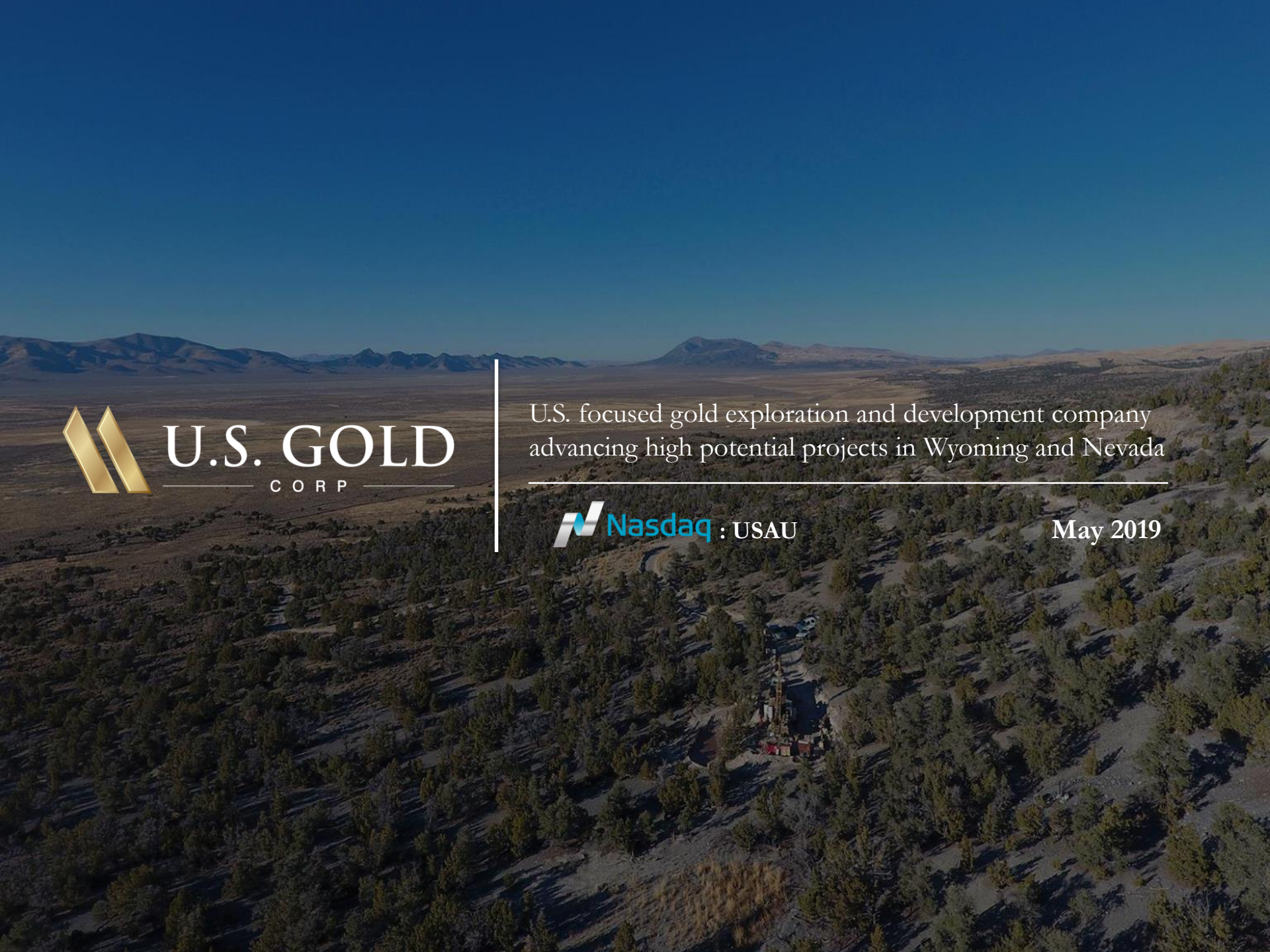

U.S. GOLD CORP

U.S. focused gold exploration and development company advancing high potential projects in Wyoming and Nevada

Nasdaq : USAU

May 2019

Forward Looking Statements

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We may use certain terms on this website, 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. Overview

Combining robust economics with district-scale exploration, in mining friendly U.S. jurisdictions

Near Term Production Potential

Copper King Project – WY*

- **Advanced Exploration and Development** property
- **Mining friendly location** in the Silver Crown Mining District of southeast Wyoming
- NI 43-101 Technical Report and Preliminary Economic Assessment (**PEA**) prepared by Mine Development Associates shows the following resource:
  - 926,000 Measured and Indicated oz Au and 223mm lbs Cu
  - 174,000 Inferred oz Au, 62.5mm lbs Cu
  - **$178.5 million Net Present Value (NPV)** at $1,275/oz Au and $2.80/lb Cu
- Copper King **remains open in multiple directions**

District-scale Exploration

Keystone - NV

- **North Central NV located** property next to some of the biggest mines in North America
- **District-scale opportunity** with multiple and major gold deposit discovery characteristics
- Located on the **prolific Cortez Gold Trend**, one of the world's most highly-prospective mineral trends
  - 10 miles south of Barrick's Cortez Hills Mine Complex
- Exploration led by prolific Nevada exploration geologist Dave Mathewson - **former Head of Nevada Exploration at Newmont Mining** with over 35 years of Nevada experience

* The estimates contained in the paragraph above are not recognized by the United States Securities and Exchange Commission. See "Cautionary Note to U.S. Investors Concerning Mineral Resources – p2." Amounts shown reflect the estimated in situ resource and do not include adjustments for metal recoveries.
See company press release date January 11, 2018

U.S. Gold Corp. Overview

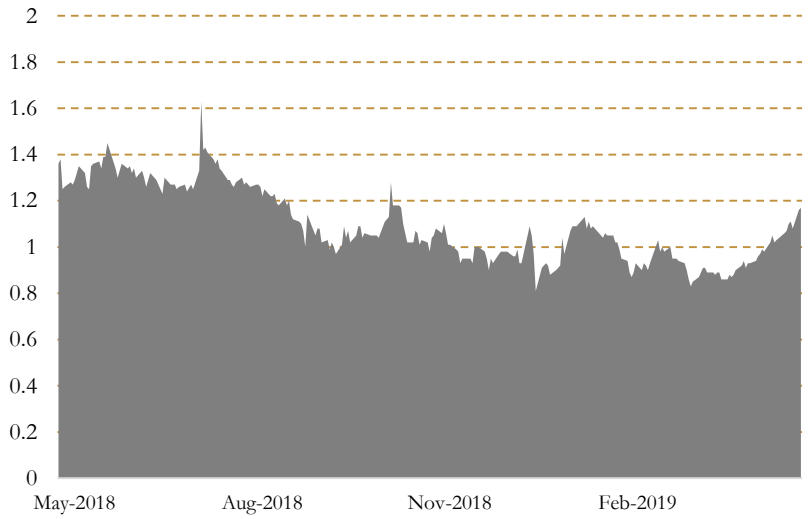
Tight share structure and listed on NASDAQ

Share Structure (May 1, 2019)	
Shares outstanding	**19,821,799**
Warrants*	**1,702,359**
Options*	**1,493,958**
Fully diluted	**23,018,116**
Cash (as of January 31, 2019)	**~$3.19M**

* USAU warrants /options are as follows:
33,415 Dataram legacy warrants, strikes from $30 to $187 expire between 01 Feb 2018 and 14 July 2019
231,458 options with a $3.60 strike expire on 26 May 2021
1,200,000 employee options, 5 year options, vesting over 3 years with a $1.47 average strike
452,359 broker warrants with a $2.64 strike expire on 31 October 2021
1,250,000 warrants with $3.30 strike price (3 year expiration – Jan 2021)

Recent significant financings & corporate activity	
January, 2018	U.S. Gold Corp. closed **$5.0 million** sale of Series E convertible preferred stock in a non-brokered registered direct offering
October, 2017	U.S. Gold Corp. completed a **$2.5 million** equity offering in October, 2017. All common stock priced at $1.80 per share
May, 2017	Public merger closed on 23 May, 2017. Stock **listed on NASDAQ** with new symbol USAU
October, 2016	U.S. Gold Corp. completed an **$11.92 million** equity offering in October, 2016. All common stock priced at $2.64 per share

Stock Information	
Listing	NASDAQ
Symbol	USAU
52 week stock range	$0.74 - $1.69
Average daily volume	~79,000



