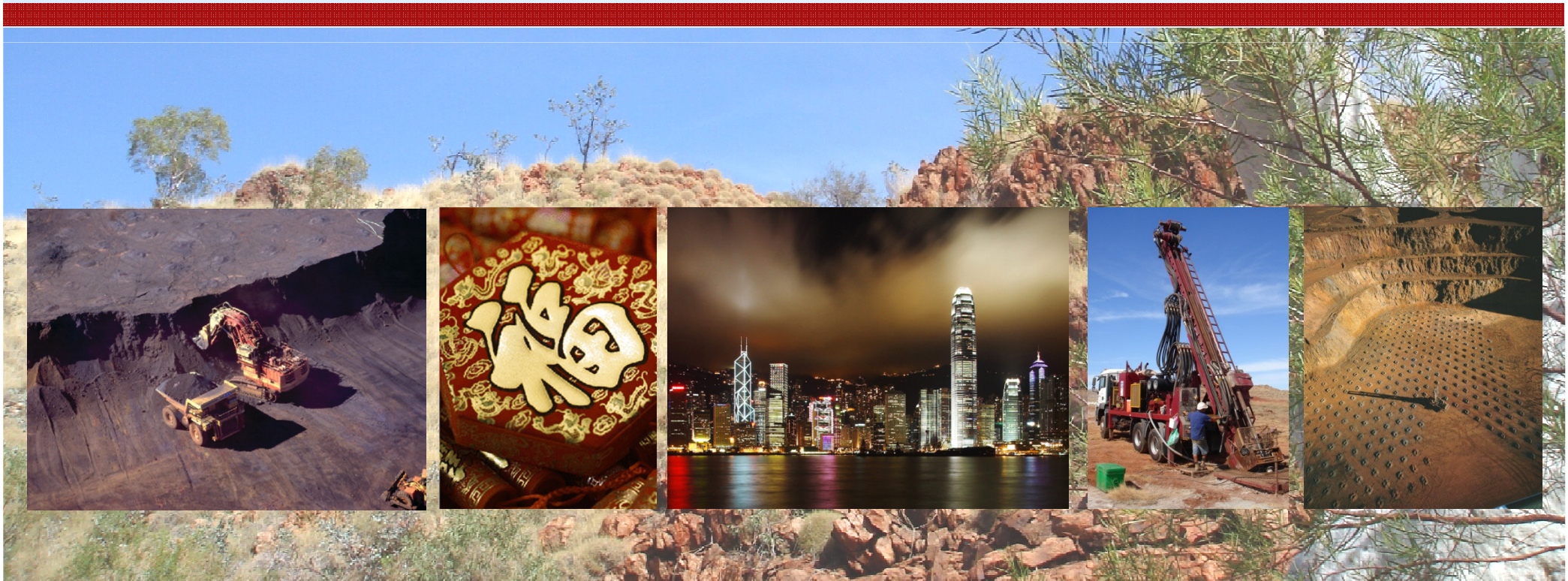




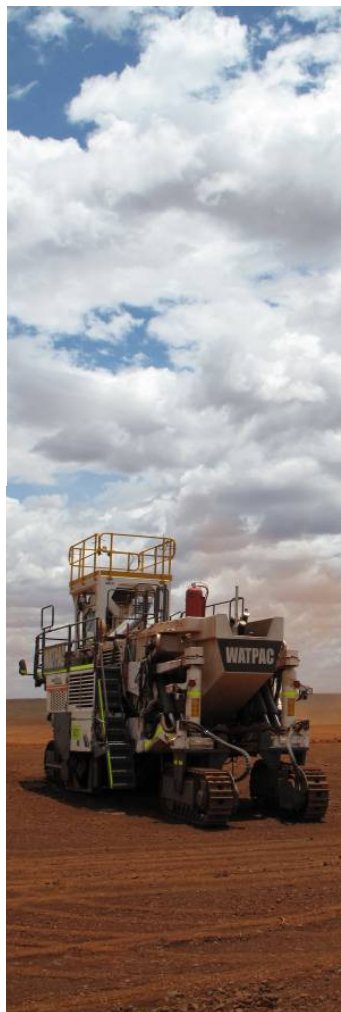
Regent Pacific Group Limited

Company Overview

August 2012



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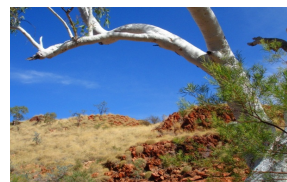
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1 Company Overview





