

THE PREMIER MURCHISON GOLD EXPLORATION COMPANY



INVESTOR PRESENTATION – AUGUST 2021

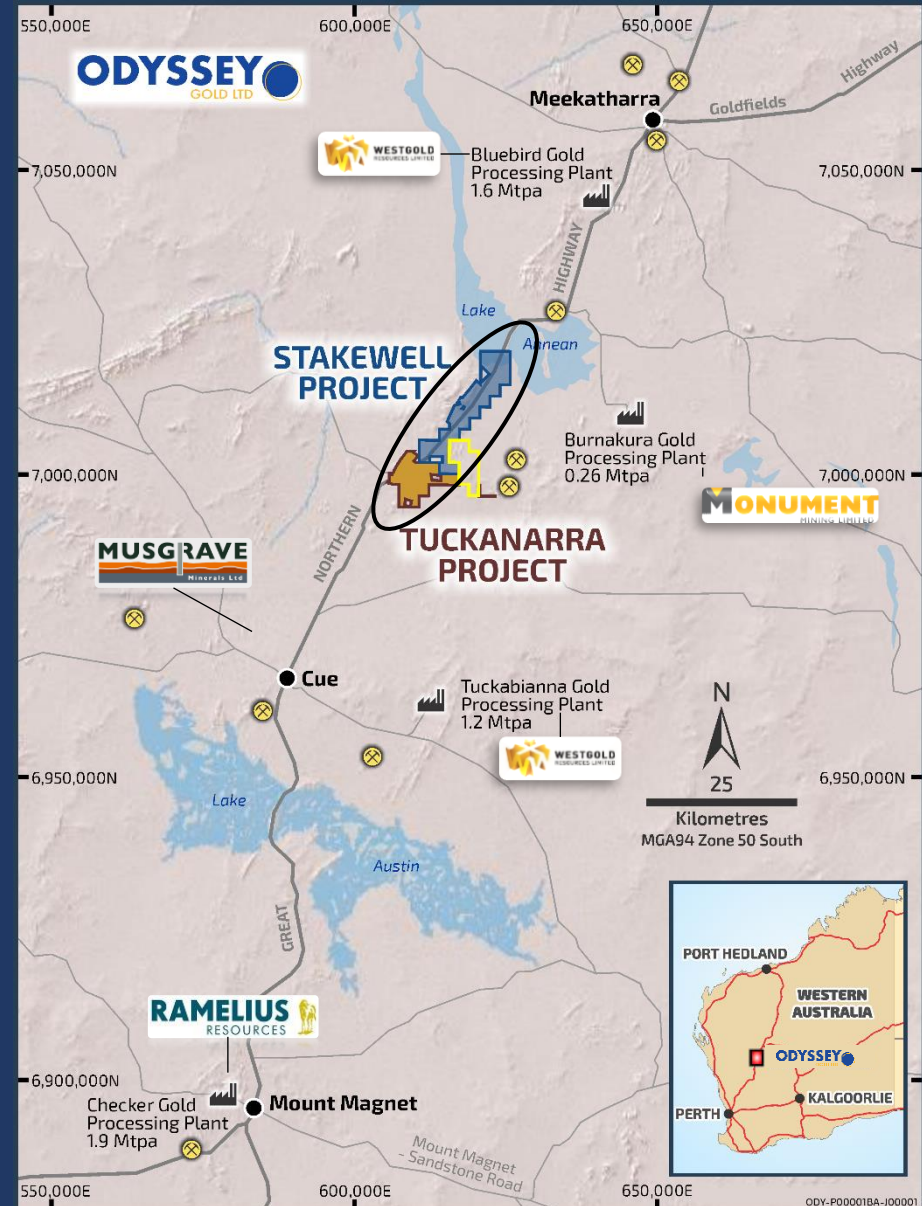
Investment Summary

- Consolidated the Tuckanarra - Stakewell Goldfields
- Extensive historical mining in 5 shallow pits
- Excellent results to date testing extensions along strike and at depth using modern exploration
- Well-funded with A\$12.7M cash at bank¹
- Team with a strong discovery & development record
- Market Cap: A\$53.9M²



