

Exhibit 15

Steady production vs new supply – Not enough to meet demand

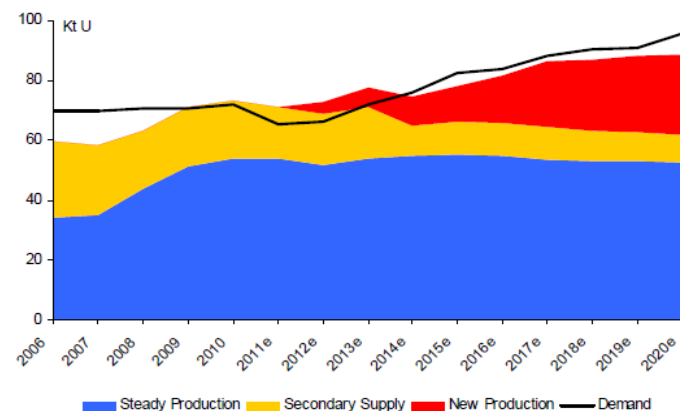
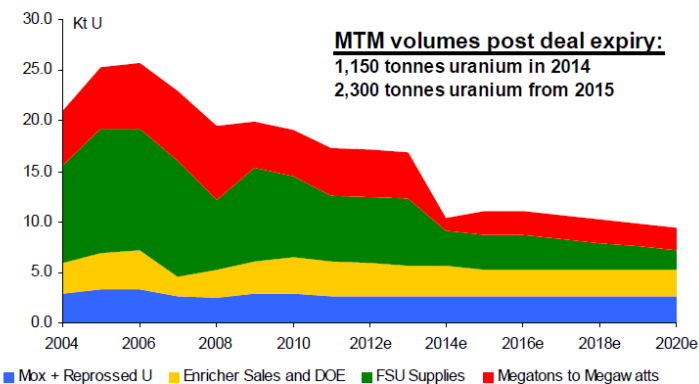


Exhibit 21

Global uranium secondary supply, 2004-20e



Source: UxC, Morgan Stanley Research. e=Morgan Stanley Research estimates.



Australia

- Emerging Australia-India negotiations on uranium sales
- Olympic Dam Expansion deferred for at least 4 years
- BHPB sells Yeelirrie to Cameco for US\$430m (+ \$21.5m stamp duty) - 144mlb @ ~\$3/lb
- Cameco announces Kintyre project requires \$US67/lb to be economic (DFS deferred)
- Wiluna Project receives WA Government approval
- ERA targeting underground mining by 2015

Global

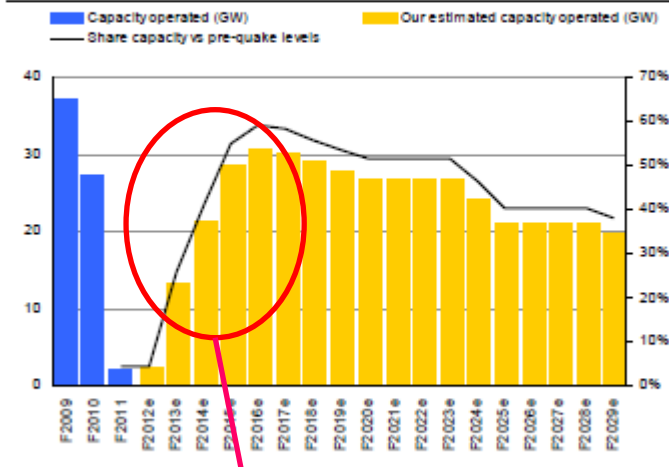
- Paladin \$200m forward payment on 13.73mlb uranium contract delivering 2019-2024
- UAE \$3b fuel supply deal with Areva/Uranium One/Rio/Converdyn/Urenco/Tenex
- Nuclear Power Corp of India & Uranium Corp of India form JV to acquire foreign mines
- Japanese election win for Abe Govt – re-start of nuclear capacity and review of new build
- ARMZ (Russian Govt uranium arm) buying out Uranium One (already owns 51%)
- Hitachi in new UK nuclear build – CGNPC also in discussions



Nuclear Price Revival: Japan Re-starts



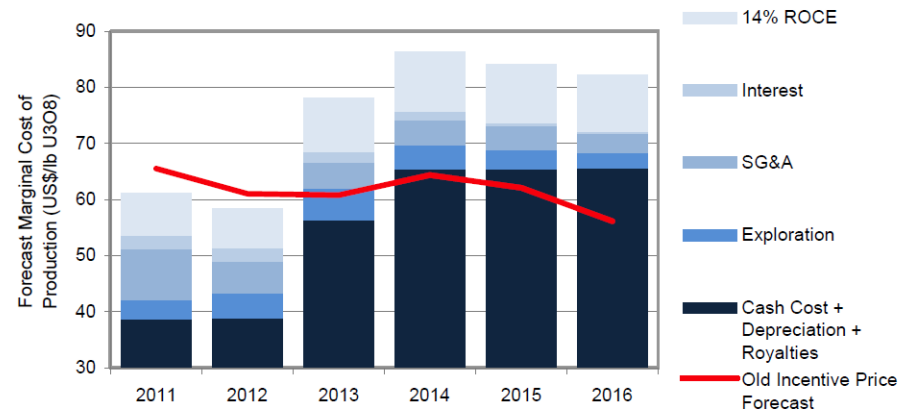
Exhibit 5
Japan: Calculated active capacity through FY29
 Assuming gradual restarts, except for reactors over 40 years old, based on current government targets



Note: Our estimated capacity (x): Morgan Stanley Research estimates
 Source: Company data, Morgan Stanley Research

BMO Capital Markets 26 October 2012

Fig 2: Estimated New Production Incentive Price (US\$/lb)



Source: BMO Capital Markets

Japanese election by Abe Govt - nuclear capacity to be restored through 2013-2015

Uranium Price Summary



	2014/2015 Term	Long Term
Investment Bank 1	US\$70/lb	US\$70/lb
Investment Bank 2	US\$85/lb	US\$65/lb
Investment Bank 3	US\$74/lb	US\$70/lb
Investment Bank 4	US\$66/lb	US\$76/lb
Incentive Price	US\$85/lb	US\$80/lb
Average:	US\$76/lb	US\$72/lb

- With growing demand and insufficient supply the price of uranium must increase
- For new mines to come into production, long-term prices in excess of \$70/lb are required
- Prices are likely to start to rise during 2013

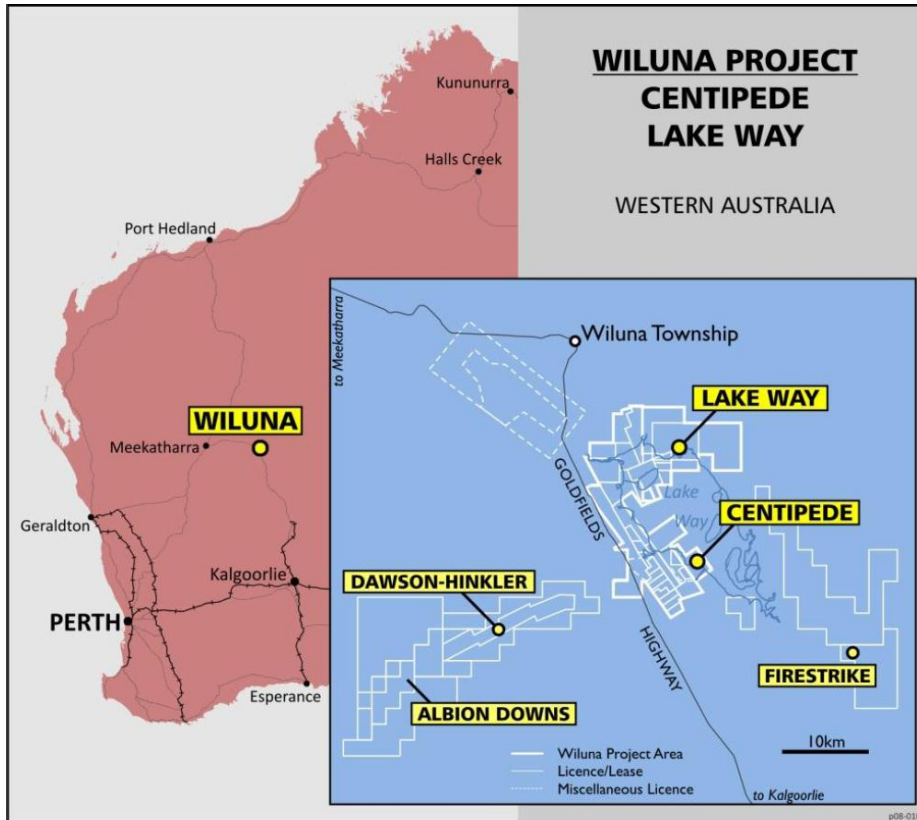
The Wiluna Uranium Project

100% Toro



Project Overview – Updated Economics

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Parameter	November 2012 Economics*
Processing Plant	1.3mtpa
Head grade	716ppm *
Recovery	Ramping to 86%
C1 Cash Cost	AUD \$41/lb USD \$37/lb #
Capital Cost	AUD \$269m
Product (per annum)	780t U ₃ O ₈ (1.7mlb)
Mining Duration	10 – 14 years

