OCEAN MINERALS

Ocean Minerals LLC

Presents

Significant Cobalt Resource from Seafloor Nodules

Corporate Presentation

May 1, 2018

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www.omlus.com

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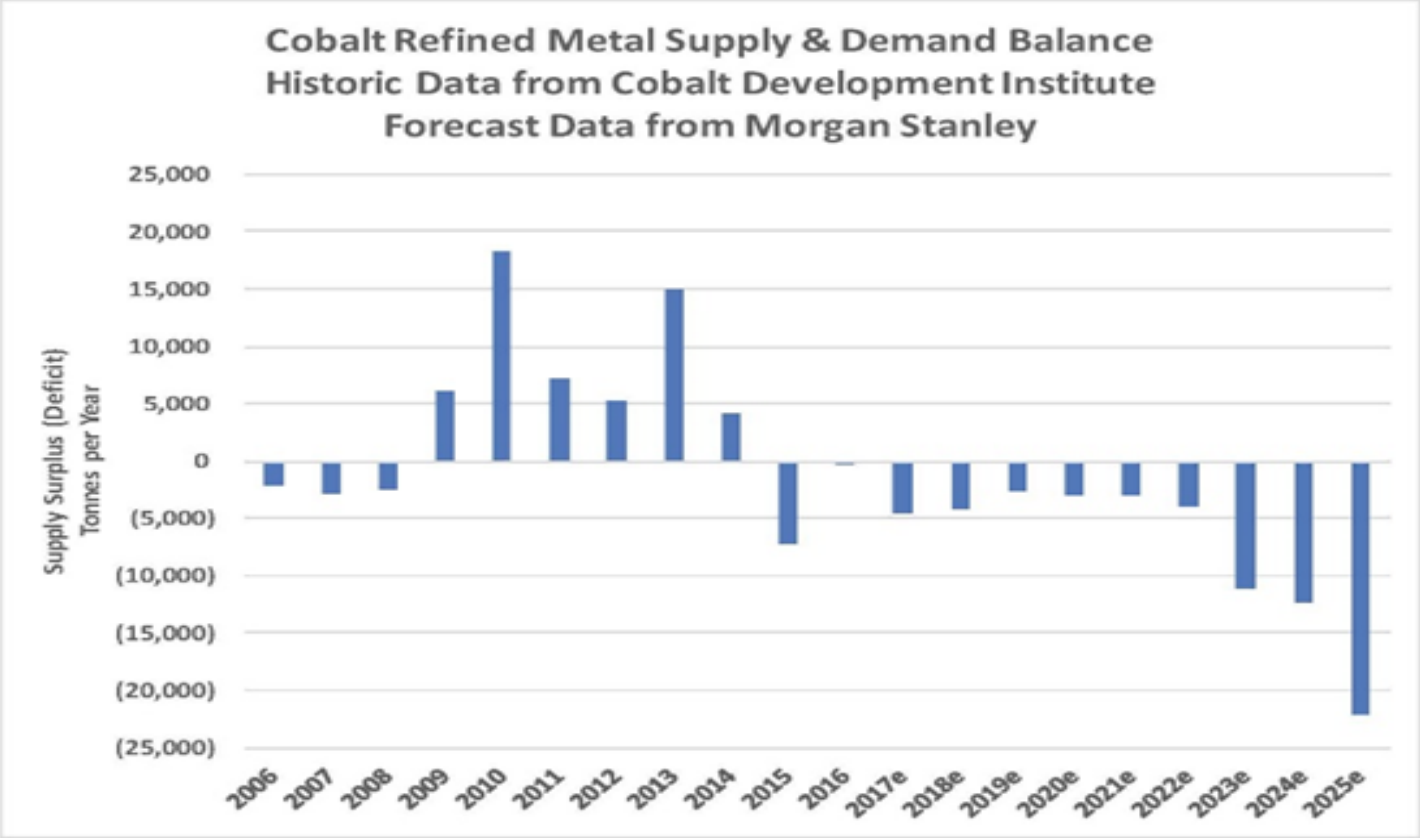
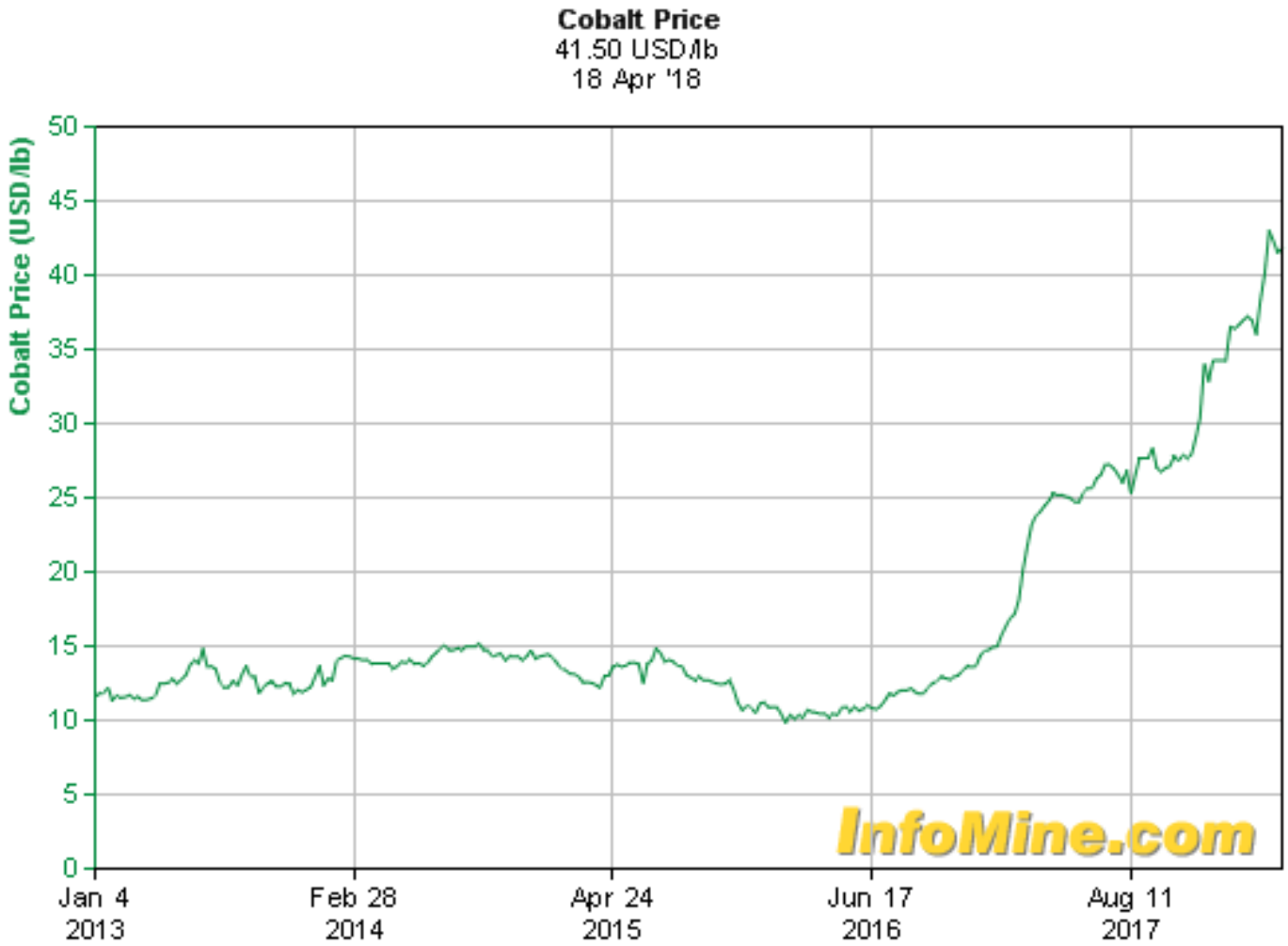
Projected Supply/Demand Deficit for Cobalt