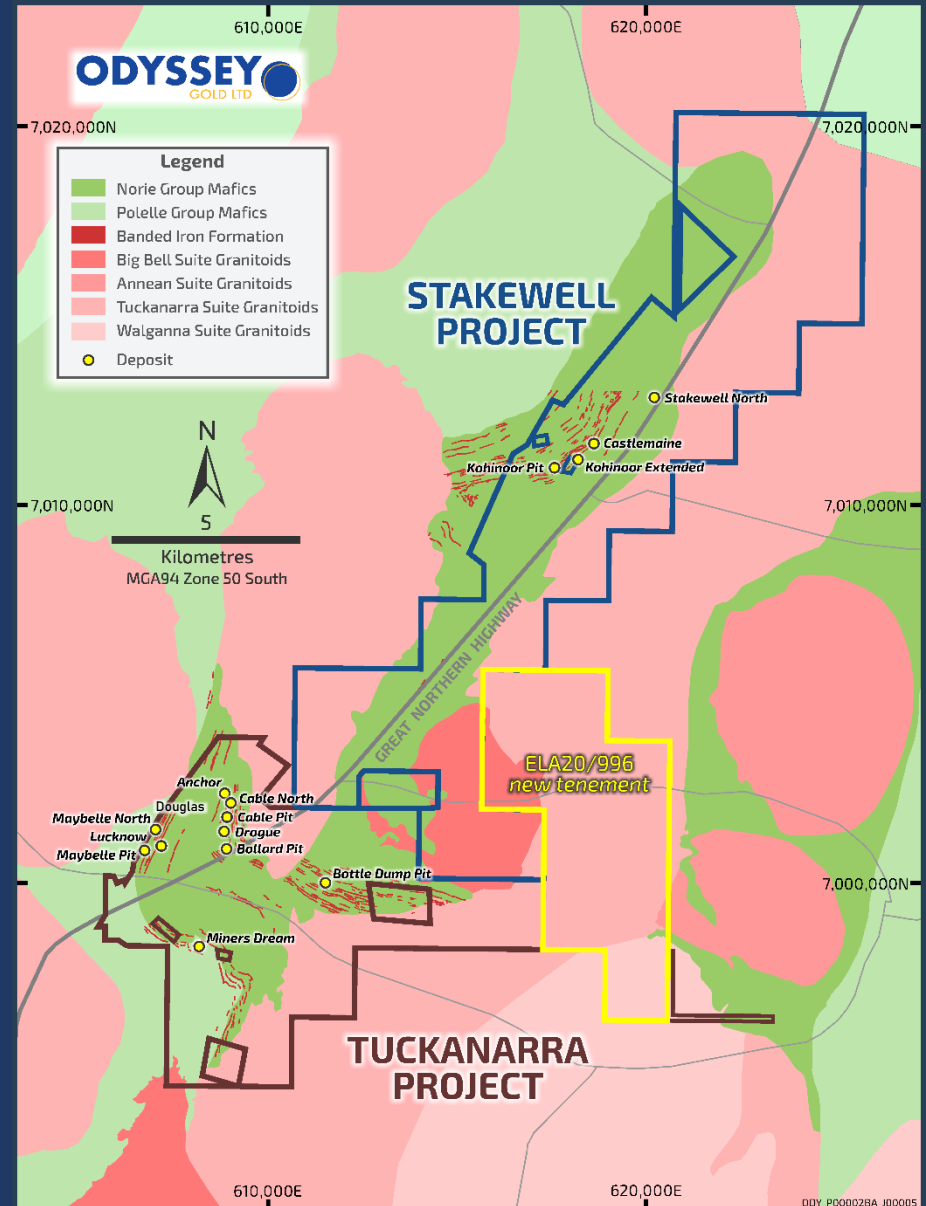
Strategic Position & Proximity

- Consolidated the historical Tuckanarra – Stakewell goldfields for the first time
- 176km² land position in the Murchison Goldfields (80 – 100%)
- Ideally located – Great Northern Highway between Cue & Meekatharra
- Proximity to numerous gold processing plants

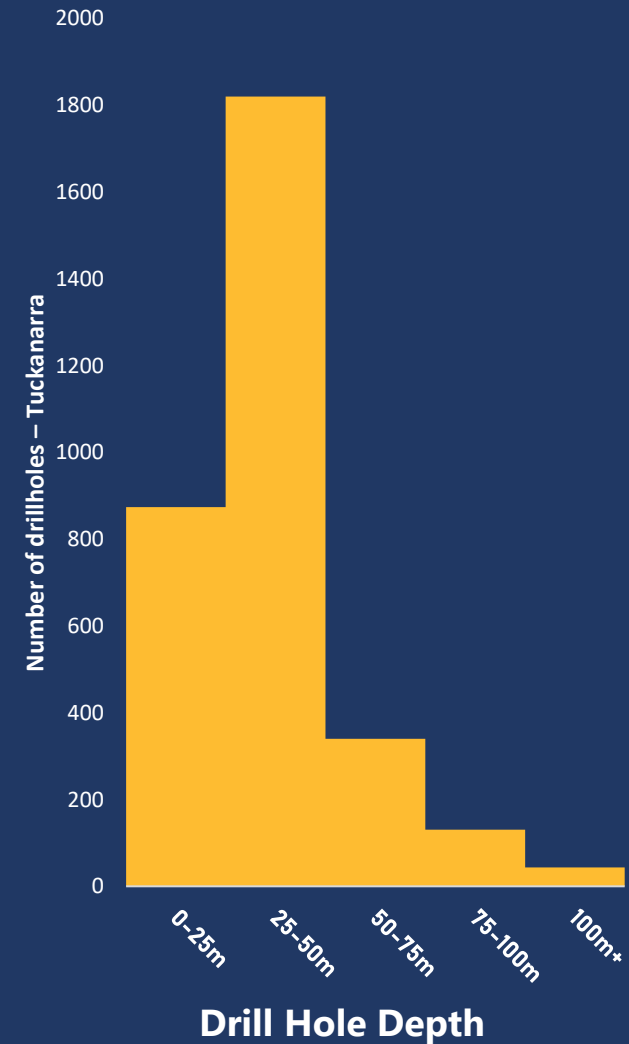
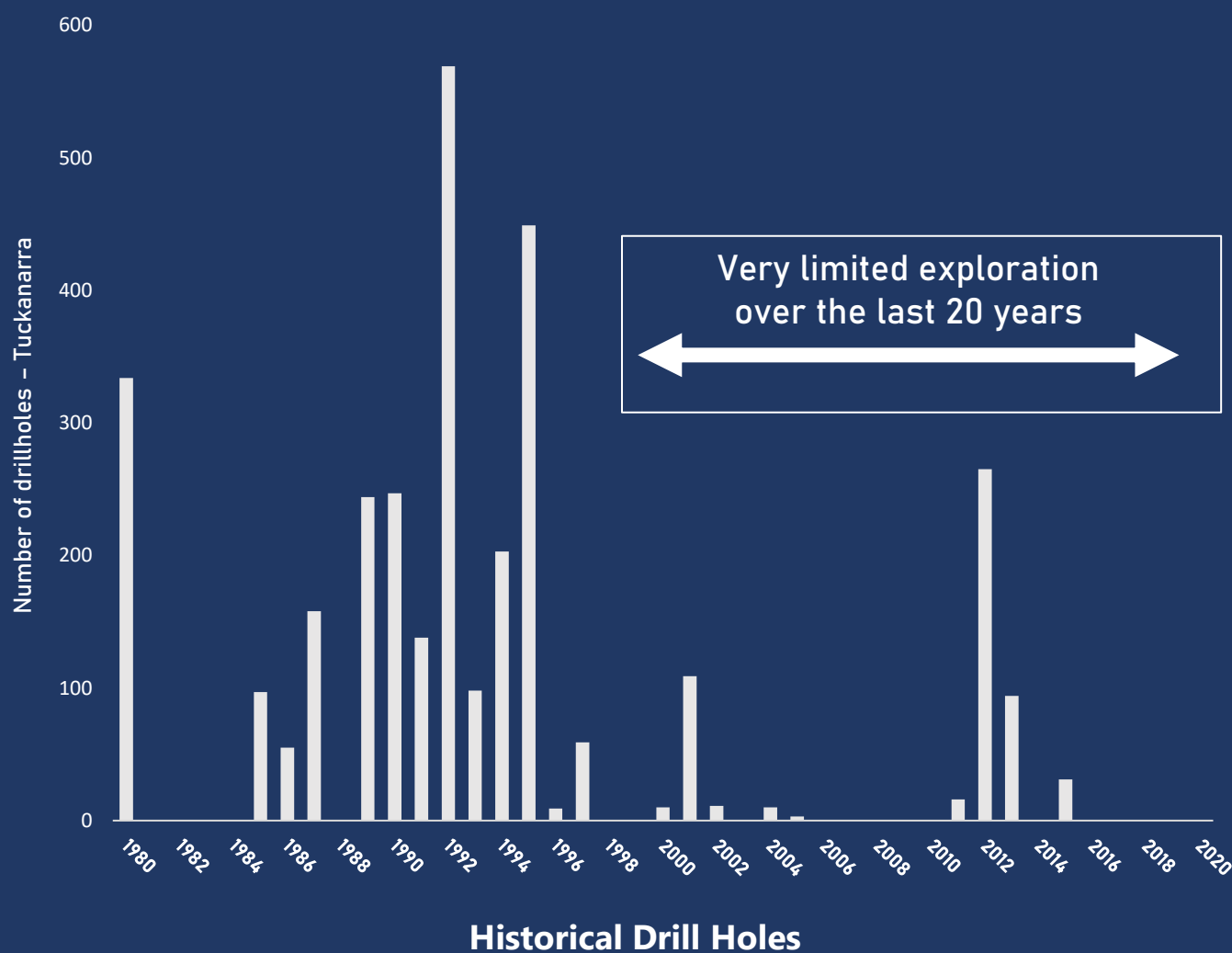