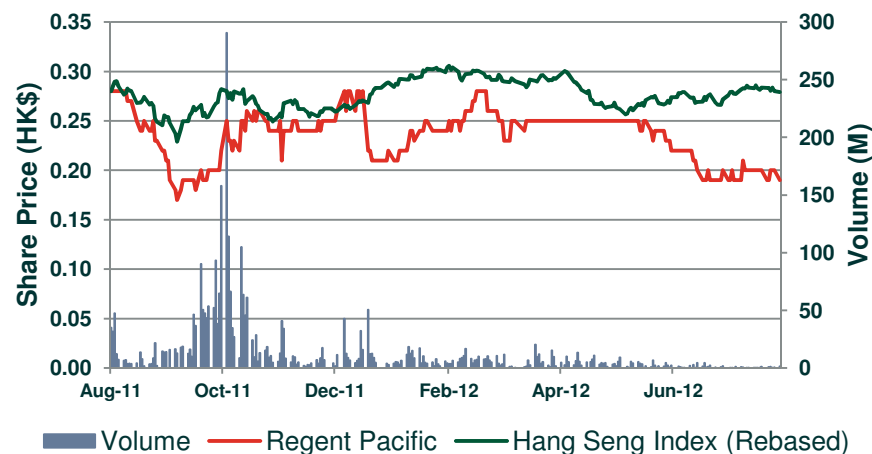
Company Snapshot

Market Statistics

Share price (28 August 2012)	HK\$0.19 / US\$0.0244
52 week high – low	HK\$0.285 – HK\$0.171
Shares outstanding	3,486m
Market capitalisation	US\$85.1m
Cash and cash equivalent (30 June 2012)	US\$12.55m
No debt	

Note: Exchange rate is USD1 = HKD7.78

Year-to-Date Share Price Performance



About Regent Pacific Group

- Regent Pacific is a diversified mining group focused on the Asia Pacific region and whose shares are listed on the HK Stock Exchange (ticker: 575, “Regent Pacific”)
- Our principal assets are located in Yunnan Province, China and Western Australia
- Major assets:
 - ACIL – Project I (25.0%)
 - BC Iron – (23.1%)
 - Venturex Resources (31.9%)
 - Trinity Oil (5.6%)
 - Strong portfolio of listed equities
- Experienced management team with proven track record in global natural resources
- Regent is an opportunistic value investor in global natural resources, without limitations in respect of asset class or investment size
- Regent invests in resource companies at key stages of the value chain and whose projects are fundamentally sound and whose commodities are actively sought by China’s end users

Source: Bloomberg



Our Asset Portfolio

ACIL – West China Coking & Gas Company (Amerinvest Coal Industry Holding Company Limited)

Regent holds a 25% interest in West China Coking & Gas Company Limited, a Sino-Foreign equity joint venture. ACIL has delivered strong earnings since 2008 through the processing and sale of coal, coke, gas and industrial chemicals. For the financial year ended 31 Dec. 2011 WCC declared a dividend to ACIL of RMB 16.25 million (US\$ 2.57 million).

