

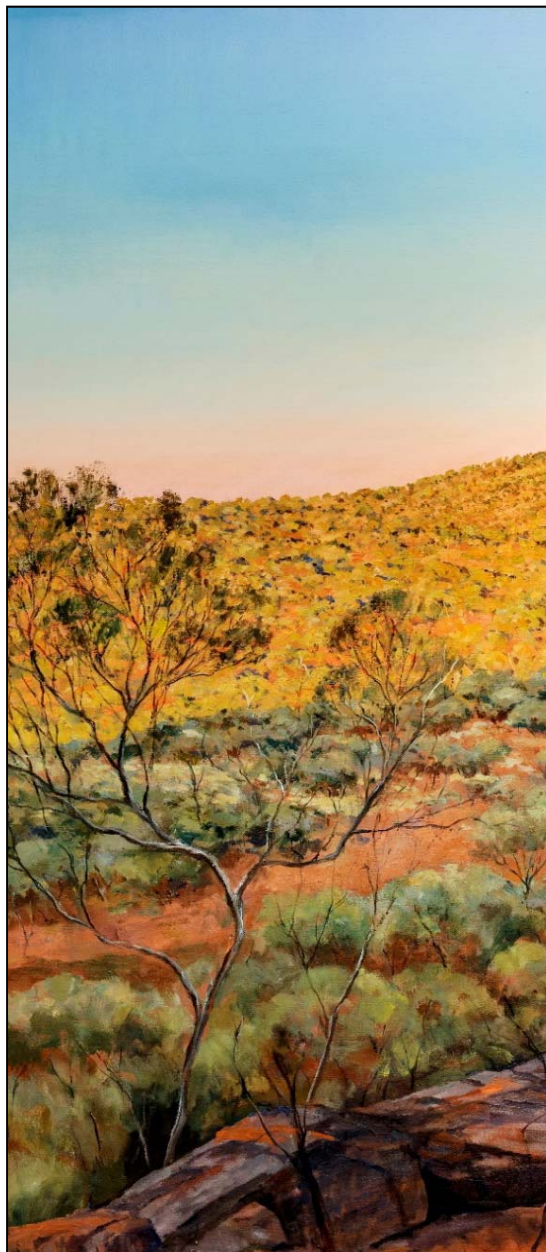


VENUS METALS CORPORATION LIMITED

Company Presentation

May 2016





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Venus Metals Corporation – Company Summary

- **Venus Metals Corporation ('Venus') is a diversified metals exploration Company focused on a developing portfolio of high-quality projects in Lithium, Precious and Base metals in Western Australia.**
- **Five strategic Lithium project areas in Western Australia, including a substantial tenement area in the "Pilgangoora Lithium Hotspot" and adjoining the Greenbushes World class Lithium-Tantalum mine.**
- **MoU with Lithium Australia Ltd (LIT) to evaluate the Lithium Carbonate and Lithium Hydroxide potential in VMC's Pilgangoora tenements. LIT has a long-term strategy for the establishment of Lithium processing hub in the Pilbara region.**
- **Processing of historical airborne magnetic, radiometric data over VMC's lithium project areas to understand the structure and lithology that controls on mineralisation within pegmatite intrusions. Field reconnaissance and sampling in the lithium project areas to delineate the potential targets with the view to commence drilling later in the year.**
- **Drill targets identified at Youanmi , Sandstone and Doolgunna Projects.**



Venus Metals Corporation – Capital Structure

Experienced Management Team and recent success by members of the team with the sale of United Minerals Corporation (Iron Ore) to BHPB in 2010 for \$204 Million through a scheme of arrangement.