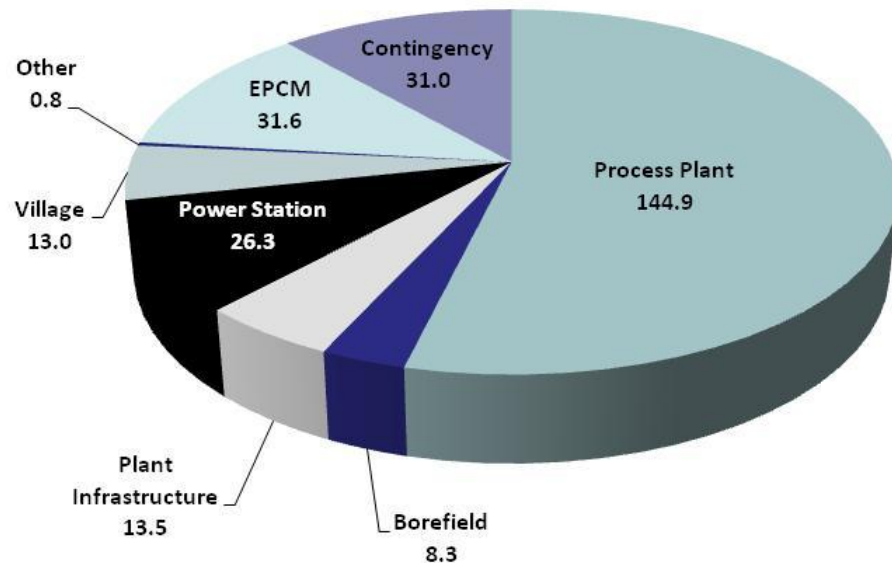
- 960km NE of Perth in Western Australia, semi arid environment with low rainfall
- Shallow open pit mining (<10m), strip 3.8:1, mining to a 250ppm or > U₃O₈ cut-off
- Processing 1.3 mtpa to a 500ppm U₃O₈ cut-off results in 716ppm head grade
- Alkaline tank leach with direct precipitation
- In-pit tailings storage, progressive rehabilitation, similar to sand mining operation

* First 10 years of production # figures based on an exchange rate AUD / USD \$0.90

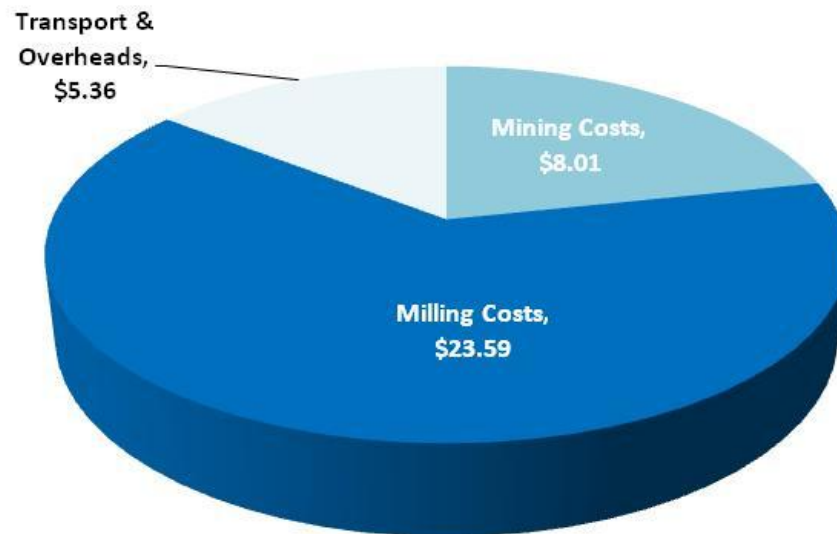
Wiluna Project Costs



CAPEX Construction (AUD)



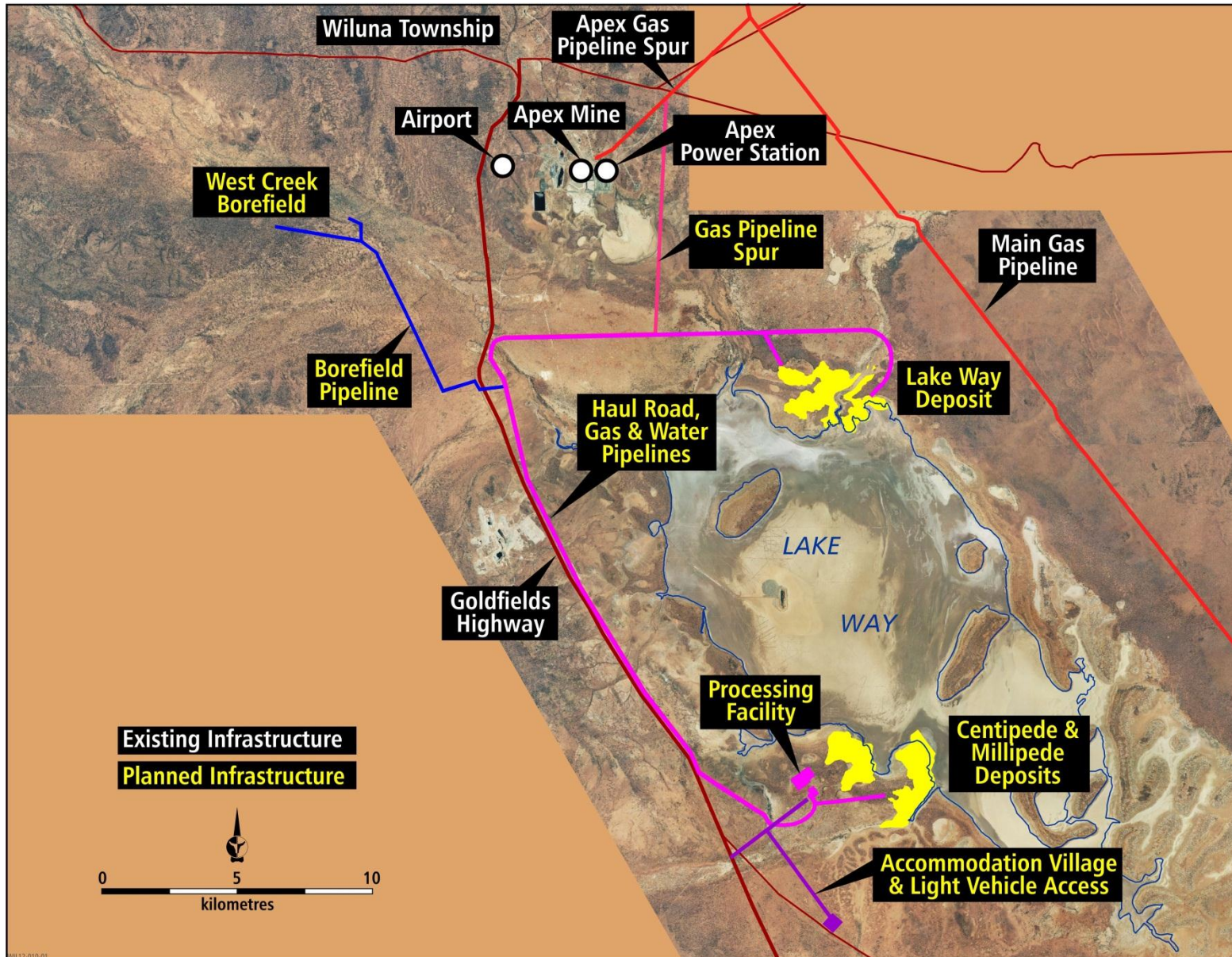
Wiluna 'C1' Operating Costs per lb (USD)*