Fertile Gold Geology

- Greenstones with pervasive BIF sequences, intruded by various granites
- 30km of mineralised BIF system identified to date
- Less than 5% of historical drilling >100m depth
- Mineralisation open along strike and at depth beneath all pits



Tuckanarra is Underexplored at Depth



Maiden Drill Program Very Successful

- 13,000m drill program completed
- Gold mineralisation extended in 4 area's with outstanding gold hit rates:

Bottle Dump - 30 of 33 holes

Cable - Bollard - 15 of 17 holes

Anchor - 4 of 5 holes

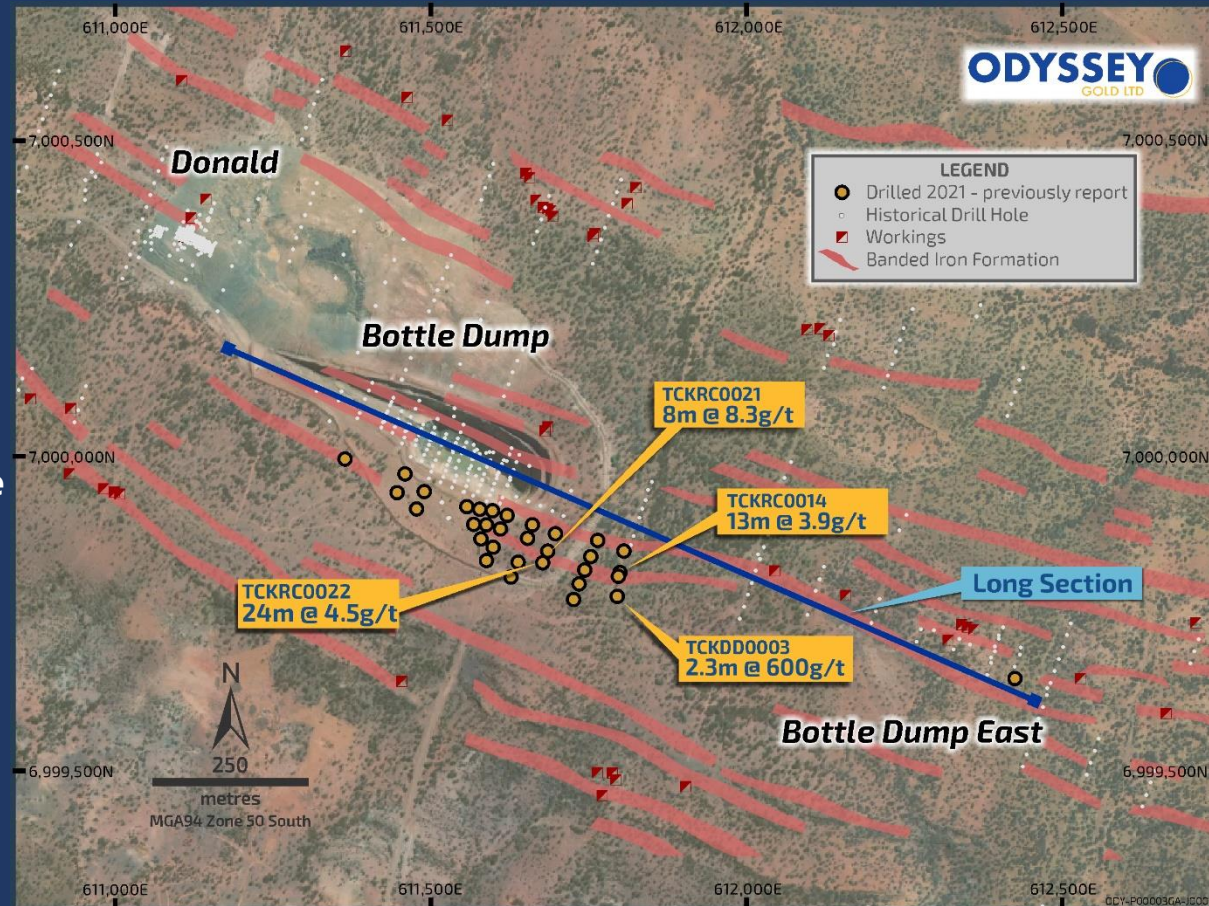
Maybelle - 3 of 3 holes

- Visible gold discovered in the maiden diamond drill hole

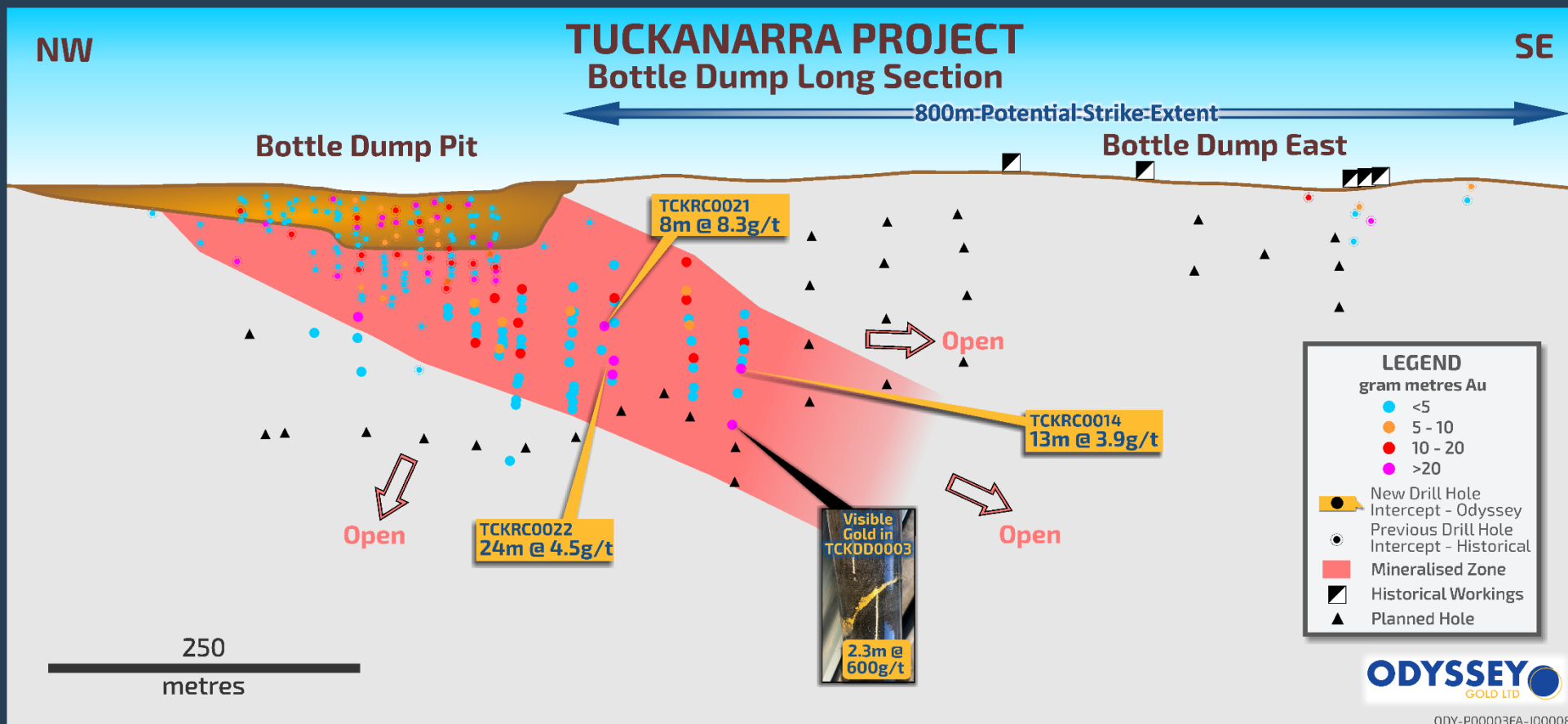


Tuckanarra – Bottle Dump

- Open pit mined by Metana Minerals (1990-1994) – produced between 10-20koz @ >3g/t Au
- ESE trending BIF sequences subparallel to interpreted ESE trending major shears
- Sub-vertical stratigraphy
- Mineralisation extended 180m beyond the pit in the maiden drill program
- **30 of 33 holes** intercepted gold mineralisation
- **Spectacular visible gold in the maiden diamond hole** – 2.3m @ >600g/t Au
- Many historical workings indicate parallel BIF's are mineralised



Bottle Dump



Anchor - Cable – Bollard Trend

- Two parallel BIF's hosting significant gold mineralisation between Cable & Bollard pits
- Phase 1 drilling extended mineralisation 350m south of Cable. Intercept's include:
 - 16m @ 10.0g/t
 - 7m @ 4.8g/t
- Potential total strike of 700m to Bollard
- Then potential extension east of Bollard towards Bottle Dump