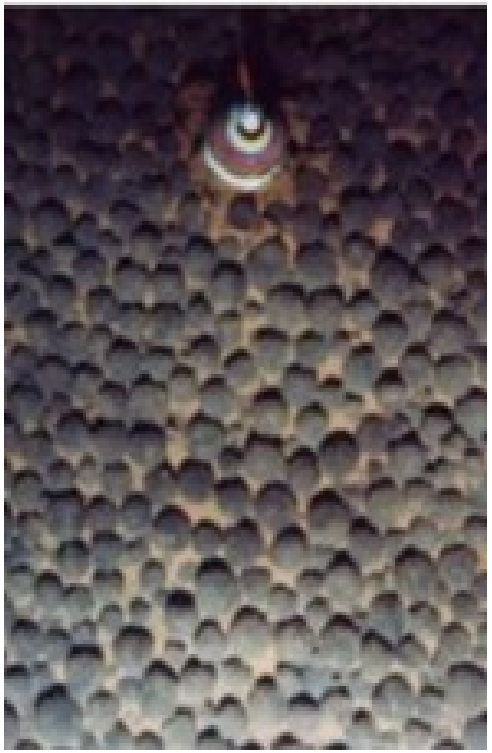
- Industry experts project the growth in Electric Vehicles will result in a net deficit in the cobalt supply of around 20,000 tpy by 2025.
- The USGS estimates 83% of the world's cobalt resource lies on the seabed.
- We believe seabed mining is the only alternative with a large enough scale to fill this gap on the horizon.

Cobalt Price



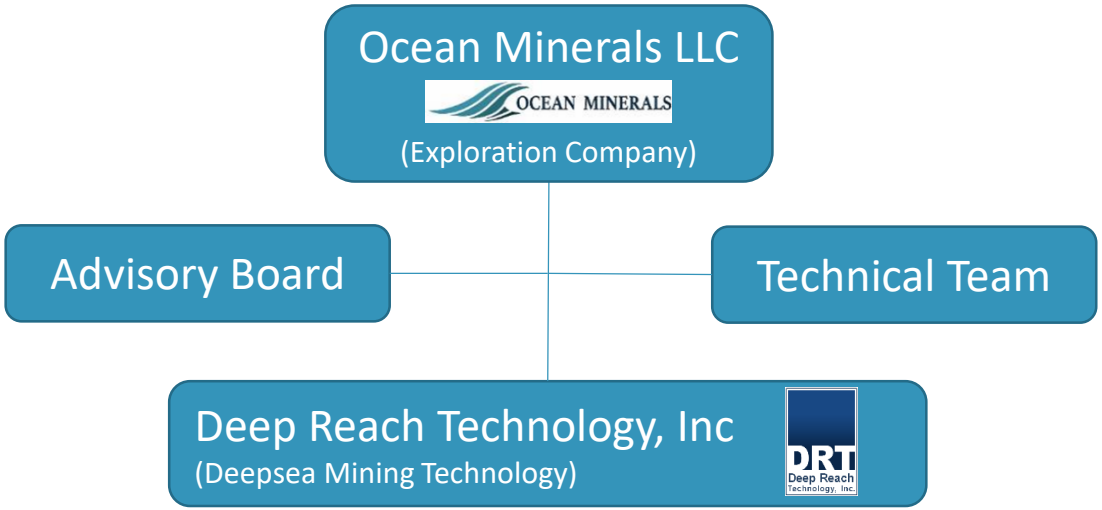
A new and major producer of Cobalt at the 18,000 tpy level

- According to the USGS: ***".. world terrestrial resources [of cobalt] are about 25 million tons… More than 120 million tons of cobalt resources have been identified in manganese nodules and crusts on the floor of the Atlantic, Indian and Pacific Oceans".*** {U.S. Geological Survey, Mineral Commodity Summaries, January 2017}
- Large tracts of cobalt-bearing seafloor nodules are technologically accessible for harvesting.
- This is the only remaining large-scale source of cobalt able to satisfy future battery related demand.
- Ocean Minerals LLC (OML) is in the process of developing what it believes to be the best cobalt bearing nodule field known today.



OML not only possesses proprietary technology and experience related to nodule collection, but has reserved rights for an exploration permit for a significant 43-101 cobalt resource in a friendly jurisdiction.