Analyst Coverage	Company	12 Month Target Price
Heiko Ihle	H.C. Wainwright & Co.	$3.00

U.S. Gold Corp. Overview

Strong leadership – renowned explorer with proven financier and company builder

DAVE MATHEWSON - VP, Head of Exploration

- Prolific geologist-explorer with >35 years of exploration experience in Nevada
- Former **Head of Newmont's** (NYSE: NEM) **Nevada Exploration team**
- Notable discoveries include: Tess, Northwest Rain, Saddle and South Emigrant gold deposits
- Important deposit extension at Newmont's Gold Quarry and Mike deposits
- Most recently a co-founder at Gold Standard Ventures (NYSE American: GSV), helped to consolidate and explore the Railroad district

EDWARD KARR – President & CEO

- Founder of several investment management and investment banking firms in Geneva, Switzerland
- Founder and currently on the Board of Directors of Pershing Gold Corp (Nasdaq: PGLC)
- Currently on the Board of Directors of Levon Resources (LVN-TSX)
- Futures Magazine named Mr. Karr as one of the world's Top Traders (2004)
- Worked for Prudential Securities in the United States, and has > 20 years financial services industry

Dave Mathewson & Edward Karr at the Keystone Project

Copper King Project Overview

Potential near-term production, low CAPEX and robust economics, WY

U.S. GOLD CORP

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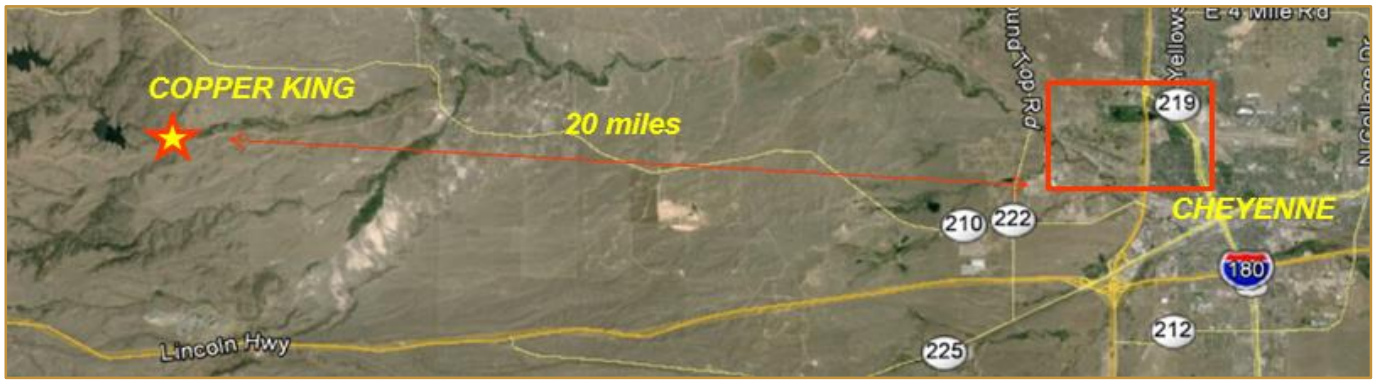
Copper King Project Overview

Delivering substantial value and targeting near-term production

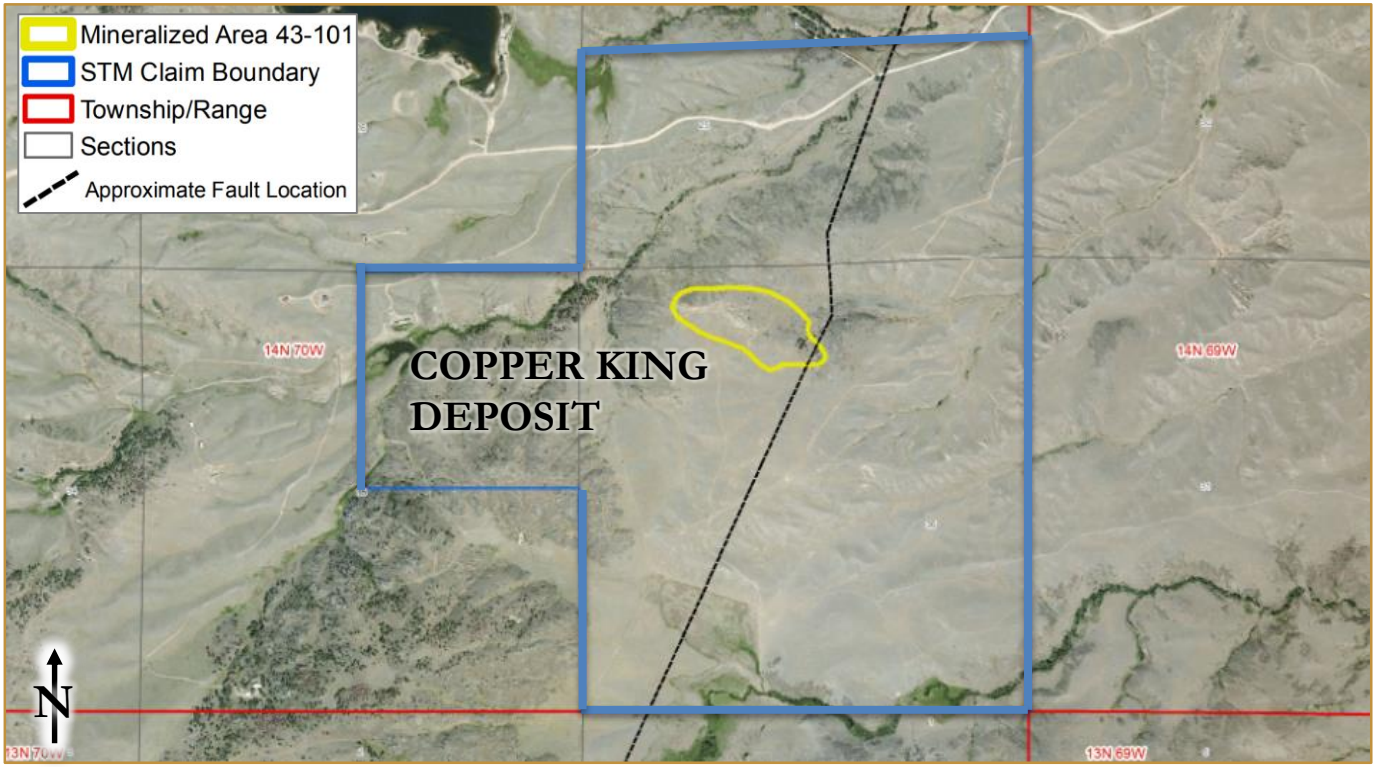
- Copper King is a **development stage, gold-copper-silver-zinc project** located in the Silver Crown Mining District, **Wyoming**
- The project offers **potential near-term production** as well as **exploration upside**
- U.S. Gold Corp. updated the project's PEA in December 2017 (see p. 10), which shows **robust economics**, low CAPEX ($113.7 million) and compelling value to the company:
  - Pre-tax **NPV of $178.5 million** versus the company's **market capitalization of ~ $23 million**[4]
- The company will be concurrently targeting **resource expansion** and **new discoveries** in 2019
- The Copper King project is located **entirely on state land**, making for a more streamlined permitting process to put the project into future production. Wyoming is a **mining friendly state** and **very supportive** of the project