Terry Hogan – Non-Executive Chairman

Matthew Hogan – Managing Director

Kumar Arunachalam – Executive Director

Specialist Technical Team

Barry Fehlberg – Exploration Advisor

Tim Putt – Specialist Consulting Geologist, VMS

Dr Fop Vanderhor- Specialist Consulting Geologist

Lynn Widenbar – Resource Modelling

ASX Code: VMC

Issued Capital: **61,626,623**

Options (@ 20c Exp 30 Nov 16): **31,531,561**

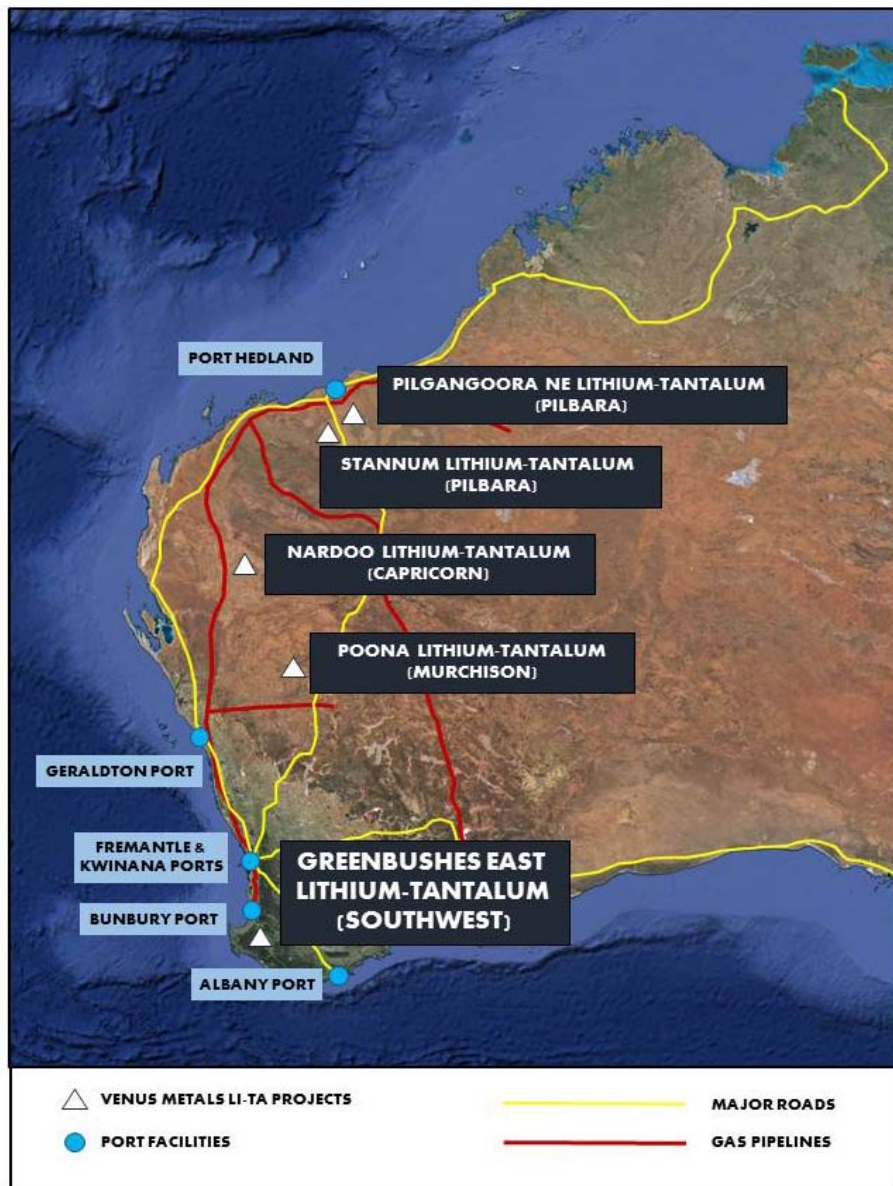
Share Price: **\$0.22**

Market Cap: **A\$13.55 M**

Top 40 **60%**

Cash **A\$1.25 M**

Lithium-Tantalum Projects – Western Australia



Pilgangoora North-East (Pilbara)

- Located along strike and close to Pilbara Minerals Pilgangoora deposit and adjacent to Dakota Minerals. This project area covers substantial pegmatite swarms, MoU with Lithium Australia Ltd (LIT) in “Lithium Hotspot” of Western Australia .

Wodgina SW (Stannum) (Pilbara)

- Located southwest of the Wodgina tantalum mine, this project hosts a number of Lithium-Tantalum prospects.

Poona (Murchison)

- The Poona project covers a number of known lithium-tantalum prospects. Previous sampling has returned assays up to 1.61% Li_2O .

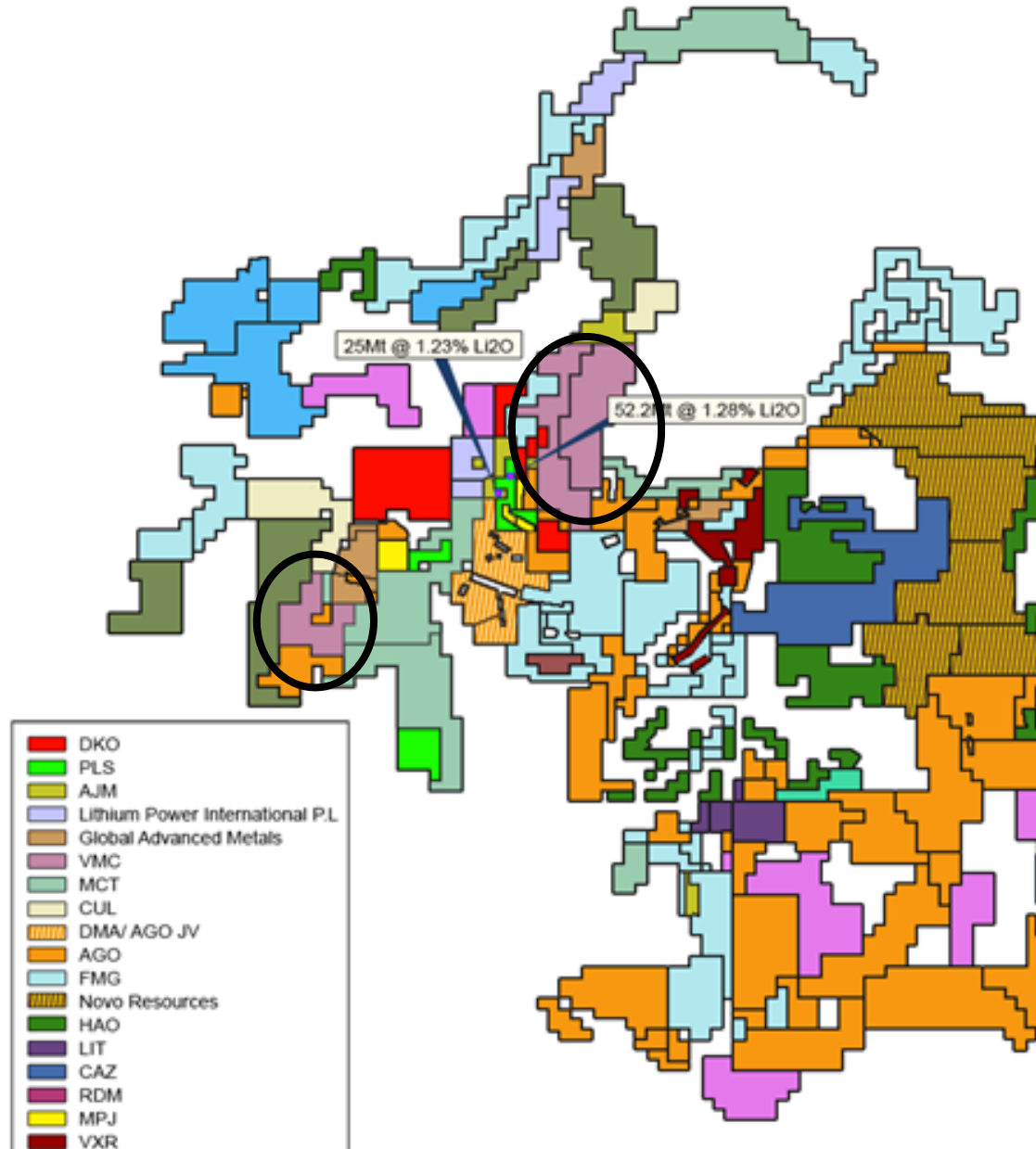
Greenbushes East (Southwest)

