



Strategic Metals Ltd.



Corporate Presentation
September, 2013

TSX.V - SMD



Forward Looking Statements

Certain information regarding the Company contained herein may constitute forward-looking statements within the meaning of applicable securities laws. Forward-looking statements may include estimates, plans, expectations, opinions, forecasts, projections, guidance or other statements that are not statements of fact. Although the Company believes that the expectations reflected in such forward-looking statements are reasonable, it can give no assurance that such expectations will prove to have been correct. The Company cautions that actual performance will be affected by a number of factors, many of which are beyond the Company's control, and that future events and results may vary substantially from what the Company currently foresees. Discussion of the various factors that may affect future results is contained in the Company's Annual Report which is available at www.sedar.com. The Company's forward-looking statements are expressly qualified in their entirety by this cautionary statement.

All technical information contained in this corporate presentation has been approved by Sarah Drechsler, P.Geo., a geological consultant to Strategic Metals and qualified person for the purposes of NI 43-101.



Investment Highlights

- Innovative explorer, rapidly grown working capital to \$52 million* through project generation, spin-outs, royalty sales and investments. Includes more than \$34 million in cash and \$18 million in marketable securities.
- Company trading at significant discount (~38%) to working capital.
- Portfolio of promising junior resource investments, including:
 - 9.1% of ATAC Resources (ATC),
 - 31.2% of Rockhaven Resources (RK), and;
 - 19.9% of Silver Range Resources (SNG).
- Reviewing acquisition and financing opportunities to capitalize on current downturn.
- Extensive management knowledge and expertise, access to a proprietary database, track record of advancing significant exploration projects, right through the takeover stage.
- Pipeline of wholly-owned projects for future sale, creation of new companies, royalties and investments.

* Includes cash and marketable securities estimated as of Sept 12, 2013. The value of marketable securities fluctuates on a daily basis.



Management and Directors

Management / Directors

W. Douglas Eaton, B.A., B.Sc.

Bruce A. Youngman, B.Sc

Ian J. Talbot, B.Sc., LLB.

Larry Donaldson, CA

Glenn R. Yeadon, B.Comm., LLB.

Lee A. Groat, B.Sc., Ph.D.

Richard Graham, B.Sc., P.Geo.

Bruce J. Kenway, C.A.

R.E. Gordon Davis, P.Eng.

President, CEO and Director

Chairman and Director

COO

CFO

Secretary and Director

Director

Director

Director

Director

Project Management

Provided by Archer Cathro & Associates (1981) Limited, an in-house geological engineering and exploration firm and pre-eminent Yukon exploration consulting firm since 1965. Yukon discoveries and/or deposits made or advanced by Archer Cathro and management:

Casino – Western Copper

Carmacks Copper– Copper North

Golden Revenue – Northern Freegold

Tiger – ATAC Resources

Marg – Redtail Metals

Blende – Blind Creek Resources

Wolverine – Yukon Zinc

Osiris – ATAC Resources

Ice – Yukon Zinc

Wellgreen – Prophecy Platinum

Division Mountain – Pitch Black

Klaza – Rockhaven Resources



Capital Structure

STRATEGIC METALS LTD. TSX-V:SMD

SHARES OUTSTANDING:	89,791,851
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FULLY DILUTED:	97,447,851
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WORKING CAPITAL:	~\$52.6 million ¹
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Significant Holders

STRATEGIC MANAGEMENT ²	18%
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Institutional Holders

TOTAL INSTITUTIONAL OWNERS – Estimated 30%
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TOCQUEVILLE ASSET – 14%

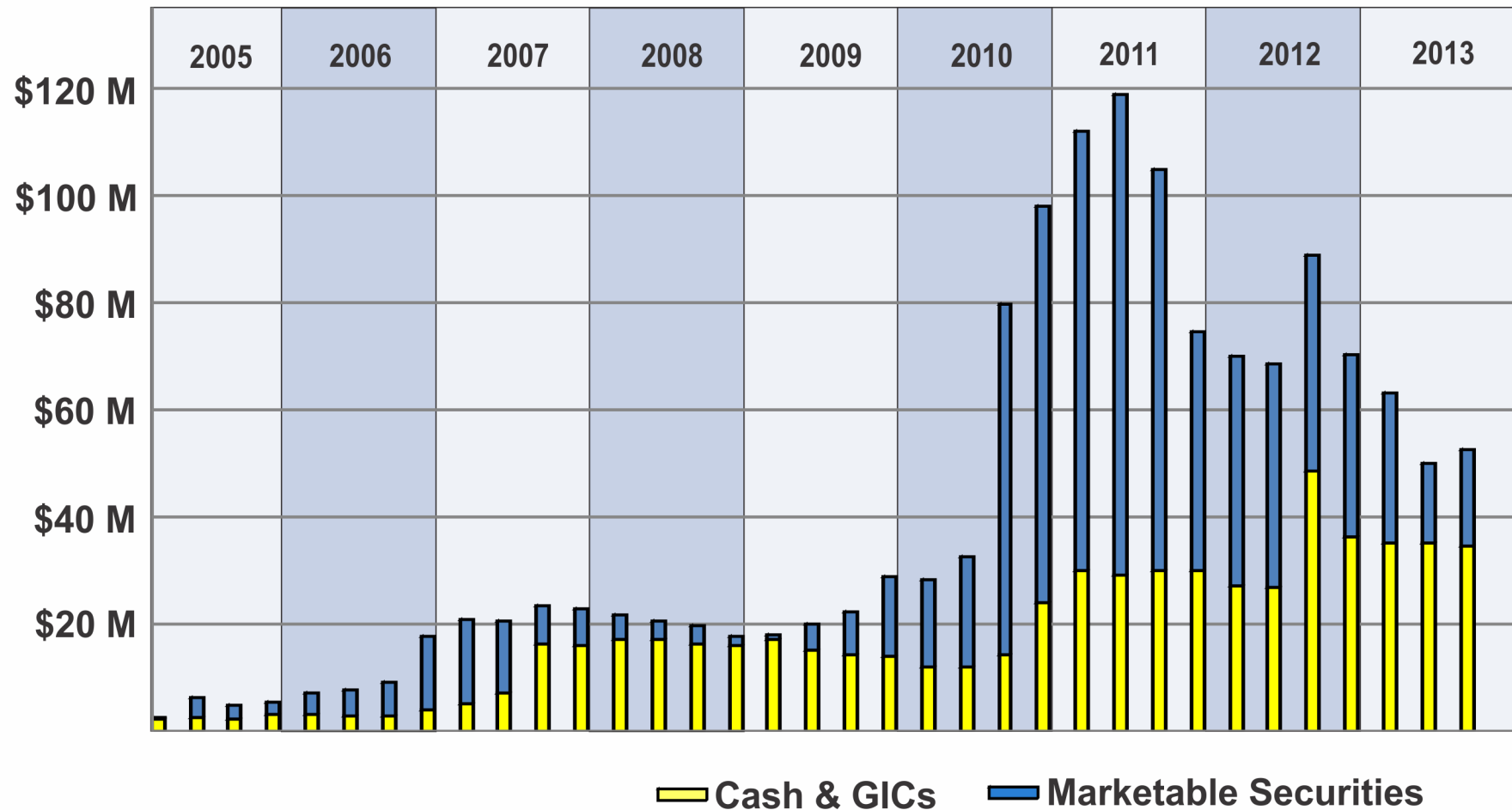


¹ Estimated cash and marketable securities as of Sept 12, 2013.

² Includes consultants and key employees on a fully diluted basis.