4 Based on NASDAQ: USAU closing price of $1.17, April 30, 2019

Copper King Project Claims & Location

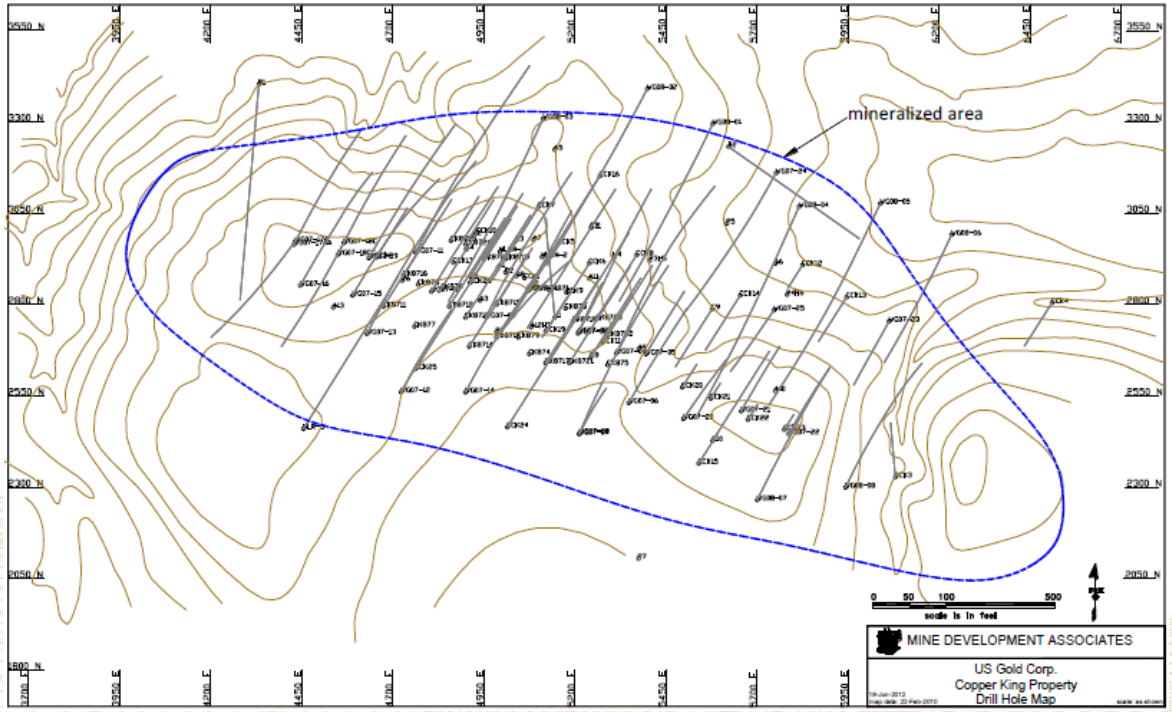


- Located in Southeast Wyoming, 20 miles west of Cheyenne
- Wyoming is ranked the 7th most mining friendly jurisdiction in the world (Fraser Institute)
- Claims consists of 2 state leases with a total area of 1,120 acres
- Project remains prospective for further resource expansion and new discoveries



Copper King Resource Estimate*

Class	Au Cutoff		Cu Cutoff	tons	tonnes	oz Au/ton	g Au/t	oz Au	% Cu	lbs Cu
	oz Au/ton	g Au/t	% Cu							
Measured	0.009	0.32	0.103	15,130,000	13,730,000	0.018	0.62	272,000	0.198	60,120,000
Indicated	0.009	0.30	0.111	44,620,000	40,480,000	0.014	0.48	654,000	0.182	162,880,000
Inferred	0.008	0.26	0.136	15,620,000	14,170,000	0.011	0.38	174,000	0.200	62,530,000



- Resource comprises of 120 drill-holes, totaling 18,105m, within the Copper King deposit
- High-grade mineralization exposed at the surface surrounded by a large, lower-grade zone with potential for expanding

*Values for tons, tonnes, oz Au/ton, g Au/t, oz Au, %Cu, lbs Cu are from the 0.015 Au Eq/ton cutoff in the Mine Development Associates, Technical Report on the Copper King Project, Laramie County, Wyoming: Resource estimates reflect an in situ resource. For further analysis of metal recoveries, see SGS Lakefield Research Ltd., 2009 (December 15), An Investigation into the Recovery of Copper and Gold from Samples of the Copper King Deposit: Report prepared for Saratoga Gold Company by SGS Lakefield Ltd., 234 p. (Results of three locked cycle tests suggest that a concentrate with 26% Cu can be produced, resulting in an approximate Cu recovery of 77%; Au grade in the concentrate resulted in an 89.7 g/t Au with a recovery of 68%). The estimates contained in the table above are not recognized by the United States Securities and Exchange Commission. See "Cautionary Note to U.S. Investors Concerning Mineral Resources – p2." Amounts shown reflect the estimated in situ resource and do not include adjustments for metal recoveries.

Copper King PEA 2017*

On December 5, 2017, Mine Development Associates (MDA) prepared an updated technical report and Preliminary Economic Assessment for U.S. Gold Corp. showing the below metrics:

Summary of Copper King Pre-Tax Economic Results	
	Base Case
Gold price (US$/ounce)	$1,275
Copper Price (US$/lb)	$2.80
Net Cash Flow	$296.8 million
Net Present Value (5.0% Discount rate)	$178.5 million
Internal Rate of Return	33.10%
CAPEX	$113.66 million
Payback	2.5 years
17 year projected mine life	~40,700 Au oz / year; 10,700,000 Cu lbs/yr

Projected Production and Processing Summary		
Mine Type	Open Pit	
Total Production	60.7 million tons	
Processing Rate	9,800 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 1-10	46,470	10.97 million
LOM: 17 years	40,718	10.70 million
Total Production	**Gold (oz)**	**Copper (lbs)**
Years 1-10	464,700	109.76 million
LOM (17 years)	692,200	181.95 million
Estimated Number of Jobs Created	**> 100 jobs**	

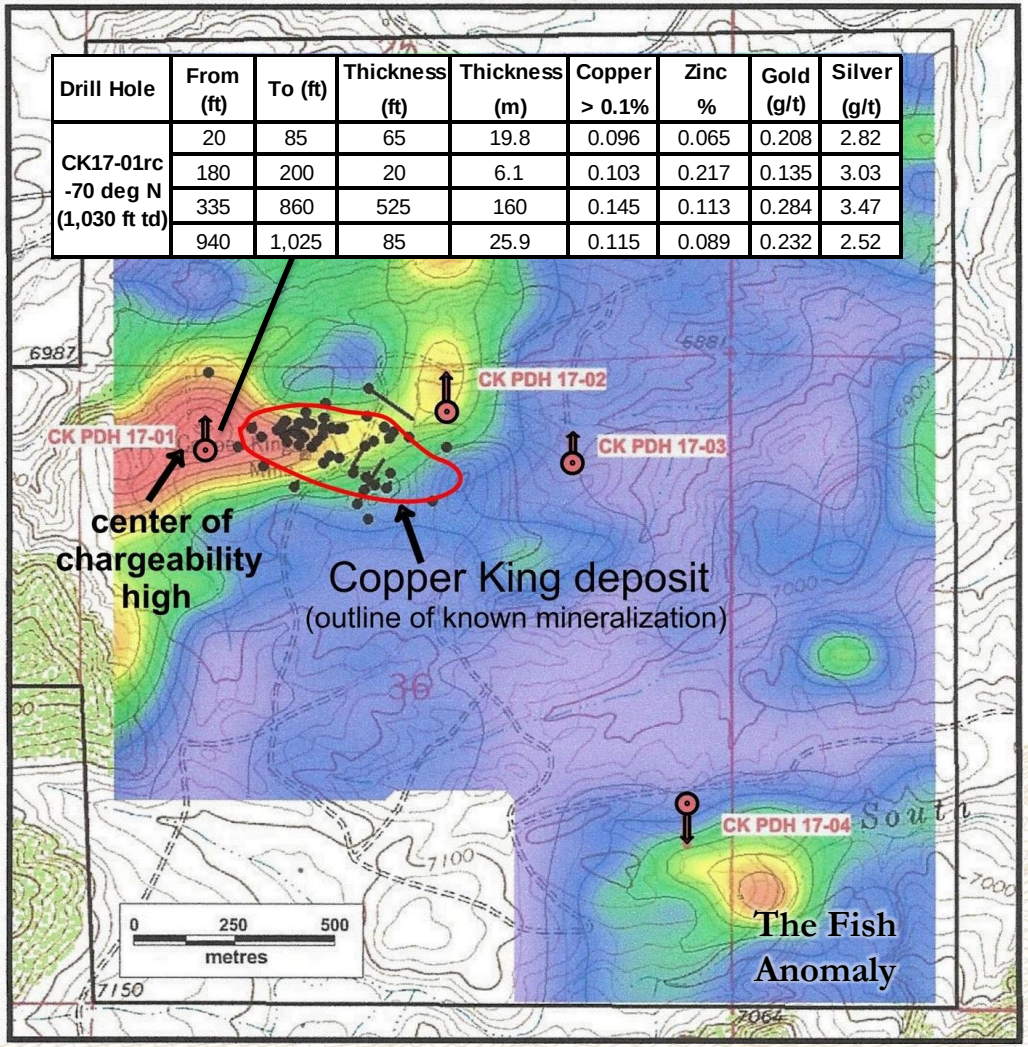
Values for tons, tonnes, oz Au/ton, g Au/t, oz Au, %Cu, lbs Cu are from the 0.015 Au Eq/ton cutoff in the Mine Development Associates, Technical Report on the Copper King Project, Laramie County, Wyoming: Resource estimates reflect an in situ resource. For further analysis of metal recoveries, see SGS Lakefield Research Ltd., 2009 (December 15), An Investigation into the Recovery of Copper and Gold from Samples of the Copper King Deposit: Report prepared for Saratoga Gold Company by SGS Lakefield Ltd., 234 p. (Results of three locked cycle tests suggest that a concentrate with 26% Cu can be produced, resulting in an approximate Cu recovery of 77%; Au grade in the concentrate resulted in an 89.7 g/t Au with a recovery of 68%). The estimates contained in the table above are not recognized by the United States Securities and Exchange Commission. See "Cautionary Note to U.S. Investors Concerning Mineral Resources – p2." Amounts shown reflect the estimated in situ resource and do not include adjustments for metal recoveries.