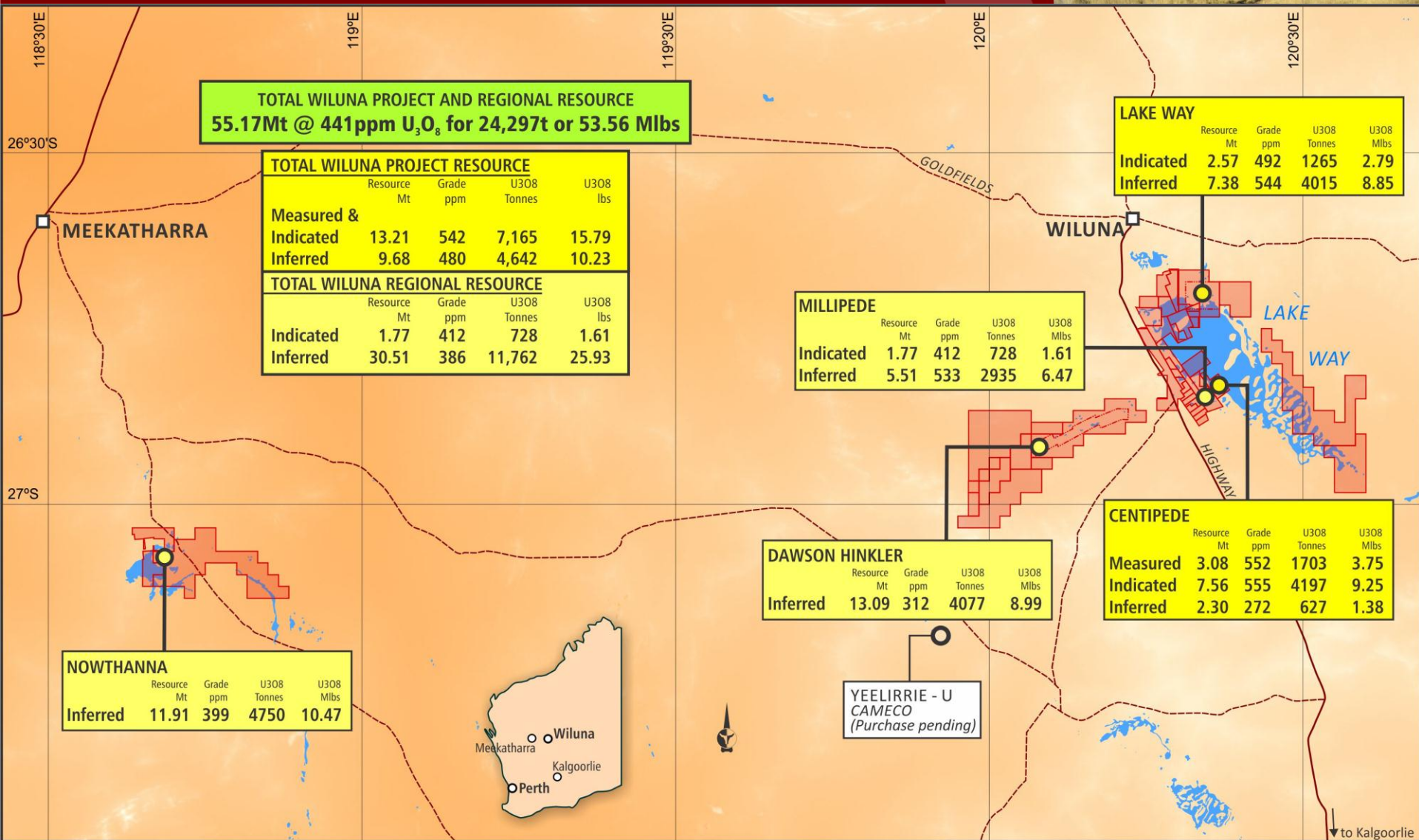
Wiluna Local Infrastructure



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Uranium Resources



All Resources are reported using a 200 ppm U₃O₈ cutoff grade



WILUNA URANIUM PROJECT AND REGIONAL RESOURCES MAP

Scale: 1:800K (A4)

Date: 28/5/12

Author: V.G.

Technical De-Risking



Trial mining confirmed selective mining process



- Vermeer continuous miner cutting 25cm bench
- GPS/gamma logger for pit floor grade mapping
- Groundwater control systems



- ✓ *Ability to map and select higher grade confirmed*
- ✓ *Continuous miner confirmed efficient method*
- ✓ *In pit tailings deposition and full rehabilitation*
- ✓ *Groundwater control through water barriers*

Pilot plant confirms Toro's proposed process

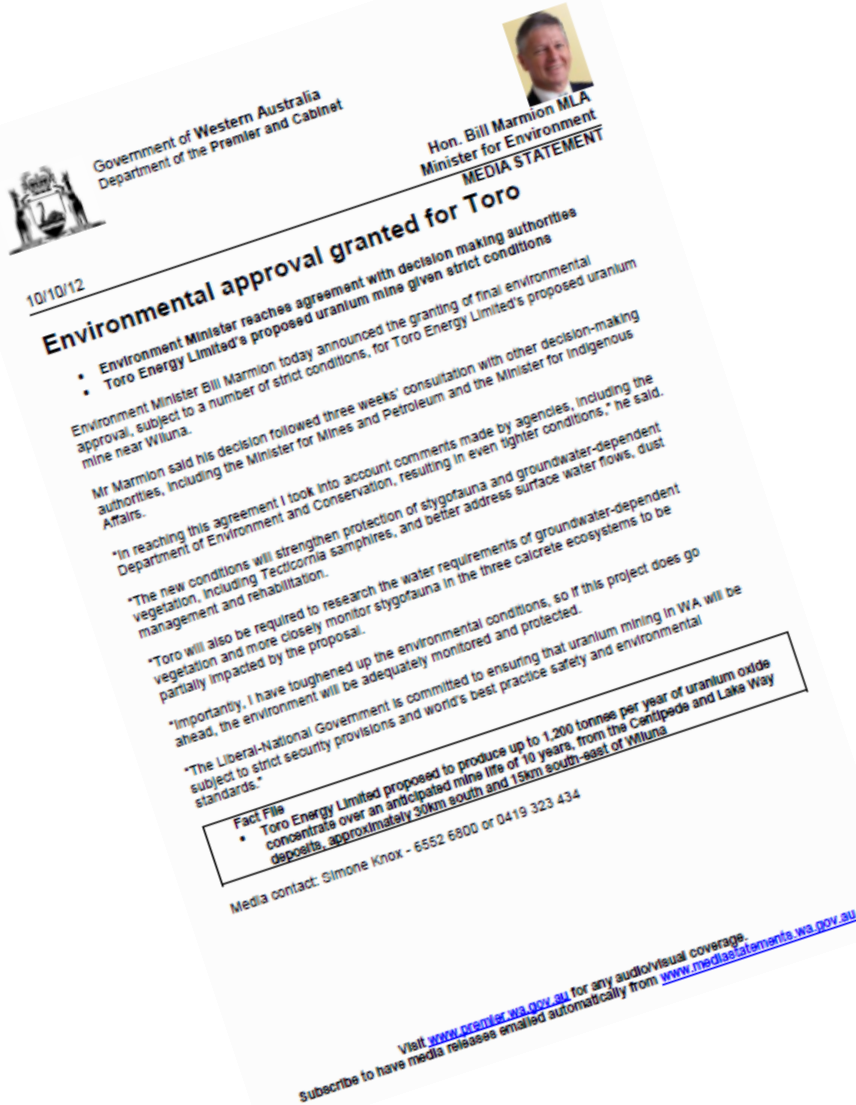


- Fully integrated continuous hydrometallurgical circuit
- Utilised 15 tonne sample from trial mining
- 40 tonne of site groundwater used in process
- Calcrete and clay dominant processes tested



- ✓ *Economic processing and recovery proven (~86%)*
- ✓ *Saline water used for processing*
- ✓ *Sample uranium to be sent to uranium converters*
- ✓ *Savings from coarser grind & lower leach temperature*

WA Ministerial Approval



"The Liberal-National Government is committed to ensuring that uranium mining in WA will be subject to strict security provisions and world's best practice safety and environmental standards."