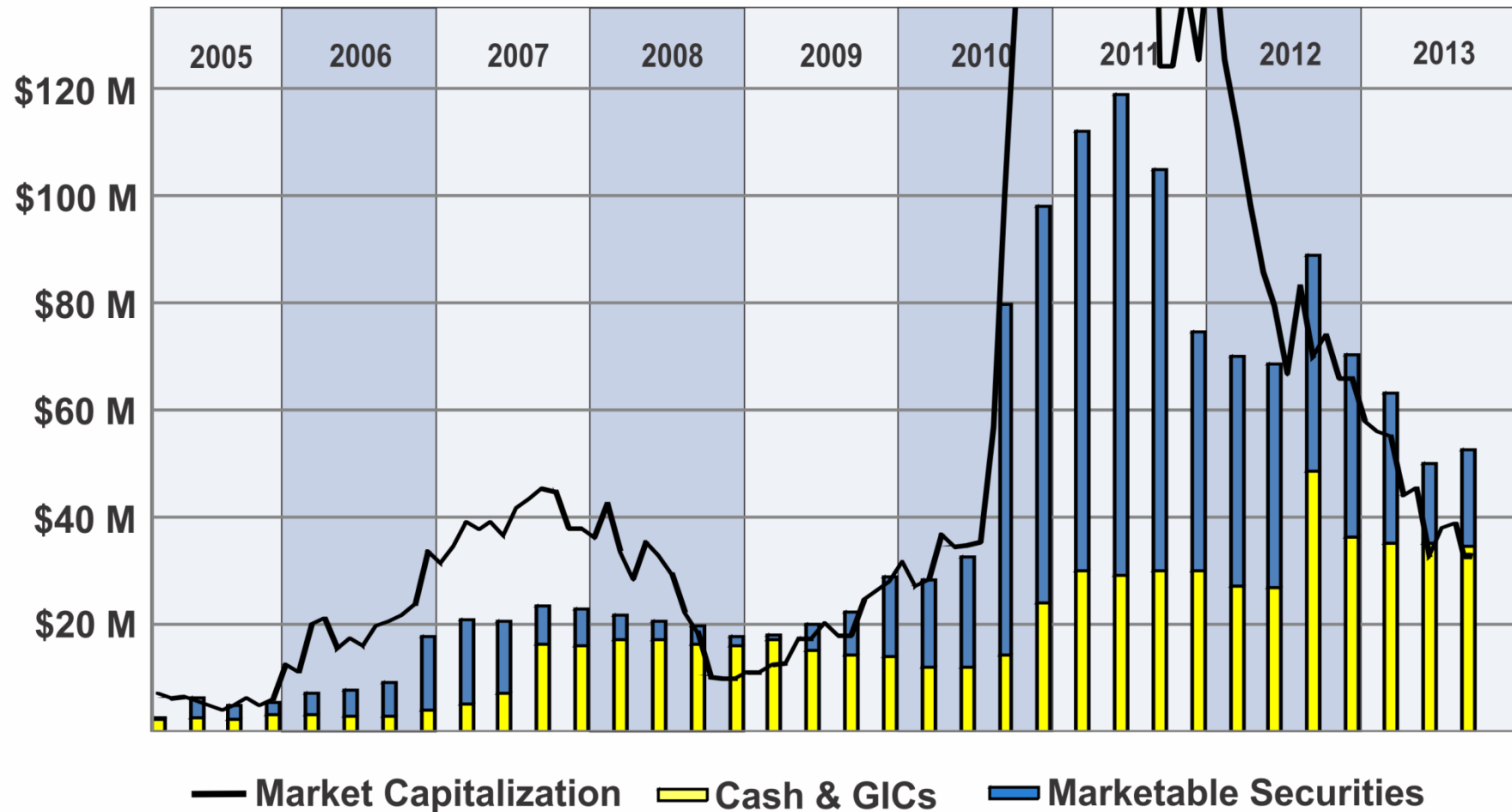


Working Capital Growth



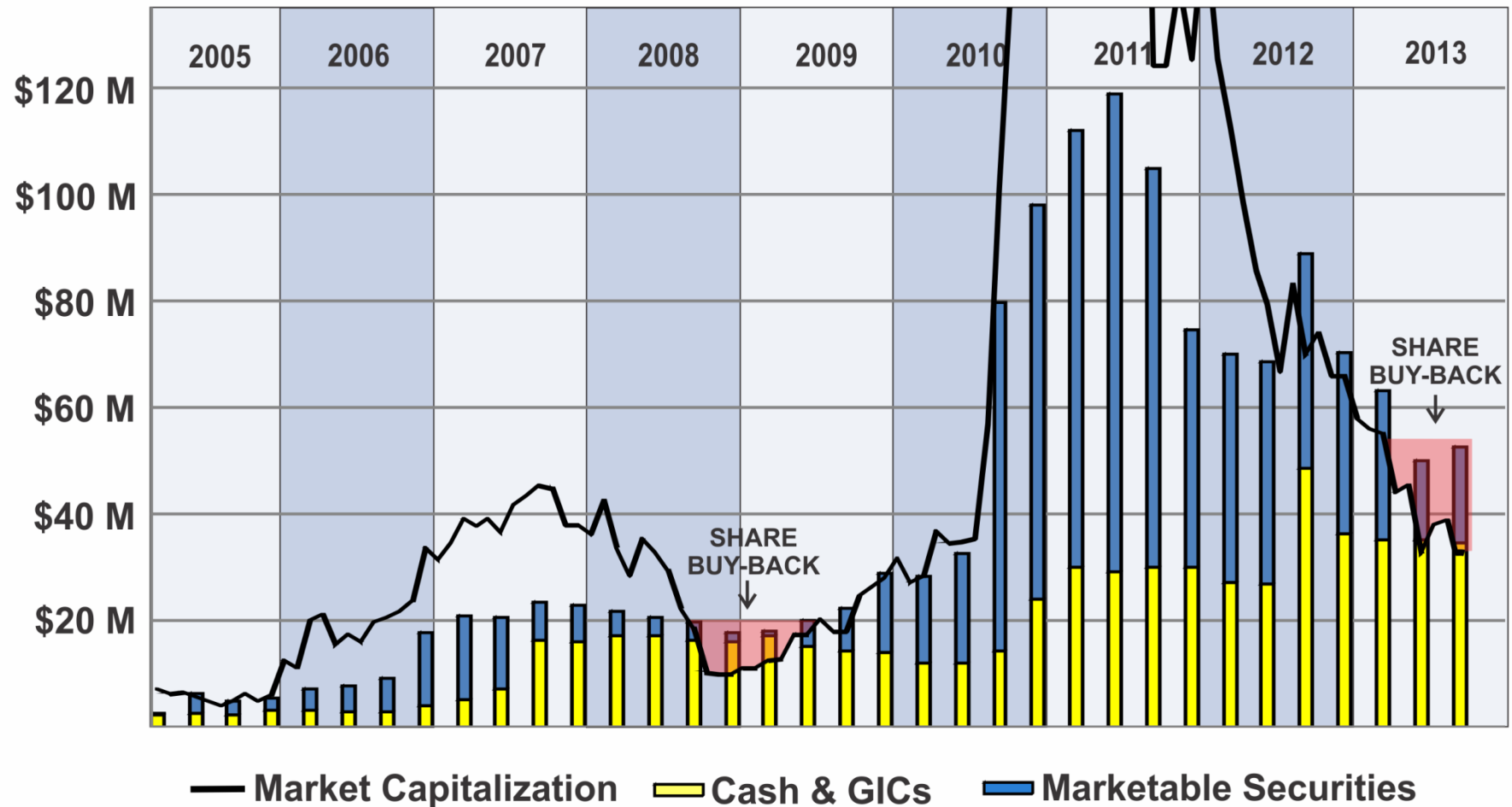


Working Capital vs Market Capitalization





Working Capital vs Market Capitalization

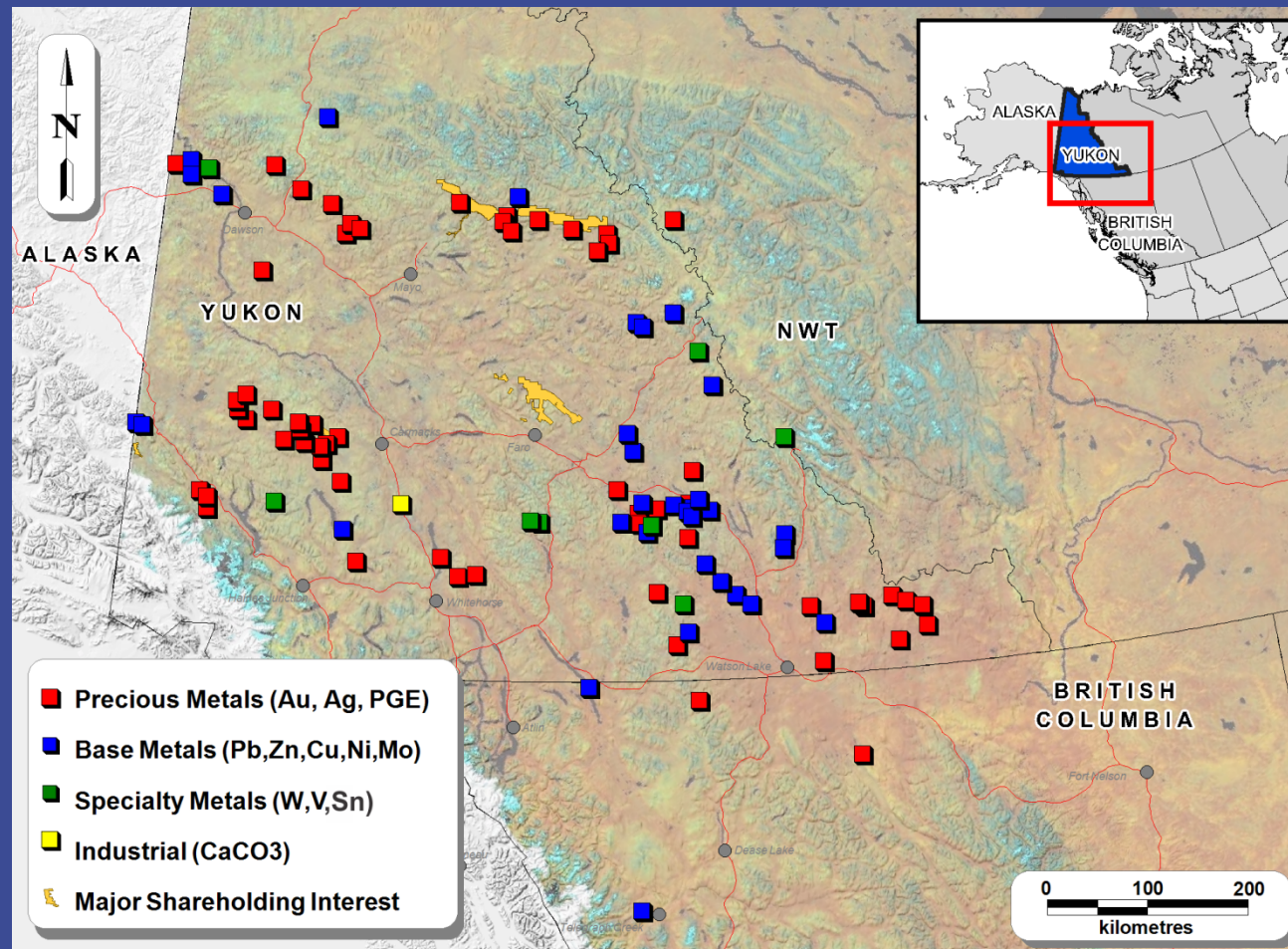




HOW HAVE WE CREATED GROWTH?



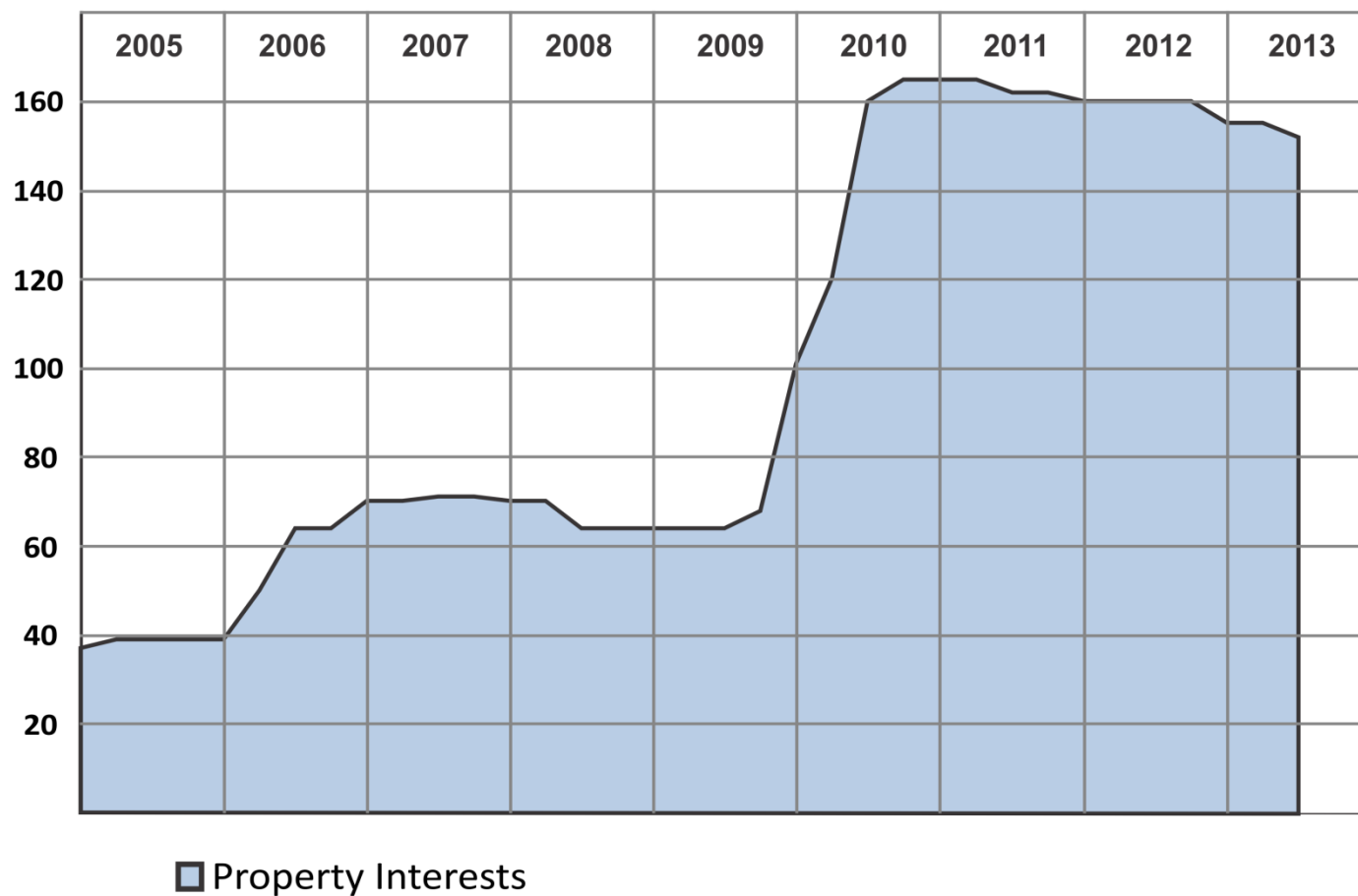
Foundation: Project Generator



- Interests in more than 150 properties.
- Diverse suite of precious and base metal targets.