Copper King 2017 Exploration Program

Drilling has encountered a newly discovered mineralized zone

- **Four drill holes** were completed to test geophysical responses on the Copper King property in 2017
- The program targeted extensions, east and west, of the known main zone as well as new target areas (The Fish anomaly)
- **Drill hole CK17-01rc** encountered a composite of almost 700 feet of base and precious metal mineralization beginning almost at the surface
- CK17-01rc represents **a 200-meter western step-out** which encounters gold, copper, zinc and silver
- The bulk of this new zone's chargeability anomaly **has not been drill-tested** to the west –potential further upside to the known deposit

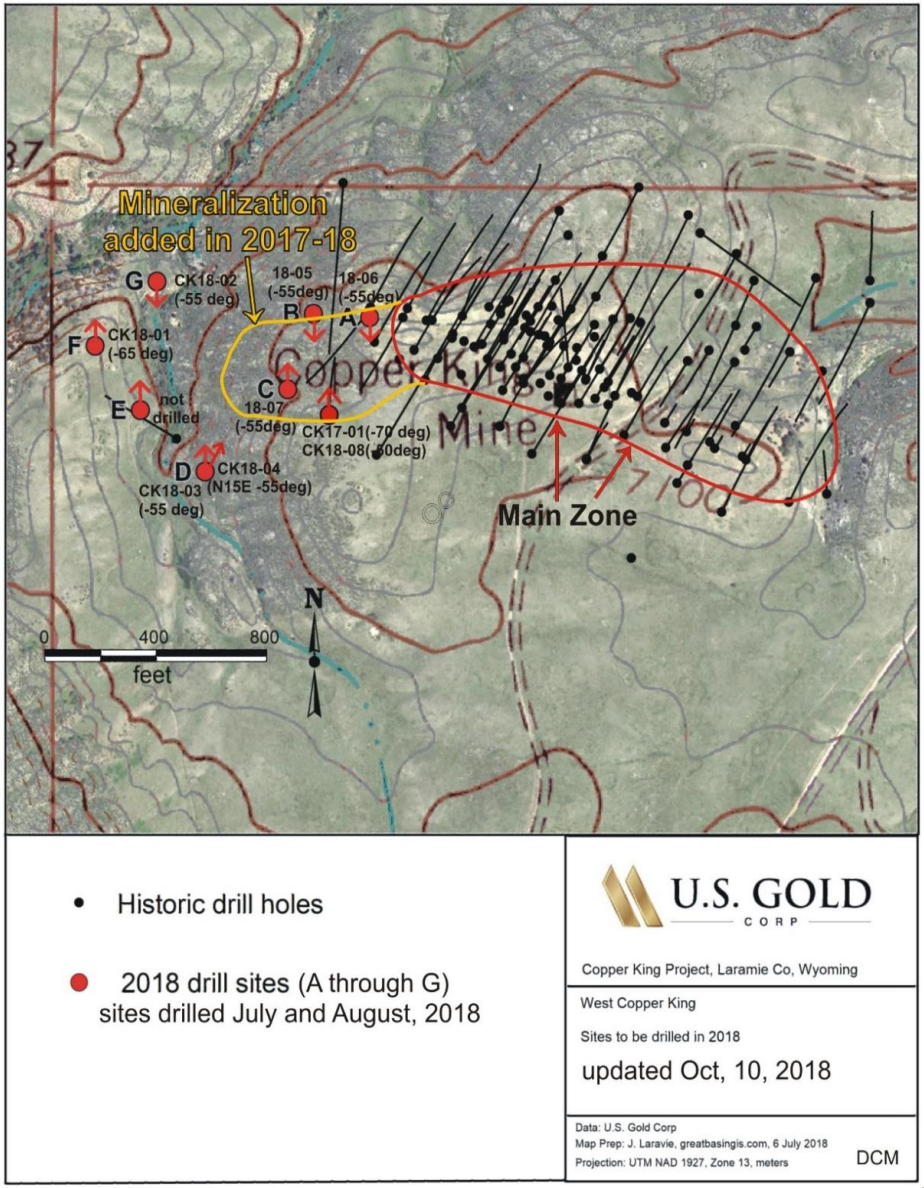
Drill Hole	From (ft)	To (ft)	Thickness (ft)	Thickness (m)	Copper > 0.1%	Zinc %	Gold (g/t)	Silver (g/t)
CK17-01rc -70 deg N (1,030 ft td)	20	85	65	19.8	0.096	0.065	0.208	2.82
	180	200	20	6.1	0.103	0.217	0.135	3.03
	335	860	525	160	0.145	0.113	0.284	3.47
	940	1,025	85	25.9	0.115	0.089	0.232	2.52



Copper King 2018 Exploration Program

Targeting expansion of the resource

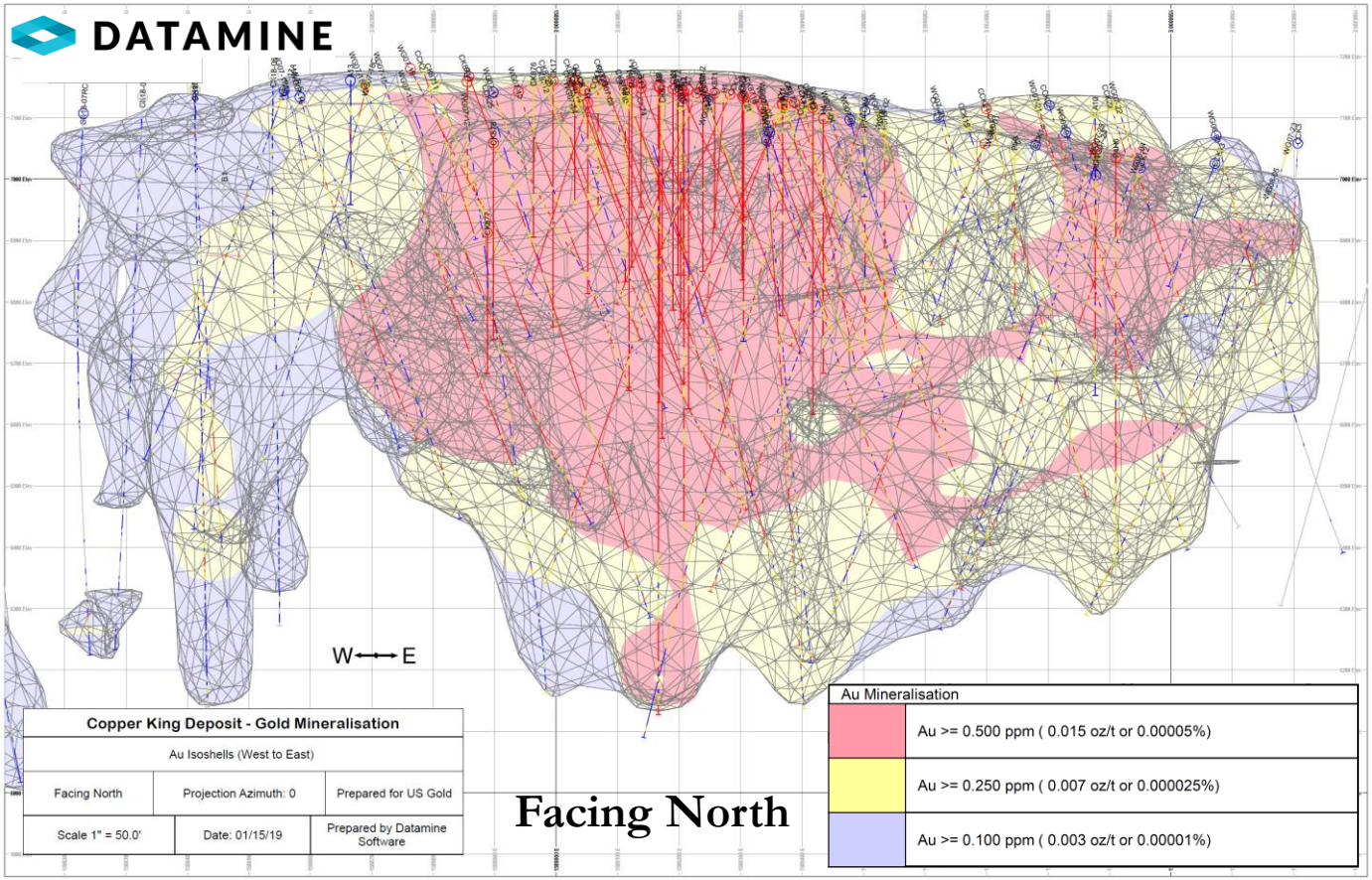
- Copper King drilling program for 2018 consisted of 8 drill holes, targeting expansion of the deposit
- Primary focus was **last year's newly discovered zone** of mineralization, the **West Zone**, a 200m step out from the Main Zone at Copper King
- Multiple, thick zones of copper, gold, zinc, and silver mineralization were encountered in **five** of the eight drill holes
- Drilling indicates that the Copper King mineralization **extends to the west at least 200 meters**
- The **thick mineralization zones** occur within a quartz, biotite schist, within a zone of about 200 meters long east-west dimension, at least 120 meters wide north-south
- This **new mineralization** also appears to remain **open to the south**, and potentially to the north