- The project area is located adjacent to, and east of, the world-class Greenbushes Lithium-Tantalum mine

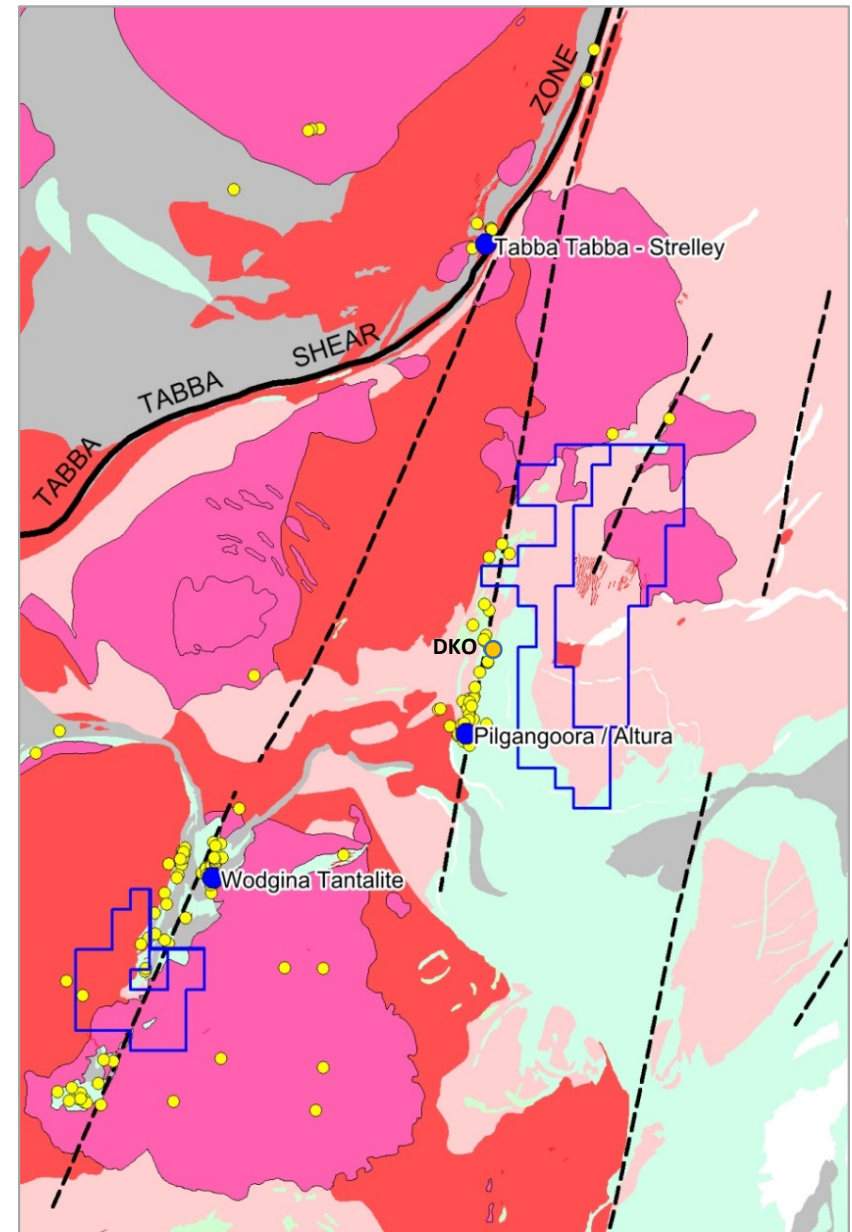
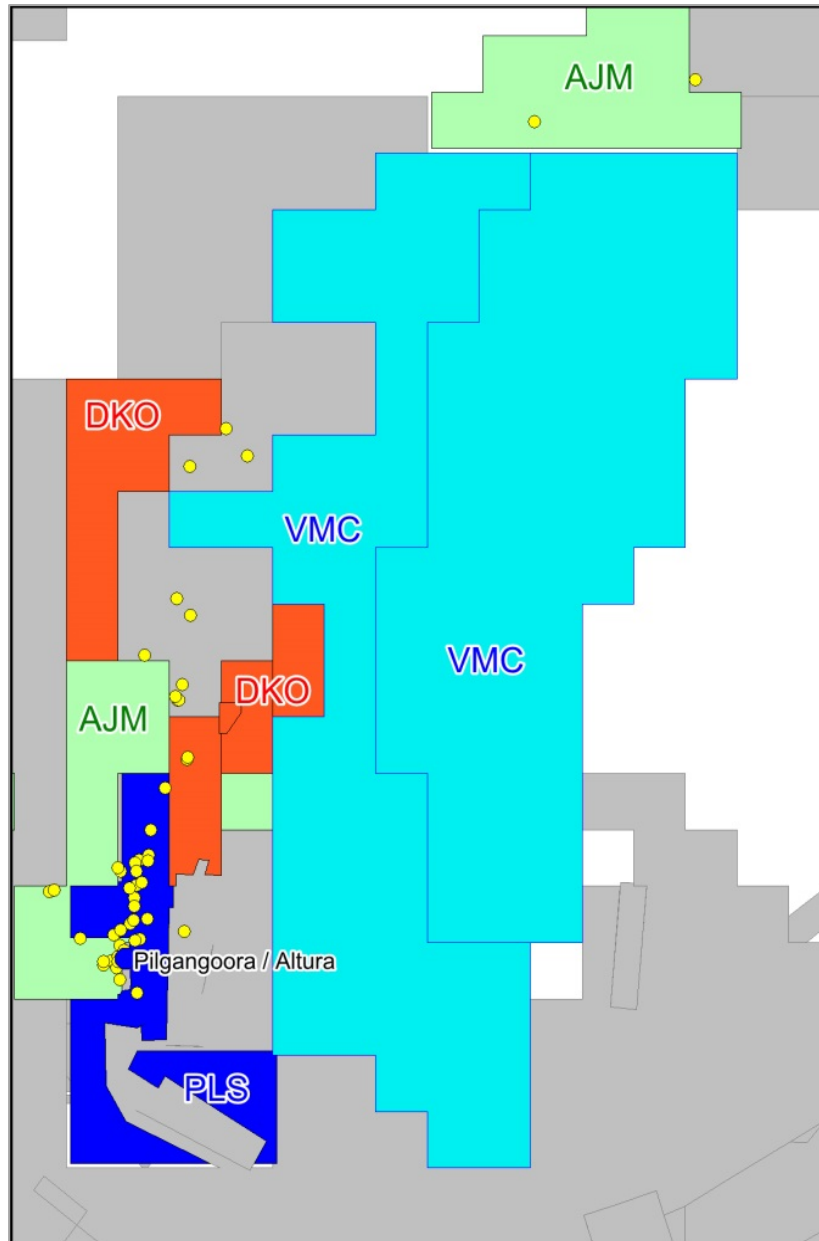
Nardoo Well (Capricorn)

