

Poised to be the next
100,000+ ounce Annual Gold-Copper Producer in Wyoming



Advancing U.S. production with a nearly “shovel-ready” gold-copper project in Wyoming
and high-potential exploration projects in Nevada and Idaho

April 2024

Forward Looking Statements

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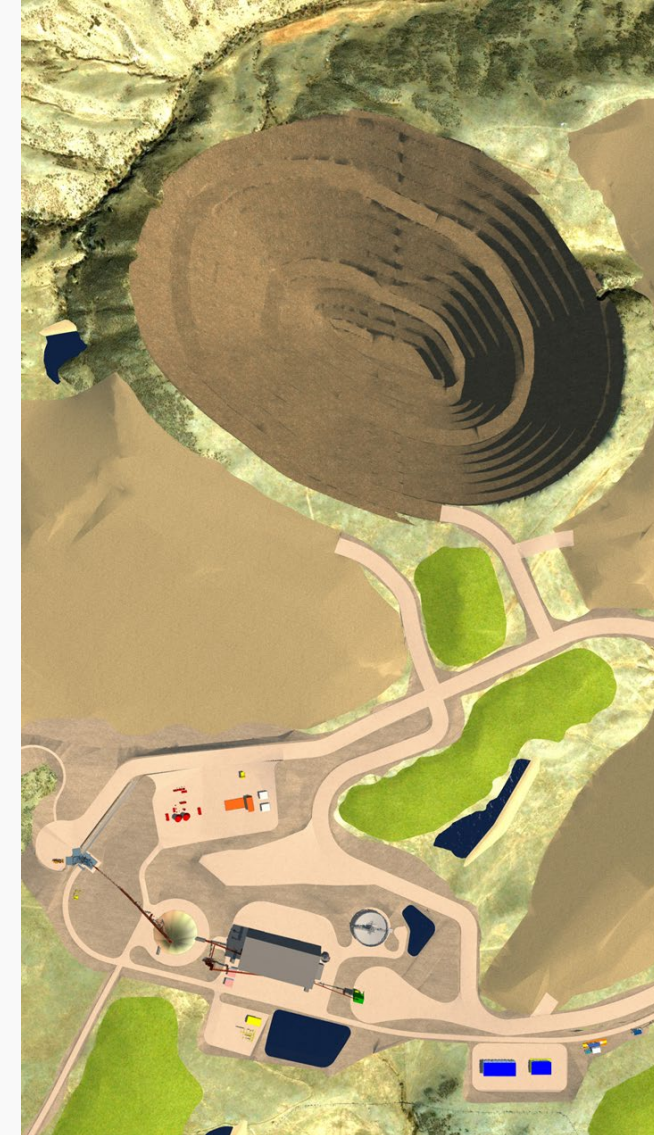
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We may use certain terms on this presentation, such as "measured," "indicated," or "inferred" mineral resources, which are defined in Canadian Institute of Metallurgy guidelines, the guidelines widely followed to comply with Canadian National Instrument 43-101--Standards of Disclosure for Mineral Projects ("NI 43-101"). We advise U.S. investors that these terms are not recognized by the United States Securities and Exchange Commission (the "SEC"). The estimation of measured and indicated resources involves greater uncertainty as to their existence and economic feasibility than the estimation of proven and probable reserves under the SEC's disclosure rules. Under U.S. standards, mineralization may not be classified as a "reserve" unless the determination has been made that the mineralization could be economically and legally produced or extracted at the time the reserve determination is made. Mineral resources that are not mineral reserves do not have demonstrated economic viability. U.S. investors are cautioned not to assume that measured or indicated mineral resources will be converted into reserves. Inferred mineral resources have a high degree of uncertainty as to their existence and their economic and legal feasibility. It cannot be assumed that all or any part of an inferred mineral resource exists, or is economically or legally viable. Under Canadian rules, estimates of "inferred mineral resources" may not form the basis of feasibility studies, pre-feasibility studies or other economic studies, except in prescribed cases, such as in a preliminary economic assessment under certain circumstances. Disclosure of "contained ounces" in a resource is permitted disclosure under Canadian regulations; however, the SEC normally only permits issuers to report mineralization that does not constitute "reserves" by SEC standards as in place tonnage and grade without reference to unit measures.

U.S. Gold Corp. Value Proposition

- **World-class portfolio**, in stable and mining friendly U.S. jurisdictions. The portfolio offers investors both potential near-term production and district-scale blue sky exploration.
- Team of **renowned explorers and proven company builders**, who have made and financed the discovery and development of numerous world class gold assets.
- **CK Gold** offers exposure to **compelling value**, and potential near-term production in **mining friendly Wyoming**.
- **Keystone** offers exposure to significant potential exploration upside – located 11 miles south of **Nevada Gold Mines' Cortez Complex**.
- **Challis** Project offers gold exploration potential in historic mining district.
- The company has a **tight share structure** (9.3M shares outstanding), listed on **NASDAQ** including large insider holding.



Financial Snapshot |

Tight share structure; Listed on NASDAQ



Stock Information	
Listing	NASDAQ
Symbol	USAU
52-week stock range	\$2.92 - \$7.48
Average daily volume	33,300



Recent significant financings & corporate activity	
April 2023	U.S. Gold Corp. closed \$5.0 million registered direct offering
November 2022	U.S. Gold Corp. closed sale of Maggie Creek Project to Nevada Gold Mines for \$2.75 million and 0.5% NSR
March 2022	U.S. Gold Corp. closed \$5.0 million registered direct offering
February 2022	U.S. Gold Corp. closed \$2.5 million registered direct offering
December 2021	SK-1300 Prefeasibility Study (PFS) technical report released
February 2021	U.S. Gold Corp. closed \$9.6 million registered direct offering

Share Structure (January 31, 2024)	
Common shares outstanding	9,332,277
Warrants*	2,888,949
Options*	192,750
Cash (as of Jan 31, 2024)	~\$2.6M

* USAU warrants /options are as follows:
 52,750 employee 5-year options, \$6.93 strike, expire Jan,2027
 140,000 employee 5-year options, \$5.02 strike, expire Jan 2028
 109,688 warrants, \$11.40 strike, expire Jul 2024
 588,333 warrants, \$6.00 strike, expire Aug 2025
 503,558 warrants \$14.50 strike, expire Aug 2026
 192,370 warrants \$8.00 strike, expire Feb 2027
 1,495,000 warrants \$6.16 strike, expire Oct 2028

Analyst Coverage	Company	12 Month Target Price
Heiko Ihle	H.C. Wainwright & Co.	\$11.00
Jake Sekelsky	Alliance Global Partners	\$15.25

Combining Robust Economics with District-Scale Exploration in Mining Friendly U.S. Jurisdictions

CK Gold Project – WY

Near Term Production Potential

CK Gold Project - Advanced Exploration & Development property

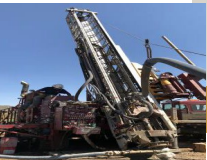
- **Mining friendly location** in the Silver Crown Mining District of SE WY, on State and private land
- SK-1300 **Technical Report and Pre-Feasibility Study (PFS)** prepared by **Gustavson Associates** shows the following reserves:-

1.01mm Proven and Probable oz Au and 248mm lbs Cu

\$323 million Pre-Tax Net Present Value (NPV 5%)
at \$1625/oz Au, \$3.25/lb Cu, \$18/oz Ag

39.4% Pre-Tax Annual Internal Rate of Return (IRR)

- CK Gold Project **remains open in multiple directions**
- Advancing to final engineering
- **Permit submitted - Production decision pending**



District-Scale Exploration

Nevada

Keystone Project - located on the Cortez Gold Trend, among the world's most prospective mineral trends - 11 miles south of NV Gold Mines' Cortez Hills Mine Complex

- 5 years of district exploration and permitting efforts have advanced Keystone to **specific drill targets**