Minister Marmion, Media Statement
10 October 2012

*WA Opposition spokesman Bill Johnston said:
"...if the ALP come to government and there's a project that's been approved - and when I say been approved I mean by state approvals - it can proceed."*

ABC Radio, 11 October 2012



- Industry collaboration on regional consultation program since 2008
- Information days in Wiluna, Kalgoorlie, Menzies and Leonora for ERMP
- Wiluna Shire (Local Government) adopted policy of support for uranium mining
- Wiluna population ~ 650 – more than half indigenous
- Contracts already provided to local and regional businesses
- Indigenous employees engaged during technical site works
- Regular attendance by Toro at claimant meetings in Wiluna to provide Project updates
- TO's support in media and public for Toro's engagement process
- Mining agreement negotiations underway



28th May 2012

MEDIA STATEMENT

The Wiluna 'Martu' People are the traditional owners of the land on which Toro Energy Ltd's (Toro) proposed Wiluna Uranium Mine (**Wiluna Uranium Mine**) is situated.

They issue this media statement to outline their position on Toro's proposed Wiluna Uranium Mine.

Background

Toro's Wiluna Uranium Mine is situated on the traditional lands of the Wiluna based 'Martu' People. There are two complementary native title claims that seek to have those traditional lands recognised under the Native Title Act: the Wiluna Native Title Claim and the Tarpa Native Title Claim (**Native Title Claims**). These Native Title Claims are at an advanced stage towards a consent determination of native title.

History of uranium exploration in the Wiluna region

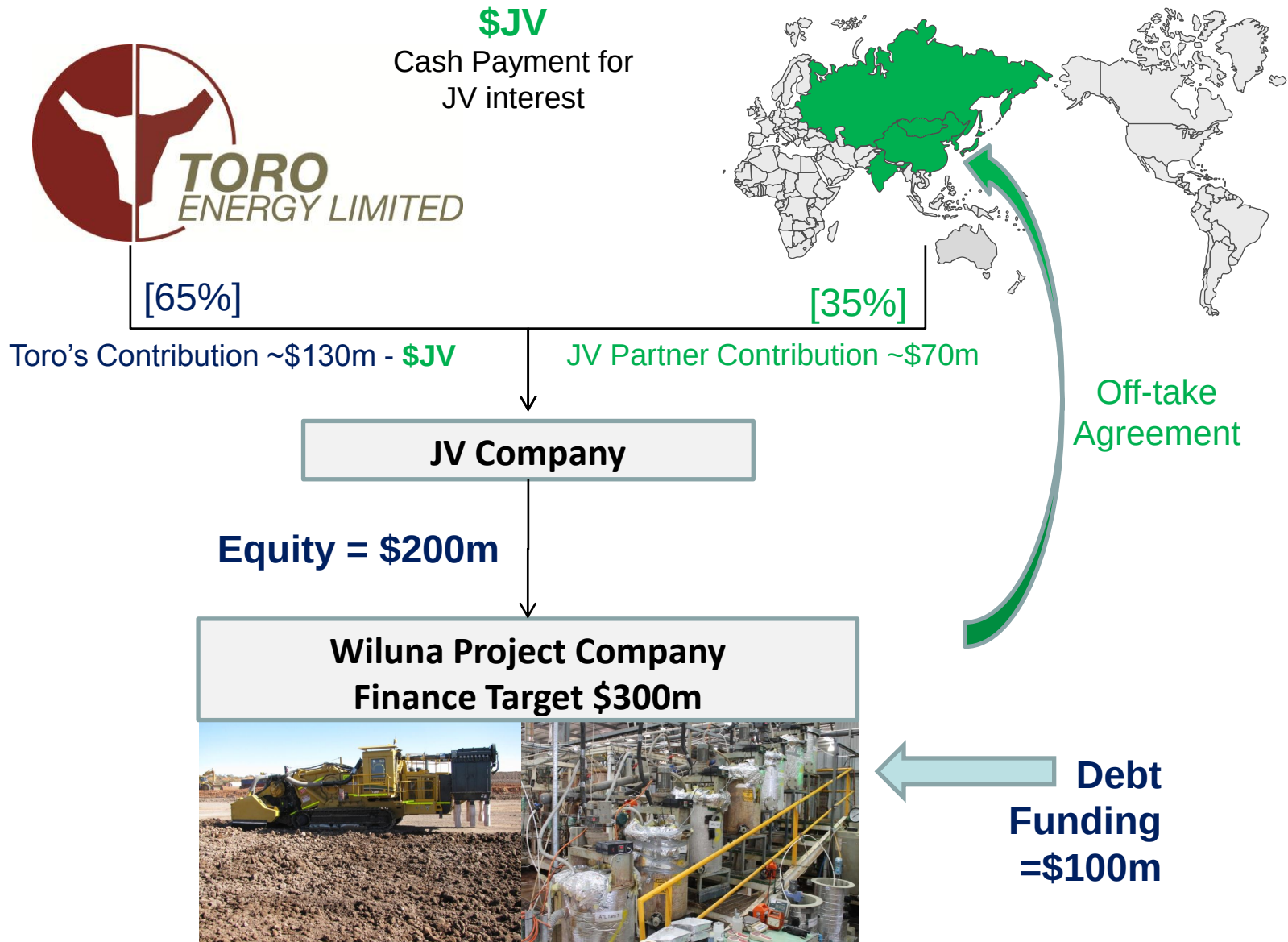
The Martu People have been dealing with uranium exploration in the Wiluna region since the 1970's; both on their traditional hunting grounds and in areas close to where traditional owners and other Martu families resided at the old Wiluna Ngangganawili mission. This early uranium exploration was conducted without any consultation with the traditional owners and with little government regulatory supervision.

The Wiluna Martu People's previous experience with uranium exploration in the Wiluna region has left them with serious and genuine concerns about the health effects of radiation. It also raised questions for them about the government's capacity to properly regulate uranium exploration and mining on their traditional lands.

Since the recommencement of uranium exploration in the Wiluna region in 2005, the Wiluna Martu People have raised their concerns about the state regulatory regime and radiation safety with the government of Western Australia.

The Native Title Claimants have in particular been seeking for the right to negotiate directly with uranium explorers so that their unique concerns as traditional owners and traditional land users can be properly recognised and their native title rights protected.

Financing Concept: Equity & Debt



Wiluna Project Summary



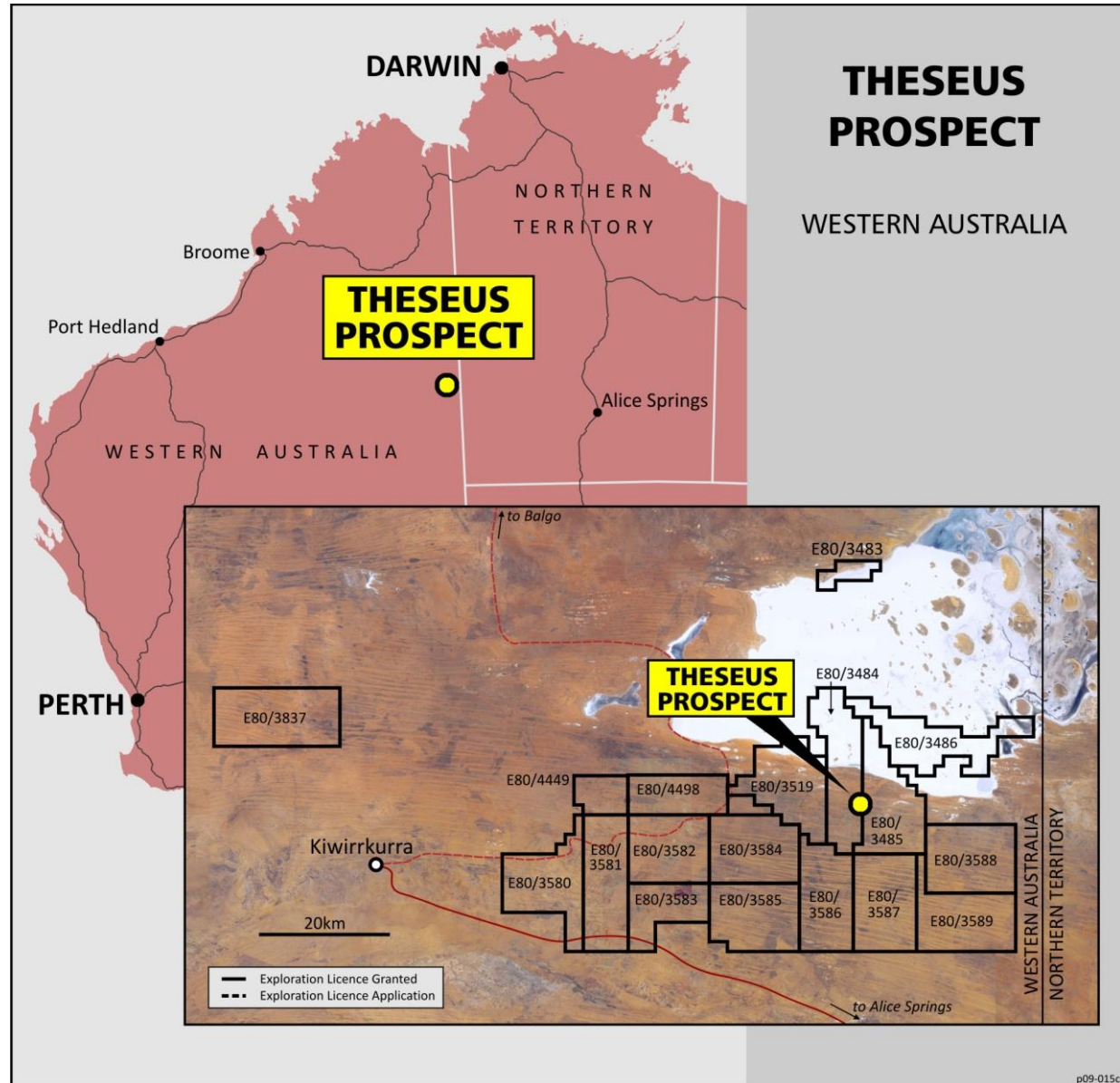
- The Wiluna project is the most advanced uranium project in Australia
 - one of only two Australian projects to receive State environmental approval in last seven years
- Toro has worked hard to bring project to market
 - Awaiting final Federal Government decision
 - Mining process proven
 - Processing technique proven
 - Excellent relationship with local people
 - Engaging with several potential finance partners
- Wiluna targeted to be the next new uranium mine in Australia
 - Subject to approval and financing – commitment in latter 2013
 - First production and sales during 2015