Cable Pit

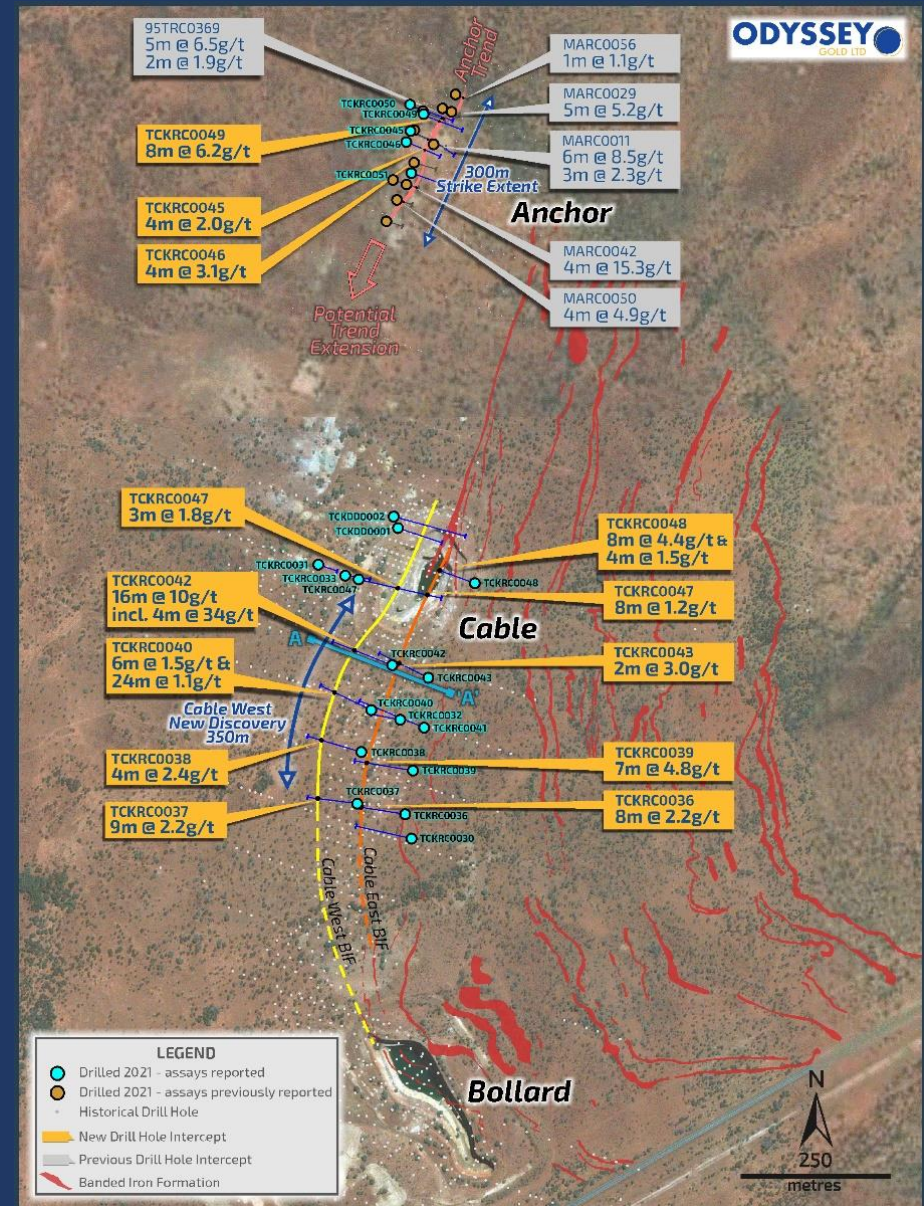


Bollard pit



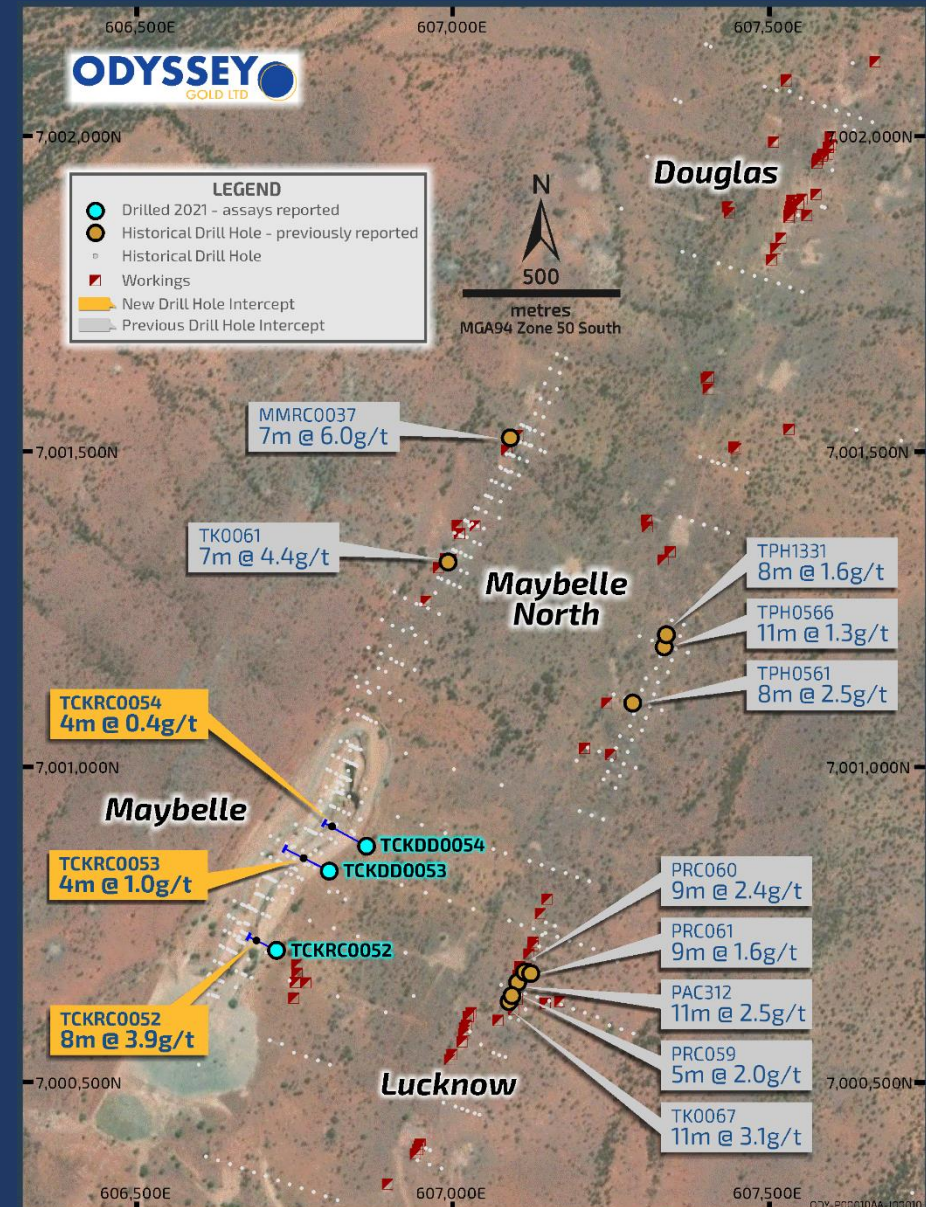
Anchor - Cable – Bollard Trend

- Potential to extend North to Anchor
- Phase 1 drilling results at Anchor included:
8m @ 6.2g/t from 60m, 4m @ 3.1g/t from 64m,
& 4m @ 2.0g/t from 60m
- Anchor is a more complex mineralised structure, interpreted to be within quartz veins hosted by altered basalts and BIF's