Maggie Creek located on the Carlin Trend, one of the world's most prospective mineral trends; approximately 1 mile NE of NV Gold Mines' Gold Quarry Mine

SOLD

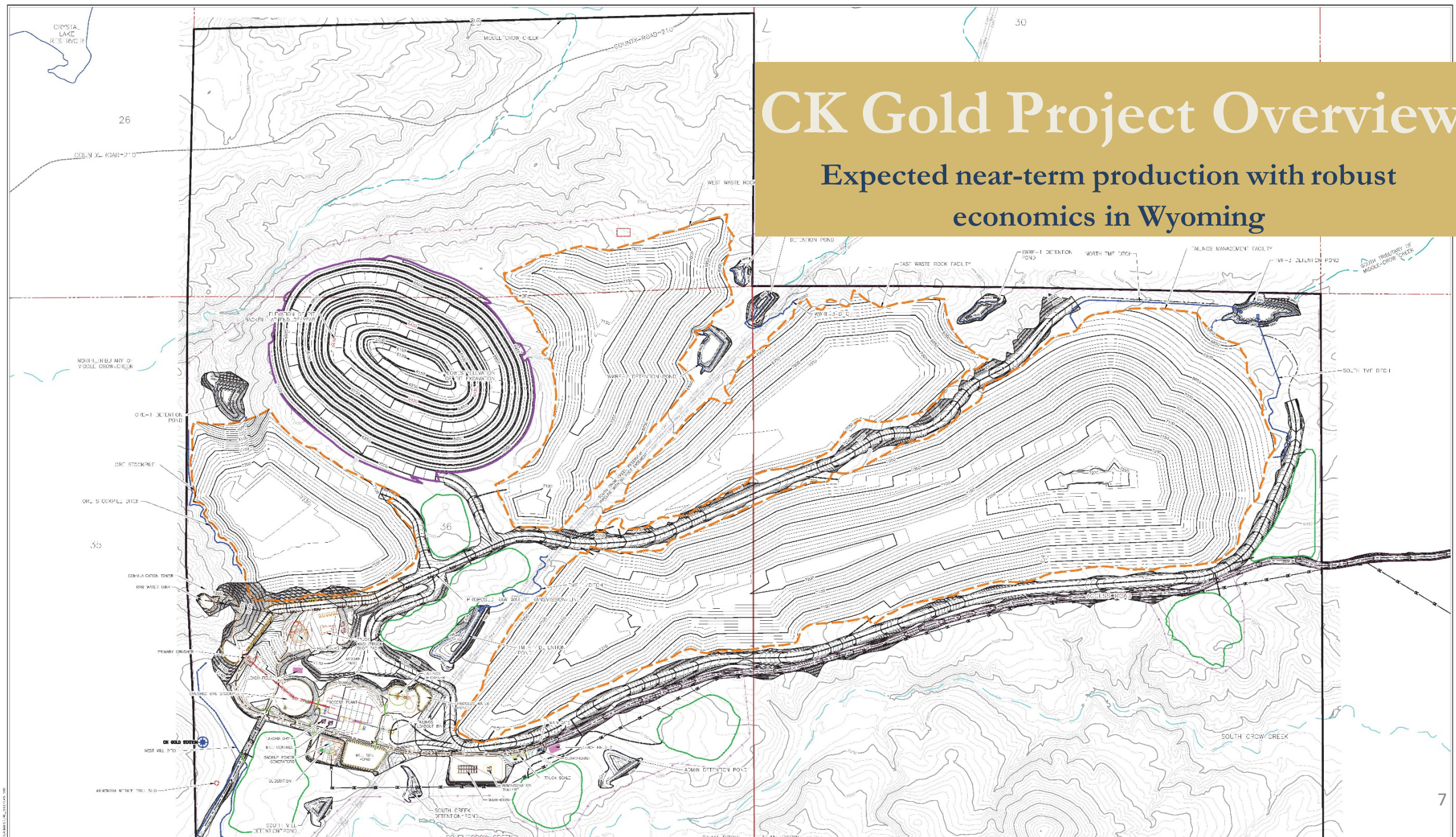
Idaho

Challis Gold Project – located approx. 75 kms southwest of Salmon, Idaho, within the tertiary Challis volcanic field

- Low sulfidation, gold/silver epithermal vein and stockwork deposit
- Significant upside exploration potential
- Historical (not-current) report estimated at approximately **313,825 ounces** of gold at a grade of **1.22 grams / ton gold**

CK Gold Project Overview

Expected near-term production with robust economics in Wyoming



CK Gold Project – Near Term Gold - Copper Producer

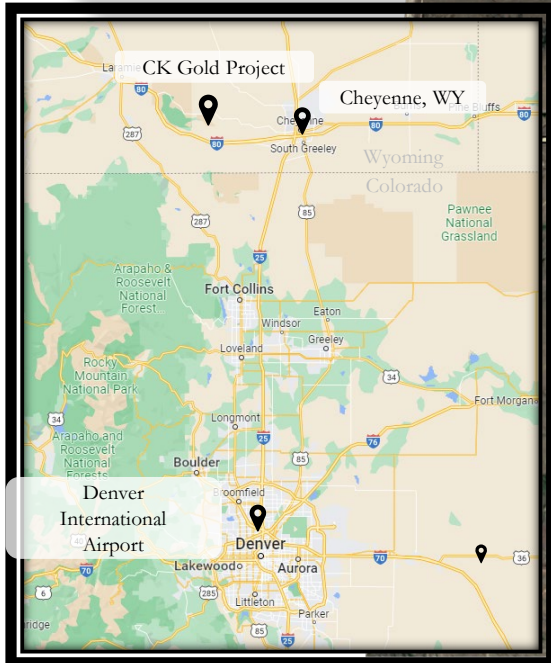
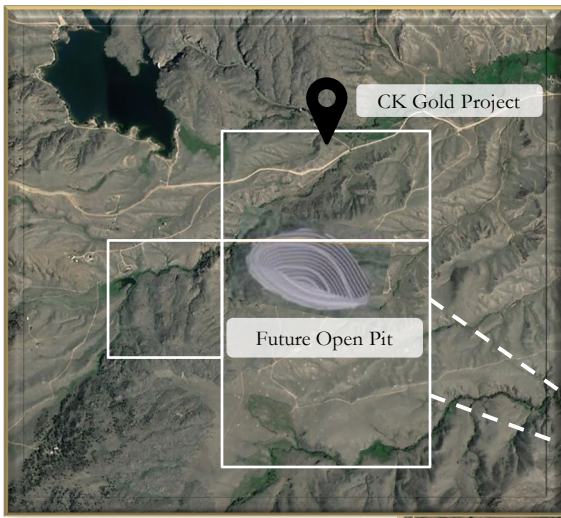
- 1.44 million AuEq Proven & Probable oz Reserve
- 100K+ oz AuEq Annual Production Forecast – plus significant upside
- Mineral Resource Expansion – open at depth and laterally
- All In Sustaining Cost (AISC) of \$800 AuEq/ oz over LOM
- Low Strip Ratio – surface mineral outcrop with immediate revenue potential
- Study Underway Analyzing Aggregate Potential



- **Final Stages of Permitting with WY government – no federal permits needed**

The Next Potential Annual 100,000+ oz AuEq Producer

CK Gold Project Claims & Location



About 1.5 hrs north of
Denver International Airport
~20 min West of Cheyenne
~3 miles North of I-80