The Theseus Uranium Project

100% Toro



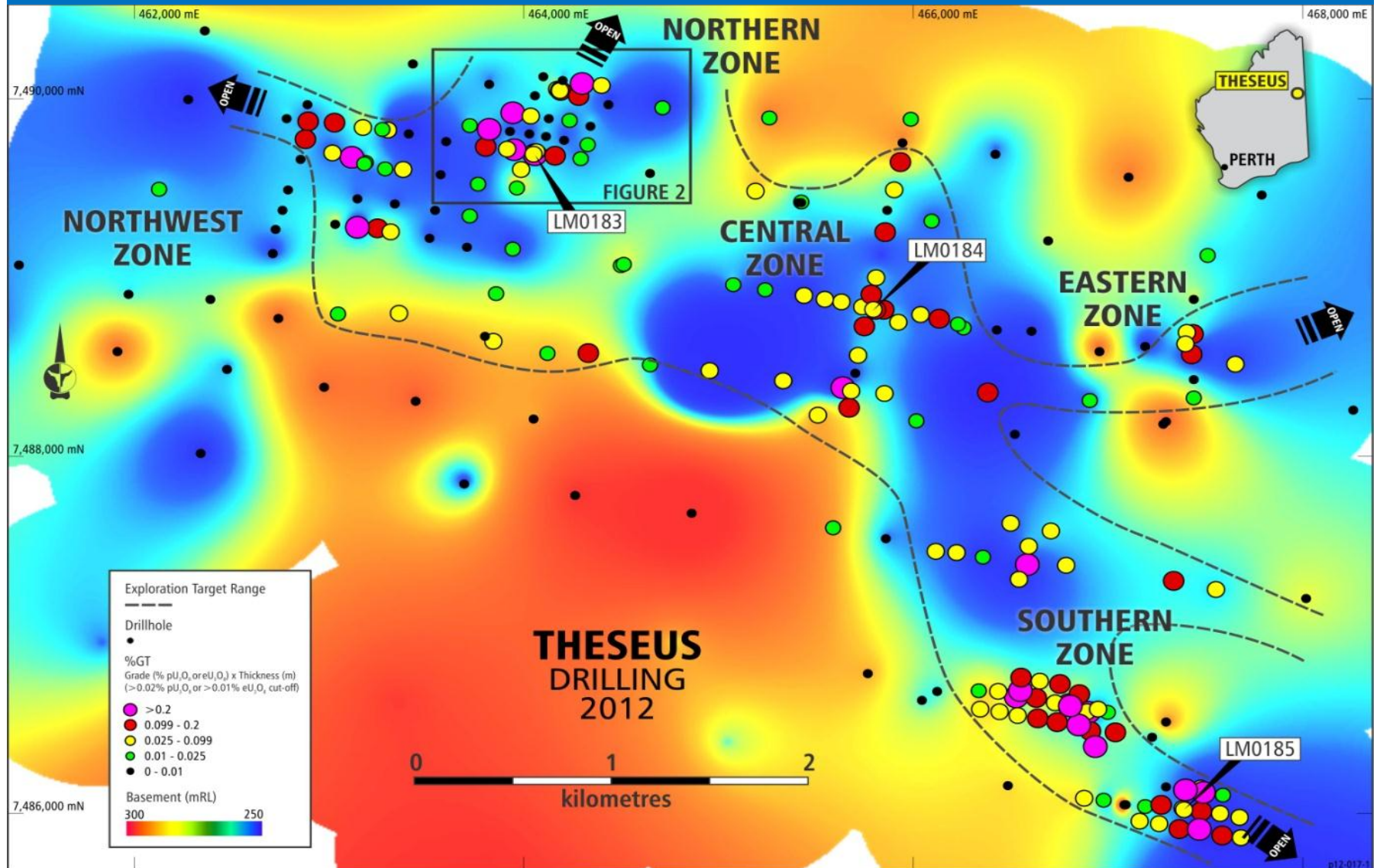
Theseus : a potential second project



Theseus Exploration Targets

TORO ENERGY LIMITED

Highest grade intercept: 0.79m @ 1.17% pU_3O_8 from 124.32m in LM0175 (grade-thickness 0.92%GT)



Theseus Project Summary



- Theseus is an exciting new uranium target
- A new uranium province
 - High grade intersections
 - Geologically open in many directions
 - Good potential for ISR operation
 - Excellent relationship with local people
- Initial Resource and updated Exploration Target range

Inferred Mineral Resource at
Toro preferred cutoffs

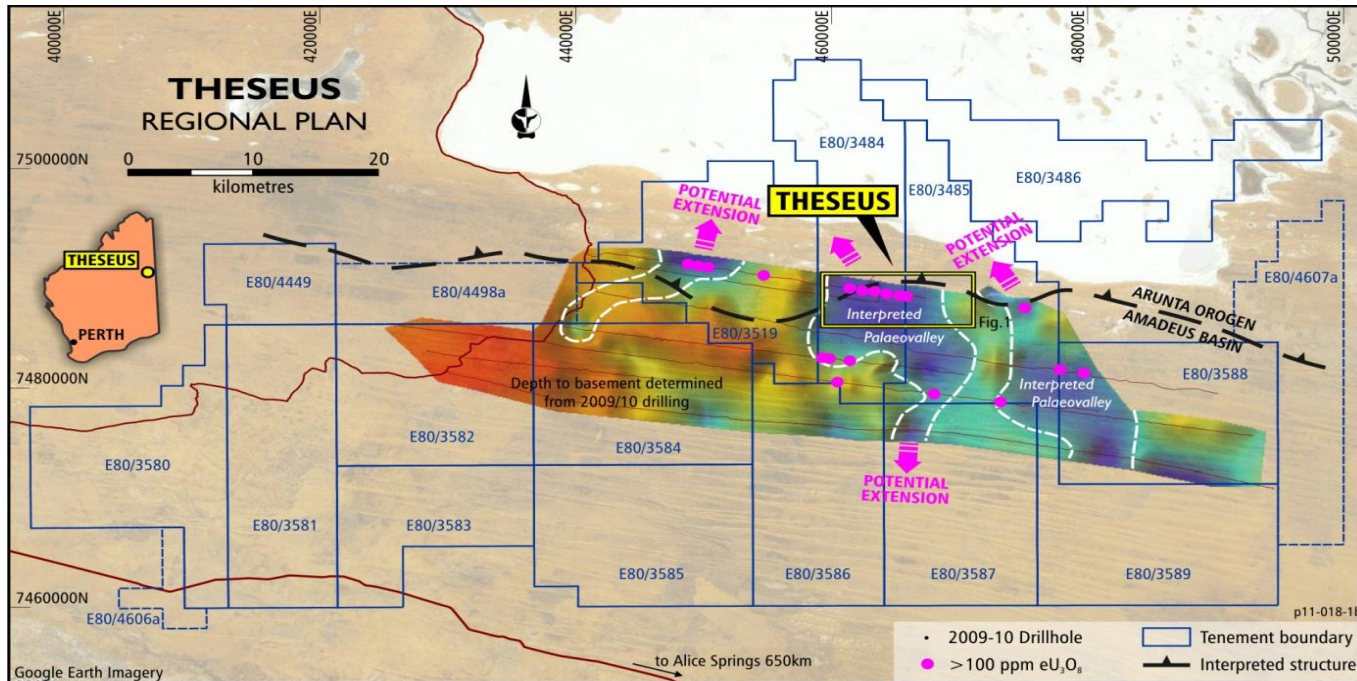
Inferred Mineral Resource	(ppm)	Tonnage (Mt)	U ₃ O ₈ (ppm)	Metal U ₃ O ₈	
				(t)	(Mlb)
Grade Cut-off	200	6.3	493	3,100	6.9
GT Cut Off	1000	6.1	491	3,000	6.6