ACIL – West China Coking & Gas Company
1.1Mtpa coking-chemical +
110Ktpa methanol

● Exploration/Development

Notes:

(1) Sourced from RPG and listed company web sites as of 28 August 2012

Significant Equity Investments

Company	Commodity	% Interest
Venturex Resources	Copper - zinc explorer and developer	31.87%
BC Iron	Iron ore producer	23.11%
Goldrich Mining	Gold explorer	16.41%
Trinity Exploration & Production	Oil explorer and producer	5.59%
Bannerman Resources	Uranium developer	3.59%
Tigers Realm Coal	Coal explorer and developer	3.07%
Avion Gold	Gold explorer and producer	2.54%

Sum of Parts Valuation



The market is not fully attributing value to our asset base

	(US\$m)	Per Share (HK cent)
Cash and bank balances	12.6	2.8
Marketable securities	92.3	20.6
Value of cash and marketable securities	104.9	23.4
Value of other assets less total liabilities	40.2	9.1
Net assets ⁽¹⁾	145.1	32.5
Market Capitalisation ⁽²⁾	85.1	19.0
Discount		42%

(1) Company Interim Report as at 30 June 2012
(2) Source from Bloomberg as at 28 August 2012
Note: Exchange rate is USD1 = HKD7.78



2 Regent – The Way Forward



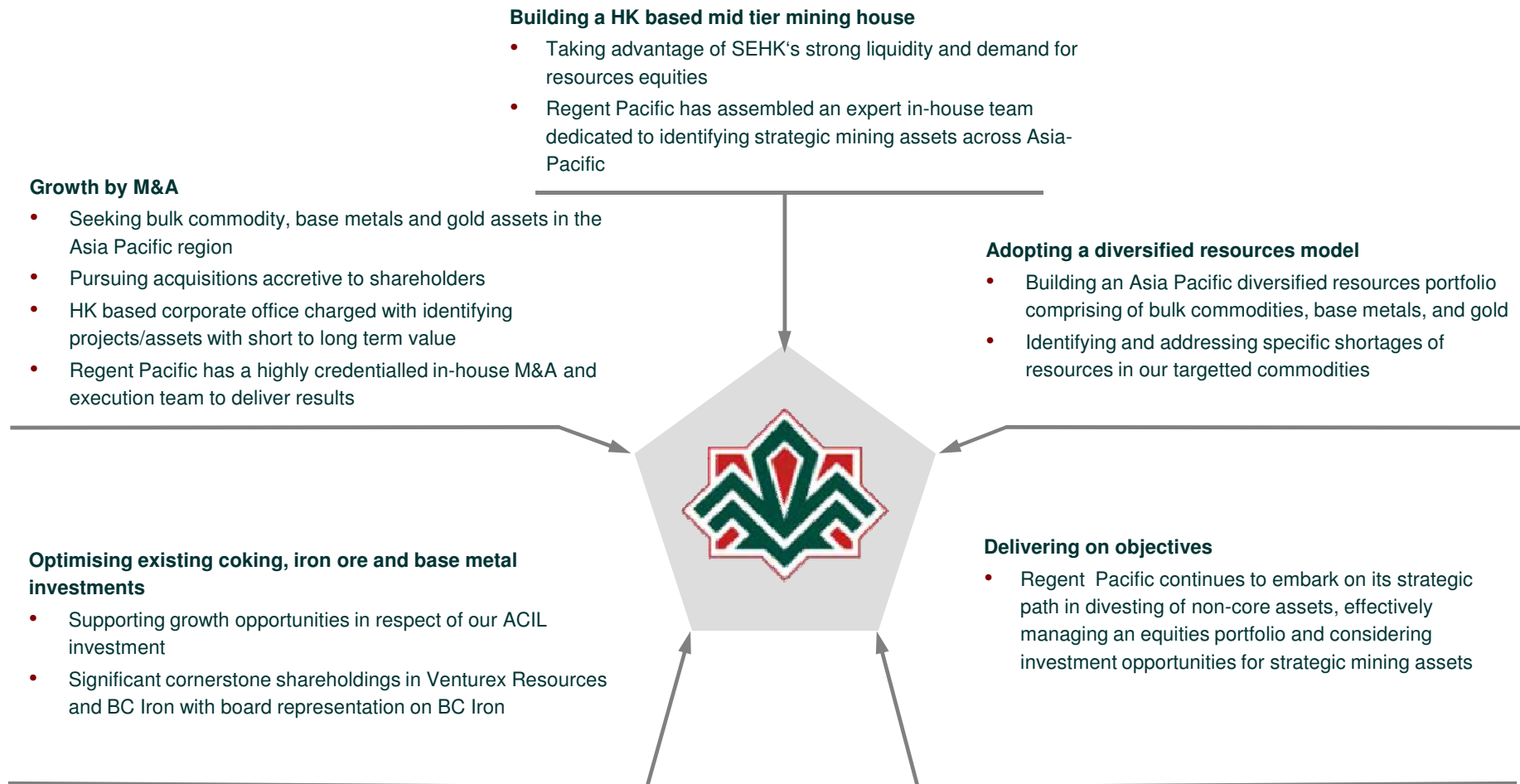
Our Vision



- **Building a diversified mining house** - Transforming our group to become Hong Kong's next major mid tier mining house
- **Utilising our in-house expertise** - Leveraging off our expert international and local teams to tackle difficult markets, deliver results and achieve global recognition
- **Pursuing growth opportunities** - Acquiring, exploring and developing strategic mining assets covering our targeted commodities of copper, gold, iron ore and thermal coal / coking coal