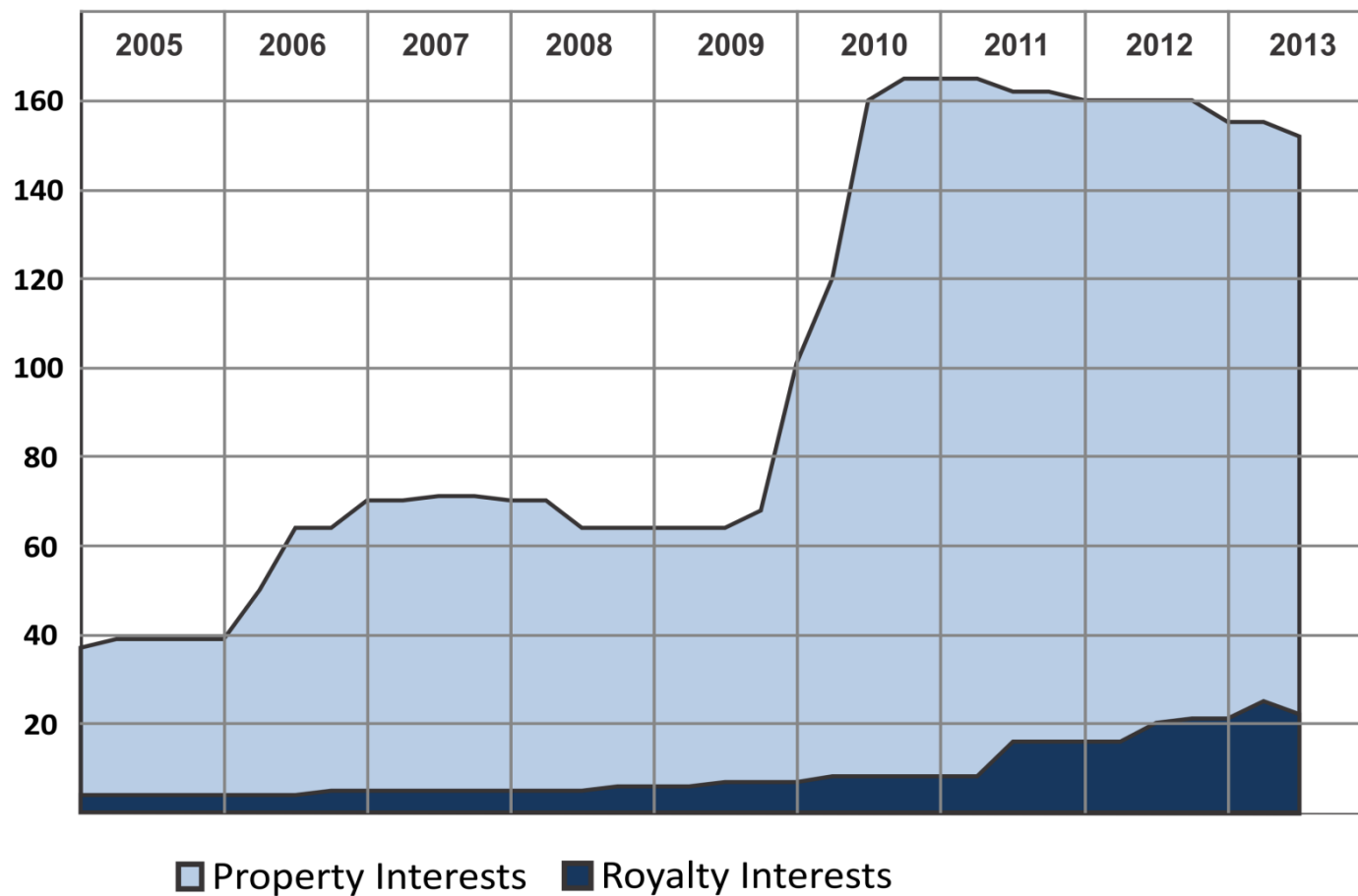
Growing Property Portfolio



- Increasing number of properties and royalties.



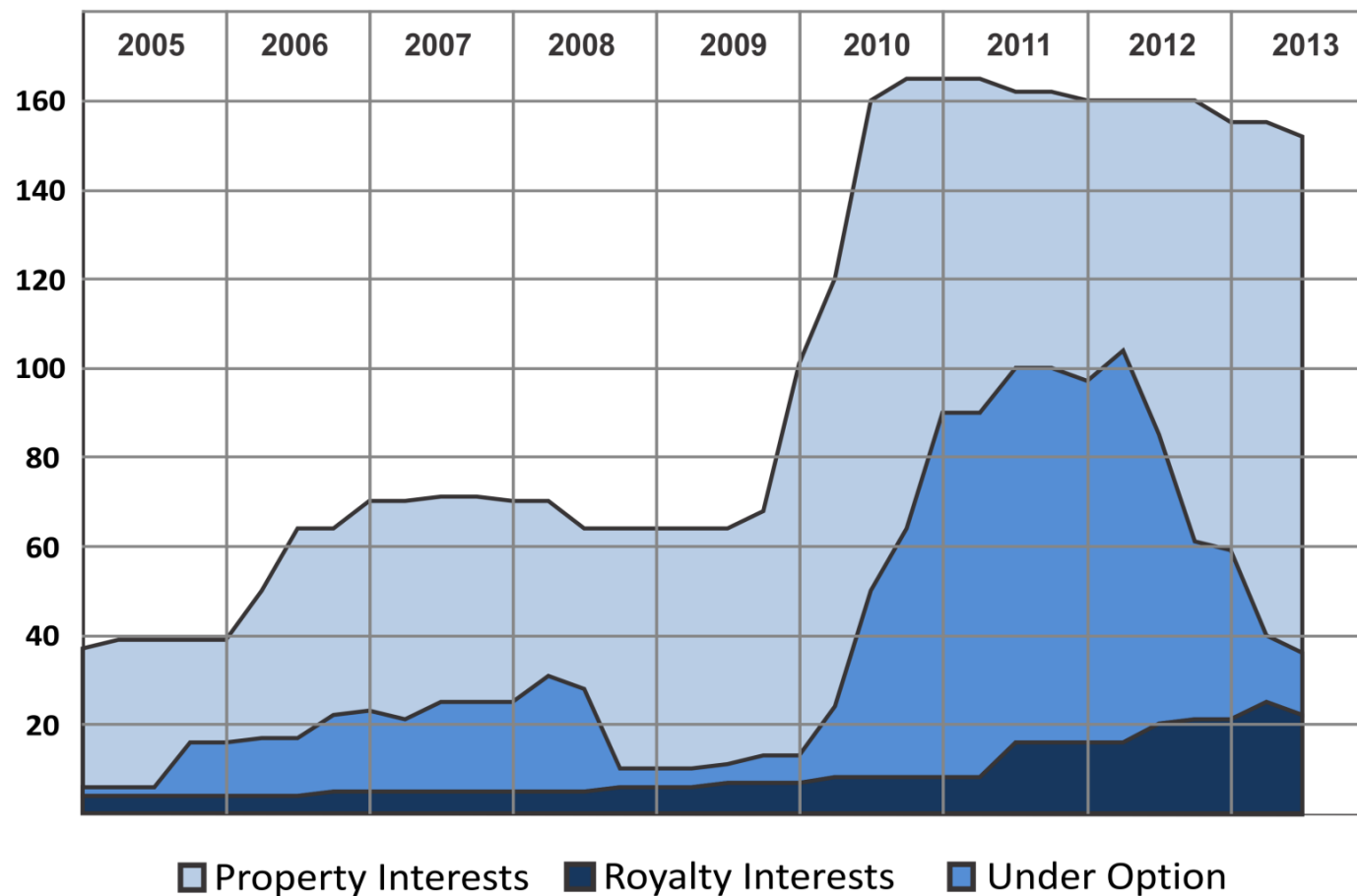
Growing Property Portfolio



- Increasing number of properties and royalties.



Growing Property Portfolio



- Increasing number of properties and royalties.
- During cyclical downturns (2009 and today), more properties returned. Most with significant improvements.
- Low maintenance cost , ready for next cycle.



Logtung (Northern Dancer) Deposit



- Major porphyry tungsten-molybdenum deposit.
- Acquired by staking in 1998 for <\$1,000.
- Initial option in 2006: received \$2 million in stock for 70% interest.
- Sold remaining 30% in 2011 for \$5 million in cash and stock.
- Retained 1% NSR, one of 3 royalties sold in 2012 for \$30 million.



Casino Deposit



- Major copper-gold porphyry deposit.
- Archer Cathro involved with discovery and expansion of deposit.
- Acquired 5% Net Profits Interest (NPI) royalty for \$300,000 in 1995.
- Casino NPI was key component of US\$30 million royalty sale in 2012.



\$30 Million Royalty Sale



- Sold 3 royalties for \$US30 million in 2012:
 - Casino Deposit: 5% Net Profits Interest
 - Logtung Deposit: 1% NSR
 - Wolverine Deposit: 0.5% NSR
- Will receive an extra \$6 million if certain Casino permits are obtained by Dec, 2016.





ATAC Investment



- During previous downturn, provided initial funding for ATAC to explore for Carlin-style gold deposits.
- ATAC has grown to core holding, valued at more than \$10 million after recapturing initial investment.

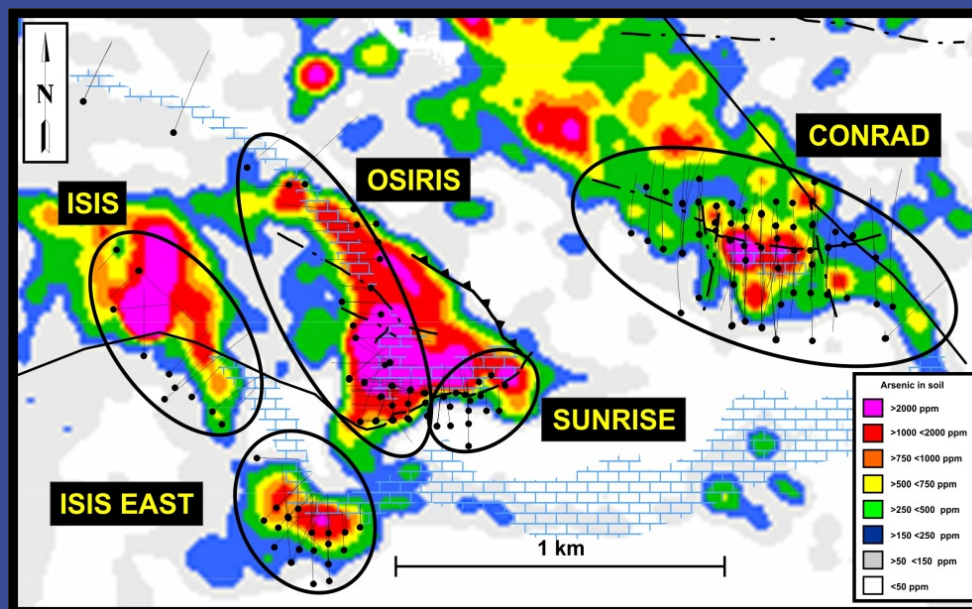


ATAC's Discoveries

OSIRIS ZONE DRILLING HIGHLIGHTS		
HOLE NUMBER	WIDTH (m)	GOLD (g/ t)
OS-10-001	65.20	4.65
OS-11-023	41.15	2.48
OS-11-031	32.01	4.25
OS-11-053	30.98	3.09
OS-11-055	26.12	6.08
OS-11-080	19.81	5.07
OS-11-082	44.20	4.41

ISIS EAST ZONE DRILLING HIGHLIGHTS		
HOLE NUMBER	WIDTH (m)	GOLD (g/ t)
OS-11-040	38.10	3.33
OS-11-073	51.82	3.13
OS-12-097	24.39	5.58
OS-12-101	21.60	5.11
OS-12-120	27.43	6.28
OS-12-125	33.53	3.68

- Multiple Carlin-type discoveries, all open.
- Anubis Zone: 10 km to west, initial drilling 8.51 m of 19.85 g/t Au.



CONRAD ZONE DRILLING HIGHLIGHTS		
HOLE NUMBER	WIDTH (m)	GOLD (g/ t)
OS-11-010	114.93	3.15
OS-11-016	87.80	2.84
OS-11-030	73.15	3.05
OS-11-058	41.15	7.33
OS-11-062	59.44	4.32
OS-12-098	40.30	10.10
OS-12-103	46.06	11.24
OS-12-114	42.93	18.44
OS-12-130	54.86	4.32
OS-12-141	16.30	15.73
OS-12-168	74.67	3.08
OS-12-169	30.12	8.38
OS-12-170	42.68	6.19

SUNRISE ZONE DRILLING HIGHLIGHTS		
HOLE NUMBER	WIDTH (m)	GOLD (g/ t)
OS-12-173	14.86	10.54
OS-13-201	12.72	9.49
OS-13-206	15.24	9.83
OS-13-214	19.81	5.54



HOW WILL WE CONTINUE TO GROW?