CK Gold Project Pre-Feasibility Study Summary*

1.44M

AuEq oz Proven & Probable Reserve

10 year

Life of Mine

20K tpd

Production Rate

108,500

Average AuEq oz Annual Production

\$800 AuEq/ oz

AISC over LOM

\$222M

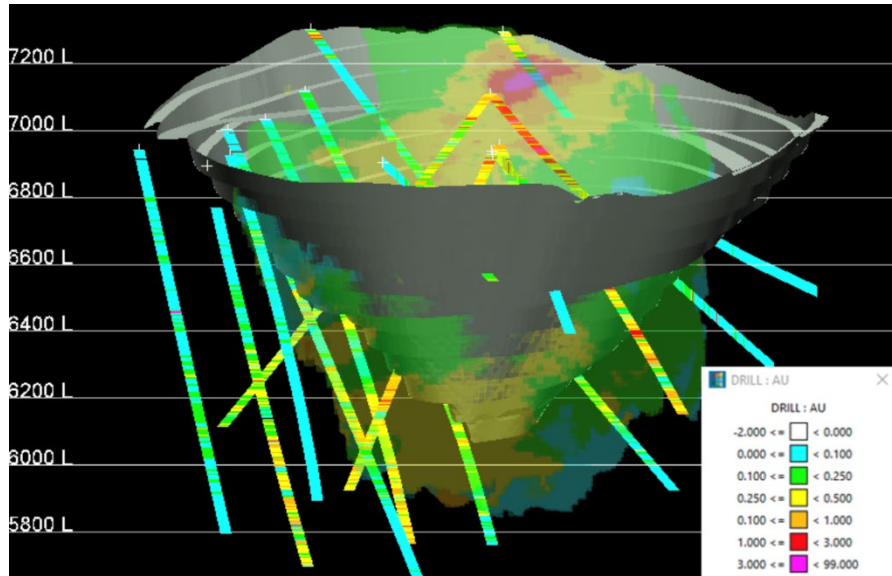
Initial CAPEX

\$15M

Sustaining Capital

		/-----Pre-Tax-----/			/-----After-Tax-----/		
Gold Au/oz.	Copper Cu/lb.	NPV M\$'s	IRR %	Payback Years	NPV M\$'s	IRR %	Payback Years
\$ 1,825	\$ 3.65	437.7	52.4%	1.7	383.9	44.6%	1.8
\$ 1,725	\$ 3.45	395.5	46.0%	1.8	325.2	39.3%	2.0
\$ 1,625	\$ 3.25	323.3	39.4%	2.0	265.7	33.7%	2.2
\$ 1,525	\$ 3.05	251.0	32.6%	2.2	204.8	27.9%	2.5
\$ 1,425	\$ 2.85	178.8	25.4%	2.6	143.5	21.7%	2.9

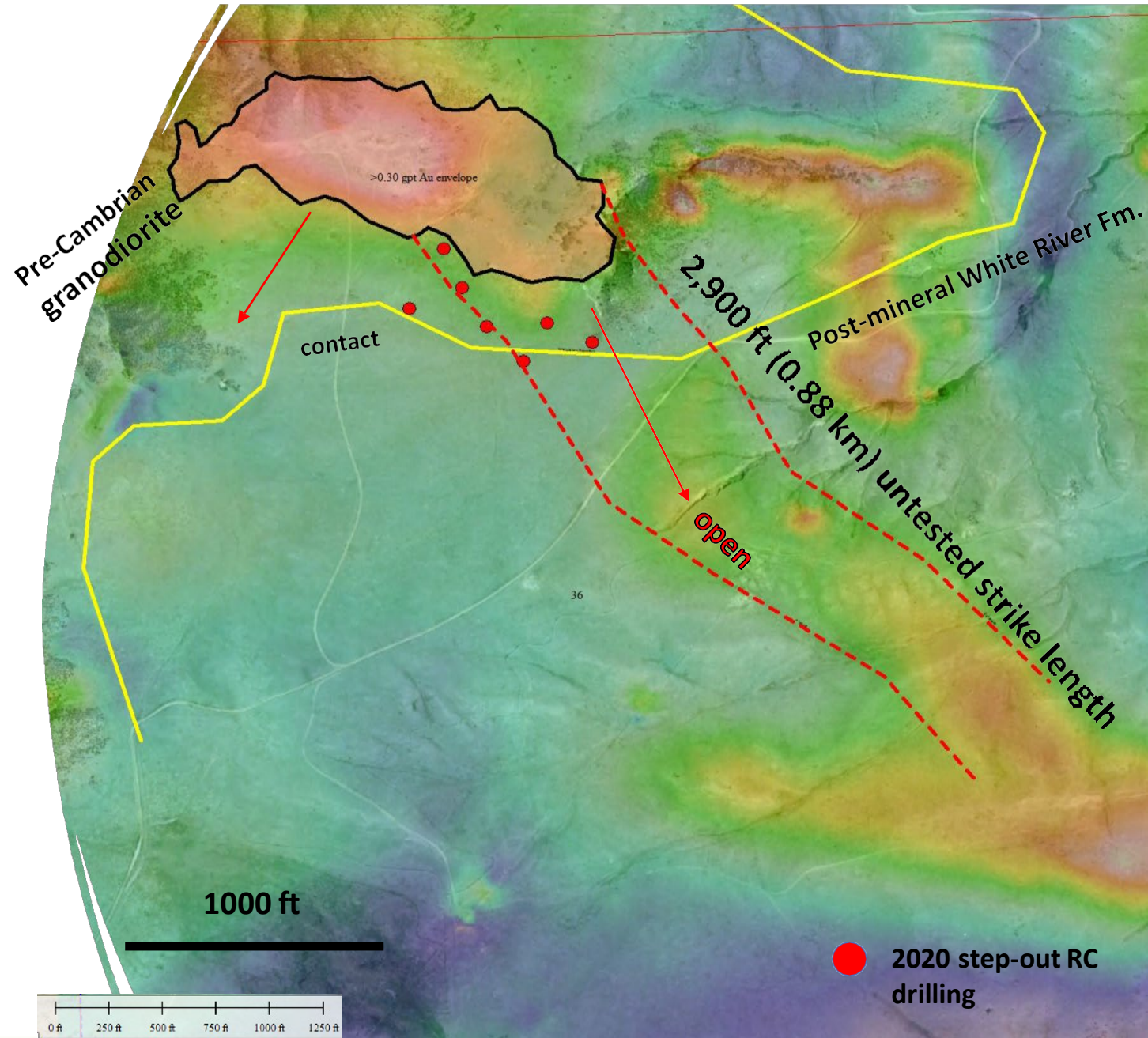
*Source: SK-1300 Technical Report Pre-Feasibility Study on the CK Gold Project report date December 1, 2021 using \$1625 Au, \$3.25 Cu and \$18 Ag. Please see "Cautionary Note Concerning Mineral Resources" in this presentation.



Results of 2021 drill program. Values not incorporated into current reserves and resources. Perspective view looking WNW. Mineralization persists to the southwest outside of the PFS pit design.

Beyond the Current Resource

- ❑ 80% of historical drill holes end in mineralization or are not closed off laterally – deposit wide open
- ❑ Open at depth below 800 feet and southeast along strike; 2,900 ft of strike length untested
- ❑ Depth and strike length volumetrics sufficient to double current gold-copper resource if mineralization continues along strike
- ❑ Clean and simple mineralogy; low overall sulfide content – little or no acid-generating potential



CK Gold Project Dec 2021 PFS Highlights

On December 1, 2021, Gustavson Associates issued an S-K 1300 technical report Pre-Feasibility Study (PFS) for U.S. Gold Corp. showing the following metrics:

Summary of CK Gold Project Pre-Tax Economic Results

	Base Case
Gold price (US\$/ounce)	\$1,625
Copper Price (US\$/lb)	\$3.25
Net Cash Flow	\$500.4 million
Net Present Value (5.0% Discount rate)	\$323.3 million
Internal Rate of Return	39.4%
Initial CAPEX	\$222 million
Payback	2 years
10 year projected mine life	~108,500 AuEq oz / year