- The Nardoo project overlies two historical mining centres, Nardoo & Morrissey Hill, with the Nardoo pegmatite covering over 1,000 metres of strike and up to 700m wide.

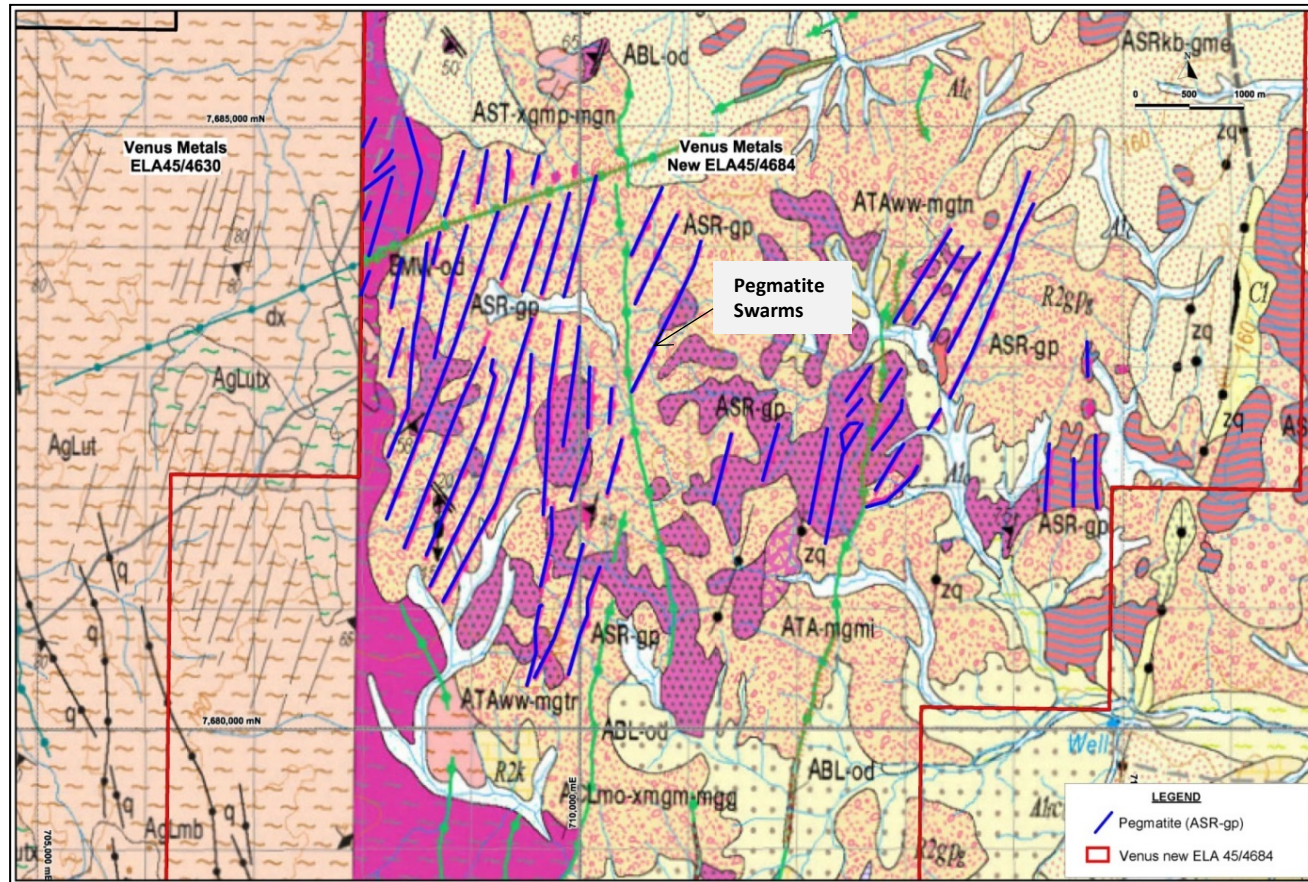
“Lithium Hotspot” Pilgangoora



VMC Pilgangoora NE Lithium Project

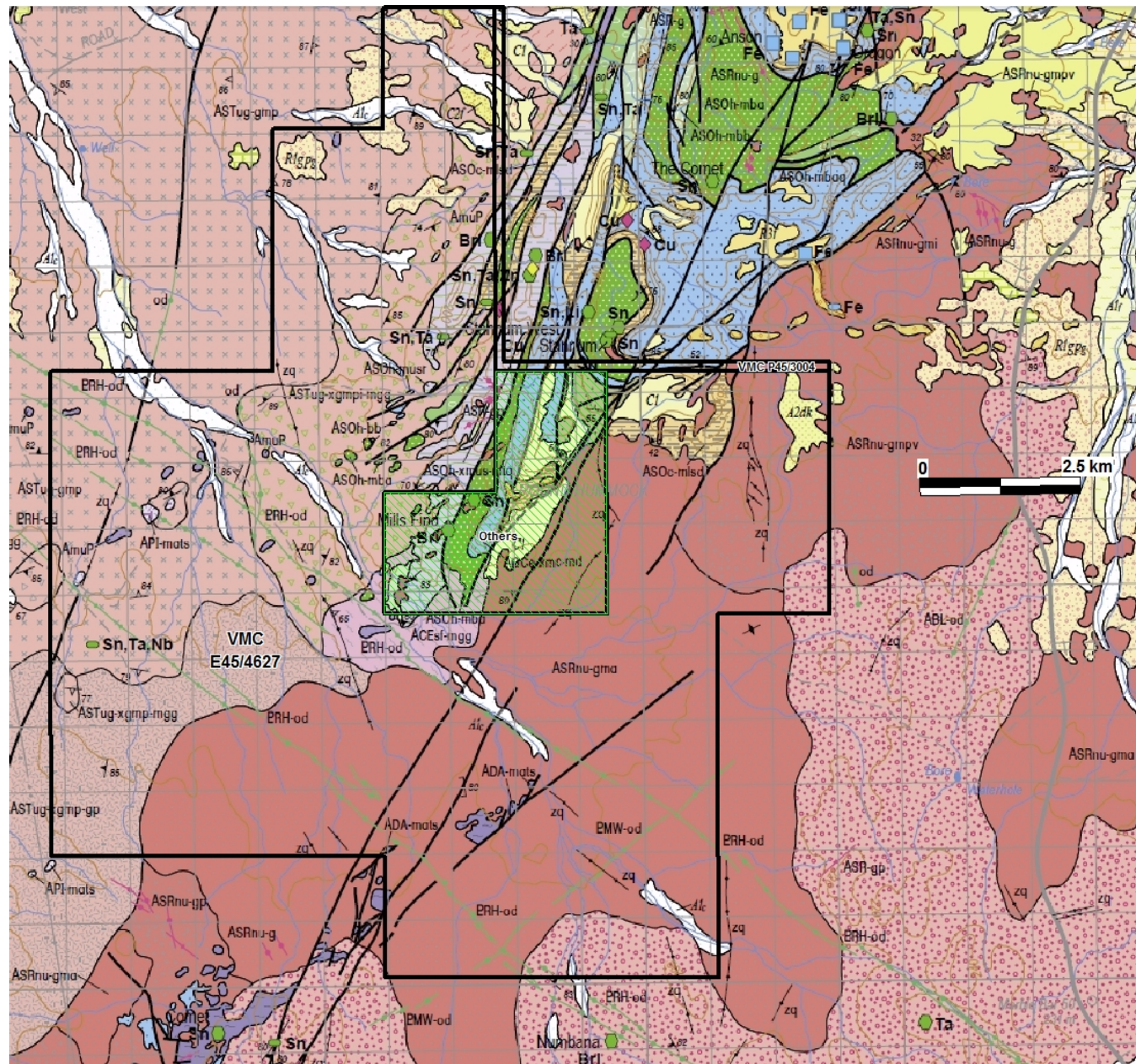