- Numerous parallel BIF's that are hardly explored
- Parallel BIF's either under cover or missed by vertical holes (steep dipping)
- Historical results such as 11m @ 9.7g/t and 3m @ 9.3g/t EAST of Bollard



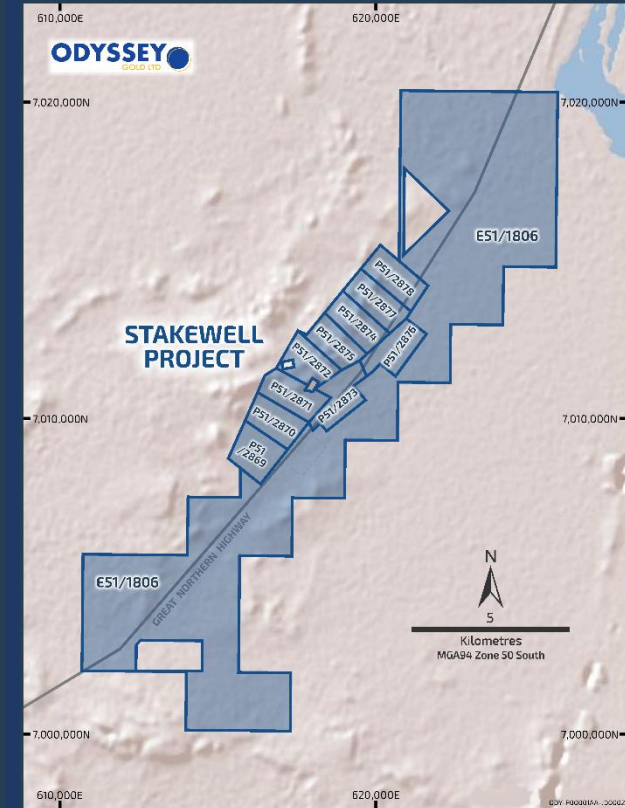
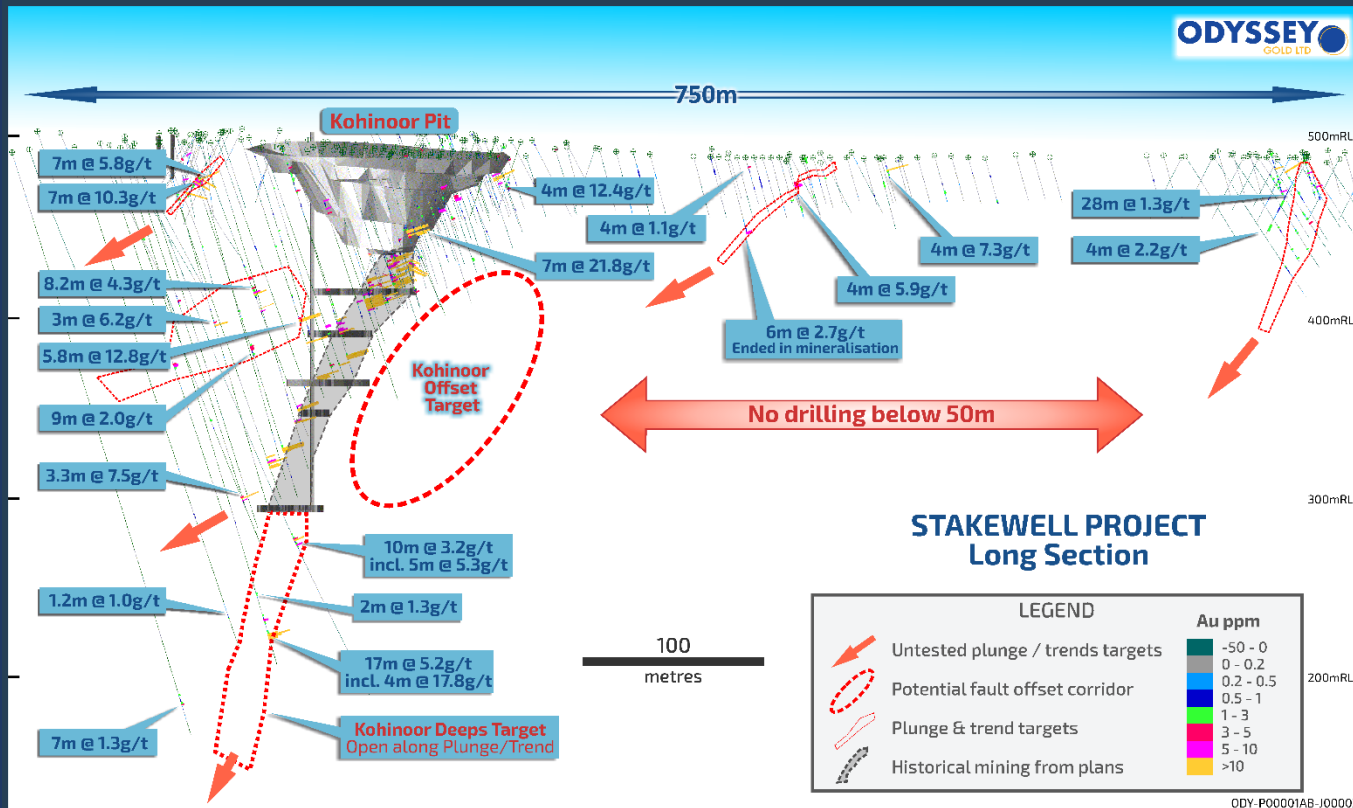
Maybelle, Lucknow & Douglas