- **Creating shareholder value** – generate strong shareholder value and returns by serving as a platform for growth and a cultivator of high quality, accretive mining assets across Asia-Pacific



What We Are Doing



Our Strategy



Near-term

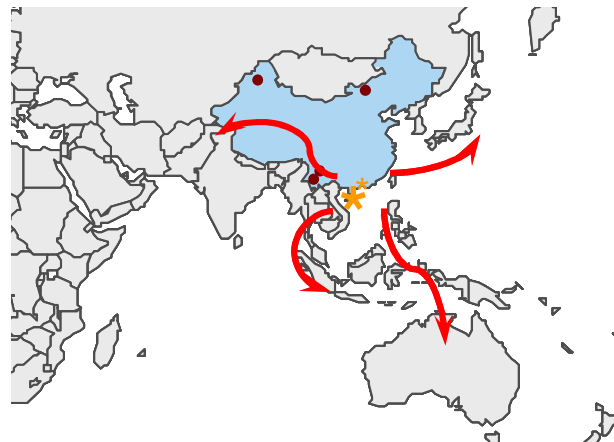
- Optimise existing asset portfolio
 - Continue to build on current equities portfolio, taking advantage of market conditions
 - Monetising non-core liquid investments

Mid-term

- Growth by accretive acquisitions
 - Focus on select regional acquisition opportunities of greenfield exploration sites or operating mines in bulk commodities, base metals and gold
 - Identify and acquire strategic assets at differing stages of the value chain
 - Generate a pipeline of accretive projects that will deliver returns to shareholders over a sustained period

Long-term

- Build Hong Kong's next major mining house
 - Develop a mid tier diversified resources company focused on bulk commodities, base metals and gold in the Asia Pacific region with a portfolio of operating and greenfield assets



HK based diversified mining house



Our Track Record in Creating Value

Realised Gains

Asset/ Company	Investment cost (US\$m)	Net proceeds (US\$m)	Actual gain (US\$m)	Rate of Return (%)
Africa Iron	0.6	1.1	0.5	83
Bathurst Resources	5.5	16.3	10.8	196
Canaco Resources	0.9	2.3	1.4	156
Dapingzhang JV	51.0	63.2	12.2	24
Hathor	5.8	8.9	3.1	53
Ji Ri Ga Lang	12.9	17.3	4.4	34
Kalahari Resources	8.9	17.6	8.7	98
MICM	0.2	6.6	6.4	3,200
PMI Gold	1.5	2.6	1.1	73
Polo Resources ¹	10.1	15.2	5.1	50
Yinzishan Mining	1.4	3.8	2.4	171
Zhun Dong Project	66.6	74.2	7.6	11
Total	165.4	229.1	63.7	39