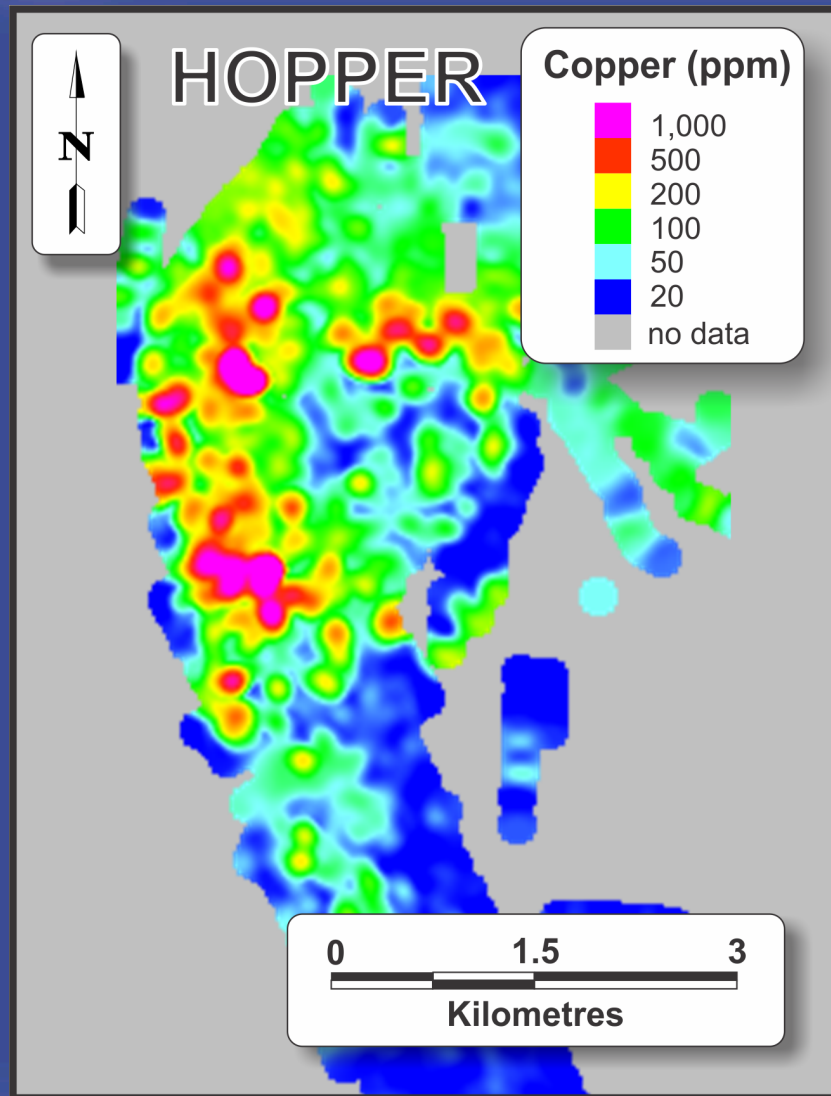


Value Drivers Going Forward

- Pipeline of projects:
 - Future sale/option
 - Create new companies
 - Create royalties
 - Exceptional projects, test ourselves
- New Investments/acquisitions
- Upside in shareholding portfolio

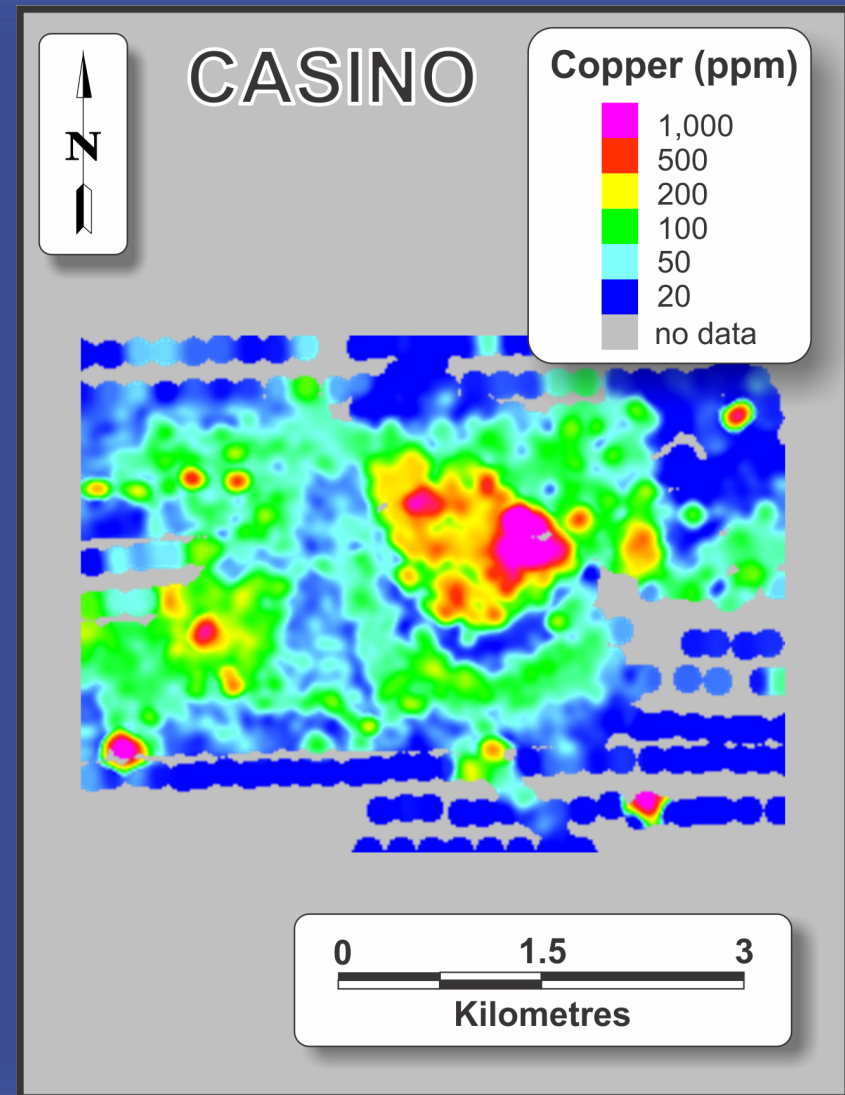
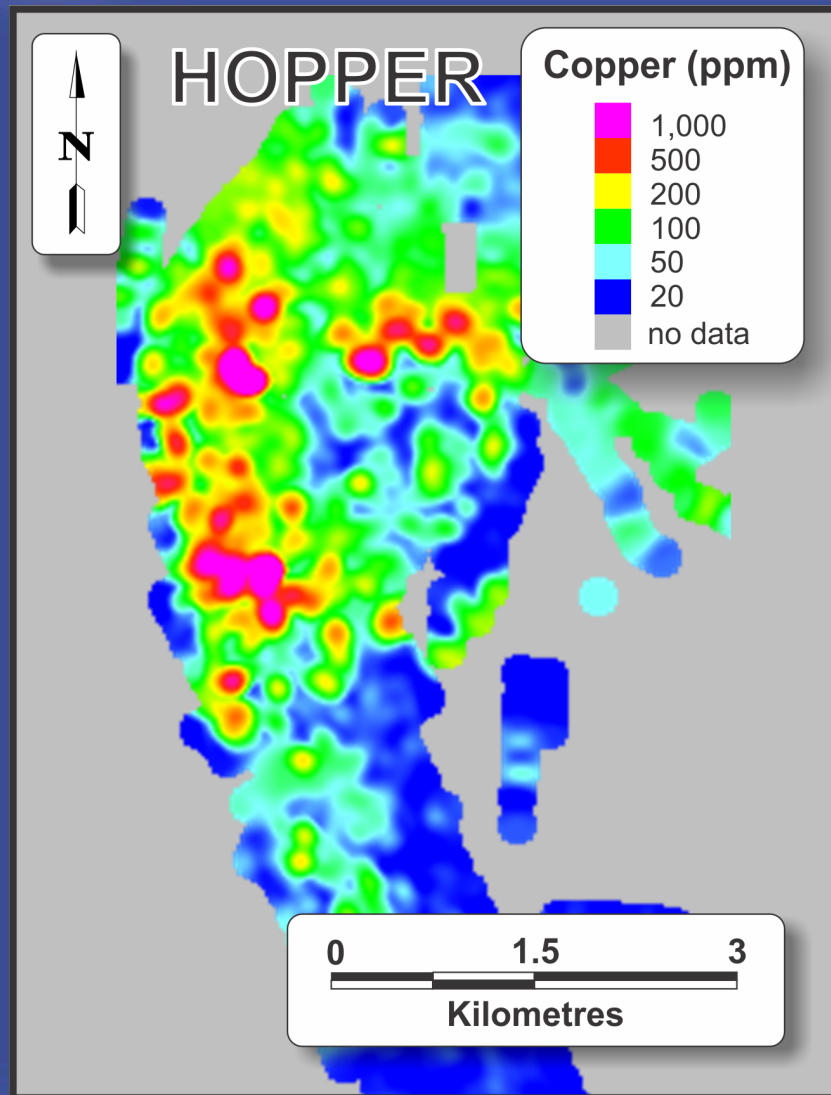