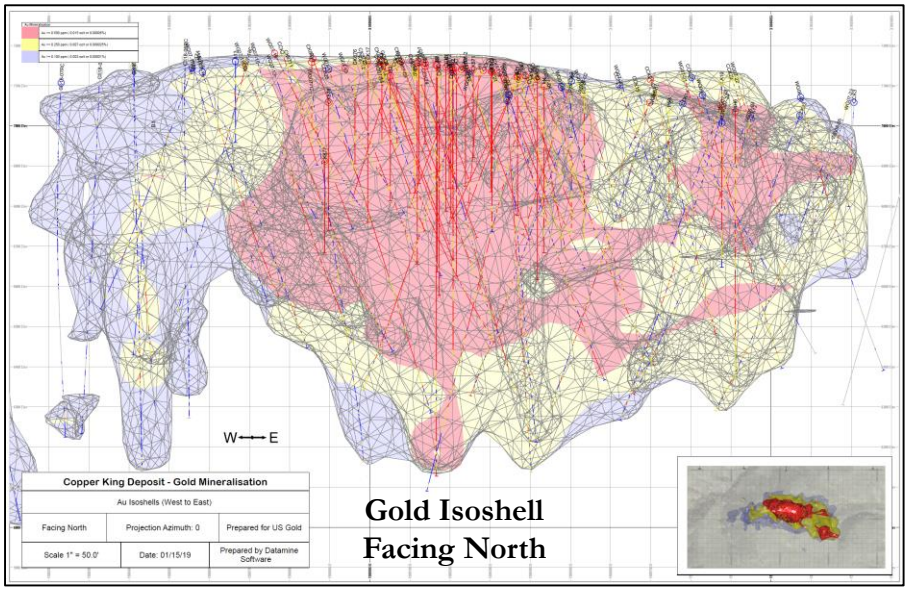
Datamine Copper King Exploration Model

Datamine completed a comprehensive drill hole analysis of the Copper King gold-copper-silver-zinc deposit

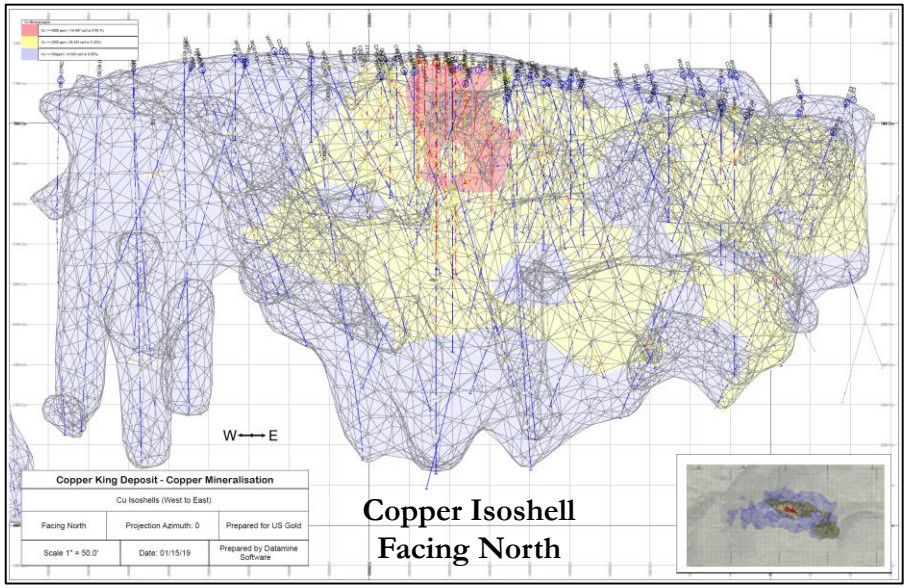
- The Datamine study importantly includes all the potential economic metals, not just gold and copper as previously modeled (see next slide)
- The study also provides indications for locations of additional potential discovery
- Deposit is potentially open to the **southeast** and **southwest**
- 2019 Copper King exploration programs being designed based upon Datamine study