Source: Company reports as at 30 June 2012

Notes:

(1) Polo realised gain includes adding back all dividends received

Deliver shareholder returns

Delivering a re-rating of the share price

- We actively build our relationships and profile with potential strategic partners, investors, resource companies and global financial institutions to explore potential business opportunities
- Experienced management team with proven track record in global natural resources
- Diligenced-based approach to investing, coupled with sensible risk management
- Market intelligence to stay ahead of market trends

Commitment to dividends

- Since 1997, we have paid over **US\$180m in dividends** and **returned over US\$59m to shareholders** through share repurchases
- We remain committed to distributing a significant portion of our future earnings as dividends



Why We Will Succeed

1

Strong credentialed Board and management with significant mining and corporate finance expertise

- Co-Chairman, James Mellon: over 20 years investment and asset management experience and in Asia and abroad, including with GT Management plc and the Thornton Group
- Co-Chairman, Stephen Dattels: Former Executive VP Corporate Finance and Director of Barrick Gold Corporation
- CEO, Jamie Gibson: direct investment specialist (ex-Clifford Chance, KPMG and PwC)
- Regent Pacific has now assembled a world class team of M&A, technical and project managers dedicated to maximising value from existing assets and identifying new strategic opportunities

2

Diversified commodity and geographical coverage

- Equity interests in companies with base metal, gold, iron ore, coal and uranium assets across the globe
- Offices in Hong Kong and Beijing (PRC)

3

Past success and track record

- Significant prior experience through Dapingzhang operations
 - Achieved commercial Cu/Zn concentrate production and completed concentrate delivery ahead of schedule
 - Ability to fund production capacity increase with internal cash flow
- Track record in growing the Company's asset portfolio through strategic cornerstone investments in companies (Venturex Resources and BC Iron)
- Monetised Dapingzhang JV holding and interests in the Yinzishan, Zhun Dong and Ji Ri Ga Lang projects for significant and profitable returns

Management expertise, geographical coverage and strong track record



3 Board of Directors and Management



Directors



Regent Pacific's Board of Directors has significant experience in corporate finance and global mining related investments

Name	Position	Biography and Relevant Experience
James Mellon	<ul style="list-style-type: none"> ▪ Non-Executive Co-Chairman 	<ul style="list-style-type: none"> ▪ Has been a Director of Regent Pacific since July 1991 ▪ Over 20 years' investment experience in Asia. He specialises in the development and restructuring of international investment vehicles ▪ Also a director in Charlemagne Capital, Emerging Metals and Red Dragon
Stephen Dattels	<ul style="list-style-type: none"> ▪ Non-Executive Co-Chairman 	<ul style="list-style-type: none"> ▪ Appointed as non-executive Co-Chairman of the Board on 12 February 2008 ▪ Former Executive VP Corporate Finance & Director of Barrick Gold Corporation ▪ Extensive track record of managing successful mining projects, including co-founder of UraMin Inc
Jamie Gibson	<ul style="list-style-type: none"> ▪ Executive Director and Chief Executive Officer 	<ul style="list-style-type: none"> ▪ Joined Regent Pacific in 1996 and was appointed CEO in 2002 ▪ Significant experience in corporate finance, direct equity investments and structuring emerging market investment products ▪ Ex-Clifford Chance, KPMG and PWC (formerly Coopers)

Senior Management



Regent Pacific has now assembled a world class team of M&A, technical and project managers