Pipeline of Projects



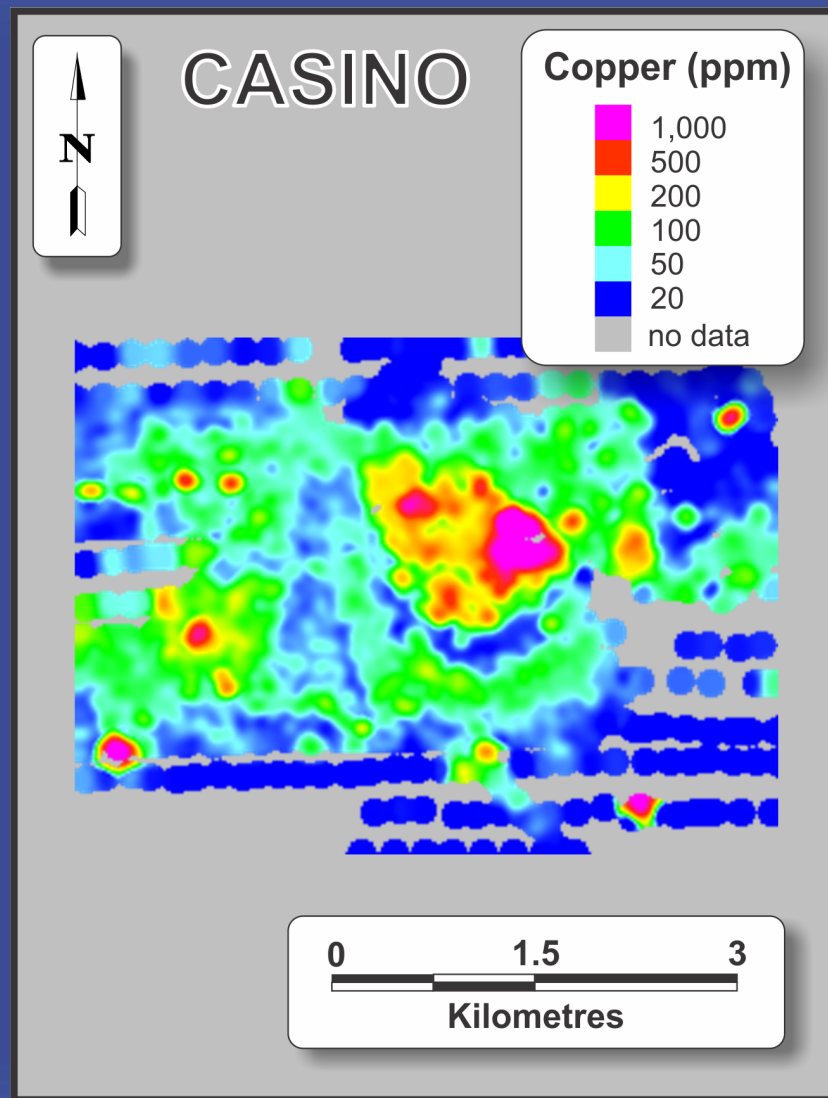
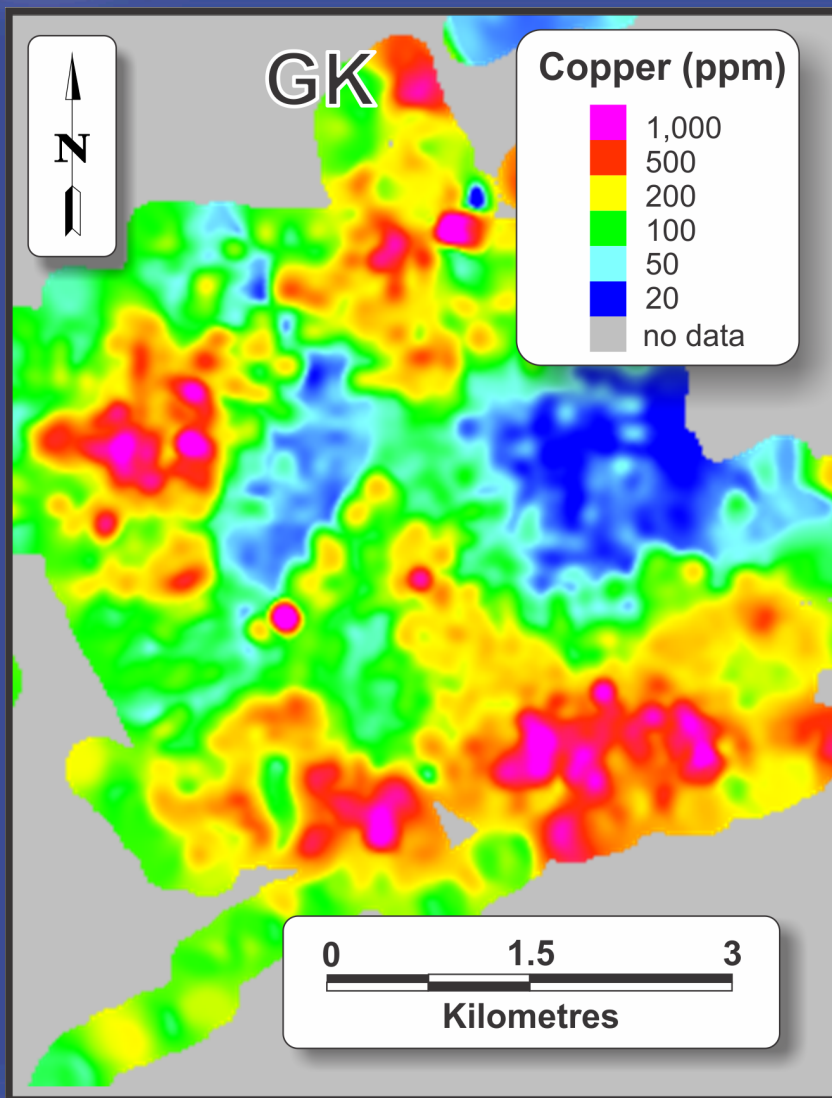


Pipeline of Projects



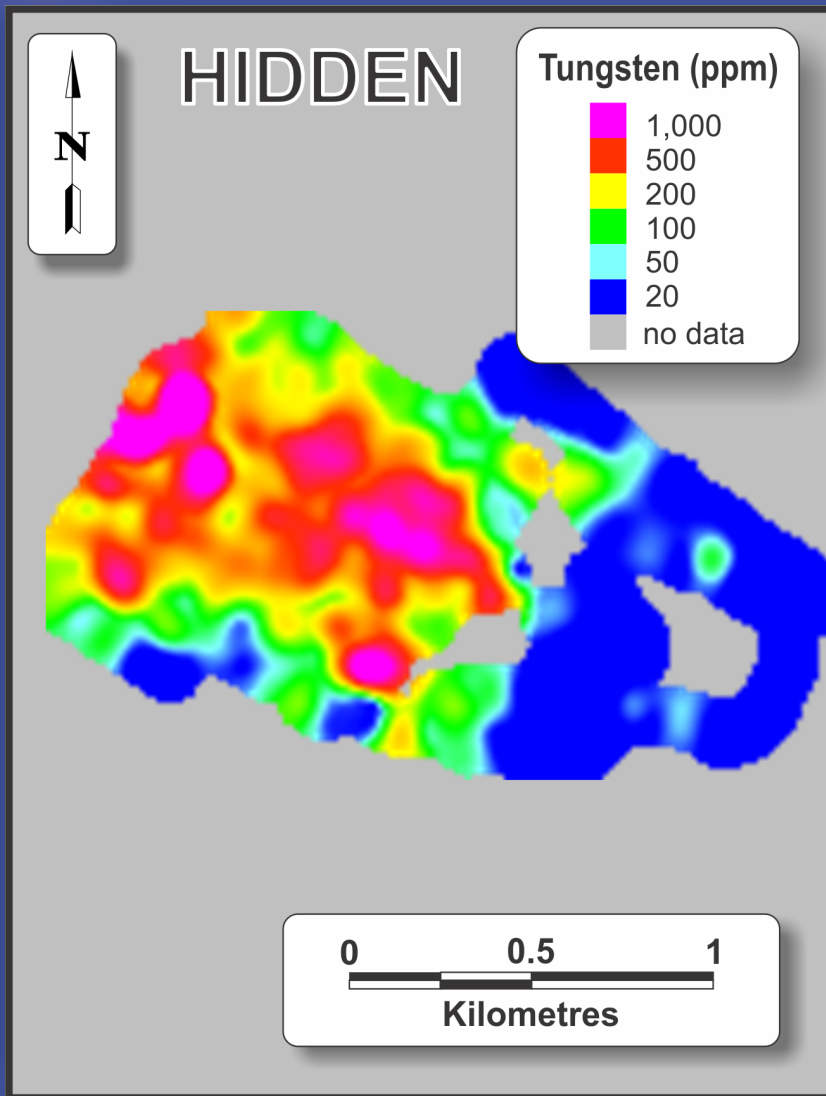


Pipeline of Projects



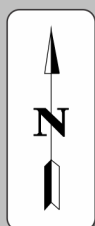


Pipeline of Projects



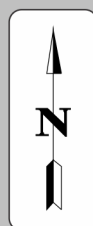
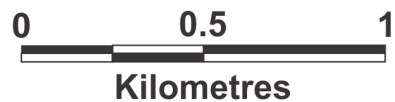
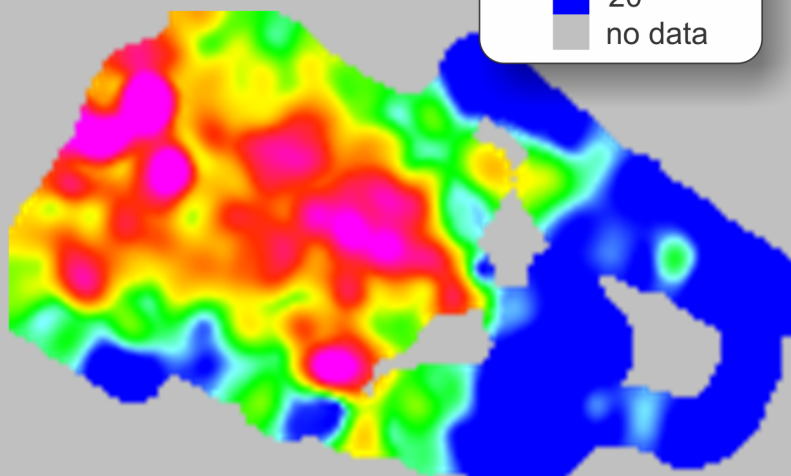
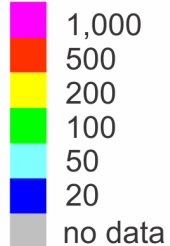


Pipeline of Projects



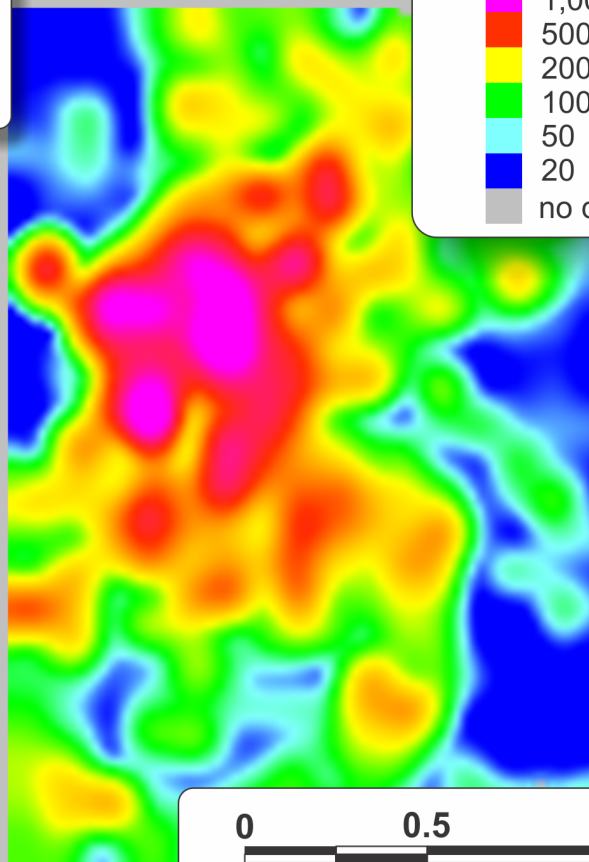
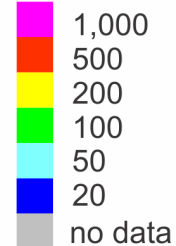
HIDDEN

Tungsten (ppm)



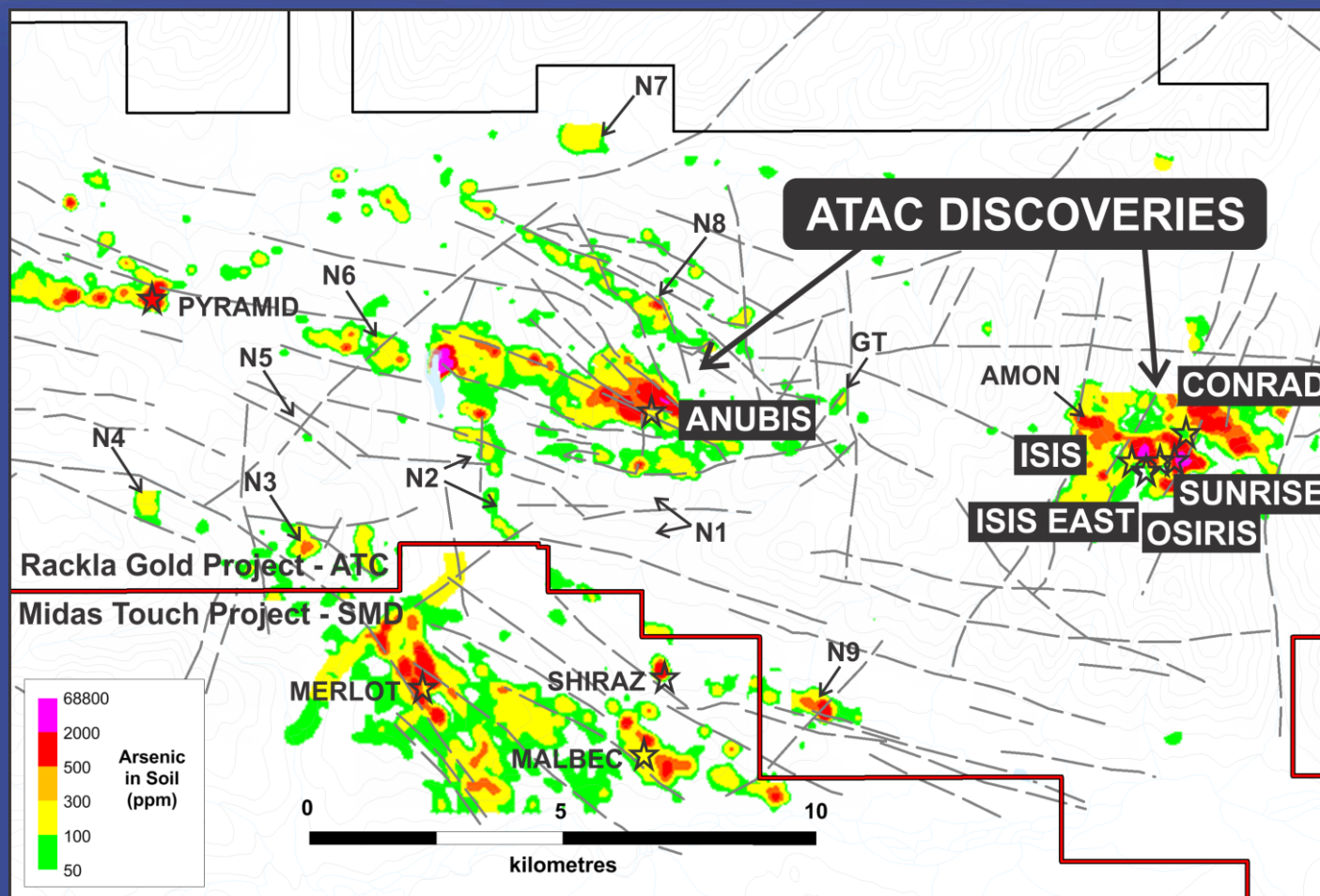
LOGTUNG

Tungsten (ppm)