Corporate Structure and Strategic Partnerships

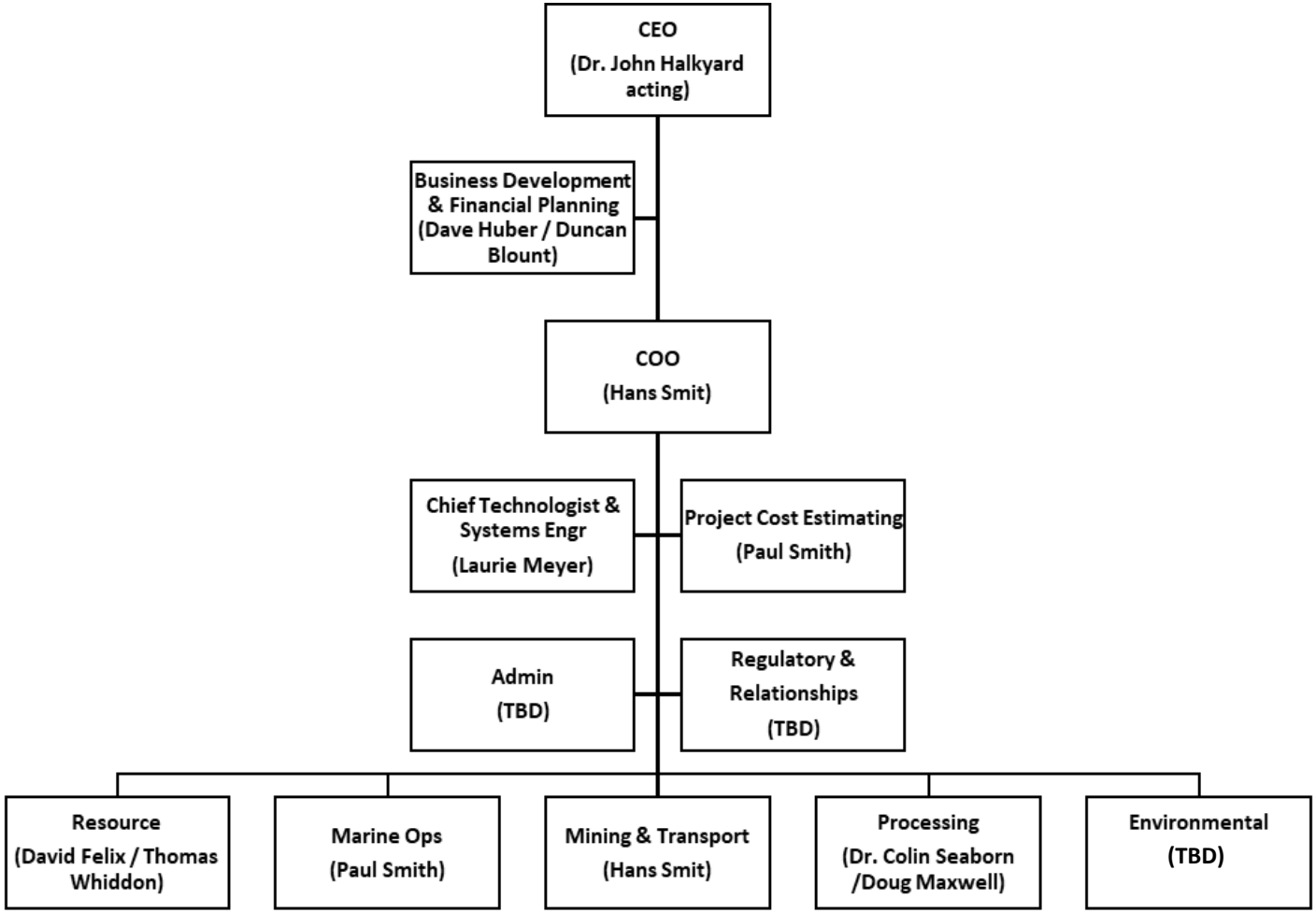


Ocean Minerals LLC (OML) is an exploration and resource development company formed in 2016 to capitalize on the resources found by DRT in the Cook Islands.

Deep Reach Technology, Inc (DRT) was formed in 2010 as a technology development and consulting company to provide technical services to the developing deep sea mining industry. The Army Research Labs awarded a two year Cooperative Research Agreement to DRT to identify a significant, non-Chinese, rare earth element resource. This resource was found in the seabed sediments of the Cook Islands resulting in the formation of OML.

DRT and OML have common shareholders and have a contract in place for DRT to provide engineering services to OML.

OML Organization



Key Team Members – Managers (Board)

Dr. John Halkyard, Chairman and President, is an Ocean Engineer and active in deep ocean projects involving mining and oil & gas since the late '60s. He was the Director of the Ocean Mining Laboratory for the Kennecott Manganese Nodule Consortium in the 1970s and led the successful mining system development effort. From 1988 – 2000 he was Technical Director for the Deep Oil Technology, Inc., which successfully developed and commercialized a proprietary deep water oil and gas platform, the "Spar". From 2000 – 2007 he served as the Vice President R&D and Chief Technical Adviser for Aker Maritime,, Inc. which was acquired by Technip, the world's largest energy engineering and project service company. Dr. Halkyard holds an ScD degree in Ocean Engineering from the Massachusetts Institute of Technology.

Jack Lifton, Manager, is a consultant, author, and lecturer on the market fundamentals of the technology metals, the term that he coined to describe those strategic rare metals whose electronic properties make our technological society possible. These include the rare earths, lithium and most of the rare metals. He is educated as a physical chemist, specializing in high-temperature metallurgy, advising both original equipment manufacturers (OEM), high tech industry and the global institutional-investment community on the natural resource issues that impact either a proposed business model or a high-volume manufacturing plan for the mass market. He is a Senior Fellow of the Institute for the Analysis of Global Security.

David S. Huber, Senior Vice President and Manager, has 43 years deepwater oil and gas experience in 13 countries, all with oil exploration and production companies. He joined Exxon and became Deepwater Engineering Supervisor before moving to the North Sea in 1981. He joined Hamilton Brothers Oil Company as Chief Engineer where he was responsible for two floating production units and four large fixed platforms. After two years with the South African National Oil company, he co-founded Mariner Energy where he held the position of Sr VP Deepwater. The company found significant oil and gas in the deepwater GOM and had a successful IPO on the NYSE. In 2006, Mr. Huber joined with two other Mariner Energy executives to start Deep Gulf Energy (www.deepgulfenergy.com). He retired in 2016. Mr. Huber is on the board of Deep Gulf Energy, Neptune Minerals, Ocean Minerals, LLC and Respinnovation, a French medical appliance manufacturer.

Key Team Members – Managers (Board)

Hans Smit, Manage and Chief Operating Officer, has 20 years of worldwide underwater mining and subsea engineering, operations and management experience. He was President of Neptune Minerals, Inc. from 2012 to 2018. He served as Managing Director of IHC MMP focused on providing services to the underwater mining industry worldwide. Prior to this, Mr. Smit was the Projects Director of Marine and Mineral Projects (Pty) Ltd a company specializing in providing the subsea diamond mining industry engineering and operation solutions. He has designed, developed, implemented and optimized numerous underwater mining systems in particular the crawler technology being used by De Beers Crawler for subsea diamond mining.

Karl Winter, Manager, has over thirty four years of experience in deepwater subsea equipment and specialized projects focused on the offshore oil and gas industry. Karl has managed and worked on numerous deepwater projects around the world. He is the founder and CEO & President of the international offshore engineering company, Ocean Flow International. He has also founded and owns several other equipment and capital companies. Education includes Master of Business Administration (MBA), Master of Science (Ocean Engineering) (Msc), Bachelor of Science (Engineering) (Bsc Honors), Diploma in Ocean Engineering, and a Diploma in Production Engineering. Karl is also a long time helicopter pilot.

Key OML Management Team

Laurie Meyer, Chief Technologist and Lead Systems Engineer has experience in aerospace and marine engineering. She led the DRT team as Principle Investigator for the Army Research Labs funded R&D project to assess the economic viability of a deep sea based new source for Rare Earth Elements. Prior to joining DRT in 2013 she was Chief Engineer for offshore renewables projects at Lockheed Martin Corporation, Chief Engineer and Systems Integrator for a wide range of programs at Lockheed Martin and Northrop Grumman (space, air and ground), and before that she was a systems analyst at Hughes Aircraft and Lead Systems Engineer at Martin Marietta. Laurie holds an MS in Mechanical Engineering from Stanford University.

Dr. Colin Seaborn, Lead Process Engineer, is a process metallurgist and mineral economist with nearly 40 years experience providing strategic reviews, business analysis & operating option assessments for various industries including mineral, manufacturing, waste management, university & Not for Profit sectors. He provides project management for development, identifies processing ideas & manages metallurgical testing for mineral exploration programs, including gold and base metals. Colin spent nearly 20 years with CRA Ltd. (now Rio Tinto) managing lead-zinc mineral concentrators at Broken Hill; process testing & development for Broken Hill and other CRA/Rio deposits (e.g. gold in WA & PNG).

Key Team Members – Advisory Board

Dr. Jay Agarwal, former Vice president, Technology Assessment, Charles River Associates Inc. has more than 50 years of experience directing new product and process development, business strategy, technical and economic feasibility, and acquisition analyses in the chemical, coal, minerals, steel, metals, and energy industries. Dr. Agarwal had senior management positions with U.S. Steel; Kennecott Copper, and lastly with Amax as V.P. of technology before joining Charles River Associates. His areas of specialization include the interaction of technology, markets, and economics; technology management; and feasibility analyses of capital expenditures, new ventures and risk analyses. He has consulted for major companies around the world and testified in International Trade cases. Jay hold a Doctor of Chemical Engineering from the Polytechnic Institute of New York.

Eric Klier has more than 25 years of materials science and engineering experience in R&D and manufacturing environments. He worked as a Scientist for M Cubed Technologies, Inc. and as a Senior Materials Engineer for the Lanxide Corporation and LTV Missiles and Electronics Group. Mr. Klier founded Chesapeake Composites Corp. where he invented and pursued commercialization of a new class of ultra fine structured synthetic metal alloy systems. Eric is advising Ocean Minerals on the downstream processing and markets for Scandium and the other rare earth elements.