Projected Production and Processing

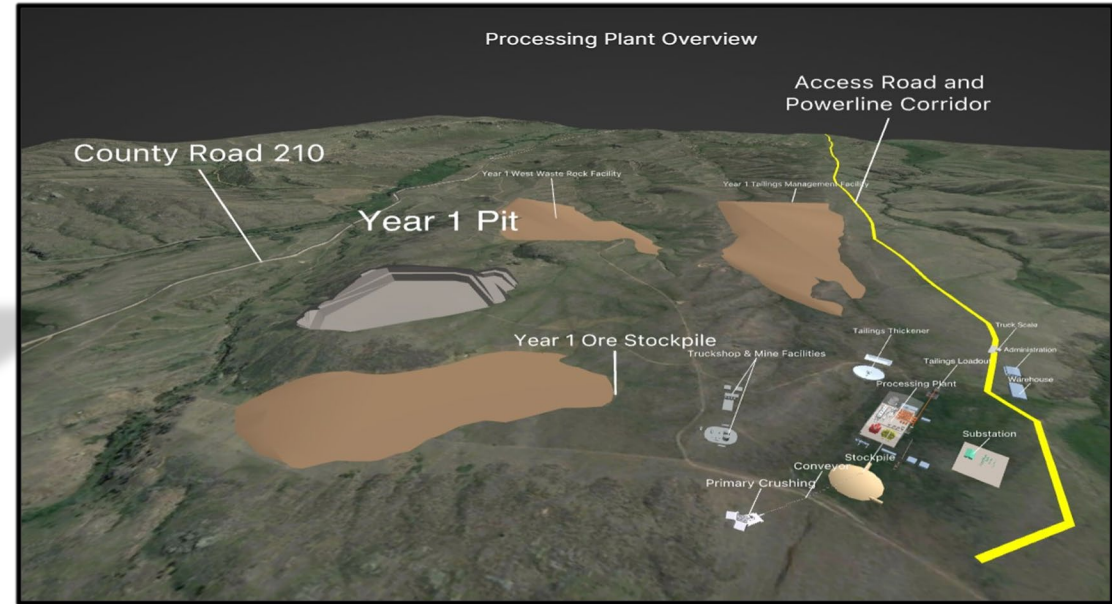
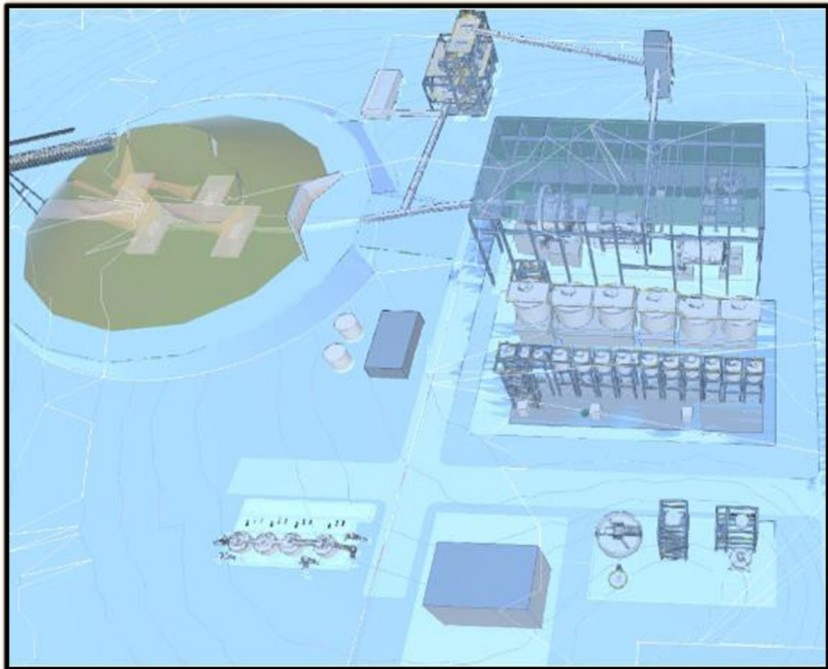
Mine Type	Open Pit	
Total Production	70.8 million tons	
Processing Rate	20,000 tons per day	
	Gold	Copper
Average Mill Feed Grade	0.015 oz/ton	0.19%
Average Metal Recoveries	68%	77%
Average Annual Production	Gold (oz)	Copper (lbs)
Years 1-5	122,000	26.40 million
LOM: 10 years	101,700	24.88 million
Total Production	Gold (oz)	Copper (lbs)
LOM (10 years)	1,017,000	248.8 million
AISC	\$800 / oz	
Estimated Number of Jobs Created	> 200 jobs	

- Refer to the SK-1300 Technical Report Summary from the CK Gold Project Prefeasibility Study, report date December 1, 2021. The estimates contained in the tables above are not recognized by the United States Securities and Exchange Commission. See "Cautionary Note Concerning Mineral Resources" in this presentation.

CK Gold Project Feasibility Study Engineering

Detailed Plant
Design
Completed

- Primary Crushing
- SAG and ball mills
- Flotation
- Concentrate to off-site smelter
- Dry-stack tailings



Advancements

- Secured Land and ROW for project
- New resource model
- P1&P2 Reserves as of December 1, 2021
- Gold-Copper-Silver Concentrate, Rock Aggregates
- FS field work complete
- Submitted mine plan permit application in Q3, 2022
- Water purchase agreement with Cheyenne BOPU
- Industrial Siting Permit approved May 2023
- Public presentations and permit reviews underway

Permitting and Social Outreach

- Mine Operating Permit Application – Submitted 9/22
 - 2-years of preparatory work and several million \$'s
 - Anticipated approval H1 2024, currently in public commentary
- Agency - Wyoming Dept. Environmental Quality
 - 2nd round of technical review responses complete
 - Post technical review public notices
 - Air permit application submitted
 - WYPDES (water discharge) permit application submitted
- Outside Water Users Agreement
 - Cheyenne City Council approved
 - Water purchase agreement approved (City)



- Industrial Siting Permit
 - December 2022 Open House meetings went well
 - May 10, 2023 - Unanimous Approval from Industrial Siting Council
- No Federal involvement
 - Project footprint does not impact waters of the U.S. per U.S. Army Corp. of Engineers review of permit boundary
- Continuous Social Outreach
 - Over 120 separate meetings, over 250 individuals from the Governor to various agencies and interested parties
 - Progress meetings with local land-owners – project description/plans
- Lease conditions updated: Royalty 2.1%, operating restrictions lifted
- Wyoming State Parks (Curt Gowdy State Park)
 - Presentation to legislative committee October 2022



Mine Closure and Legacy Opportunities

Trihydro **RJH** **AVI** **SWCA**

CHEYENNE MUNICIPAL STORAGE LEVEL II PHASE I STUDY RESULTS PRESENTATION

Cheyenne, Wyoming, April 19, 2021

PROJECT TEAM

- Wyoming Water Development Commission
 - Tony Rutherford, Former Project Manager
 - Andrew Linch, Project Manager
- Trihydro Corporation – Prime Consultant
 - Todd Hanlin, Project Manager
 - Derrick Thompson, Assist. Project Manager
 - Herman Noe, Technical Advisor
- AVI Engineering – Civil Engineering
- Population and Demand Projections
 - RJH - Geotechnical Expertise
 - SWCA - Environmental Consultants



Mine Closure Plan Submitted

- Contemplates pit back-fill
- Returning land to pasture and wildlife habitat

Potential Mine Closure Scenario

- Contemplates completed open pit as raw water storage
- Obviates the need to create additional water storage to cater to future City of Cheyenne growth
- Obviates need to reclaim and relocate recreation facilities around local park
- Utilizes planned connections to the Cheyenne Board of Public Utilities for water supply
- Possibly a pump storage scheme



CK Gold Project Reserve Estimate (2021)*

Mineral Reserves Statement

	Mass	Gold (Au)		Copper (Cu)		Silver (Ag)		Au Equivalent (AuEq)	
	Tons (000's)	Oz (000's)	oz / st	lbs (millions)	%	oz (000's)	oz / st	oz (000's)	oz / st
Proven (P1)	29,600	574	0.019	118	0.198	1,440	0.049	757	0.026
Probable (P2)	40,700	440	0.011	130	0.160	1,220	0.030	679	0.017
P1 + P2	70,400	1,010	0.014	248	0.176	2,660	0.038	1,440	0.020