VMC Pilgangoora NE Lithium Project Substantial Pegmatite Swarms

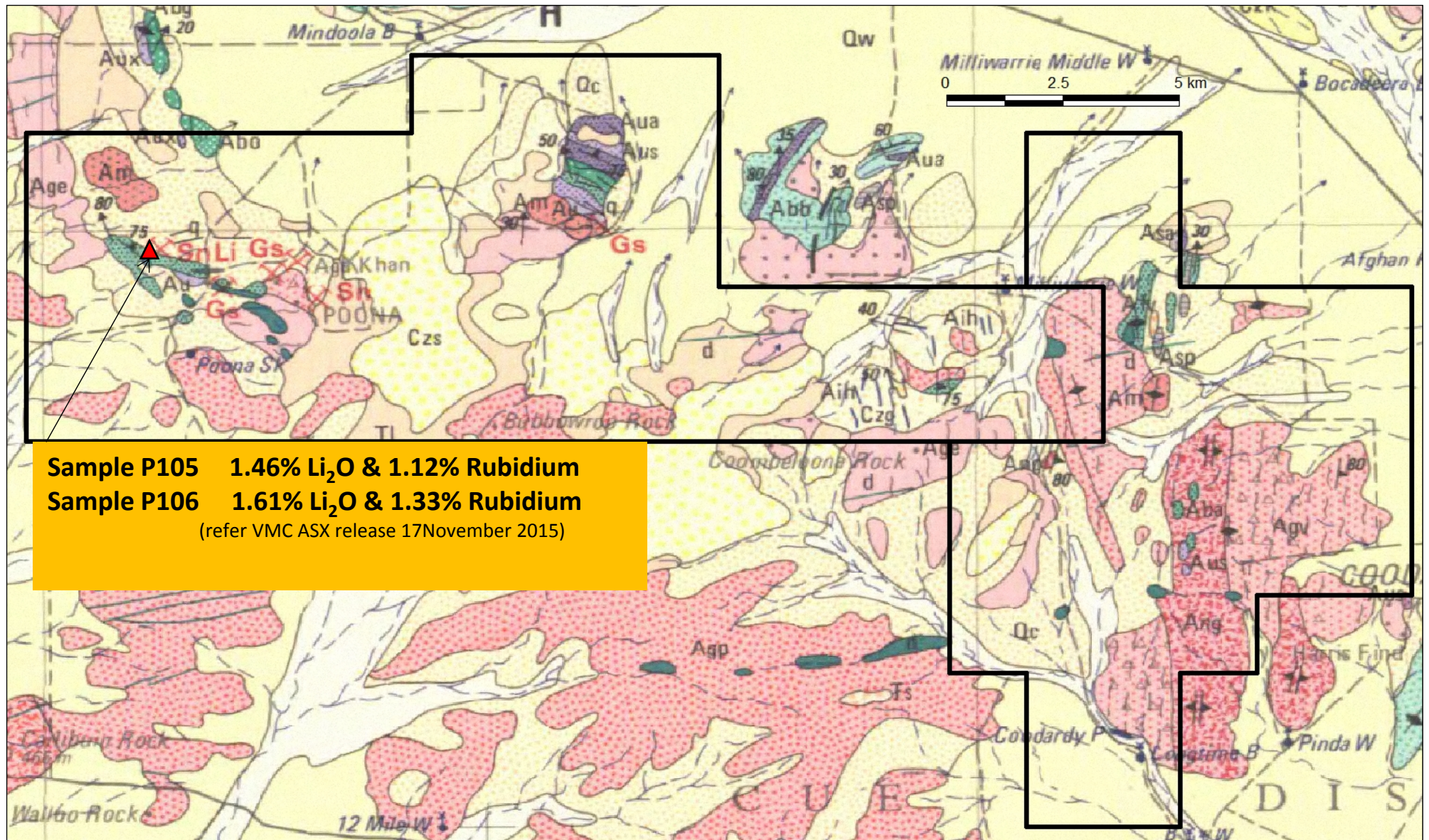


- Tenements cover extensive, unexplored, granite-hosted substantial Pegmatite dyke swarms adjacent to prospective granites.
- Linear trends suggest fault control on intrusion and mineralization.
- Strategically located along fertile western margin of East Pilbara