John Petersen is a lawyer and accountant with over three decades of corporate finance, due diligence, M&A advisory and related legal services for manufacturers, innovators and investors in the energy storage and renewable energy sectors. Over the last eight years John has earned a global following for his articles on the energy storage and alternative energy sectors. He has contributed to AltEnergyStocks, Seeking Alpha, The Street, NASDAQ.com and Batteries International Magazine and InvestorIntel. John is a 1979 graduate of the Notre Dame Law School and a 1976 graduate of the W.P. Carey School of Business at Arizona State University.

Cameron May has a Multi-faceted and multi-national career in advanced materials business development. Business responsibilities included Technical Director, Business Development Director, VP of Marketing & Sales, Commercial & Technical Director–North America, Business Development Manager-Medical & Components Division and Senior Research Engineer. Cameron spent 22-Years as an Associate of Calloway Cars, responsible for materials technology, engineering and applications for Callaway Cars, developers of high performance automotive vehicles.

Key Team Members – Advisory Board (Continued)

Duncan Blount, Director of Business Development and Finance, is currently CEO of Asian Mineral Resources (www.asianmineralres.com). He has 10 years experience focused on the natural resources sector – including base, precious, bulk and specialty metals/mining. He was previously Head of Emerging & Frontier Market Commodities at RWC Partners, where he was responsible for developing their commodity and natural resources portfolio strategy. Duncan has been involved in public and private investments in mature producers, as well as exploration-level juniors. Additionally, he has experience in physical mineral trading and structuring off-take agreements.

Jim Guild is Executive Vice President in the Willis Energy Practice and member of the executive Committee for the Houston Energy Practice. His responsibilities include the development, marketing and servicing of energy and marine accounts. Jim has forty years of experience in the insurance industry with a significant emphasis on marine and energy business. His expertise includes domestic and foreign primary casualty, P&I Clubs, excess liability, property and builders risks including subsea deepwater tie backs. He also has extensive experience in the use of fronting for insured-owned captive insurance companies, including the use of Oil Insurance, Ltd. (OIL) as reinsurance

Key OML Technical Team

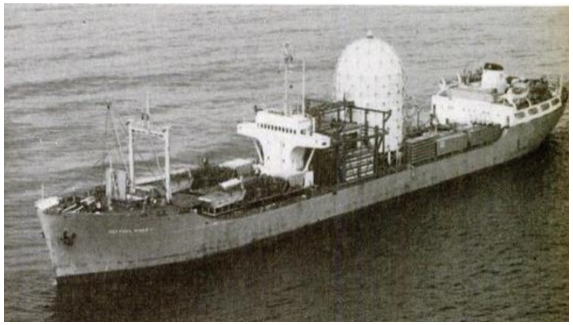
David Felix, Chief Geologist, Served as the Sr. Exploration Geologist for Kennecott Exploration, Inc., discoverer of superior manganese nodule deposits in the Clarion Clipperton Zone of the Equatorial Pacific for the KCON Consortium: AREA USA 4 under the U S Deep Seabed Hard Mineral Resources Act. Dave holds a MS in Geology from the University of Southern California.

Doug Maxwell, Associate Process Metallurgist, Deep Reach Technology, has more than 30 years' experience in mineral processing. He has been project manager for projects up to $30 million in total value and has supervised or participated in several plant start-ups. His experience includes bench testing, pilot plant testing, start-up and field service in mineral processing and hydro-metallurgical plants for copper, gold, lead-zinc, potash, phosphate rock and other materials. Doug holds a Masters of Engineering, Metallurgy, from the Colorado School of Mines.

Richard Petters, Chief Ocean Engineer, began his career as design and test engineer for Ocean Management, Inc., a pioneer manganese nodule consortium in the 1970s. Richard participated in the successful pilot mining tests in the Clarion Clipperton Zone where OMI collected over 800 tonnes of nodules. Following the nodule experience, Richard pursued a career in undersea engineering designing and testing numerous subsea vehicles and equipment. He was staff engineer for Lockheed Martin Undersea Systems for 10 years and has been an independent consultant for 25 years prior to becoming an Associate of DRT. He has participated in several deep sea mining study projects with DRT. Richard holds an MS in Ocean Engineering from the University of Hawaii.

Paul Smith, Marine Engineering and Operations Associate, has over forty years' experience and leadership in offshore and underwater operations, manufacturing and engineering. Previously he was Chief Engineer of Elastec/American Marine, largest US manufacturer of oil spill cleanup equipment, and winner of the $1 million first prize on Wendy Schmidt Oil Cleanup X-Challenge. He was previously Principal in Charge of Marine Consulting for Glosten Associates, a leading naval architecture firm in Seattle. Paul began his career in the marine salvage business, where he served as marine salvage engineer on dozens of ship casualties and deep ocean recovery operations. He holds an MS degree in Ocean Engineering from the Massachusetts Institute of Technology.

Our combined experience goes back to the 1970's deep sea mining consortia and covers all these projects



OMA
(Deepsea Ventures, U S Steel, Sun Oil, Union Miniere)
Trial mining with airlift and towed, hydraulic collector

Dr. Halkyard on first successful nodule collector test!

KCON
(Kennecott, Mitsubishi, Noranda, RTZ, Goldfields, BP Minerals)
Tested hydraulic towed collector, developed "froth flow" airlift model

Conducting geotechnical Sediment testing!

OMCO
(Lockheed, Amoco, Billiton,Bos Kalis)
Tested self-propelled collector with mechanical pickup

OMI
(Inco, DOMCO, Preussag, Metallgesellschaft AG,SEDCO)
Tested multiple towed collectors, airlift and pump tests

Pilot tests have proven nodules can be recovered and lifted from the seabed, and OML/DRT have the experience! DRT has proprietary technology related to nodule collection and lifting.