2021 resource defined by 160+ drill-holes, totaling 28,500m, within the CK Gold Project deposit

Mineral Reserves Statement (Metric)

	Mass	Gold (Au)		Copper (Cu)		Silver (Ag)		Au Equivalent (AuEq)	
	Tonnes (000's)	Oz (000's)	g / tonne	Tonnes (000's)	%	oz (000's)	g / tonnes	oz (000's)	g / tonnes
Proven (P1)	26,900	574	0.664	53	0.198	1,440	1.664	757	0.876
Probable (P2)	37,000	440	0.370	59	0.160	1,220	1.027	679	0.571
P1 + P2	63,800	1,010	0.494	112	0.176	2,660	1.295	1,440	0.700



High-grade mineralization exposed at the surface surrounded by a large, lower-grade zone with potential for expansion

*Refer to the SK-1300 Technical Report Summary from the CK Gold Project Prefeasibility Study, December 1, 2021. Reserves tabulated at a cutoff grade of (0.0107–0.0088) AuEq oz/st, 0.009 AuEq oz/st average. AuEq is calculated on a recovery-weighted basis for the three metallurgical types, oxide, mixed oxidation and sulfide. Note only 3 significant figures shown, may not sum due to rounding. Please see "Cautionary Note Concerning Mineral Resources" in this presentation.

Future CK Catalysts

Permitting

Submitted the CK Gold Project Mine Operating Plan Permit Application in Q3, 2022
Industrial Siting Permit Approved May 2023 bodes well for Mine Operating Plan Permit expected H1 2024

Advanced Engineering

Final engineering studies for CK permits and feasibility study largely complete

Aggregate Market Study

Thought to provide significant upside potential to CK project NPV. Undergoing further study

Attractive Future Potential Financing Options

Exploring State of WY debt funding along with attractive potential vendor financing options

Pit Lake Water Storage Optimization

Continue with hydrology, water monitoring and technical studies to assess viability of future pit lake

Construction and Production

Building mill, advancing towards potential commercial production

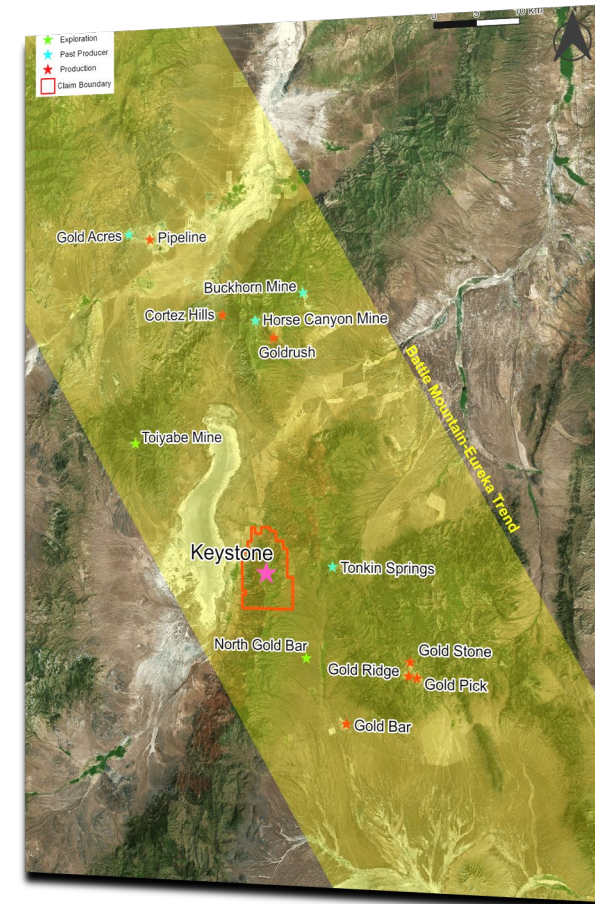
Nevada and Idaho Exploration Overview

McEwen Mining's Bar Gold Mine

Keystone Project

Discovering the next major gold opportunity on
the Cortez Trend in Nevada

Barrick's Cortez Hills Complex



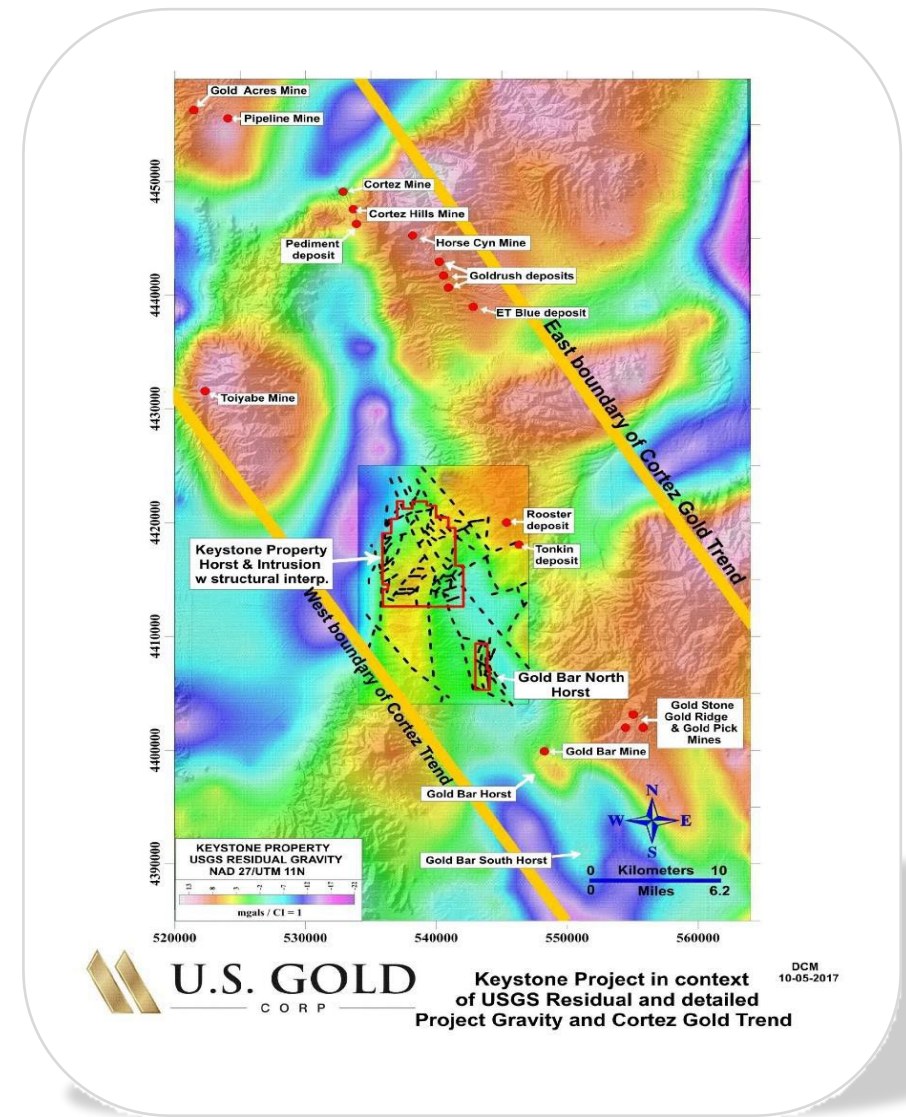
Keystone Project Location

An established gold mining jurisdiction

- Produced ~4.47 M oz of gold produced in 2021 - approx. **78% of U.S. gold production**¹
- **6th largest** gold producing “country” in the world, if Nevada were a country
- Historically, Nevada has produced > 225M oz of gold, hosting numerous world-class deposits
- “**Elephant country**”: >20M oz gold deposits
- Pro-mining environment, **geopolitical stability**, major infrastructure