- Maiden drill results confirm the potential for continuity of the mineralisation at Anchor & Maybelle
- **Maybelle: 3 of 3 holes intercepted gold mineralisation**
- Intercepts include **8m @ 3.9g/t**
- Parallel BIF's may extend 1.5km from Lucknow to Douglas, based on historical workings



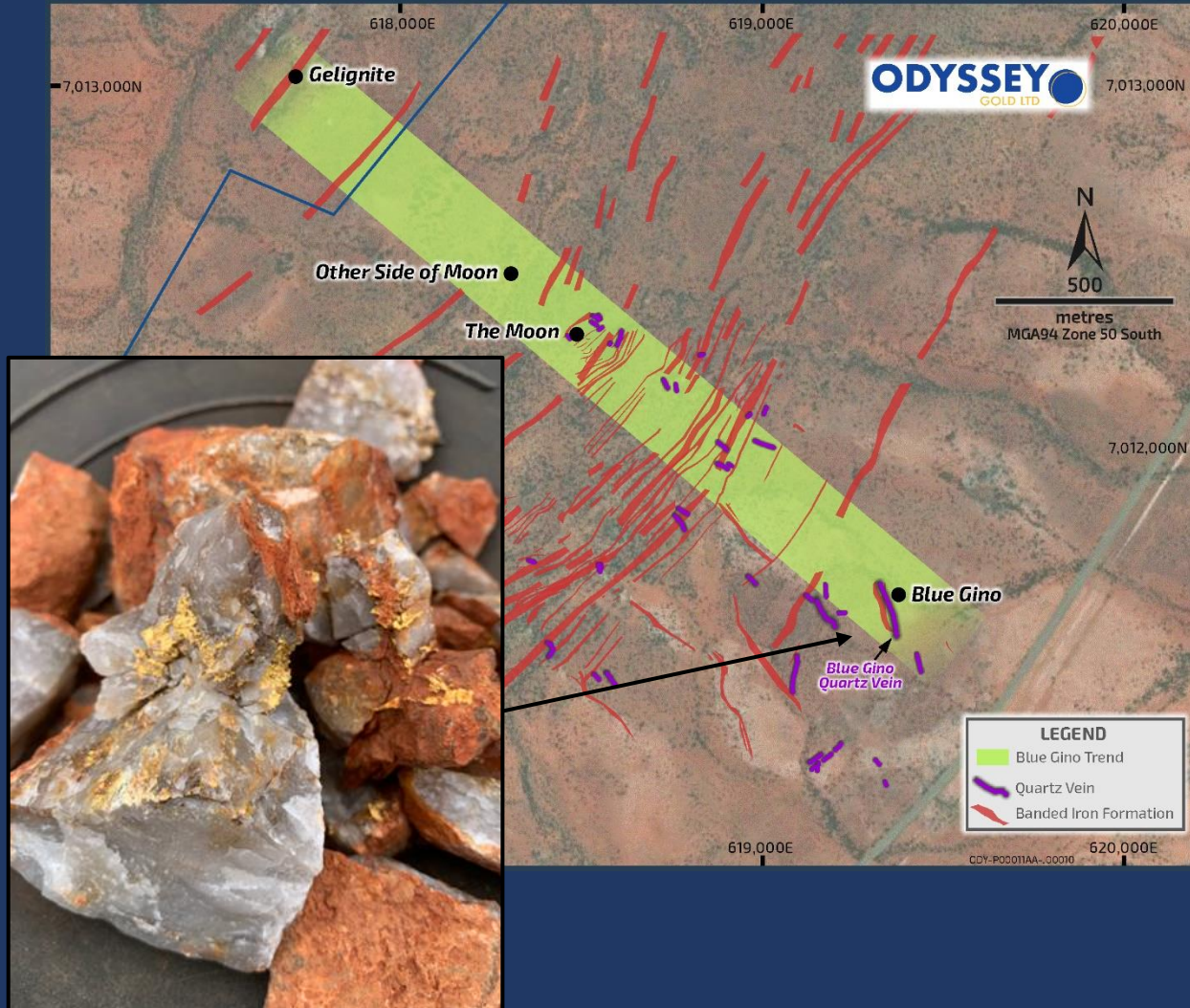
Stakewell – Kohinoor Indirect Targets

- Depth extension beyond historical underground workings
- Stacked lodes only drilled near surface
- Potential cutback of open pit