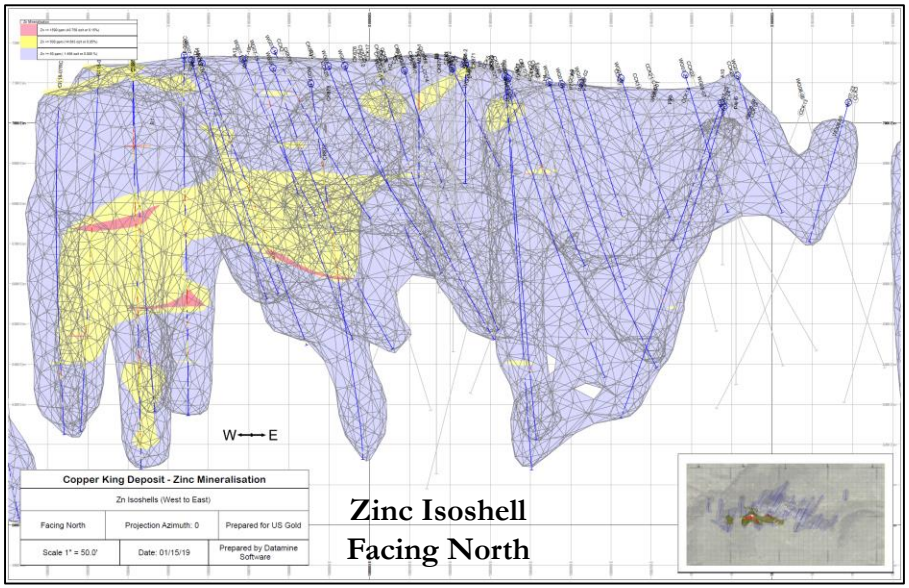
Datamine Copper King Exploration Model



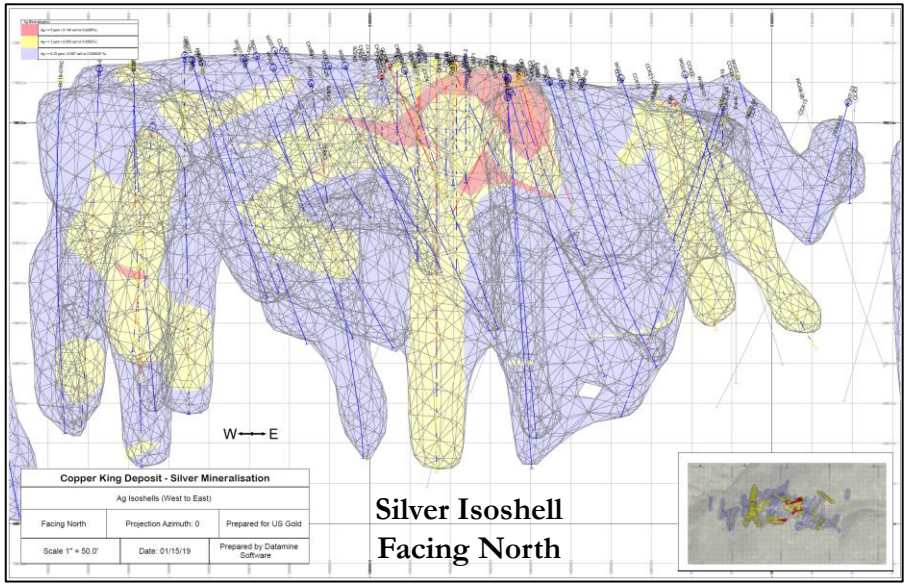
Gold Isoshell
Facing North



Copper Isoshell
Facing North



Zinc Isoshell
Facing North

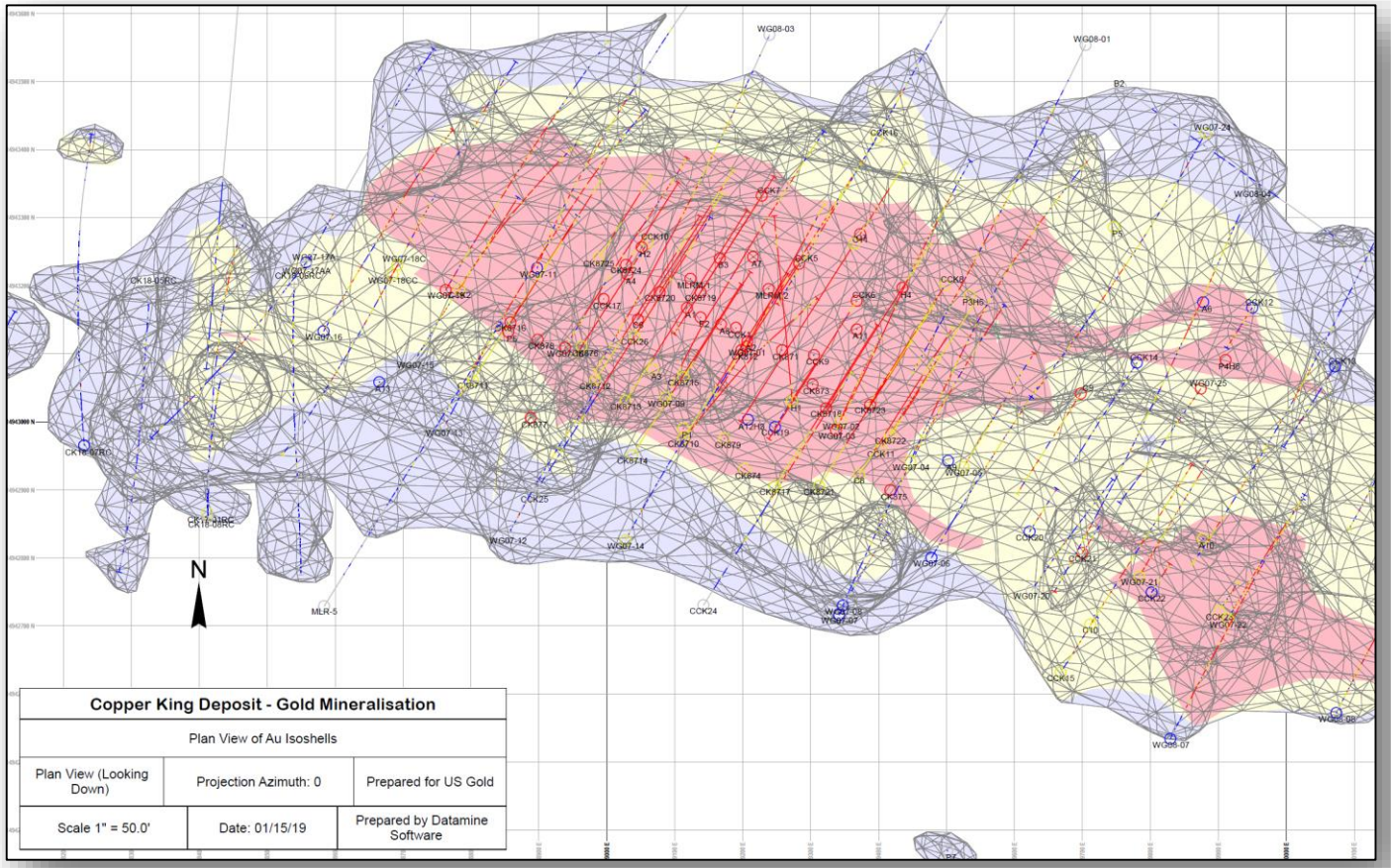


Silver Isoshell
Facing North

Copper King 2019 Exploration Plans

Datamine Exploration Model Shows Deposit Potentially Open to SE & SW

- Datamine gold isoshell shows deposit **cuts off in higher grade gold** mineralization to the SE
- The deposit also has the potential to extend further to the SW (as exhibited by 2017 & 2018 drilling)
- 2019 exploration programs currently being designed
- Primary focus in 2019 will be **to expand resource and deposit size**



- After Datamine analysis, the team now believe the future deposit will be more **"banana" shaped** than the existing oval known resource

Keystone Overview

Discovering the next gold district on the Cortez Trend, NV

U.S. GOLD CORP

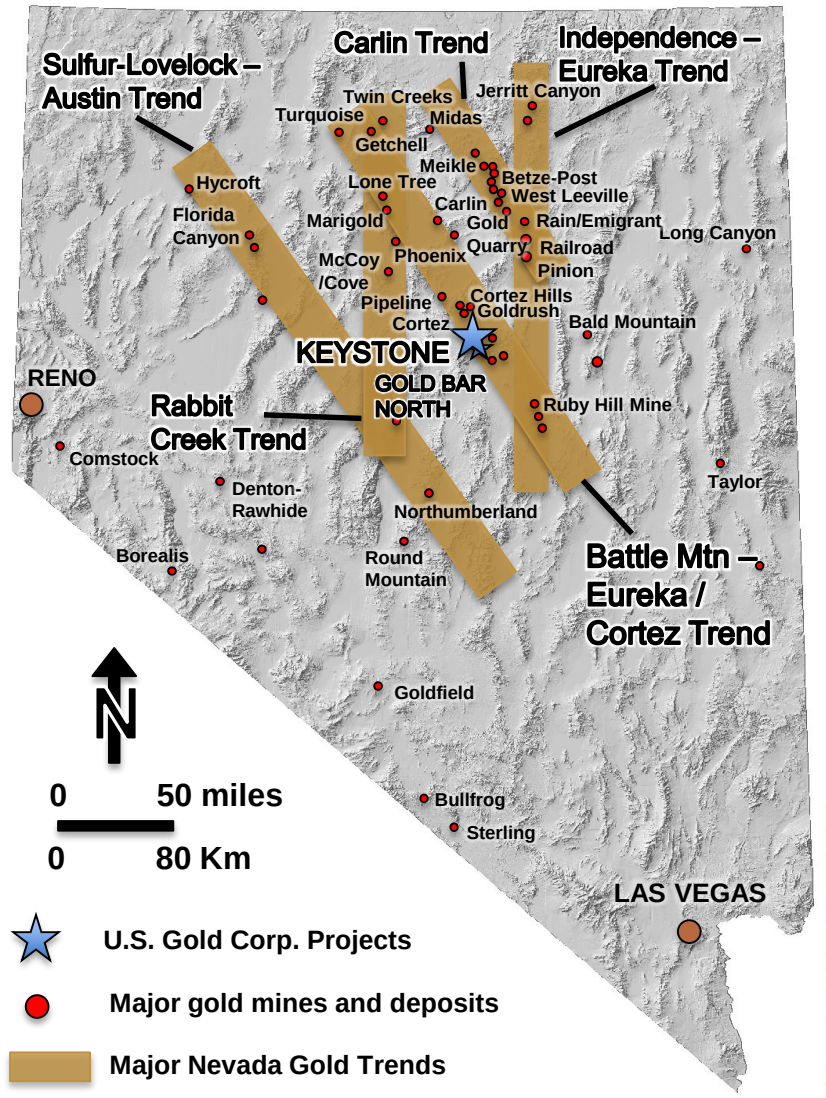
Nasdaq: USAU | usgoldcorp.gold

Keystone Project Location

Nevada – renowned gold mining jurisdiction

- Produced ~5.6 M oz of gold produced in 2017 - approx. **75% of U.S. gold production**[1]
- The **5th largest** gold producing "country" in the world
- Historically, Nevada has produced > 225M oz of gold
- **"Elephant country"**: numerous > 20M oz gold deposits
- Pro-mining environment, **geopolitical stability**, major infrastructure
- Nevada hosts multiple prolific gold trends, including the **Cortez Trend**, on which **Keystone** is located.