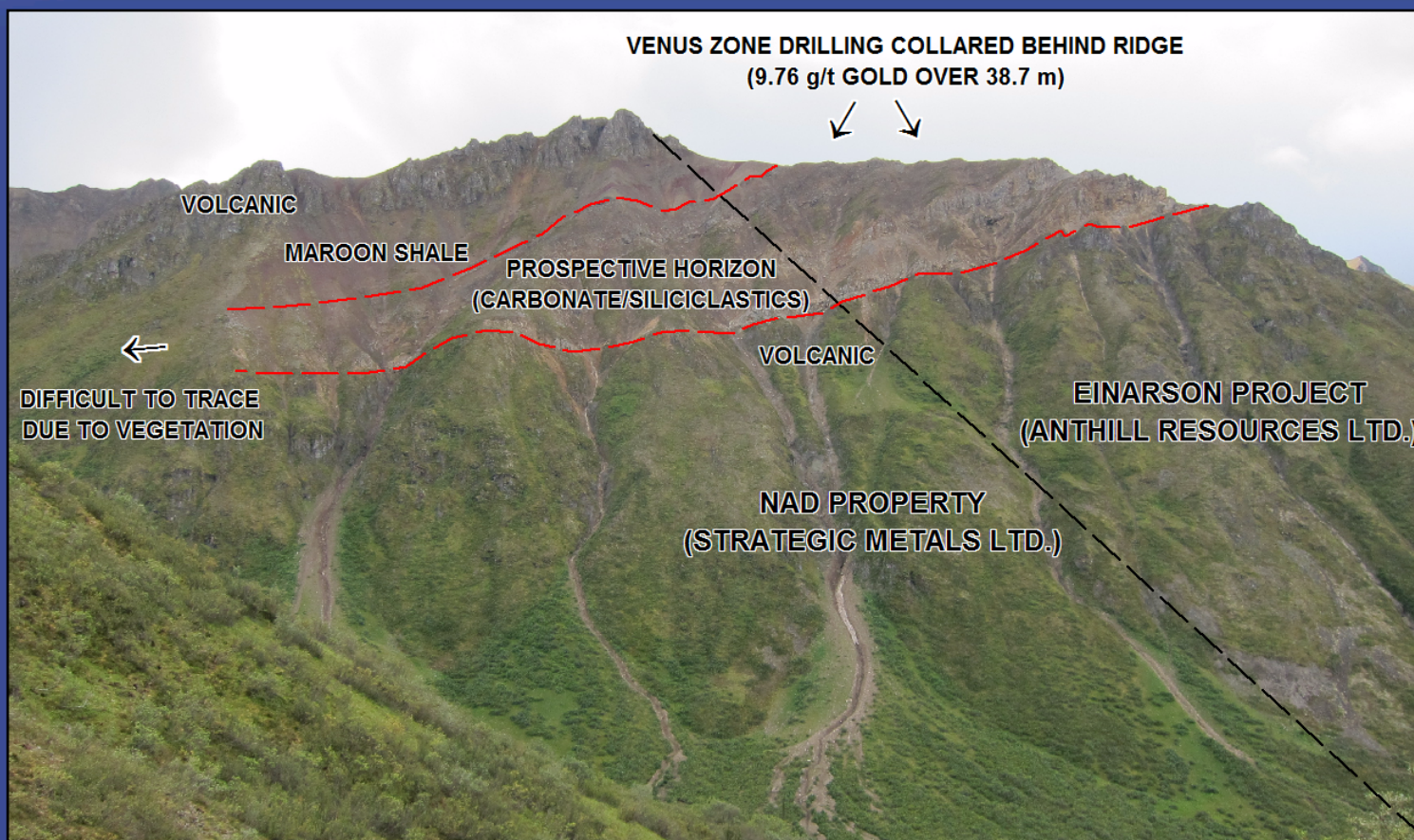
Midas Touch Project



- Large, wholly-owned property position with similar setting and geochemical signature to ATAC's Carlin-style discoveries.



Midas Touch Project - Nad Property



- Nad property located 400 m along trend from new Venus gold discovery by Anthill Resources: 9.76 g/t gold over 38.7m.



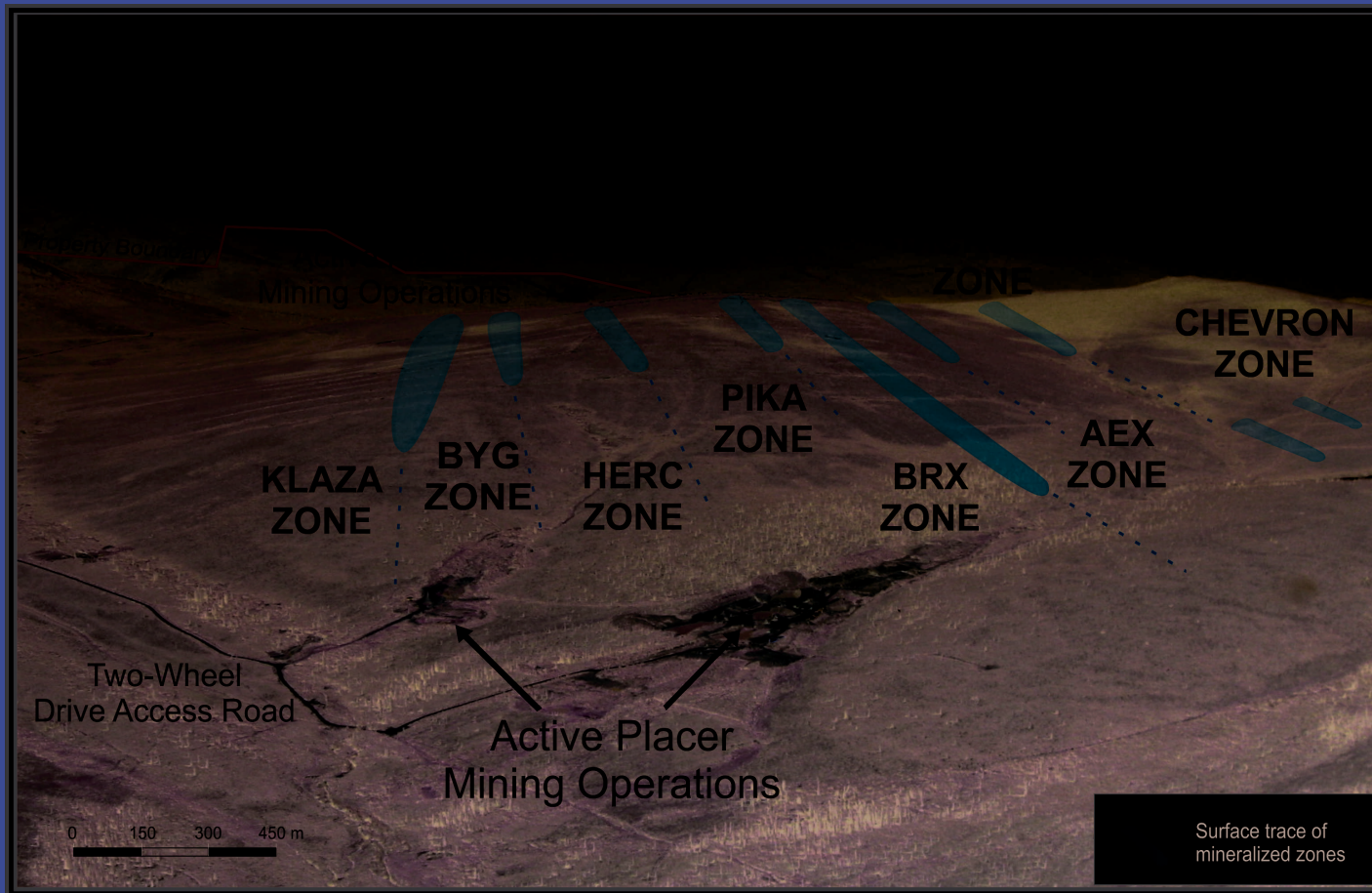
Significant Upside To Shareholdings

Company	Strategic Ownership	Number of Shares	Market Value ¹
ATAC Resources	9.1%	10,334,586	\$10,747,969
Rockhaven Resources	31.2%	19,162,500	\$2,012,062
Silver Range Resources	19.9%	9,480,340	\$1,516,854
Orefinders Resources Inc.	7.9%	3,700,000	\$962,000
Precipitate Gold Corp.	17.6%	5,068,827	\$709,635
Cardero Resources Corp.	3.8%	3,605,000	\$486,675
Other Companies	-	-	\$1,663,819
Total Market Value	-	-	\$18,099,014

¹ Estimated as of Sep. 12, 2013



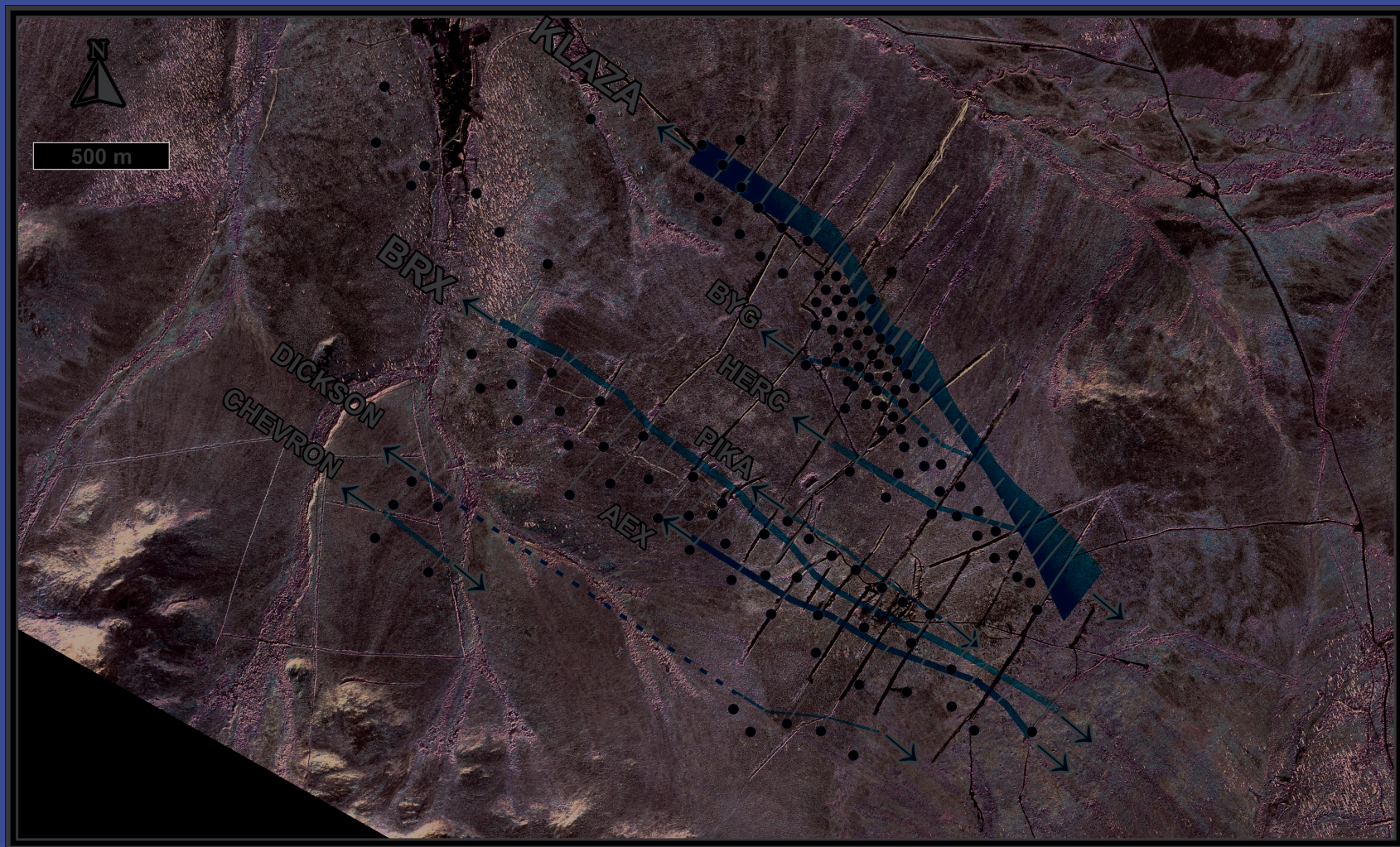
Major Shareholder of Rockhaven Resources Ltd.