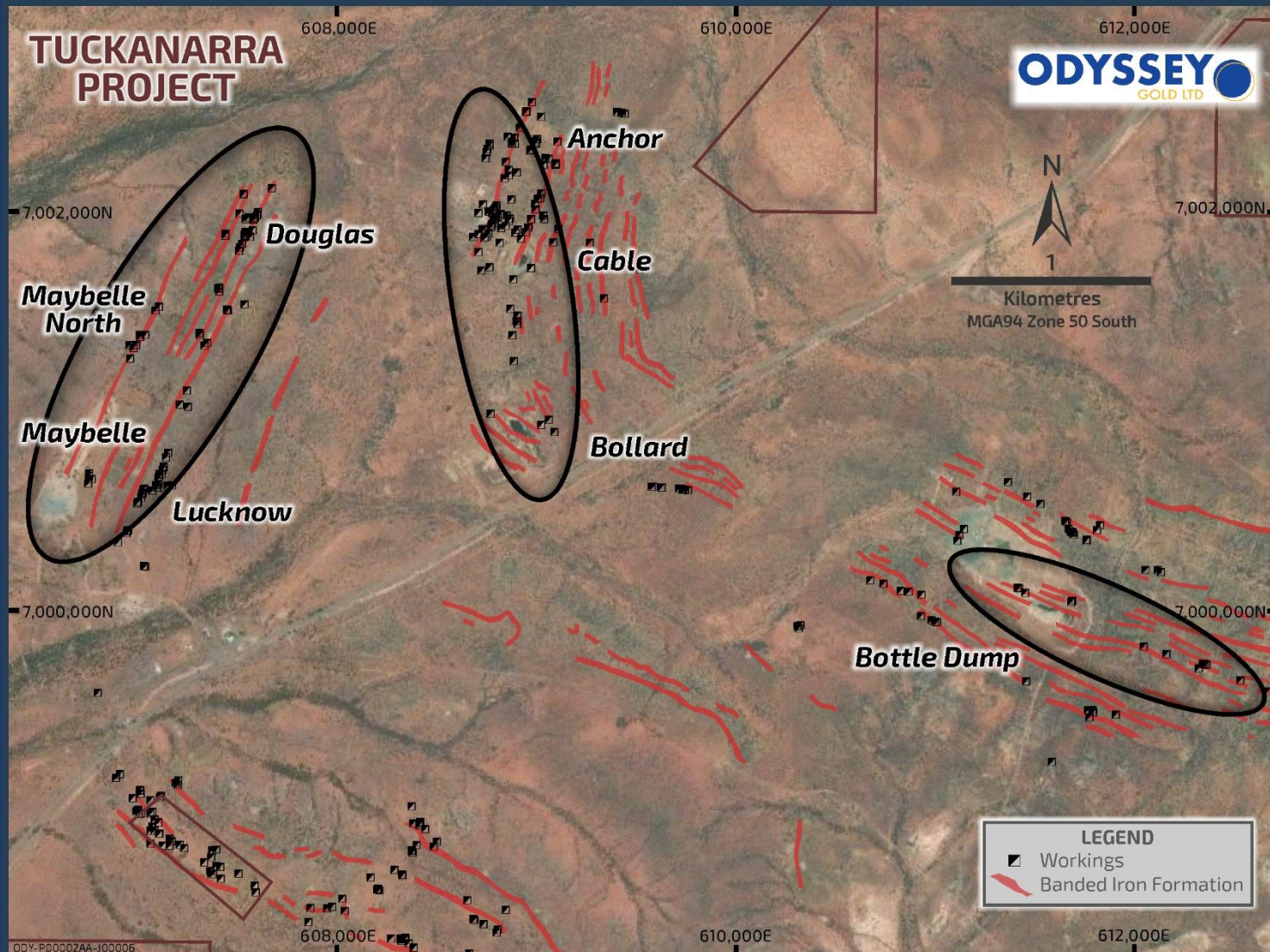
New Target Regions

- Spectacular free gold discovered at surface at Blue Gino
- Potential for multiple thin quartz veins occurring within the shear system. Initial interpreted strike extent of ~300m
- 'The Moon' – BIF structure, chalcedonic quartz and quartz veins subject to extreme tension like gashes
- Never previously explored



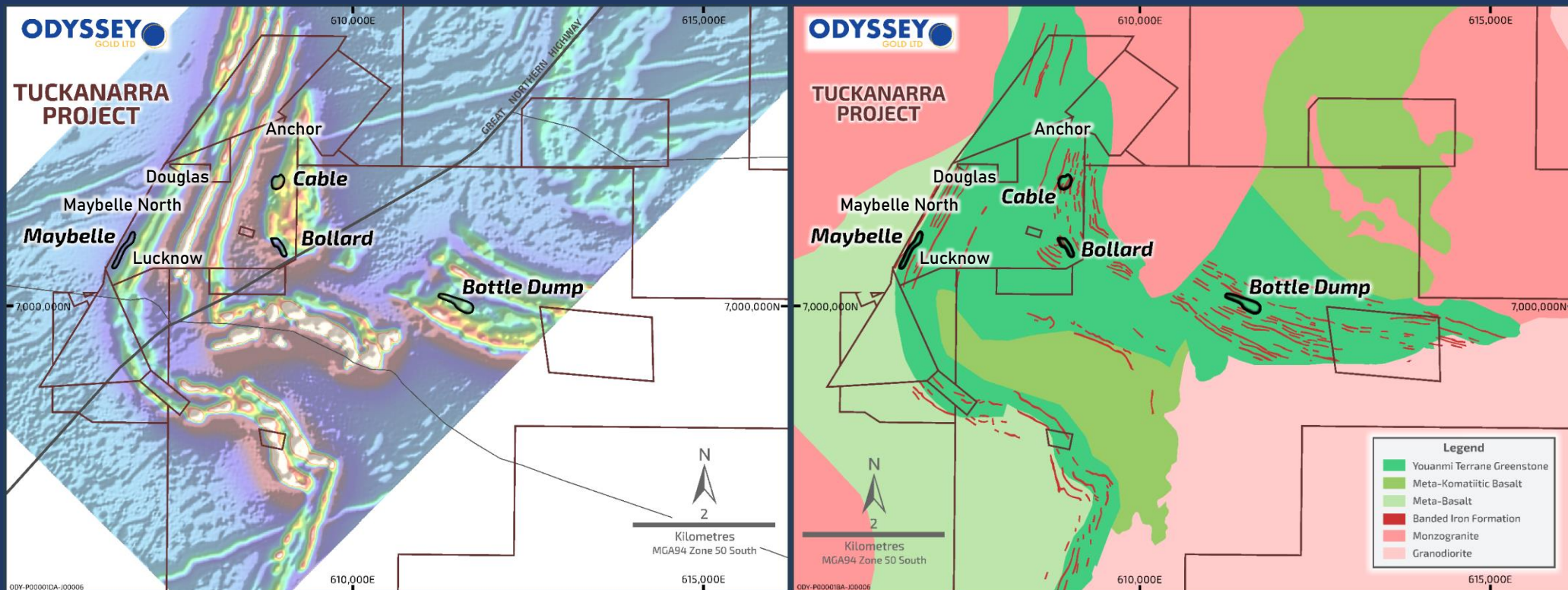
Tuckanarra – Phase 2 Drilling

- Focused on three main areas with immediate resource potential



Tuckanarra

- Main drill targets comprise a fraction of the potentially fertile geology



Board & Management with a proven track record

Board of Directors

Ian Middlemas - *Chairman*

Highly regarded Chairman and resources executive with an enviable track record of identifying, financing and developing major resource projects. Mr Middlemas is currently the Chairman of a number of publicly listed companies.