Name	Position	Biography and Relevant Experience
David Church	<ul style="list-style-type: none"> General Counsel and Head of Mergers and Acquisitions 	<ul style="list-style-type: none"> Joined Regent Pacific in September 2008 Qualified and has practiced as a solicitor in Australia, with Clayton Utz, and in the UK and Hong Kong, with Linklaters Over 15 years public and private M&A and corporate finance experience, having worked on and structured leading cross border transactions across Europe and Asia
Paul Jones	<ul style="list-style-type: none"> Investment Director 	<ul style="list-style-type: none"> Appointed Investment Director of Regent Pacific in April 2011 Private Equity fund management from 2005-2011 Extensive prior experience in banking and corporate finance from 1997-2005
Frankie Wong	<ul style="list-style-type: none"> Chief Financial Officer 	<ul style="list-style-type: none"> Appointed Chief Financial Officer of Regent Pacific in 2011 Member of Hong Kong Institute of Certified Public Accountant (HKICPA), a Fellow Member of The Association of Chartered Certified Accountants Extensive prior experience with Deloitte
Michael Redman	<ul style="list-style-type: none"> Director – Technical and Operations 	<ul style="list-style-type: none"> Joined Regent Pacific in August 2008 Qualified Electrical and Mining Engineer with a Master's degree in Applied Finance from the University of Newcastle Over 15 years in various management, mining, environmental and maintenance positions in the mining industry
Kaiqiang Fan	<ul style="list-style-type: none"> Chief Geologist and Head of Exploration 	<ul style="list-style-type: none"> Joined Regent Pacific in October 2005 A Master of Science degree in Mineral Exploration from Queen's University, Canada in 1995 and a member of the Australasian Institute of Mining and Metallurgy (AusIMM) Over 20 years of experience in the mineral exploration and mining industry



4 Asset Overview



Coal

ACIL – Project 1



ACIL – West China Coking & Gas Company

- Through Amerinvest Coal Industrial Holding (ACIL), Regent holds 25% equity interest in West China Coking & Gas Company (WCC)
- Production capacity: 1.1Mtpa coke, 110Kt methanol, 30Kt coal tar, 9Kt crude benzol and 8Kt ammonium sulphate
- WCC also has a 13.14% interest in Yunnan Daiwei, a private company with an annual production capacity of 500Kt synthetic ammonium
- 1H 12 production: 411Kt coke, 41Kt methanol, 17Kt tar, 3.8t ammonium sulphate and 4.4Kt crude benzol










Asset Location

ACIL – WCC
1.1Mtpa coking-chemical
+ 110Ktpa methanol





Listed Equities Portfolio

Company	Commodity	Key Assets	Market Cap (US\$m)	EV	% Interest	Market Value of Investment (US\$m)
 BC IRON LIMITED	▪ Iron ore producer	▪ Nullagine Iron Ore Project	270.0	254.8	23.11%	62.4
 VENTUREX RESOURCES LIMITED	▪ Copper - zinc explorer and developer	▪ Pilbara Copper - Zinc Development Project, Australia. Gold exploration Brazil	67.0	62.7	31.87%	21.4
 AVION GOLD CORPORATION	▪ Gold explorer and producer	▪ Tabakoto and Kofi Projects, Mali and Hounde Exploration Project, Burkina Faso	313.9	349.2	2.54%	8.0
 TIGERS REALM COAL	▪ Coking coal explorer and developer	▪ Amaam Development Project, Amaam North Exploration Project, Eastern Russia	71.5	82.1	3.07%	2.2
 GOLDRICH MINING COMPANY	▪ Gold explorer	▪ Gold exploration projects in Alaska	10.5	10.9	16.41%	1.7
 BANNERMAN RESOURCES	▪ Uranium developer	▪ Utango Development Project, Namibia	32.9	25.4	3.59%	1.2
 ALLEGIANCE COAL LIMITED	▪ Coal explorer	▪ Coal exploration projects in Australia	12.8	10.6	6.61%	0.8
 BRAZILIAN GOLD CORPORATION	▪ Gold explorer	▪ Gold exploration in Brazil	26.6	21.0	3.81%	1.0
 PMIGOLD CORPORATION	▪ Gold explorer and developer	▪ Obotan Development Project, Asanko and Kubi Exploration Projects, Ghana	250.5	201.2	0.39%	1.0
Total			1,055.7	1,017.9		99.7

Source: Bloomberg as at 28 August 2012