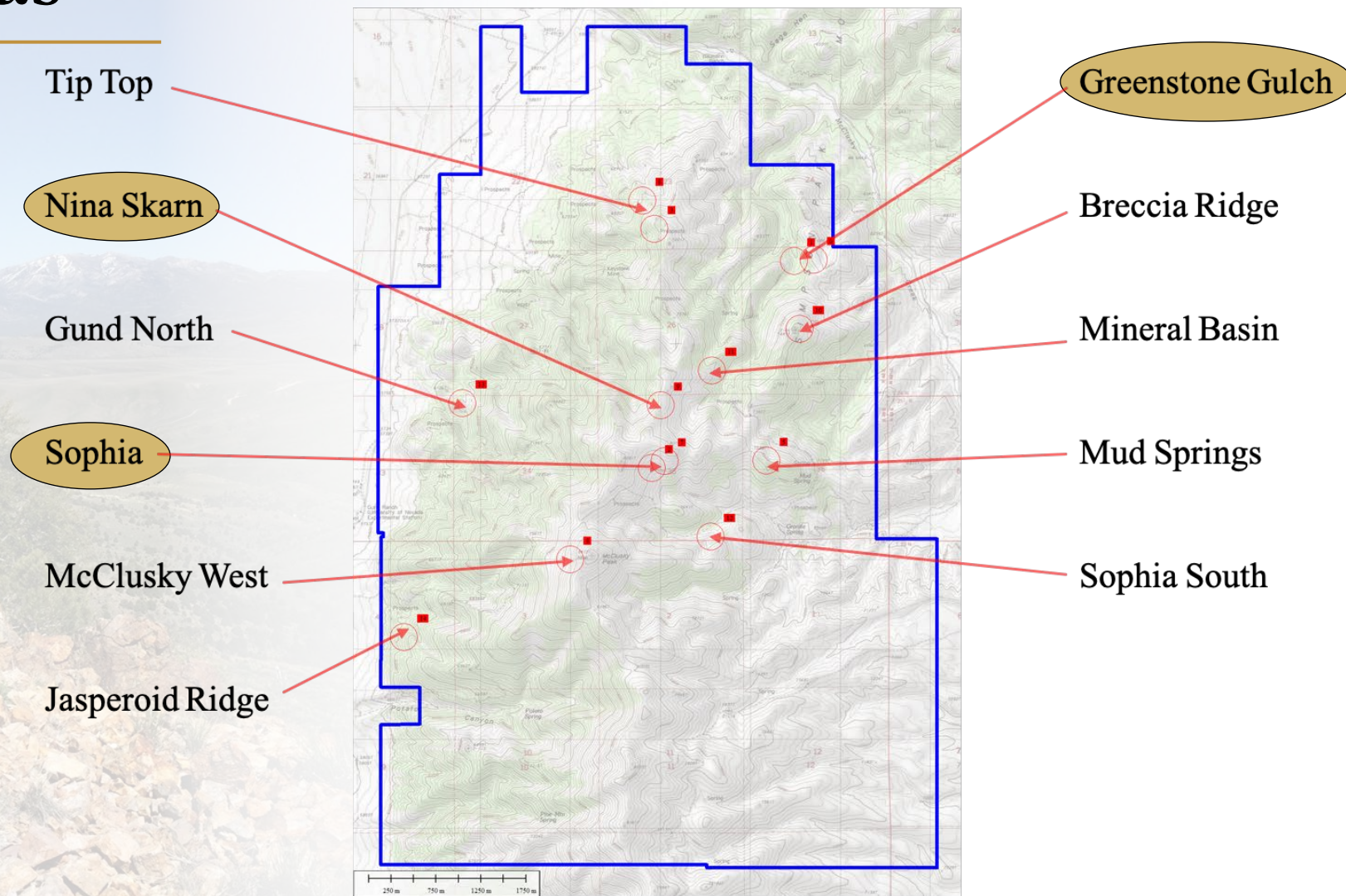
Keystone exhibits many similarities to Barrick’s deposits to the north; similar **host rock, stratigraphy, structure and Eocene intrusions**

1. USFunds.com



Priority Target Areas

- Consolidated an entire district on the **Cortez Trend, NV** - **20 square miles**, **100% controlled** by U.S. Gold Corp.
- **Never previously consolidated** nor systematically explored by model-driven, modern-day exploration techniques
- The extent and **intensity of the alteration** and the **thickness of permissive rock** packages encountered, highlight the potential of this district scale mineral system
- Systematic exploration has primed Keystone for discovery
- Recent hyper-spectral survey undergoing ground investigation for potential additional targets



Cortez Complex Comparison to Keystone

Keystone

- ✓ Shallow and deep targets are largely untested
- ✓ 20 square miles of geologic mapping, soil sampling and rock chip sampling
- ✓ Approved Plan of Operations for targeted drilling

Cortez

- ✓ Within Battle Mountain trend
- ✓ 11 miles north of Keystone

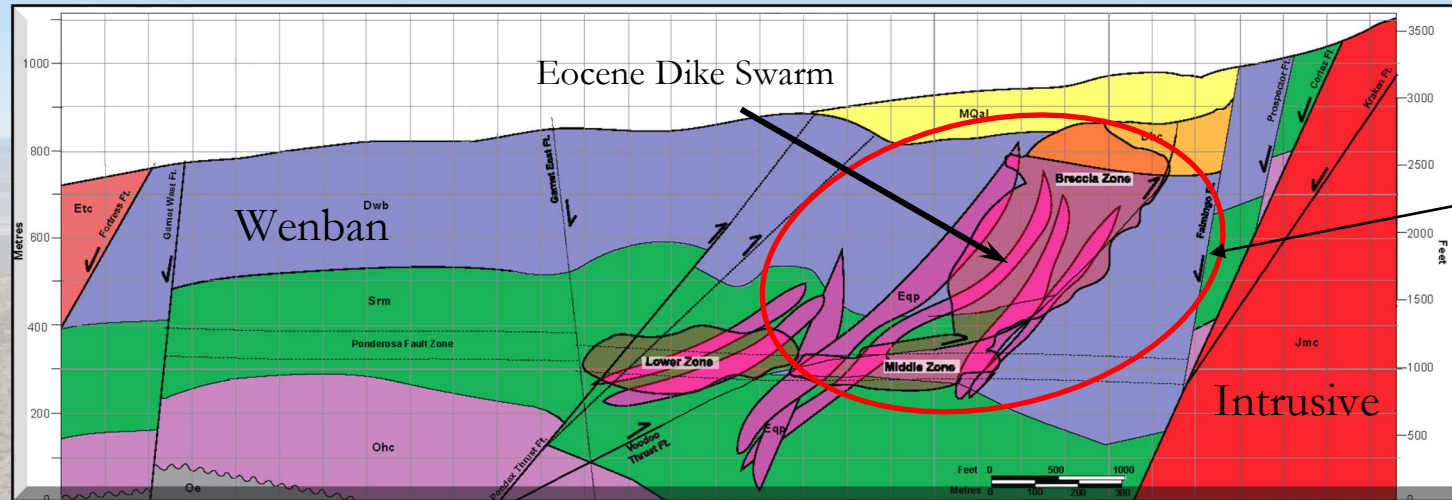
Cortez and Keystone Similarities

- ✓ Extensive Wenban Formation across the entire property
- ✓ Broad areas of high-grade trace metals
- ✓ Eocene-aged intrusives related to mineralization
- ✓ Porphyry and Carlin-type mineralization
- ✓ Dissolution collapse breccias
- ✓ High angle fault structures