Matt Syme - *Executive Director*

+27 years' experience as an accomplished mining executive. Considerable experience in managing mining projects in a wide range of commodities and countries, leading to the identification and acquisition of multiple projects including Salt Lake Potash (currently being developed), Sierra Mining (acquired by RTG Mining) and Berkeley Energia.

Levi Mochkin - *NED*

+30 years advising companies in the resources sector, identifying projects, raising \$1Billion + for mining projects. Mr Mochkin was a founder and director of Piedmont Lithium Ltd.

Robert Behets - *NED*

+30 years' experienced geologist with extensive corporate and management experience, including roles with WMC and Mantra Resources (Managing Director). Mr. Behets is a Director a number of ASX-listed companies in the resources sector.

Senior Management

Steve Le Brun - *Geology Manager*

+30 years of international geology, corporate and management experience in base, gold and speciality metals throughout Europe, Africa, the Americas, CIS and Australasia. He has led the resource development of several world class deposits from brownfields through to feasibility. Previously he was Superintendent - Resources Development for Northern Star Resources.

Neil Inwood - *Consultant Geologist*

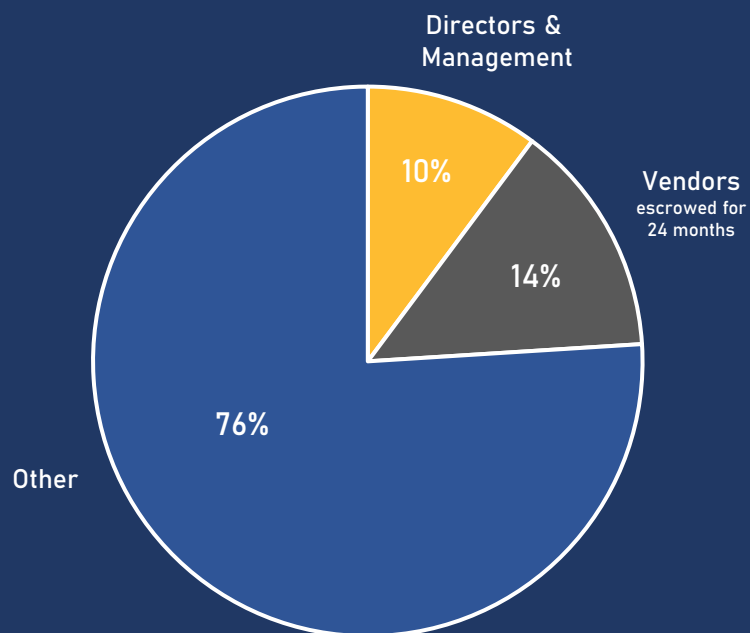
+25 years of international geology, corporate and management experience in base, gold and specialty metals including extensive experience in gold exploration in WA , including +9 years at Barrick Gold . Mr. Inwood has led exploration teams to world-class discoveries, including Panda Hill Niobium Project (Tanzania).

Greg Swan - *Company Secretary & CFO*

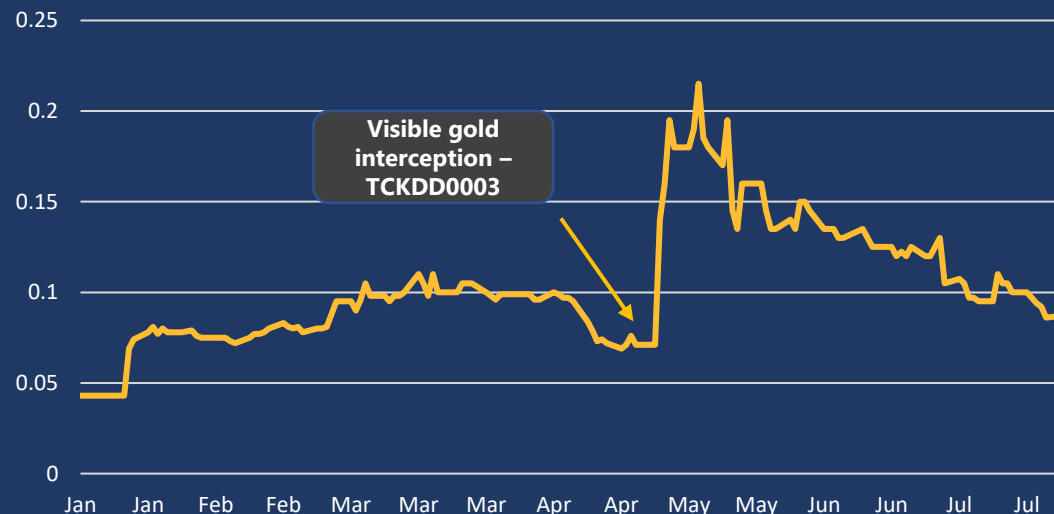
Chartered Accountant with +15 years corporate, accounting and governance experience with multiple ASX / Nasdaq listed mining companies, including Piedmont Lithium Ltd, Papillon Resources Ltd, and Mantra Resources Ltd.

Corporate Structure

COMPANY OWNERSHIP



Share Price since re-listing (14th January)



CAPITAL STRUCTURE

ODY Shares on Issue	612.33M
Price (close as at 29 July 2021)	A\$0.088
Basic Market Capitalisation	A\$53.89M
Cash (as at 30 June 2021)	\$12.69m
Enterprise Value	\$41.20m
Options (exercise prices \$0.025 - \$0.10)	116.50M
Performance Rights (subject to vesting conditions) *	50.00M

* Subject to a delineation of an independently assessed JORC Code inferred resource of at least 200,000 ounces of gold at a minimum resource grade of 6.5g/t Au at the Project, within 30 months from completion of the Stakewell Acquisition.



Disclosures & Disclaimers

COMPETENT PERSONS STATEMENT

The information in this presentation that relates to historical exploration results are extracted from the Company's ASX announcements dated 4 September 2020, 22 October 2020, 14 January 2021, 3 February 2021, 9 February 2021, 22 February 2021, 19 April 2021, 4 May 2021, 19 May 2021, 26 May 2021, 3 June, 2 July, 21 July and 28 July. These announcements are available to view on the Company's website at www.odysseygold.com.au. The Company confirms that it is not aware of any new information or data that materially affects the information included in the original ASX announcements; that all material assumptions and technical parameters underpinning the content in the relevant ASX announcements continues to apply and have not materially changed; and that the form and context in which the relevant Competent Person's findings are presented have not been materially modified from the original ASX announcements

FORWARD LOOKING STATEMENTS

Statements regarding plans with respect to Odyssey's project are forward-looking statements. There can be no assurance that the Company's plans for development of its projects will proceed as currently expected. These forward-looking statements are based on the Company's expectations and beliefs concerning future events. Forward looking statements are necessarily subject to risks, uncertainties and other factors, many of which are outside the control of the Company, which could cause actual results to differ materially from such statements. The Company makes no undertaking to subsequently update or revise the forward-looking statements made in this presentation, to reflect the circumstances or events after the date of that presentation.

ASX: ODY

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