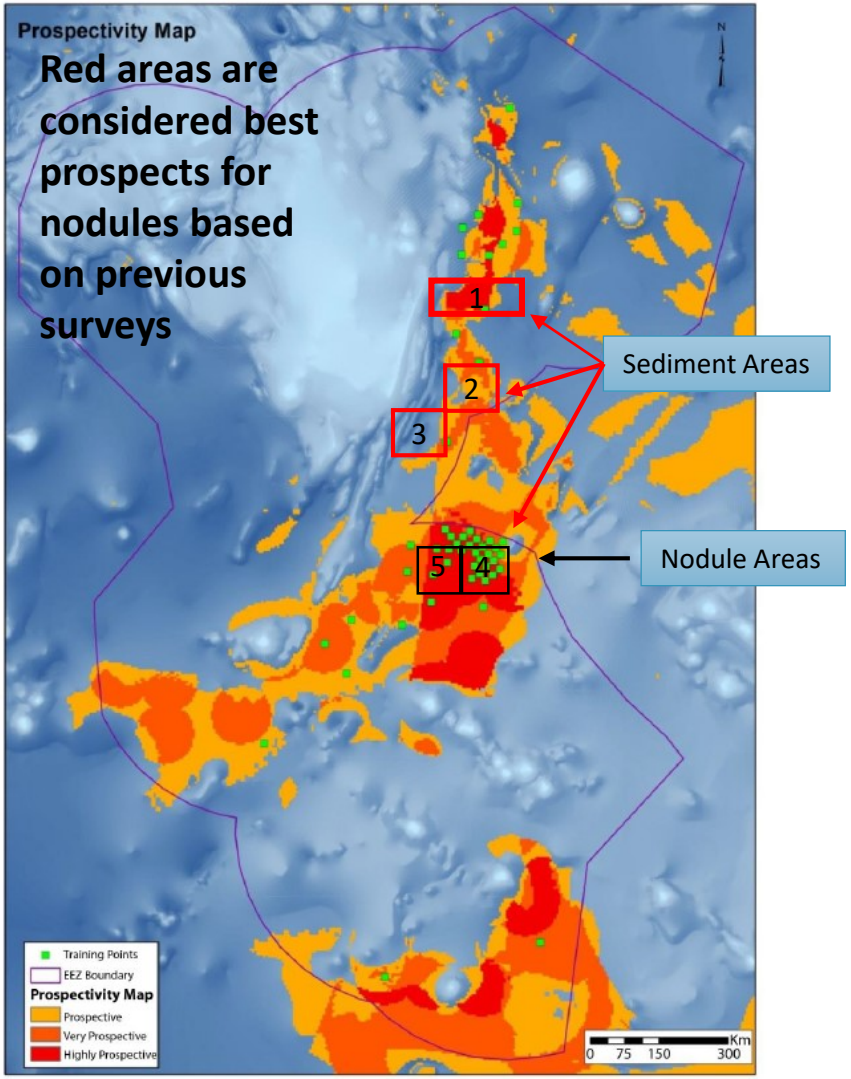
COOK ISLANDS

- Cook Islands is an independent Commonwealth Nation in the South Pacific.
- Cook Islands encourages development of nodule and other underwater mining.
- Fiscal and regulatory terms are in place.
- Established the Seabed Mineral Authority in 2012.
- Cook Islands enacted the Seabed Mining Act of 2009 to manage the seabed minerals sector of the Cook Islands Exclusive Economic Zone (EEZ).
- Our activities are well away from recent declared marine preserve protected areas.

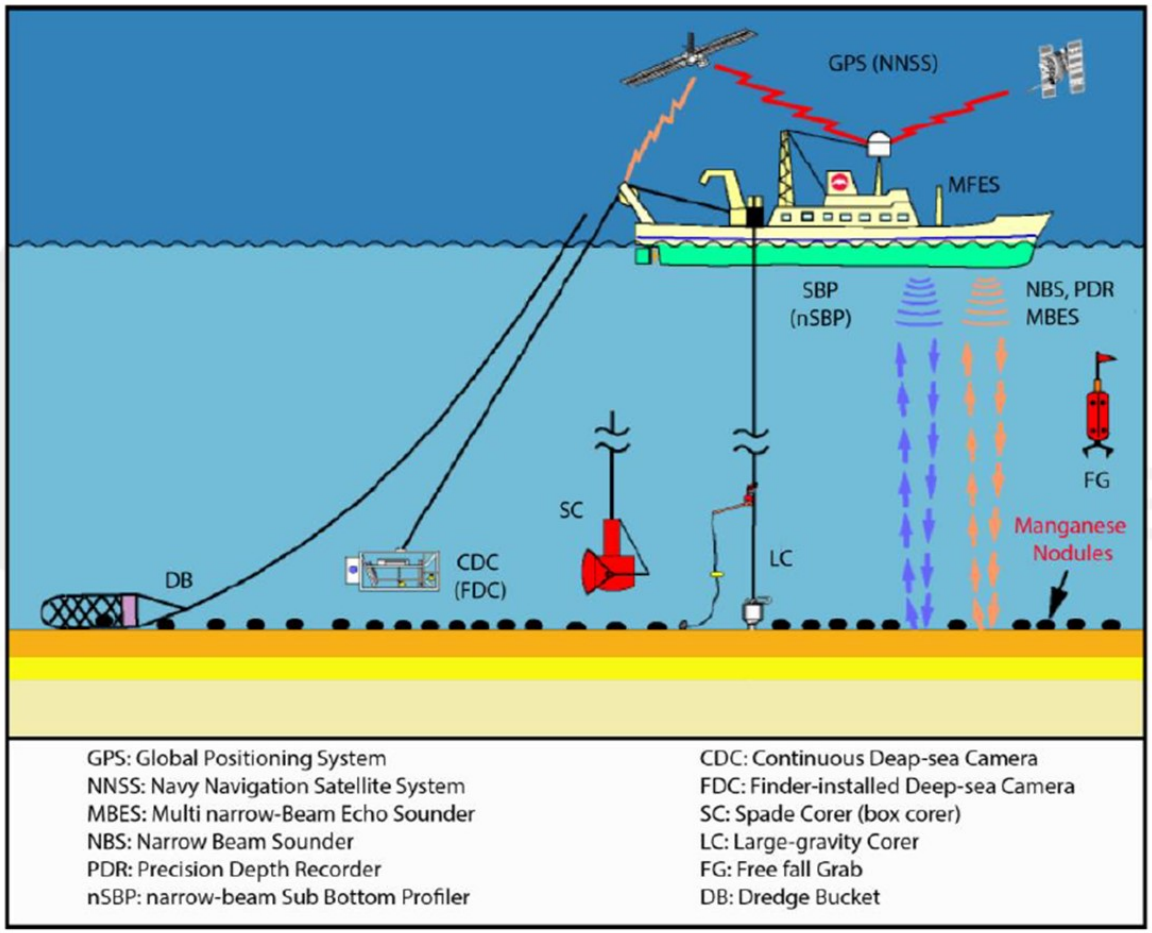
Terms of the Cook Islands Agreements

- Sediment Agreement, Sept. 2016
  - Limited to the Rare Earth Element (REE) sediment resource only.
  - Area 1 (map) is exclusively reserved for OML.
  - OML has first right of refusal for exploration license applications over Areas 2, 3, 4 & 5.
  - OML has two years to apply for a prospecting license to explore these areas.
  - Terms are payment of US$8,000 per month.
- Nodule Agreement, Oct. 2017
  - OML has exclusive rights to apply for an exploration license for nodules containing cobalt in blocks 4 & 5.
  - Exploration license must be applied for within 12 months, which can be extended to 18 months if requested by month 9.
  - Terms were payment of US$100,000.
- **Two Exploration License Applications currently in progress and project issue of permits in September 2018.**

Areas reserved for OML Under the agreements of Sept 2016 and Oct. 2017. Each Block is approximately 12,000 sq km.