- 100% held by Rockhaven.
- Road accessible.
- Gentle terrain.
- Eight structural zones now defined.
- All zones open-ended along strike and to depth.
- Individual strike lengths >2,400 m.

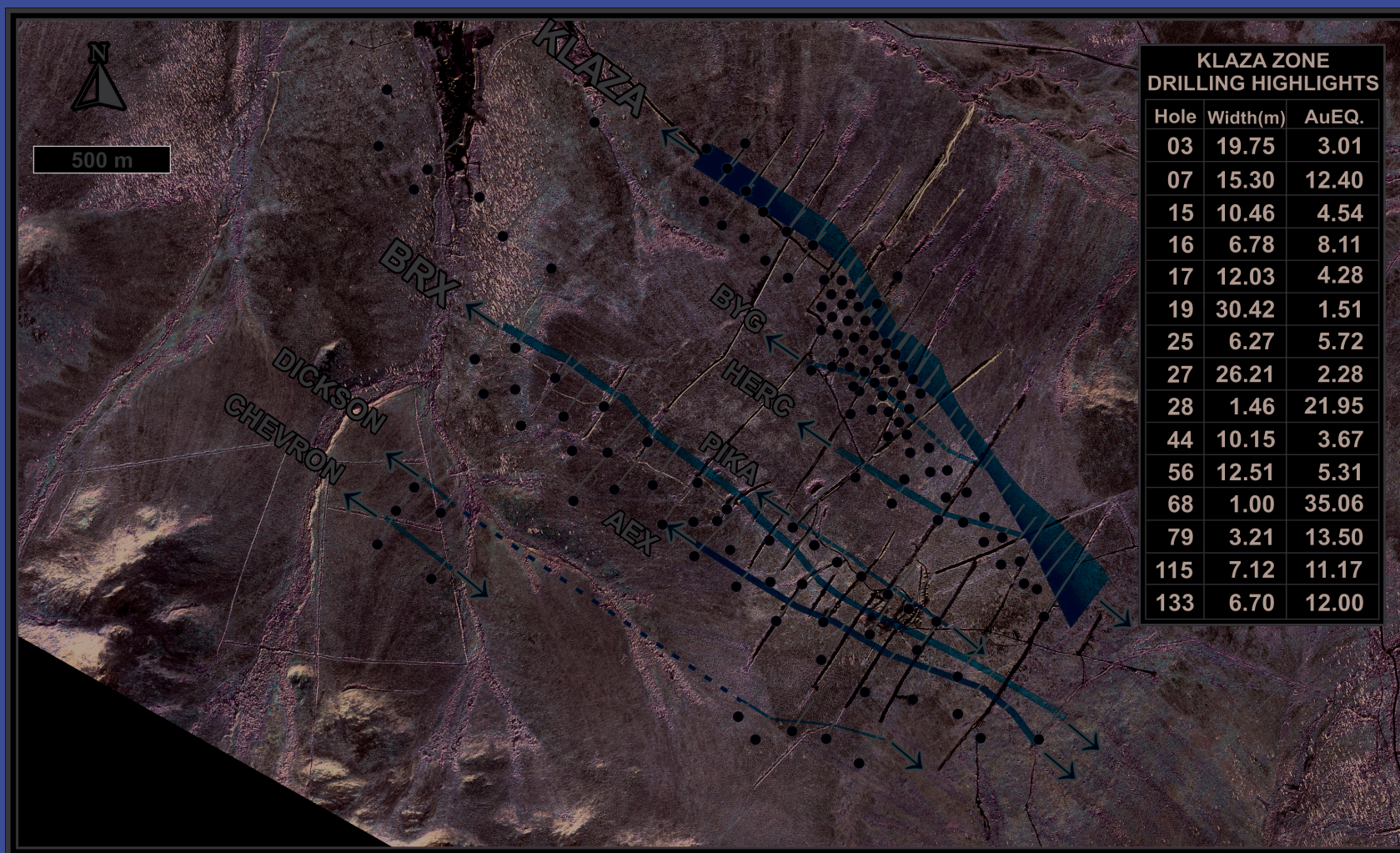


Major Shareholder of Rockhaven Resources Ltd.



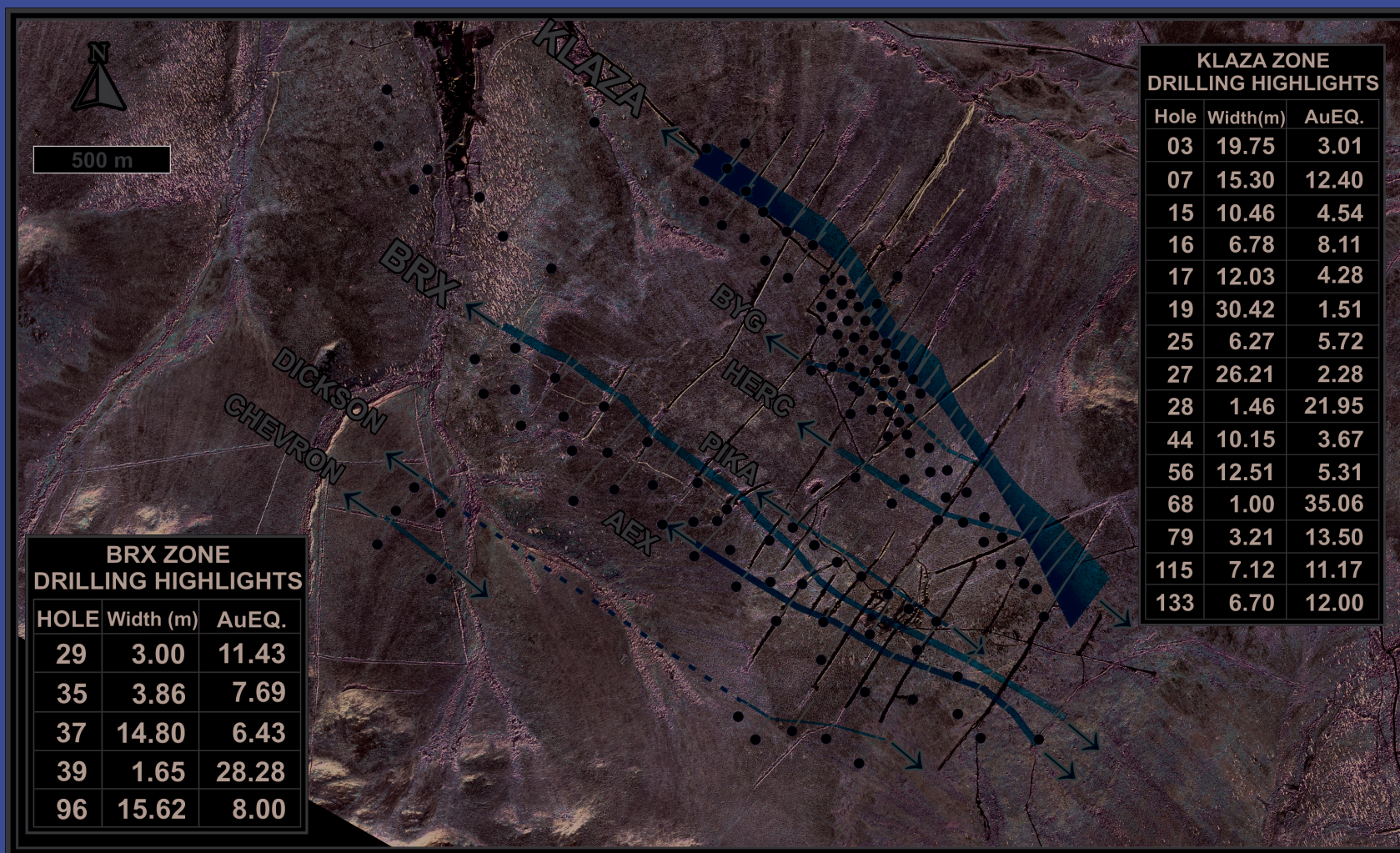


Major Shareholder of Rockhaven Resources Ltd.



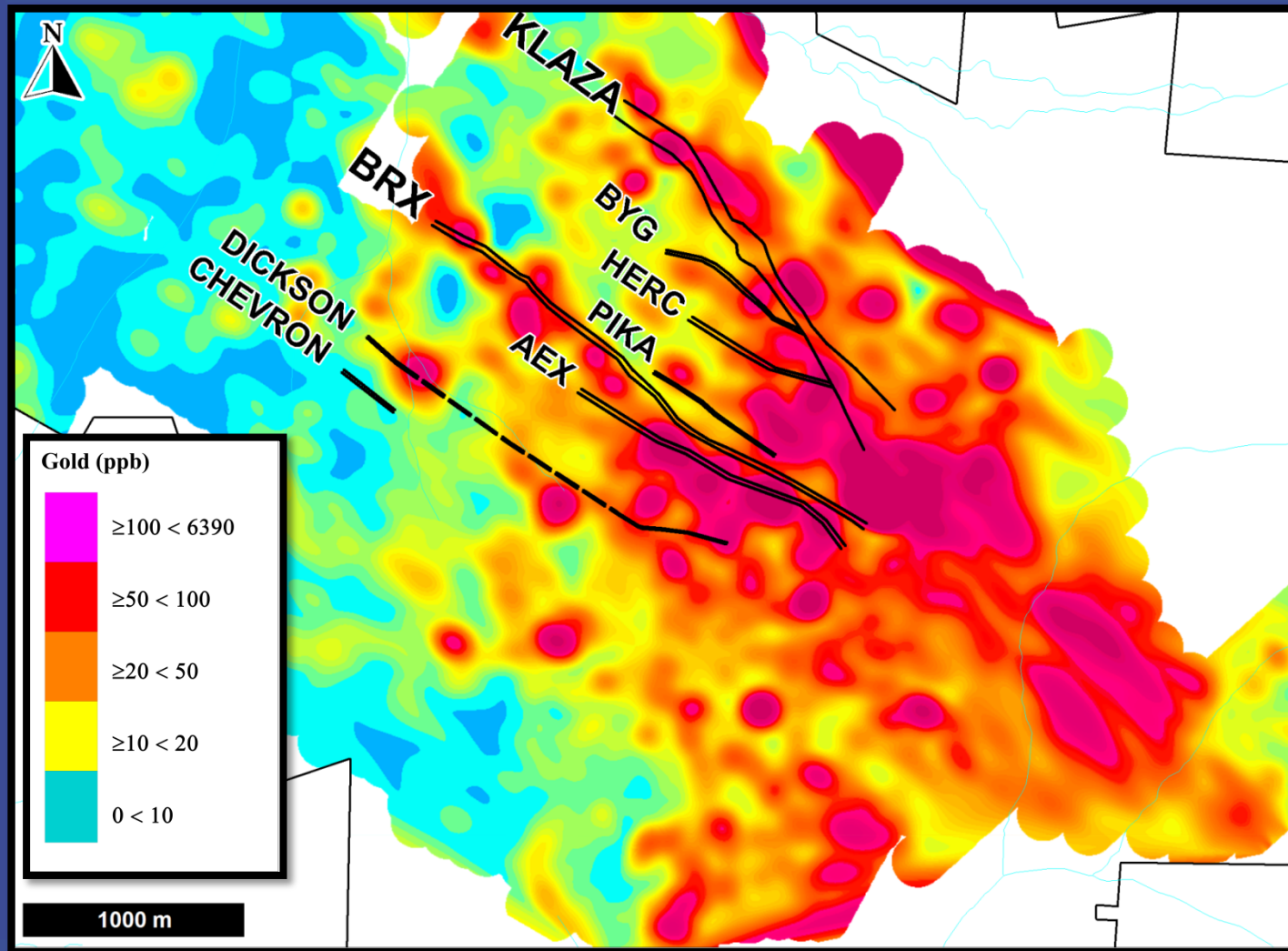


Major Shareholder of Rockhaven Resources Ltd.