Exploration Target Range (ETR) of:

**28 - 35 Million tonnes of ISR Uranium at 450-520ppm U₃O₈
for 28Mlb to 40Mlb U₃O₈ (12,600t to 18,200t U₃O₈)**

Forward Work Plan

TORO ENERGY LIMITED



Prime Objectives for 2012-2013

- Awaiting final disequilibrium studies on recovered core (Q1 2013)
- Core recovery from 12 to 20 holes - 2500m (2013)
- Combination of aircore / core samples to extend resource (2013)
- Drill 5000m to test regional potential (2013)



Market

- Global uranium market indicates growth in demand
- Supply shortfall opening in 2015

The Wiluna Project

- Most advanced new uranium project in Australia
- WA State approval and is nearing final Federal Govt decision
- Development dependent on financing and market conditions
- Target commitment decision in late 2013 with first uranium sales in 2015

The Theseus Project

- Significant blue sky and the potential to be a second project in the medium term
- Potential evolution of a new uranium province with significant regional-scale and ISR mining potential
- Initial resource established along with upgrade of exploration target range

Other Exploration

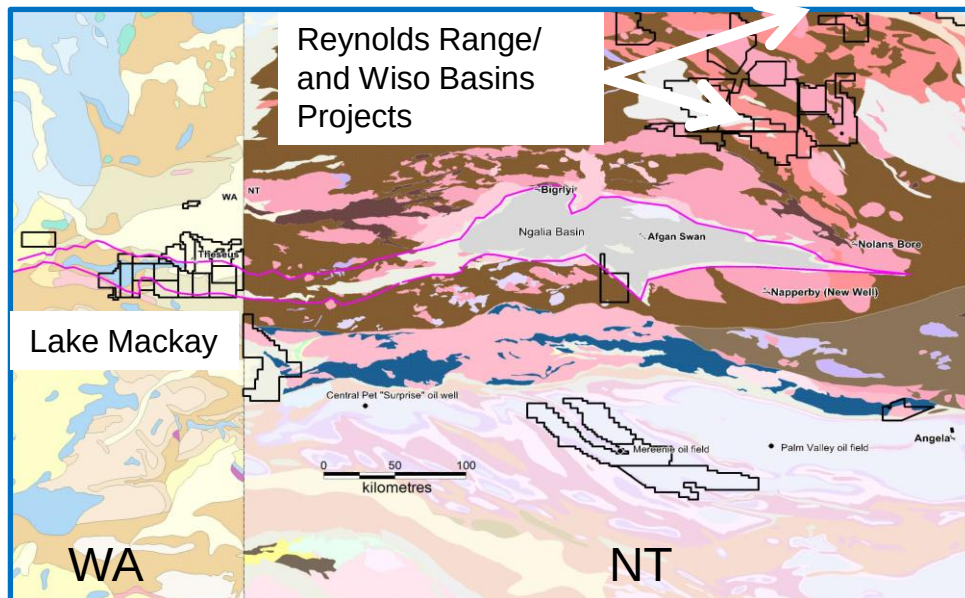


Toro's Uranium Exploration Model



TORO ENERGY LIMITED

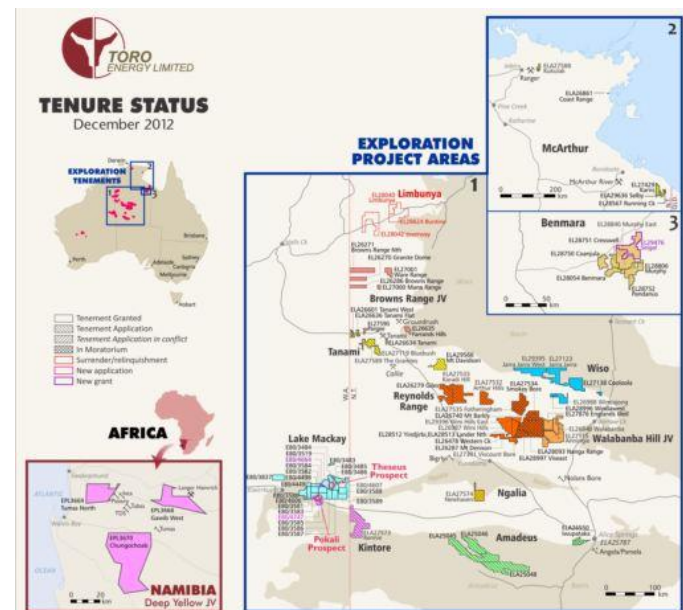
Central Australia - analagous to the Kazakhstan Uranium Province - Unexplored



- Uraniferous hinterland
- Three vast Tertiary Fluvial Basins over 100m thick - 'ISR' potential
- Known hydrocarbon/uranium occurrences in lower basins
- Sequences of Oxidised and Reduced clays and Sands towards the base of fluvial systems- Redox boundaries

Targeting Approach:

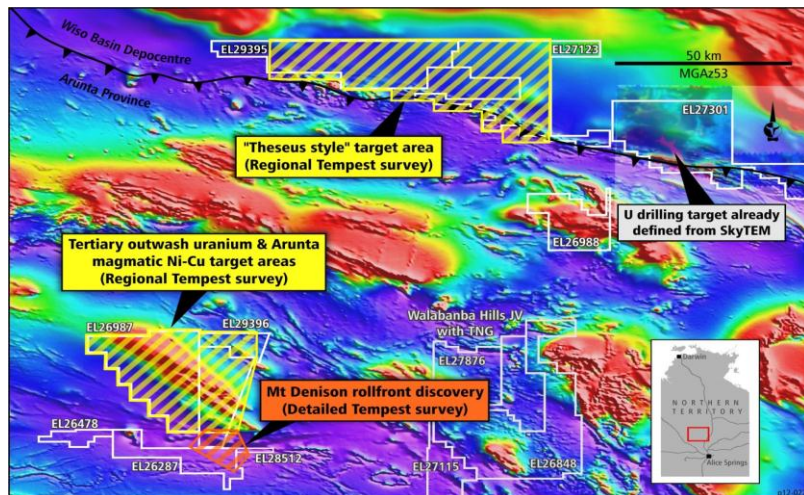
- 1) Airborne EM to define palaeovalley systems-recent NT gov't collaborative survey
- 2) Simple aircore drilling to find redox boundaries and uranium –Mt Denison discovery (*Discovery in one-year*)
- 3) Follow-up mud rotary drilling, gamma logging and core recovery to define uranium grade and character



Toro's Key NT Exploration Assets



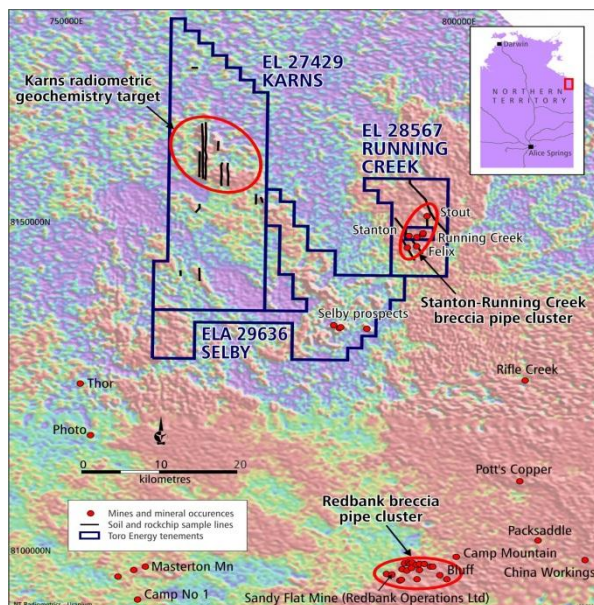
1)



REYNOLDS RANGE and WISO PROJECTS

- Similar geological-host and redox characteristics compared to the “Kazakhstan style” roll front deposits.
- Toro has an extensive ground position in the Reynolds Range-Wiso region that equates in area to one of the Kazakhstan redox fronts
- Very high exploration upside in the Tertiary basins of central Australia.
- Mt Denison uranium discovery

2)



McARTHUR PROJECTS

- Recognition of a large-scale geochemical alteration system
- Up to 280 ppm U₃O₈ and 1360 ppm Cu in rockchips of quartz sandstone that is elsewhere chemically ‘bland’.
- Represent the surface expression of fertile breccia pipes in the underlying Gold Creek Volcanics. Analogous with the Arizona Strip Uranium Province.
- Nearby Running Creek-Stanton breccia pipes also show anomalous uranium at surface associated with copper mineralisation suggesting a genetic connection to the stratigraphically higher Karns system.