Determining resource estimates for nodule deposits

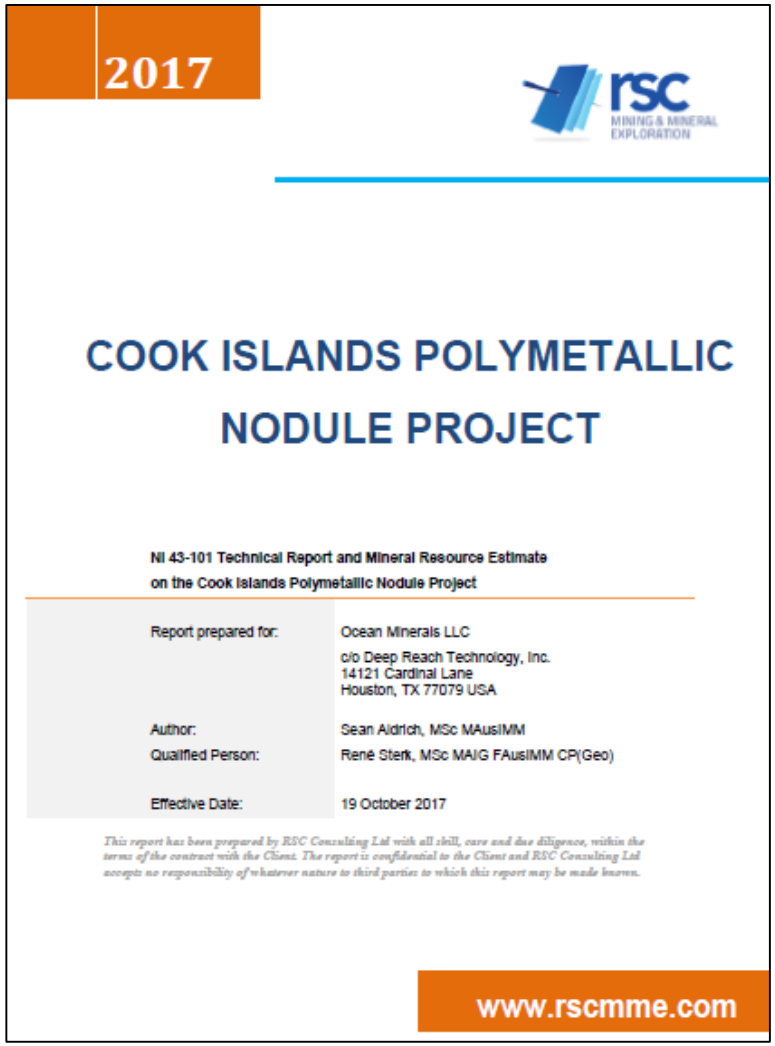


- Nodules are a two dimensional resource.
- Found lying "proud" on the seabed (no overburden).
- Can be observed in photographs.
- Photos can be "ground-truthed" using variety of sampling tools as shown in figure.

NI 43-101 Resource

- NI 43-101 Resource Report results for our reserved blocks:
  - Inferred Resource.
  - 200 million tonnes of nodules.
  - Cobalt Grade of 0.5%.
  - Abundance of 28 kg/m^2.
  - 1.0 million tonnes of Cobalt.
  - 30 Years of mining at 18,000 tpy Co.
- Additional cobalt rich nodule areas not covered in the report will be the target of future exploration.

This process is used by mining companies in the International Seabed Authority regions of the Pacific Ocean for reporting nodule resources. This is a mining industry standard and is undertaken by independent, third party professional resource reporting organizations.



2017

rsc MINING & MINERAL EXPLORATION

COOK ISLANDS POLYMETALLIC NODULE PROJECT

NI 43-101 Technical Report and Mineral Resource Estimate on the Cook Islands Polymetallic Nodule Project

Report prepared for:	Ocean Minerals LLC c/o Deep Reach Technology, Inc. 14121 Cardinal Lane Houston, TX 77079 USA
Author:	Sean Aldrich, MSc MAusIMM
Qualified Person:	René Sterk, MSc MAIG FAusIMM CP(Geo)
Effective Date:	19 October 2017

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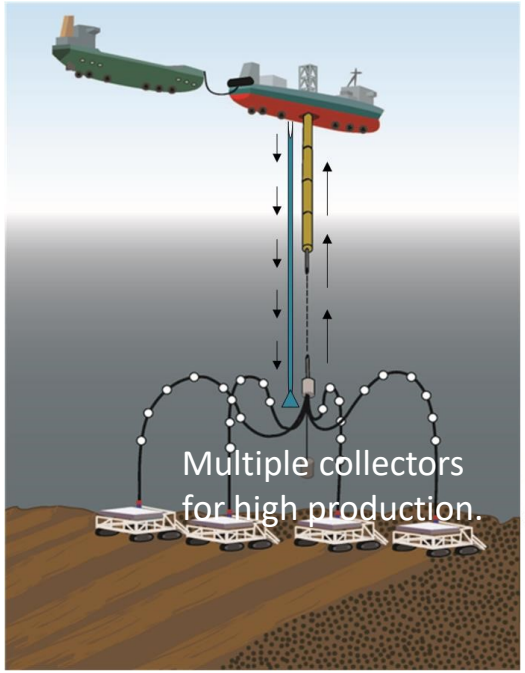
Technology - Mining

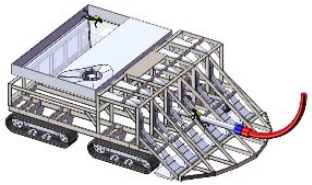
- Technology for recovering and processing nodules has been proven.
- Recent deep water oil exploration and production technology enhances the viability of deep sea mining technology.
- Concept for nodule extraction:
  - Mining vessel with riser pipe for lifting of nodules.
  - Multiple collectors.
  - Support vessel to maintain and repair collectors.
  - Cargo vessels to ferry nodules to processing facility.
  - Annual production of 4.4MM tpy (dry).

Modified drill ship used to prove mining concept in 1978!



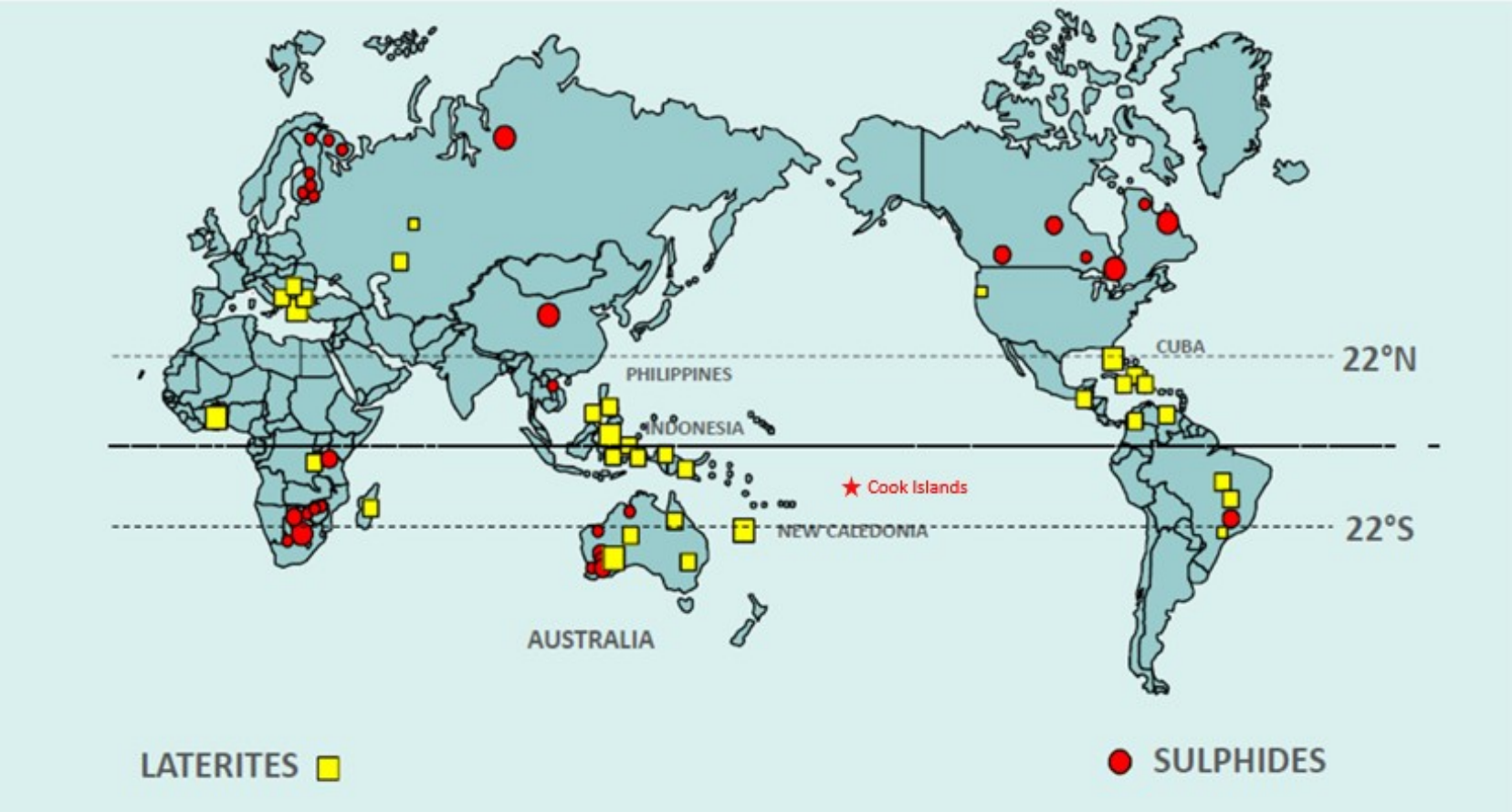
Multiple collectors for high production.