+51 million gold oz - either produced or within mineral reserves and resources

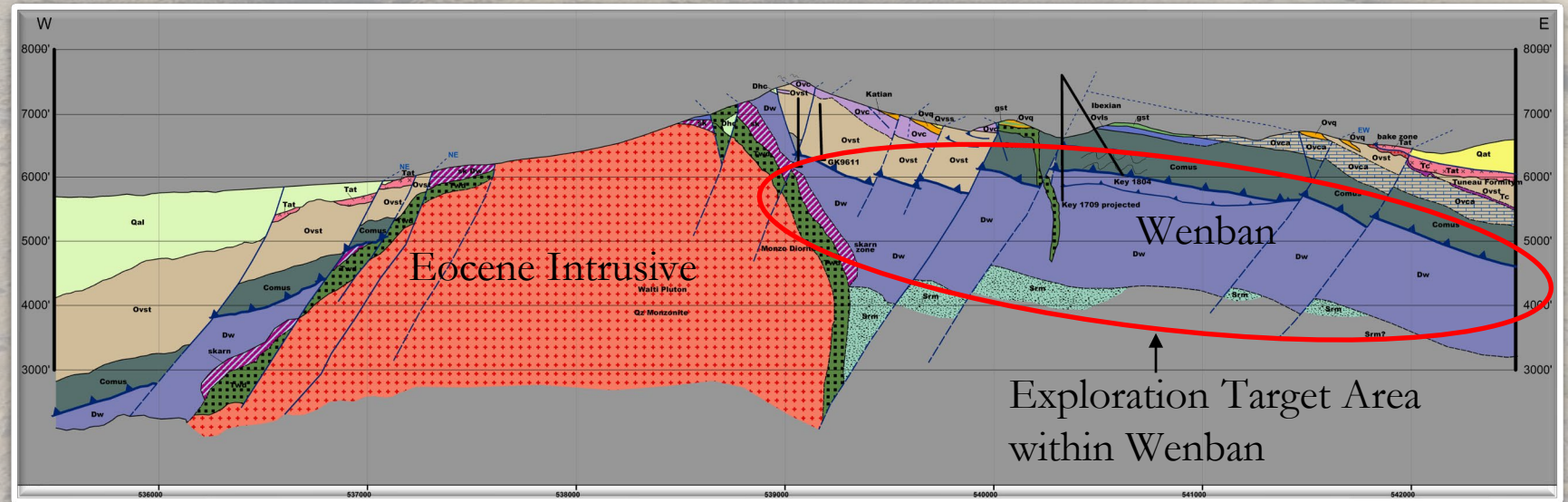
Typical Keystone and Cortez Cross Sections

Cortez



Wenban Ore Host at Cortez

Keystone



Exploration Target Area within Wenban

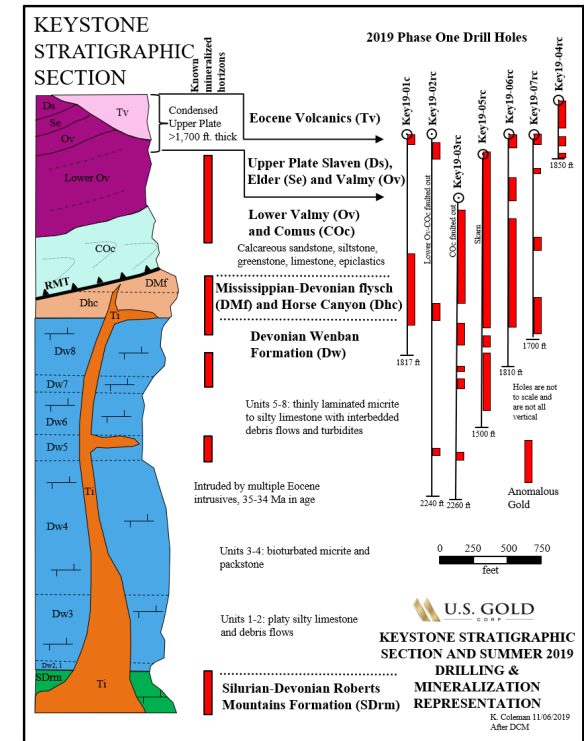
From Herron, 2018 Vectoring Cortez Hills Thesis

Keystone Stratigraphy

- All holes encountered anomalous Au and strong pathfinders within thick favorable stratigraphy
- Hole Key19-05rc was first test of Nina Skarn target area



- Strongest continuous Au mineralization ever encountered at Keystone to date
- Altered, gold bearing upper and lower plate rocks from surface to 414.5 meters
- Demonstrates the Keystone district scale project hosts a gold bearing Eocene magmatic-hydrothermal system



Extensive favorable stratigraphy

Keystone Exploration

Keystone moved from scout hole to targeted drilling – vectoring toward discovery success

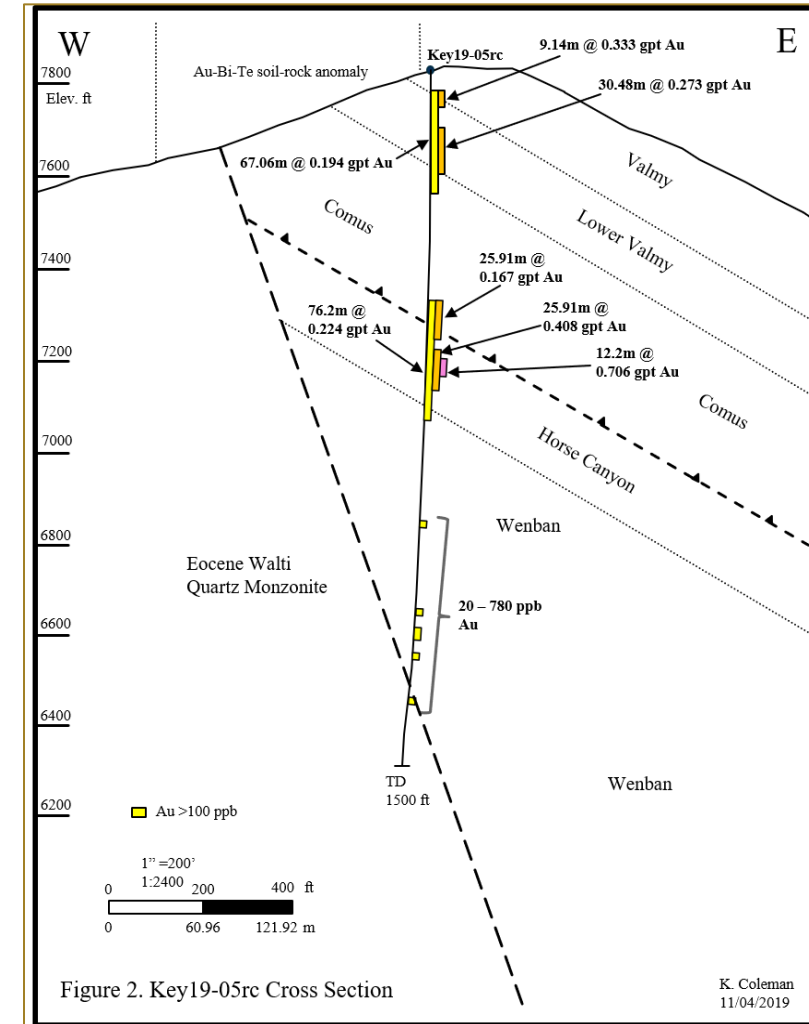
2019 targeted drilling of 7 holes

- High priority targets to follow up on 2018 results
- Provided a first test to several drill targets in areas previously inaccessible

Future proposed drilling

- Will be a mix of core and RC, focused on the Sophia and Greenstone Gulch target areas. Further drilling will be conducted at Nina Skarn in the future
- Discussing potential partnership opportunities at Keystone with leading industry company