Major Shareholder of Rockhaven Resources Ltd.

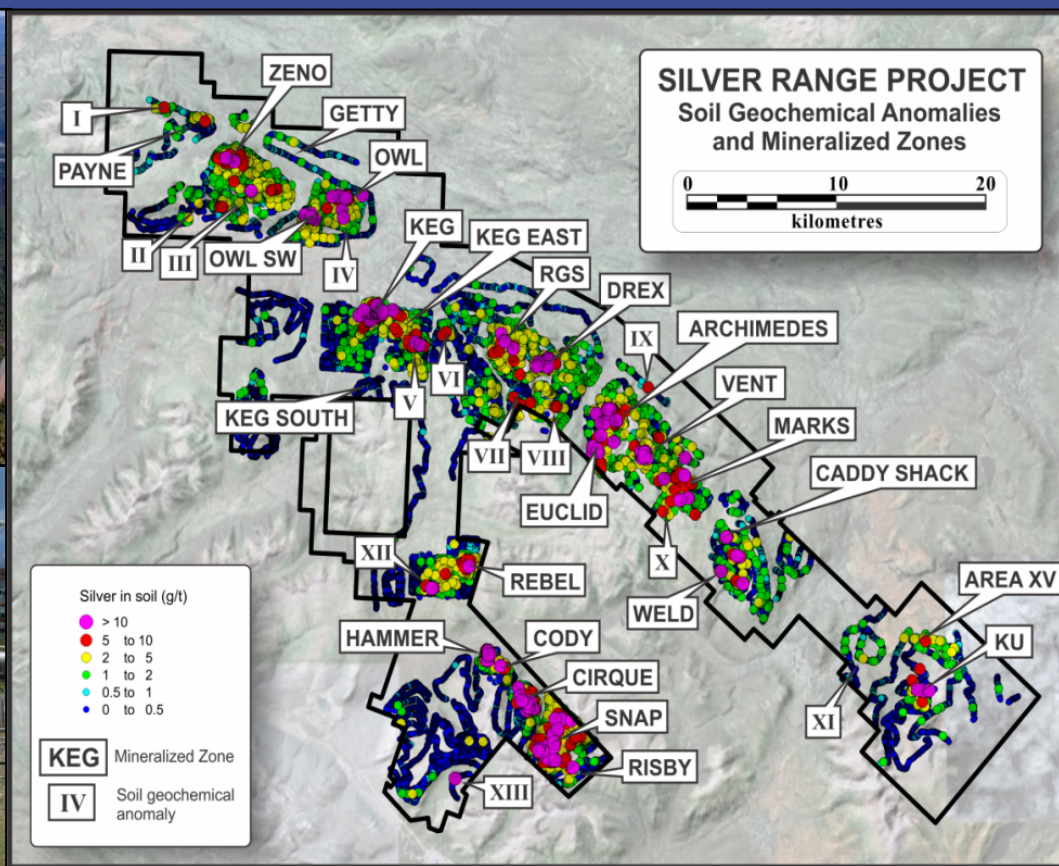


- Large, strong geochemical anomalies to the east indicate further potential.
- Rockhaven market capitalization \$4 million (net of cash).



Major Shareholder of Silver Range Resources Ltd.

New silver district in area of excellent infrastructure near Faro, Yukon.

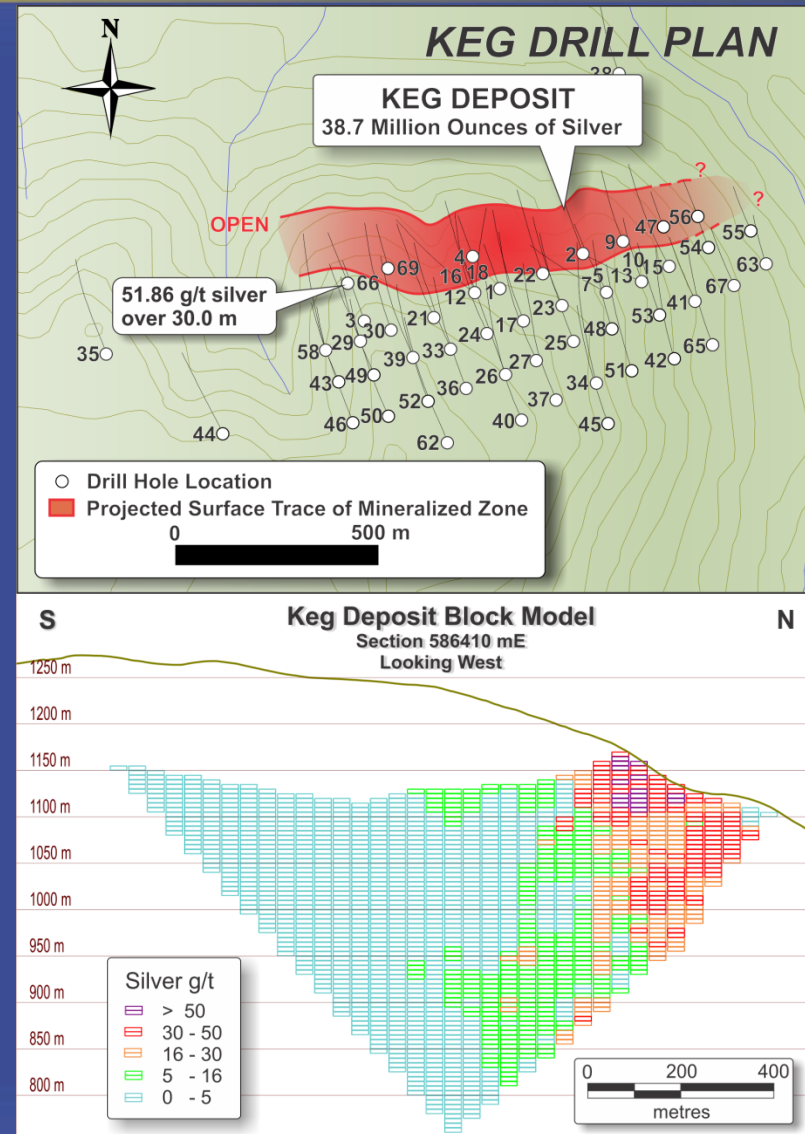




Major Shareholder of Silver Range Resources Ltd.

- Keg Main Zone maiden resource estimate:¹
 - 38.7 million ounces silver
 - 675 million pounds zinc
 - 228 million pounds lead
 - 131 million pounds copper.*
- Open to west-northwest: 51.86 g/t silver over 30.0 m (DDH Keg-66).
- Metallurgical testwork shows mineralization responds very well to conventional copper/lead/zinc flotation processing.

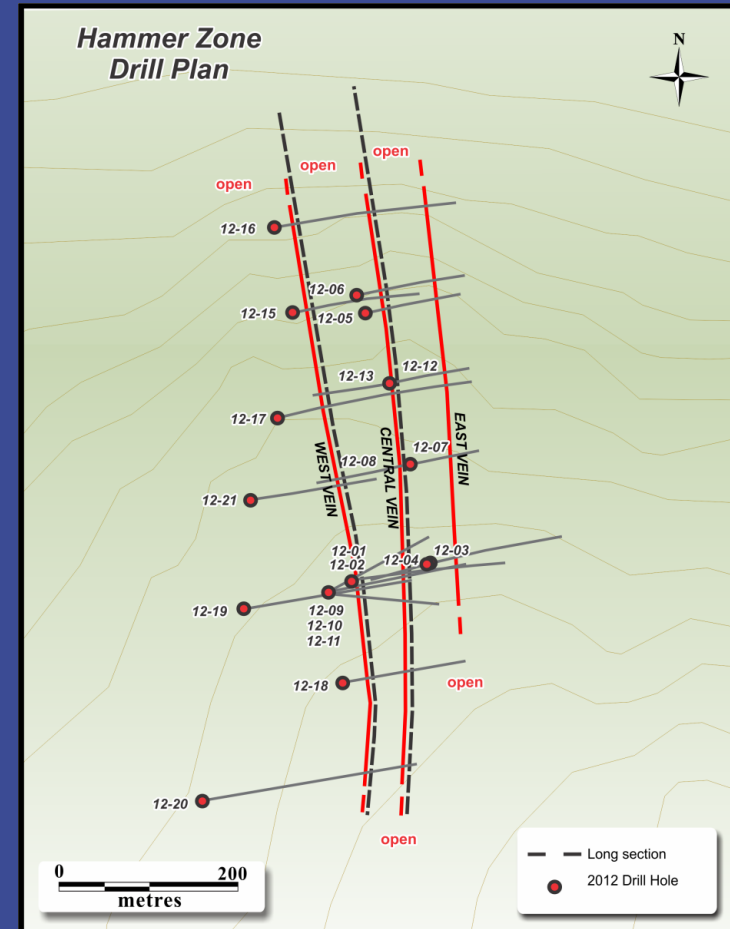
¹ Source: Silver Range Resources' Keg Property Technical Report dated December 19, 2012 and amended May 27, 2013 and filed on SEDAR. At a 16 g/t silver cut-off, the Keg inferred resource is 39.76 million tonnes grading 30.25 g/t silver, 0.26% lead, 0.77% zinc and 0.15% copper.





Major Shareholder of Silver Range Resources Ltd.

- Hammer Zone: new bonanza grade epithermal system. 600 m strike length, 280 m depth, open in all directions. Results to 4,620 g/t silver over 0.53 m.
- Owl Southwest Zone: new drill discovery. 5,370 g/t silver over 0.34 m.
- 20 other showings and 13 geochemical anomalies on >1,000 sq km project.
- Current enterprise value: \$0.08 per in-situ ounce of silver.





Looking Forward – Growth Opportunities

- Advance wholly-owned property portfolio. Build value through future property sales, creation of new companies, royalties, and investments.
- Strong upside to portfolio of junior resource shareholdings.
- Take advantage of current downturn for acquisition and financing opportunities.
- Ability to sole-fund projects with exceptional risk-reward profile.
- Creative approach to capitalize on shifts in market conditions and metal prices.



Contact Information

Strategic Metals Ltd.

1016-510 West Hastings Street

Vancouver, BC, V6B 1L8

Phone: 604-687-2522

Toll Free: 1-888-688-2522

E-mail: info@nordacres.com

Web: www.strategicmetalsltd.com

Investor Relations:

Richard Drechsler

Phone: 604-687-2522

Toll Free: 1-888-688-2522

E-mail: rdrechsler@strategicmetalsltd.com