Airlift Test



Concept Collector

Brownfield Processing Plant Possibilities



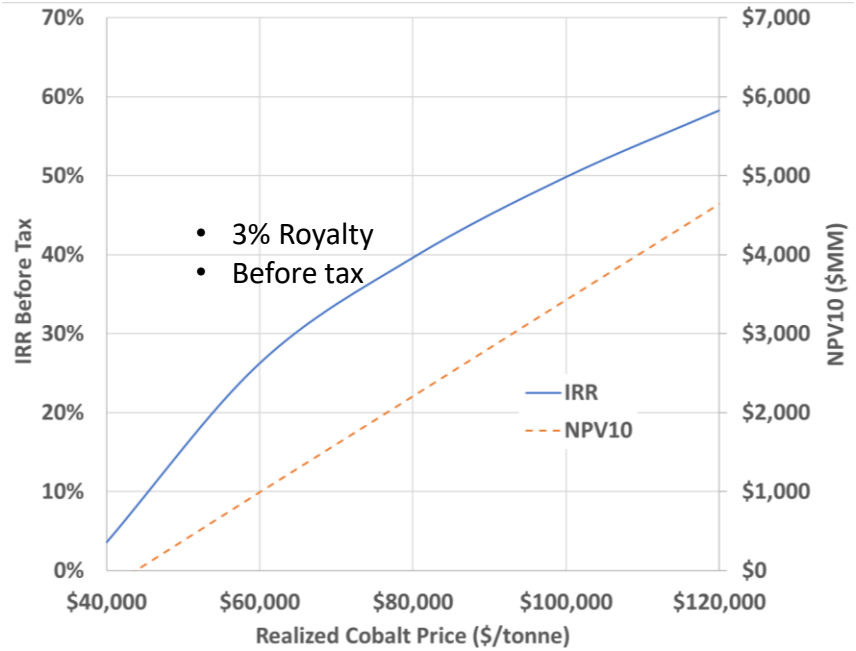
At least 12 existing laterite processing facilities are within economic transportation distance of the Cook Islands. Our strategy is to find a downstream partner that can upgrade and operate one or more of these plants to extract cobalt from the nodules (Source: CSA).

Project Economics

CAPEX ($MM)	
Exploration, Delineation, Permitting	$36
Engineering, Test & Program Management	$150
Equipment Procurement incl Spares	$298
Integration, Commissioning & Startup	$121
Total	$605
OPEX ($MM)	
Personal, M&R, G&A, Insurance	$59
Transport (5600 km)	$178
Fuel	$76
Mining and Support Vessel	$128
Exploration & Environmental Monitoring	$11
Total	$452

- Upstream costs only. Mining, support and transport vessels leased.
- Revenue based on nodule transfer price equivalent to 60% of realized Co revenue.
- Realized Co revenue assumes 80% recovery of Co, 90% of Ni and Cu. No credit for Mn, Ti or other minerals in nodules.
- Fuel costs based on $660/tonne.
- Annual Production 4.4MM dry tpy nodules.

IRR and NPV Estimates vs. Realized Cobalt Price



- Assumes 3% royalty fees.
- Assumes revenue before tax.
- Cook Islands non-resident company tax rate - 28%

Comparative Company Values

Cobalt-Focused Mining Valuations

Company	Ticker	Market Cap (USD MM)	Enterprise Value (USD MM)	Project(s)	Location	Commodities	Co Grade	Stage of Development	Contained Co (k mt)	EV/mt Co
Clean TeQ	CLQ AU	$ 596	$ 566	Sunrise/Syerston	Australia	Ni, Co, Sc	0.10%	Pre-Feasibility Study	114	$ 4,965
Cobalt Blue Holdings	COB AU	$ 114	$ 111	Thackaringa	Australia	Co, Pyrite	0.09%	Currently Drilling	50	$ 2,220
Australian Mines Ltd	AUZ AU	$ 177	$ 165	Sconi	Australia	Co, Ni, Sc	0.11%	Bankable Feasibility Study	98	$ 1,684
eCobalt Solutions	ECS CN	$ 170	$ 160	Idaho Cobalt	US	Cu, Co, Au	0.55%	Bankable Feasibility Study	25	$ 6,400
First Cobalt Corp	FCC CN	$ 145	$ 121	Keely-Frontier	Canada, DRC	Co, Ag, Cu	-	Exploration	-	-
Fortune Minerals Ltd	FT CN	$ 65	$ 63	NICO	Canada	Co, Au, Bi, Cu	0.11%	Feasibility Study	37	$ 1,703
US Cobalt Inc	USCO CN	$ 55	$ 51	Iron Creek	US	Cu, Co	0.61%	Exploration	-	-
AVERAGE	**-**	**$ 189**	**$ 177**	**-**	**-**	**-**	**0.26%**	**-**	**65**	**$ 3,394**
Ocean Minerals LLC	**Private**	**$ 3,394**	**$ 3,394**	**Subsea Nodules**	**Cook Islands**	**Co, Ni, Cu, Mn**	**0.5%**	**Exploration**	**1000**	**$ 3,394**

OML figures based on most recent volumetric estimate from NI 43-101

Seabed Mining Peer Group

Company	Ticker	Market Cap (USD MM)	Enterprise Value (USD MM)	Focus Project	Location	Commodities	Stage of Development
Nautilus Minerals	NUS CN	$ 126	$ 126	Solwara-1	Papua New Guinea	Copper, Gold	Bankable Feasibility Study
Odyssey Marine Exploration	OMEX US	$ 75	$ 86	Don Diego	Mexico	Phosphates	Pre-Feasibility Study
Chatham Rock Phosphate	CRP NZ / NZP CN	$ 4	$ 4	Chatham Rise	New Zealand	Phosphates	Bankable Feasibility Study
Trans-Tasman Resources	Private	-	-	South Taranaki	New Zealand	Iron Sands	Currently Drilling
DeepGreen Resources	Private / Pre-IPO	-	-	NORI D	CCZ (Pacific Ocean)	Nickel, Manganese	Exploration
Neptune Minerals Inc.	Private	-	-	Tinakula	Solomon Islands	Zinc, Gold	Exploration / Scoping Study

Phase 1 Objective: Advance the Project

- **Secure** exclusive rights to **best resource** blocks.
- **Improve** accuracy of **cost estimates** and **economic projections.**
- Start **environmental assessment** and **outreach** with the Cook Islands and other stakeholders.