1 Nevada Division of Minerals, http://minerals.nv.gov/Programs/Mining/Mining/

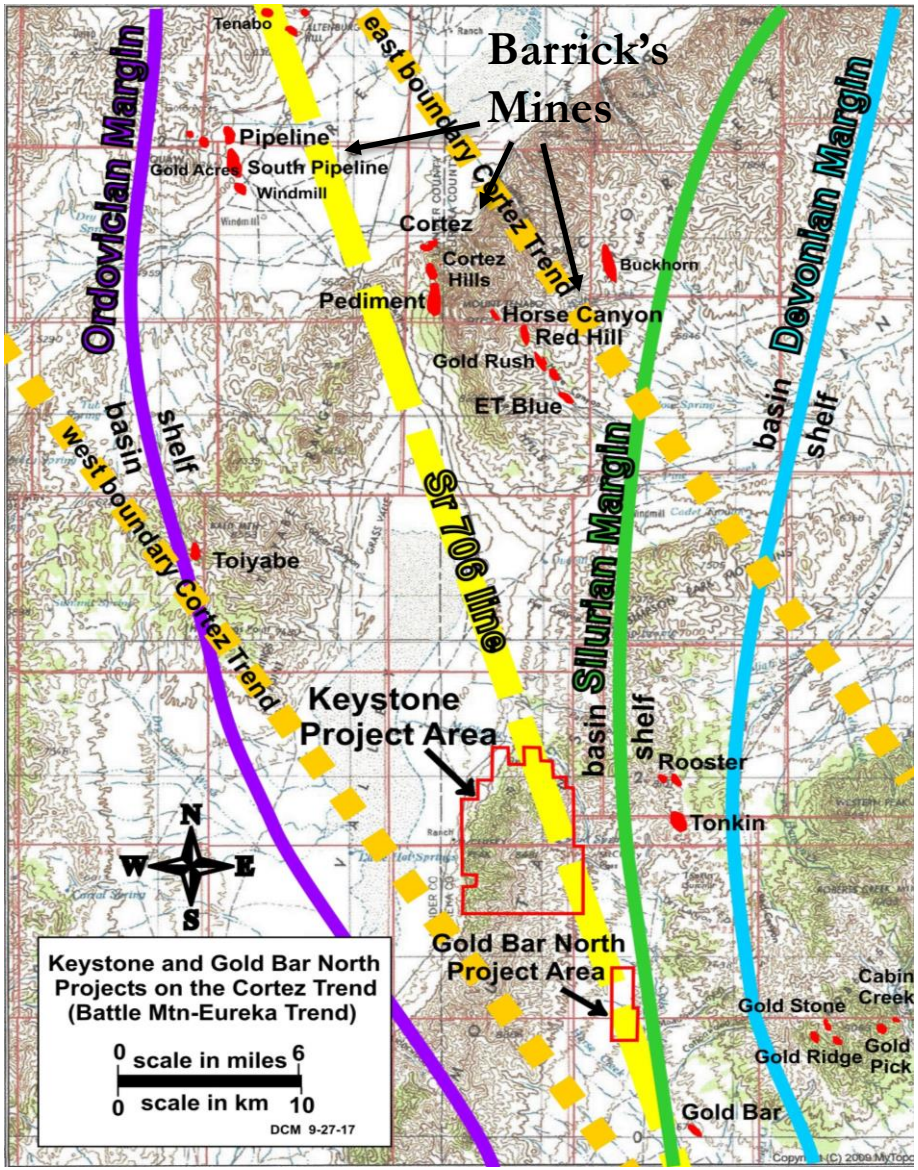


Keystone Project Location

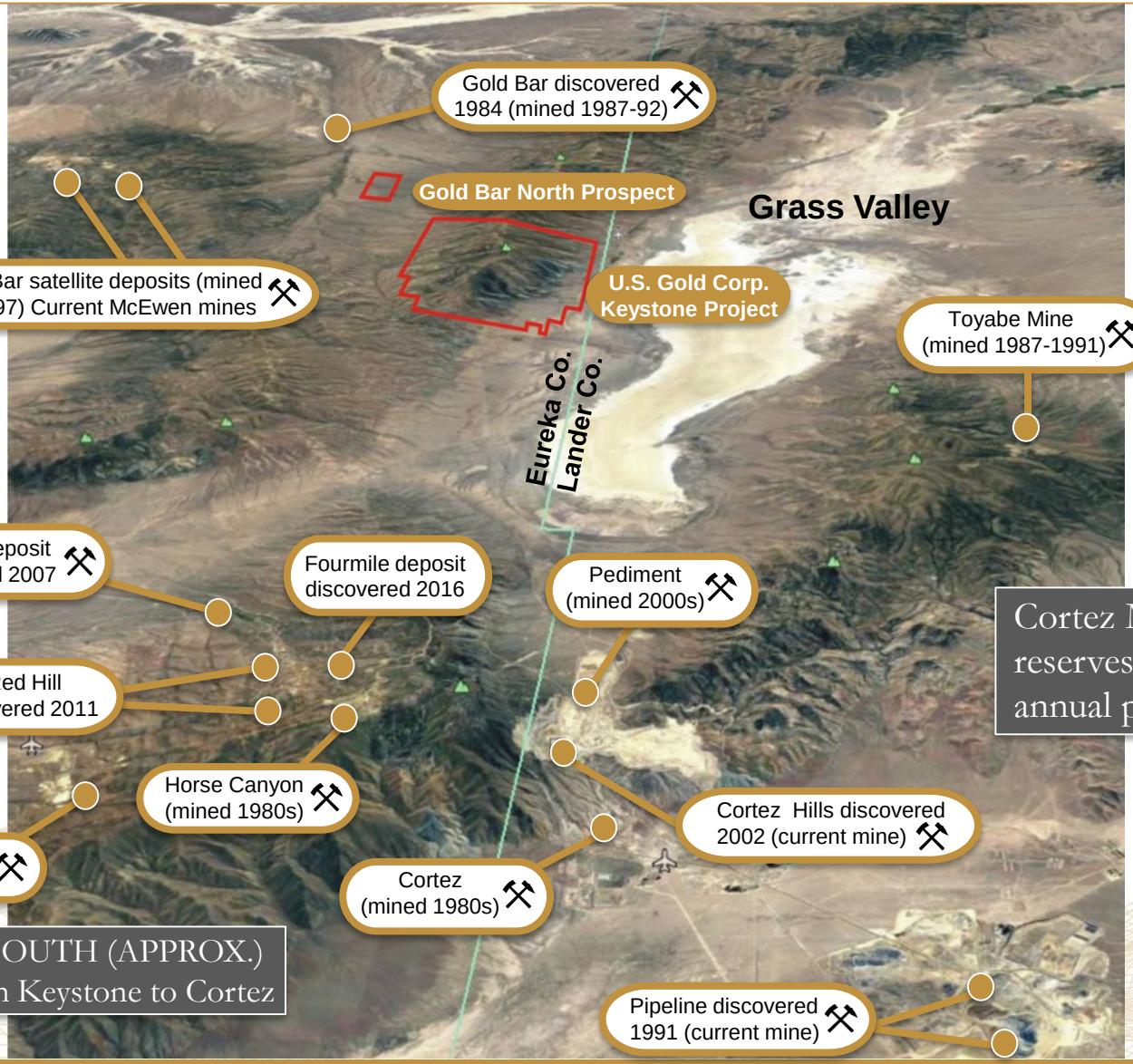
The Cortez Trend – prolific gold mining belt

- The Cortez Trend is one of the **world's most productive trends** - producing ~ 1M oz of gold per year
- The trend hosts numerous **world class deposits**[2]:
  Barrick's Pipeline: ~21+ M oz gold
  Barrick's Cortez Hills: ~15+ M oz gold
  Barrick's Goldrush: ~10+ M oz gold
- Significant discoveries still being made on the Cortez Trend, e.g. Barrick's Fourmile Project
- The NNW-trending **Sr .706 line** likely represents a major crustal suture favorable for development of gold-bearing hydrothermal systems and deposits
- **Keystone** exhibits **many similarities** to Barrick's deposits to the north - similar **host rock, stratigraphy** and **intrusive-centered, dome**