Appendix



Competent Person's Statement



The information in this report that relates to Mineral Resources is based on information compiled by Dr Katrin Karner of Toro Energy Limited, Mr Robin Simpson and Mr Daniel Guibal of SRK Consulting (Australasia) Pty Ltd. Daniel Guibal takes overall responsibility for the Resource Estimate, and Dr Karner takes responsibility for the integrity of the drilling and bulk density results. Dr Karner, Mr Simpson and Mr Guibal are Members of the Australasian Institute of Mining and Metallurgy (AusIMM), and have sufficient experience which is relevant to the style of mineralisation and type of deposit under consideration and to the activity they are undertaking to qualify as Competent Persons as defined in the 2004 Edition of the 'Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves (JORC Code 2004)'. The Competent Persons consent to the inclusion in this release of the matters based on the information in the form and context in which it appears.

Information in this report relating to Exploration results is based on information compiled by Mr Mark McGeough who is a Fellow of the Australasian Institute of Mining and Metallurgy. Mr McGeough is a full-time employee of Toro, and has sufficient experience which is relevant to the style of mineralisation and type of deposit under consideration and to the activity he is undertaking to qualify as a Competent Person as defined in the 2004 Edition of the 'Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves'. Mr McGeough consents to the inclusion in this release of the matters based on his information in the form and context in which it appears.

Information in this report relating to Deconvolved Gamma Results, is based on information compiled by Mr David Wilson BSc MSc who is a Member of the Australasian Institute of Mining and Metallurgy. Mr Wilson is a full-time employee of 3D Exploration Ltd, a consultant to Toro and has sufficient experience which is relevant to the style of mineralisation and type of deposit under consideration and to the activity he is undertaking to qualify as a Competent Person as defined in the 2004 Edition of the 'Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves'. Mr Wilson consents to the inclusion in this release of the matters based on his information in the form and context in which it appears.

Uranium Resources Table



Project Name	Category	Resource M Tonnes	Grade U ₃ O ₈	Contained U ₃ O ₈ , tonnes	Contained U ₃ O ₈ , Mlb
Centipede	Measured	3.08	552	1,703	3.75
Centipede	Indicated	7.56	555	4,197	9.25
Centipede	Inferred	2.30	272	627	1.38
Lake Way	Indicated	2.57	492	1,265	2.79
Lake Way	Inferred	7.38	544	4,015	8.85
Total Wiluna Project		22.89	516	11,807	26.02
Millipede	Indicated	1.77	412	728	1.61
Millipede	Inferred	5.51	533	2,935	6.47
Dawson Hinkler Well	Inferred	13.09	312	4,077	8.99
Nowthanna	Inferred	11.91	399	4,750	10.47
Total Wiluna Regional		32.28	387	12,490	27.54
Total Wiluna Project & Regional		55.17	441	24,297	53.56
Theseus Project Resource	Inferred	6.3	493	3,100	6.9
Toro Energy Total Resources				27,397	60.46

All resources quoted on a 200ppm U₃O₈ cut-off.

Theseus Project Exploration Target Range



**20Mt to 40Mt @ approx 400 to 500 parts per million (ppm) U_3O_8 ,
for 10,000t to 20,000t U_3O_8 or 22Mlb to 44Mlb U_3O_8 #.**

CAUTIONARY STATEMENT

The Exploration Target Range (ETR) is conceptual in nature and there has been insufficient exploration completed to define this material as a Mineral Resource. There is no certainty that the further work referred to herein will result in the determination of a Mineral Resource.

c U_3O_8 denotes results obtained via chemical assay

e U_3O_8 denotes results obtained via down-hole gamma logging

p U_3O_8 denotes results obtained via down-hole Prompt Fission Neutron logging 'PFN'

Down-hole gamma logging of drill holes provides a powerful tool for uranium companies to explore for and evaluate uranium deposits. Such a method measures the natural gamma rays emitted from material surrounding a drill hole. Gamma radiation is measured from a volume surrounding the drill hole that has a radius of approximately 35cm. The gamma probe is therefore capable of sampling a much larger volume than the geological samples recovered from any normal drill hole. Gamma ray measurements are used to estimate uranium concentrations with the commonly accepted initial assumption being that the uranium is in (secular) equilibrium with its daughter products (or radio- nuclides) which are the principal gamma ray emitters. If uranium is not in equilibrium (viz. in disequilibrium), as a result of the redistribution (depletion or enhancement) of uranium and/or its daughter products, then the true uranium concentration in the holes logged using the gamma probe will be higher or lower than those reported in this announcement.

Information in this report relating to the Theseus Resource Estimate is based on work supervised by Michael Andrew, who is a Member of the Australasian Institute of Mining and Metallurgy and the Australian Institute of Geoscientists. Mr Andrew is a full-time employee of Optiro, and has sufficient experience which is relevant to the style of mineralisation and type of deposit under consideration and to the activity he is undertaking to qualify as a Competent Person as defined in the 2004 Edition of the 'Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves'. Mr Andrew consents to the inclusion in this release of the matters based on his information in the form and context in which it appears.

The down-hole PFN logging tool directly measures the amount of the isotope U^{235} that is present in all natural uranium. This is considered to give a reliable estimate of the grade of uranium results with a cut off at or above 0.5m @ 300ppm. For further information on the use and calibration of the PFN, readers are directed to the GAA Wireline website www.gaawireline.com.

All drill holes are vertical and all intersections are considered to be true widths.



The Toro Board*

TORO ENERGY LIMITED



Dr Erica Smyth
**Non-Executive
Chairman**

30+ years experience in the mineral and petroleum industries,



Vanessa Guthrie
Managing Director

Extensive executive & management experience in sustainability, environment, government & approvals, mine operations, community & indigenous in Western Australia.



Greg Hall
Non-Executive Director

30+ years resource sector experience, including 21 years uranium (Ranger, Jabiluka & Olympic Dam) and uranium marketing (ERA North America) – Founding MD of Toro Energy



Peter Lester
**Non-Executive
Director**

Extensive experience in senior operating, development and corporate roles with Newcrest, North, CRA and MIM



Andrew Coles
**Non-Executive
Director**

Currently CFO of OZ Minerals Ltd, previously Treasury roles at Esso, Exxon Mobile and Zinifex

**From Feb 8th, 2013*

Management Team



[Vanessa Guthrie](#)

Managing Director

Extensive executive & management experience in sustainability, environment, government & approvals, mine operations, community & indigenous in Western Australia.



[Todd Alder](#)

Company Secretary & General Manager, Finance & Corporate

16+ years financial management experience within the Mining, Energy and Steel Manufacturing industries



[Mark McGeough](#)

General Manager, Exploration

+25 years experience in geological & exploration management, project generation and acquisition, uranium and other commodities.



[Richard Yeeles](#)

Approvals and Community Director - Wiluna

Extensive management experience in government/ community relations, ex-BHPB Olympic Dam Expansion, WMC, Government.



[John Baines](#)

Manager – Processing

17 years of experience in a range of operational and process design roles. He specialises in uranium processing and has worked for BHPB, WMC and as a general consultant to the industry.

[Current Recruitment:](#)

- General Manager – Wiluna Project
- General Manager – Project Finance



[Greg Shirtliff](#)

Geology Manager

13 years experience in geology and geochemistry of uranium including a PhD from Australian National University. Employed in roles within the environment, mining and exploration side of the uranium mining industry with ERA-Rio Tinto and Cameco prior to joining Toro Energy.