Securing Resource

- Secure exploration license(s).
- Validate historical data.
- Improve and expand data.
- Improve resource models.
- Update NI 43-101.

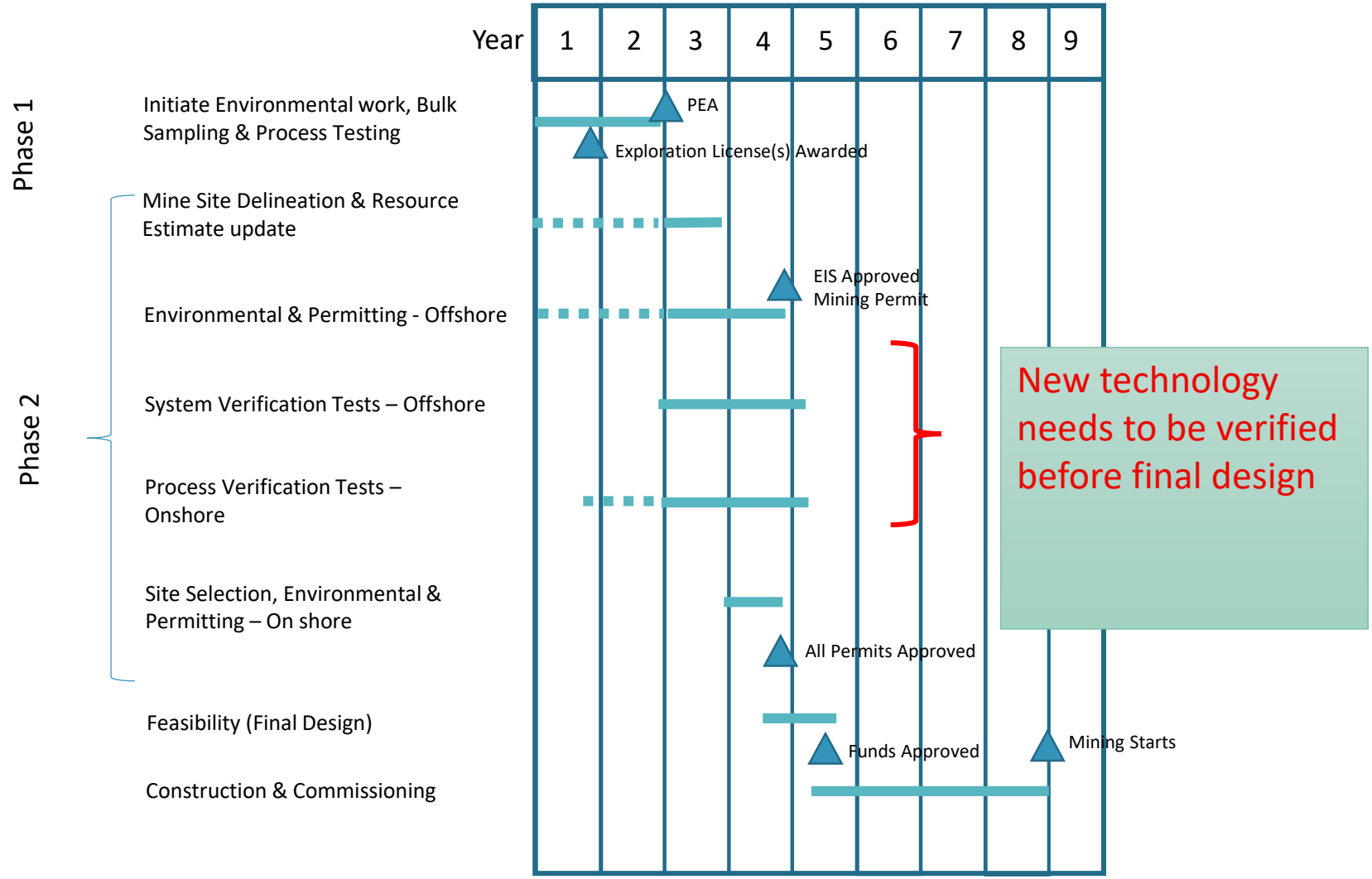
Improving Cost Estimates & Economic Projections

- Validate economic Cobalt extraction & refine process concepts.
- Obtain critical engineering data & refine mining system concepts.
- Update economic models.
- Develop PEA.

Outreach & Environmental

- Begin baseline environmental data collection.
- Establish OML presence and advance relationships in Cook Islands.

Roadmap to Commercial Production



Ocean Minerals' Business Plan (Budget $MM)

Year	1	2	3	4	5	6	7	8	
	Scoping		Pre-Feasibility		Feasibility	Construction & Commisioning			Total Costs
Scoping & PEA	$2	$2							$4
Exploration, Permitting and Environmental	$3	$3	$9	$9	$9	$9			$42
Non-Recurring System Verification Tests (Offshore)			$20	$60	$10				$90
Non-Recurring System Verification Tests (Onshore)			$5	$15	$10				$30
Feasibility (Final Design)				$18	$54				$72
Construction & Commissioning						$94	$188	$215	$497
TOTAL	$5	$5	$34	$102	$83	$103	$188	$215	$735

Values in red included in CAPEX

- Notes
  - Mining, support and transport vessels are leased under long term contract and are included in operating expenses.
  - Construction & Commissioning Costs include subsea mining equipment, working capital, spares and offshore operations for commissioning.
  - Construction & Commissioning are Offshore Costs only.

Rev.
2/6/18

Current Funding Summary

- $10,000,000 raise is underway to fund Phase 1 activities over the next 2 years.
- Focused on private equity investors.
- $5,000,000 of this has been subscribed as of February 1 (Initial Phase):
  - Collection of bulk samples.
  - Metallurgical testing.
- $5,000,000 raise currently in progress (Current Phase):
  - Initiate Environmental baseline work.
  - Update cost estimates, prepare PEA.

In Summary

- OML has secured rights to apply for an exploration license(s) covering an area with an NI-43-101 inferred resource containing about 1MM tonnes cobalt.
- A single mining operation could produce 18,000 tpy Cobalt and the currently reserved area could support over 30 years of mining at this rate.
- This operation has a CAPEX of $605MM and a pre-tax IRR of 50% at Cobalt price of $100,000/t.
- The resource is in a friendly jurisdiction, the Cook Islands, which has been working towards production for many years, with regulatory, environmental and fiscal frameworks already in place.
- OML has a strong and longstanding relationship with the sovereign Cook Island government.
- The technology for deep sea mining has been demonstrated by four consortia in the 1970s.
- OML is able to improve on those 1970's efforts using technological advancements pioneered by the deepsea oil & gas exploration and production industry.
- A strong technical and commercial team has been built, including legacy experience from the 1970s and more recent activities.
- OML has recently raised over $5Million and is seeking an additional $5 Million for a two year scoping phase to initiate environmental sampling and to perform technical work to verify the project economics.
- With additional capital and strategic partners, startup of production could be as soon as 2025.

OCEAN MINERALS

Ocean Minerals LLC's mission is to responsibly transform deep ocean natural resources into prosperity in a responsible and sustainable manner by applying a precautionary approach and by employing world-class technology and expertise.

Our objective is to be a preferred deep water resource company creating long term value through excellence and caring for people and our planet, particularly the ocean.

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