Terrane and covering prospective granites and known mineralization trends within the Pilgangoora Lithium District.
- Pilgangoora Lithium District is emerging as the second largest hard rock lithium resource base in the world.

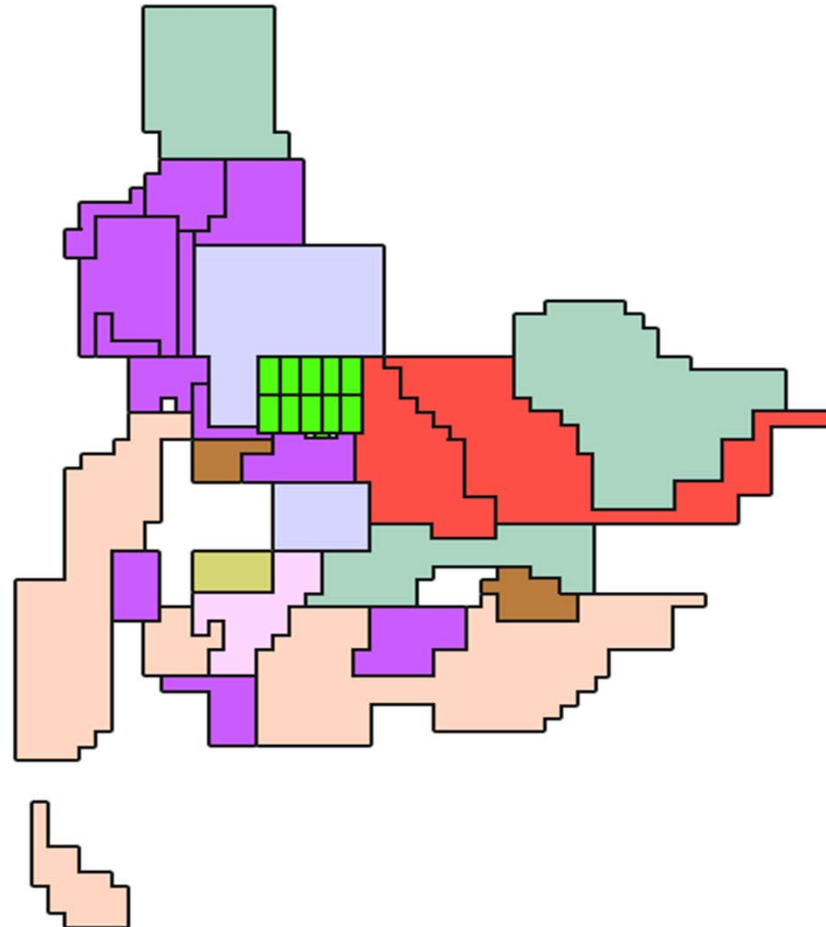
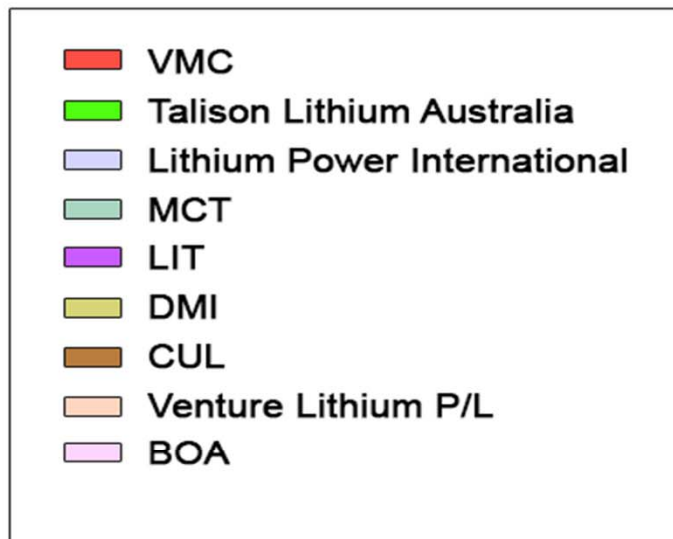
VMC Wodgina SW Lithium Project