[David Rawlings](#)

Regional Exploration Manager

+20 years experience in exploration, previously with Cameco Australia, NT Mines Dept, undertook PhD in NT McArthur River region

Contact



Greg Hall

Non-Executive Director

Vanessa Guthrie

Managing Director

Toro Energy Limited

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Corporate & Wiluna Project Office

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WEST PERTH WA 6005

Telephone: +61 8 9214 2100

Email: info@toroenergy.com.au

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THE TORO PROJECT PYRAMID

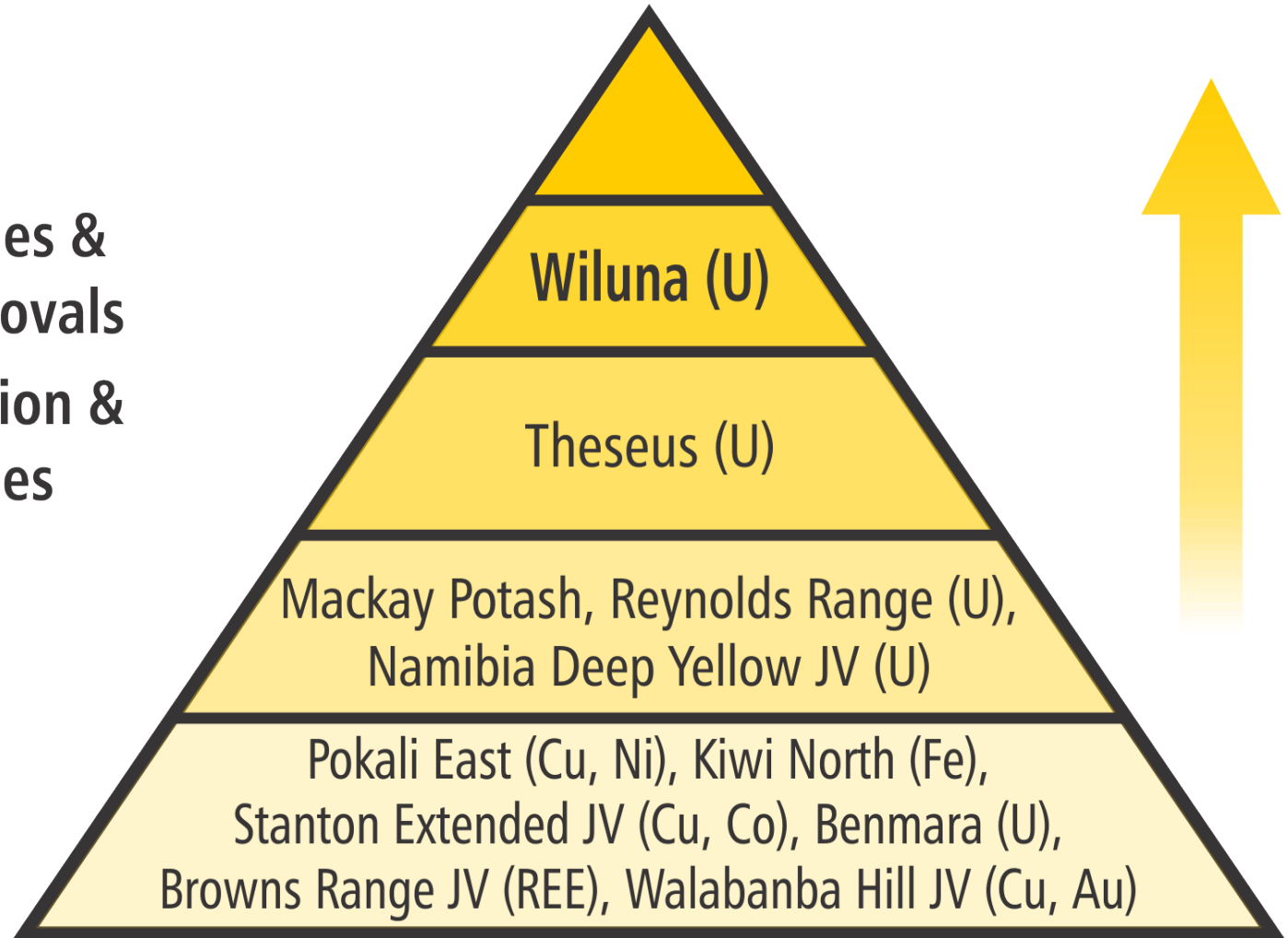
Production

Feasibility Studies &
Regulatory Approvals

Resource Definition &
Scoping Studies

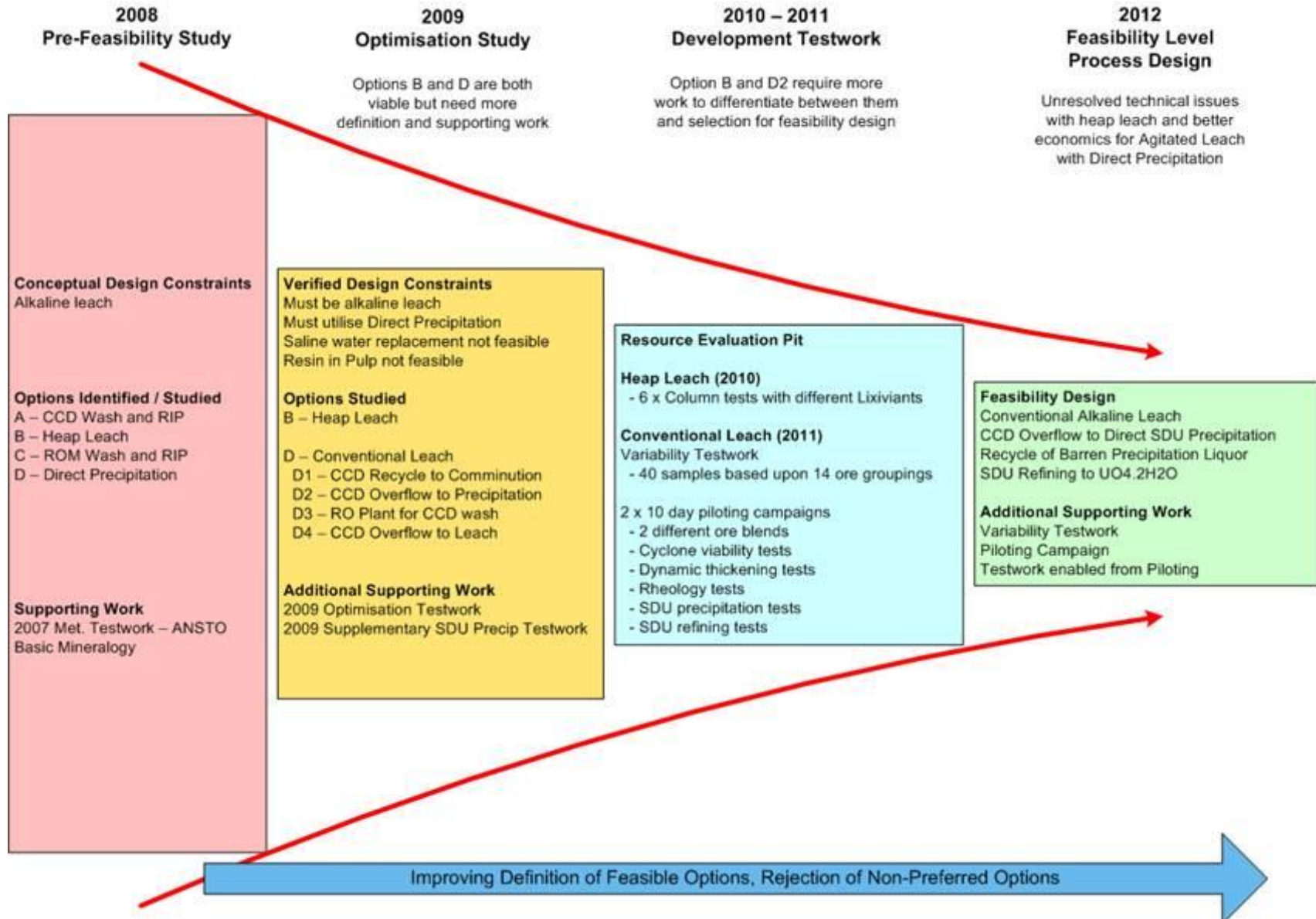
Advanced
Exploration

Greenfields
Exploration



Project Development

TORO ENERGY LIMITED



Approvals Timeline

TORO ENERGY LIMITED