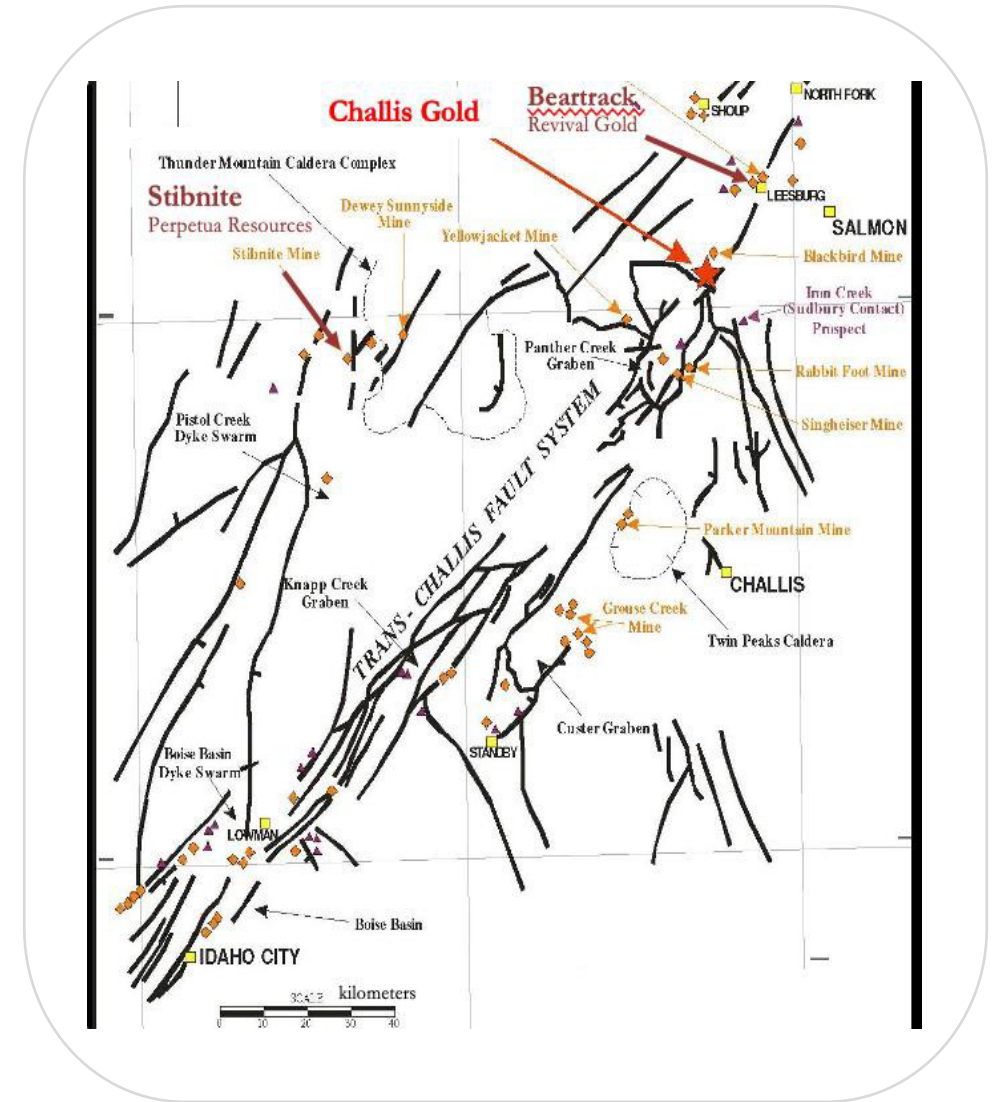
We believe that high priority targets show the potential for promising **Carlin-type gold deposits**



Challis Gold Project

Idaho Is A Mining State


- Challis Gold Project is located about 75 kms SW of Salmon, ID and 20 kms SW of Revival Gold's Beartrack Project, within the Tertiary Challis Volcanic Field
- Challis Gold is a low sulfidation, Au-Ag epithermal vein and stockwork deposit localized along intersecting NW – NE trending shear structures in a window of sedimentary rocks exposed through the Challis Volcanics
- Historical (not-current) 43-101 Resource of approximately 313,825 oz Au at a grade of 1.22 g/t Au, low strip ratio (Johnny's Point)
- Idaho is ranked as world's 8th best mining jurisdiction by the Fraser Institute; higher than any Canadian jurisdiction
- Nearby Idaho mining areas include the Stibnite Au project, Bear Track Au project, Delamar Ag-Au mine, Coeur d'Alene Ag-Zn-Pb mines, Black Pine Au mine and Thompson Creek Mo mine




ESG Dashboard | Where We Are Today

Environmental


Working towards a future **low carbon** footprint 

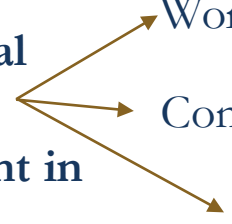
 Exploring carbon offset technology to get to future **Net Zero**

Commitment to land stewardship in partnership  with local stake-holders and ranchers

Water conservation through dry stack tailings and **potential future water storage facility** within the open pit 

Social

ZERO work-related safety incidents 

Substantial Local Investment in  Work Force
Consultants
Office

Community Outreach & Community Engagement 

Governance



Majority of Board is independent



Female Director Representation

100% Committed to annual ESG review and best corporate governance practices as needed

Management & Directors



George Bee

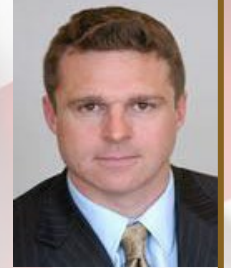
President & CEO, Director

Mr. Bee has managed multiple world-class mining projects in 8 countries for major and junior mining companies. He has taken several mines from development to production and recently was a Sr. VP for Barrick Gold. He also worked for Rio Tinto and Anglo American as well as several junior mining companies in his distinguished mining career.

Luke Norman

Executive Chairman

Mr. Norman has 20 years of experience in Venture Capital Markets and has raised more than \$300 million dollars for mining companies. He is also a Co-founder of U.S. Gold Corporation.



Kevin Francis

VP Exploration and Tech. Services

Mr. Francis has held many senior roles in the mining industry from VP of Technical Services to Principal Geologist.

Eric Alexander

Chief Financial Officer

Mr. Alexander has over 30 years of business experience, and 15 years in the mining industry. He is also a CPA.



Independent Directors



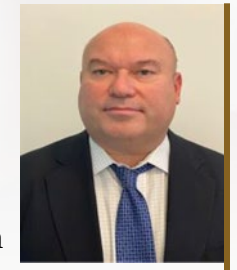
Robert Schafer

Mr. Schafer is a geologist with 35 years of international experience including discovering deposits that have become producing mines. He is the past President of The Society for Mining, Metallurgy, and Exploration.



Tara Gilfillan

Ms. Gilfillan is a CPA with 25 years experience in mining and engineering. She has been the CFO of multiple mining companies.



Michael Waldkirch

Mr. Waldkirch is a CPA in both the US and Canada and worked in mining for 25 years.



The U.S. Gold Corp. Opportunity

Advancing world-class assets

- **Promising portfolio**, in stable and mining friendly U.S. jurisdictions. The portfolio offers investors both potential near-term production and sizeable blue-sky exploration
- Team of **accomplished explorers and proven company builders**, who have made, and financed, the discovery and development of numerous world class gold assets
- CK Gold Project offers potential exposure to **compelling value**, and potential near-term production in **mining friendly Wyoming**
- Keystone offers exposure to significant potential exploration upside – entire districts on Nevada’s prolific **Cortez Trend**. We believe **Challis Gold** to be a high potential exploration project located in **Idaho**
- The company has a **tight share structure** (9.3M shares outstanding), with a large audience - listed on **NASDAQ**

DEVELOPMENT PACKAGE

Exciting combination of a later stage development asset and multiple exploration blue sky potential

PROVEN TEAM

Top quality management and advisory team with pedigrees of developing renowned gold projects

U.S. COMPANY

U.S. Gold Corp. is a US based company, listed on a major US Exchange – NASDAQ, with US based properties

HIGH UPSIDE

Large growth potential for the current resource and valuation upside based on market comps

Contacts

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