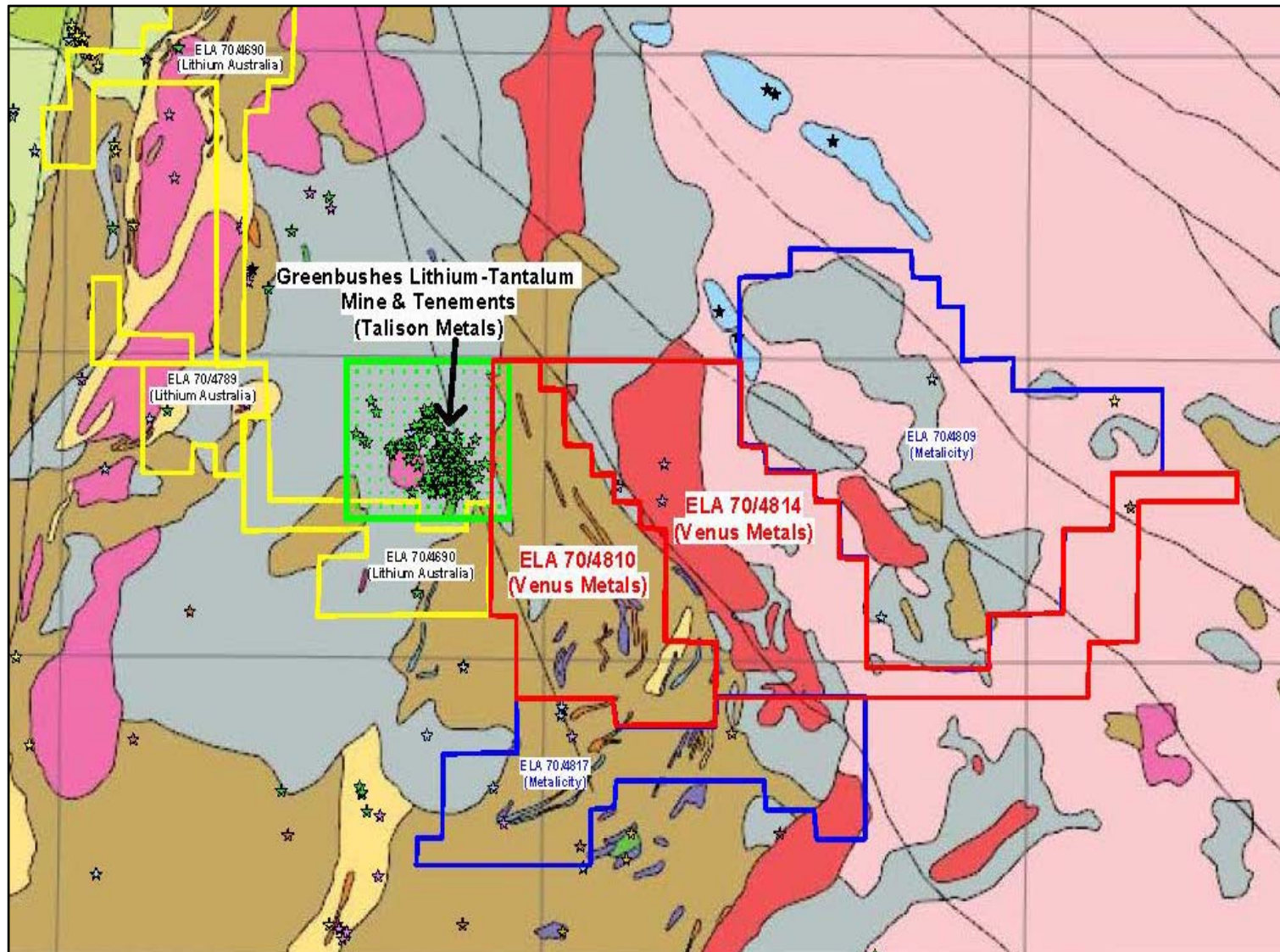
VMC Poona Lithium Project



VMC Greenbushes East Lithium Project

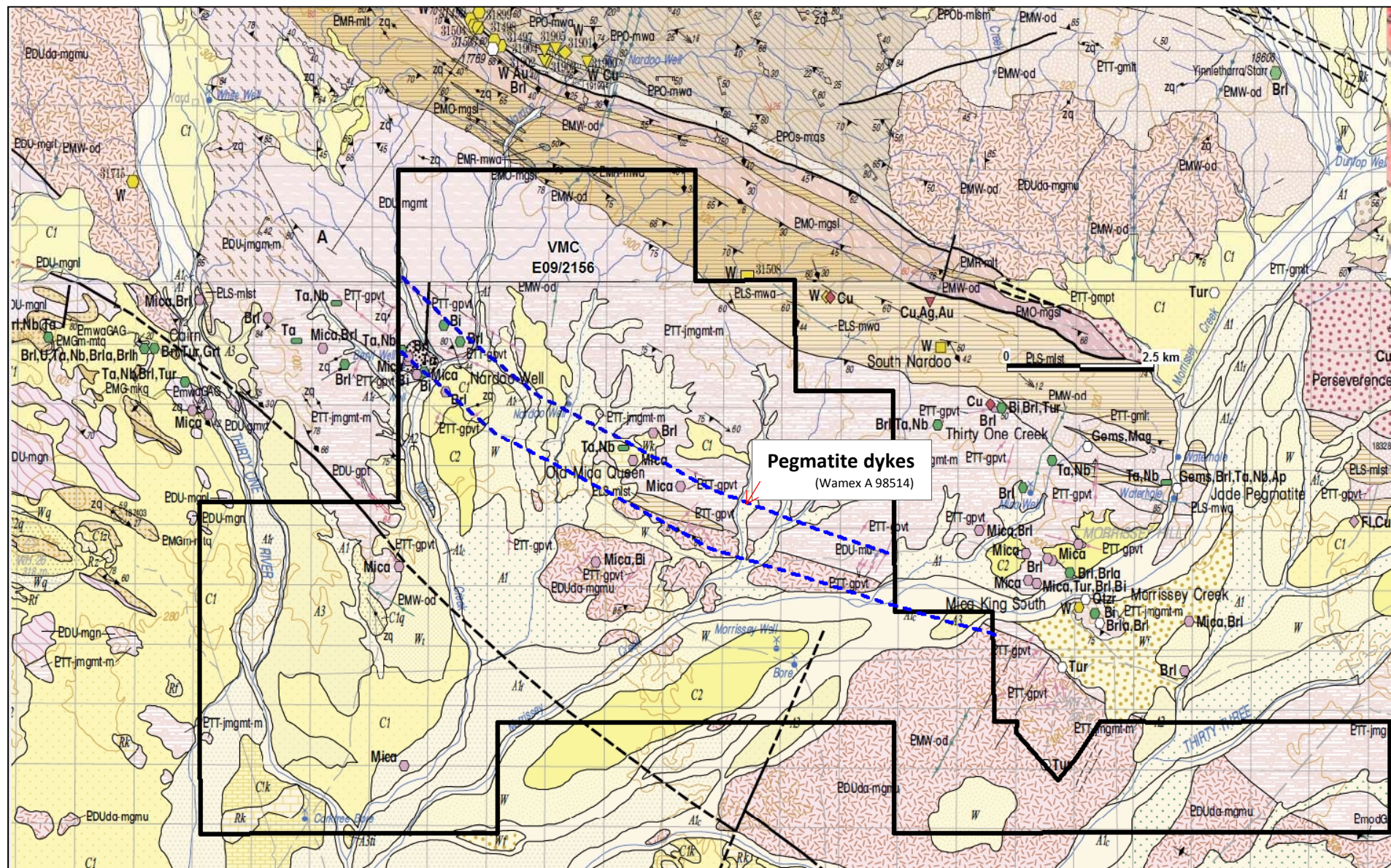


VMC Greenbushes East Lithium Project



Venus Greenbushes East tenements ELA 70/4810 & 4814 (red) with prospect locations over regional geology. The Greenbushes mine area is shown in green.

VMC Lithium Project Nardoo Well



Active Exploration Program 2016-17

Venus Metals has assembled an outstanding portfolio of Lithium, Gold and Base metals projects in Western Australia. The work program for the 2016-17 may include:

WA Lithium Projects

- Field reconnaissance work and sampling-delineation of potential targets for drilling.
- MoU with Lithium Australia at Pilgangoora NE and Wodgina SW projects for Lithium exploration.

Curara Well Copper-Gold-Diamonds (Doolgunna)

- 3D Magnetic Modelling and Airborne EM completed and historical data review in progress to delineate potential drilling targets.

Manindi South Copper-Zinc (Youanmi)

- POW approved to drill high-strength DHEM sulphide target (previously identified by Sirius Resources NL).
- DMP co-funded drilling award of \$150,000.

Pincher Well Zinc-Copper (Youanmi)

- Program of geophysics, including IP, and structural modelling and JV discussions.

Currans Well Nickel-Copper-PGE (Youanmi)

- Detailed evaluation & geophysical modelling for future drilling.

Bell Chambers Gold-Copper (Sandstone)

- JORC 2012 Gold Resources 219,000 tonnes @ 2.0 gpt Gold (14,000 Ounces)
- VTEM modelling completed & high priority drill targets identified.

Youanmi Vanadium

- JORC 2012 Vanadium Resources of 167.7 Million Tonnes @ 0.41% V₂O₅ / 7.52% TiO₂ (0.25% V₂O₅ cut-off). Further metallurgical work is planned and JV discussions.



Competent Persons Declaration

The information in this report that relates to Exploration Targets, Exploration Results, Target Potential and Mineral Resources is based on information compiled by:

Mr Timothy Putt, Specialist Consulting Geologist, who is a Member of the Australian Institute of Geoscientists. Mr Putt has sufficient experience that is relevant to the style of mineralisation and type of deposit under consideration and to the activity being undertaken to qualify as a Competent Person as defined in the 2012 Edition of the 'Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves'. Mr Putt consents to the inclusion in the report of the matters based on his information in the form and context in which it appears.

Mr Widenbar, who is a Member of the Australasian Institute of Mining and Metallurgy, is a full time employee of Widenbar and Associates and produced the Mineral Resource Estimate based on data and geological information supplied by Venus Metals. Mr Widenbar has sufficient experience that is relevant to the style of mineralisation and type of deposit under consideration and to the activity that he is undertaking to qualify as a Competent Person as defined in the 2012 edition of the Australasian Code for Reporting of Exploration Results, Minerals Resources and Ore Reserves. Mr Widenbar consents to the inclusion in this report of the matters based on his information in the form and context that the information appears.

Dr Fop Vanderhor, Specialist Consulting Geologist, who is a Member of the Australian Institute of Geoscientists. Dr Vanderhor has sufficient experience that is relevant to the style of mineralisation and type of deposit under consideration and to the activity being undertaken to qualify as a Competent Person as defined in the 2012 Edition of the 'Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves'. Mr Putt consents to the inclusion in the report of the matters based on his information in the form and context in which it appears.

The information in this report has also been prepared by Mr Kumar Arunachalam, who is a Member of The Australasian Institute of Mining and Metallurgy and is a General Manager (Operations) of the Company. Mr Arunachalam has sufficient experience that is relevant to the style of mineralisation and type of deposit under consideration and to the activity that he is undertaking to qualify as a Competent Person as defined in the 2012 edition of the Australian code for Reporting of Exploration Results, Minerals Resources and Ore Reserves. Mr Arunachalam consents to the inclusion in this report of the matters based on his information in the form and context that the information appears.

Exploration Targets

The term 'Exploration Target' should not be misunderstood or misconstrued as an estimate of Mineral Resources and Reserves as defined by the JORC Code (2012), and therefore the terms have not been used in this context.

The potential quantity and grade of the 'Exploration Target' is conceptual in nature, that there has been insufficient exploration to estimate a Mineral Resource and that it is uncertain if further exploration will result in the estimation of a Mineral Resource. The current drilling density is insufficient to classify the mineralisation as a 'Mineral Resource' under the 2012 JORC guidelines.