2 The presence of gold resources on properties in close proximity is not necessarily indicative of the gold mineralization on the Keystone property



Barrick's Pipeline & Cortez mines to Keystone



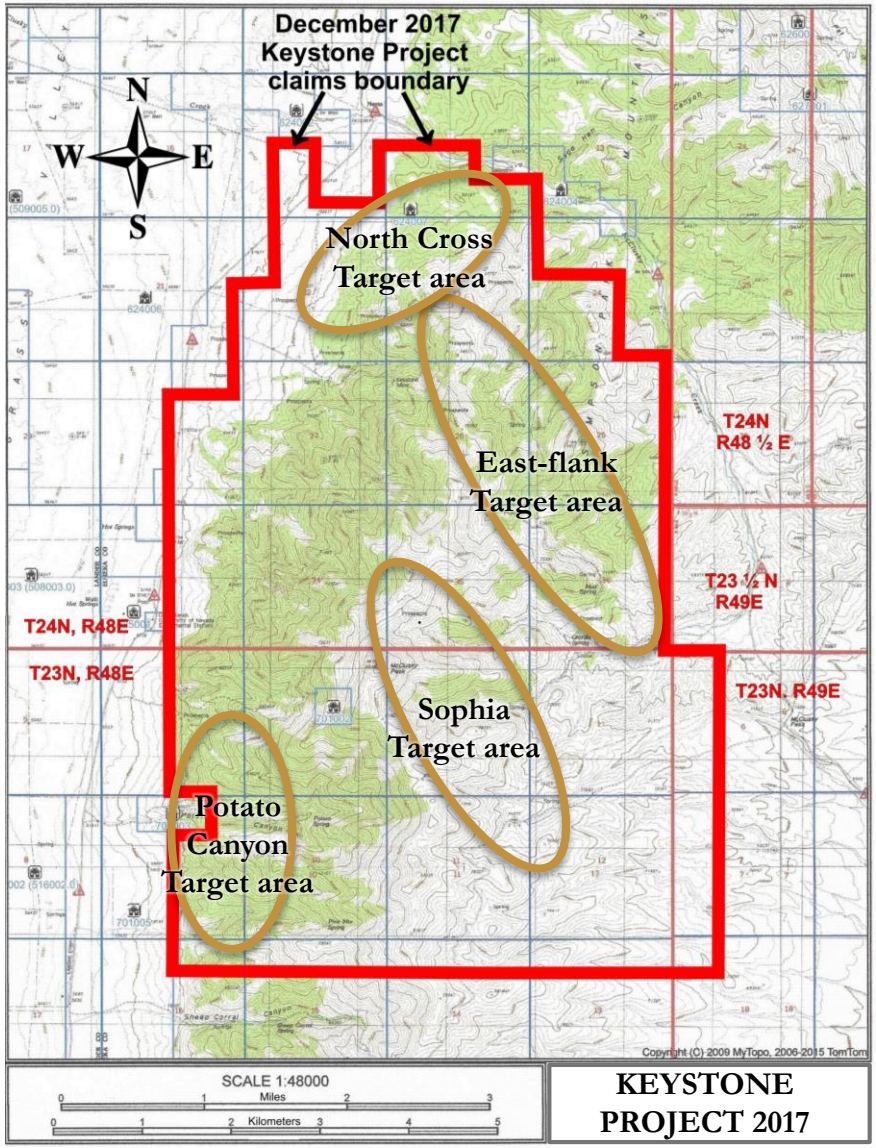
Cortez Mine has P&P reserves ~ 9M oz of gold; annual production ~1M oz

VIEW LOOKING SOUTH (APPROX.)
approx. 10 miles from Keystone to Cortez

Keystone Project Overview

Targeting the next substantial gold district on the Cortez Trend

- 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
- Hosts many of the same characteristics of the major mines on the Cortez district:
  - Tertiary **intrusive-centered, domed** carbonate window
  - Geochemistry indicates a **very large epithermal system** is present
  - The **host rocks** at Keystone are very similar in **character** and **thickness** to the **Pipeline & Cortez Hills** deposits to the north of the trend
- The extent and **severity of the alteration** and the **thickness of permissive rock** packages encountered, highlight the potential of this district scale mineral system
- Systematic exploration from 2016-2018 has primed Keystone for discovery



Cross-sectional schematic of Keystone

Exploring a significant intrusive-centered, domed, gold district on the Cortez Trend

Intrusives: the "mechanism(s)" that drove the system(s).

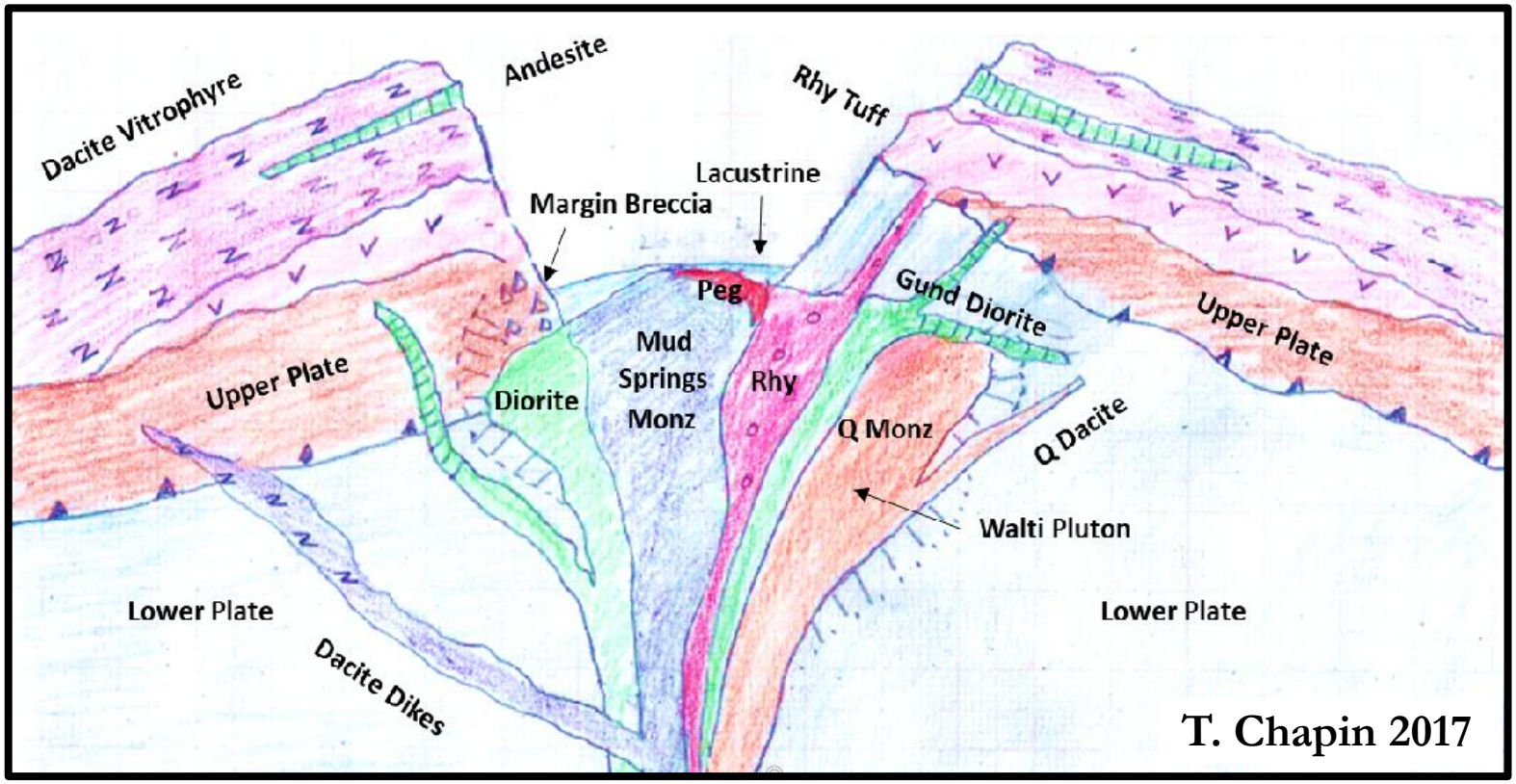
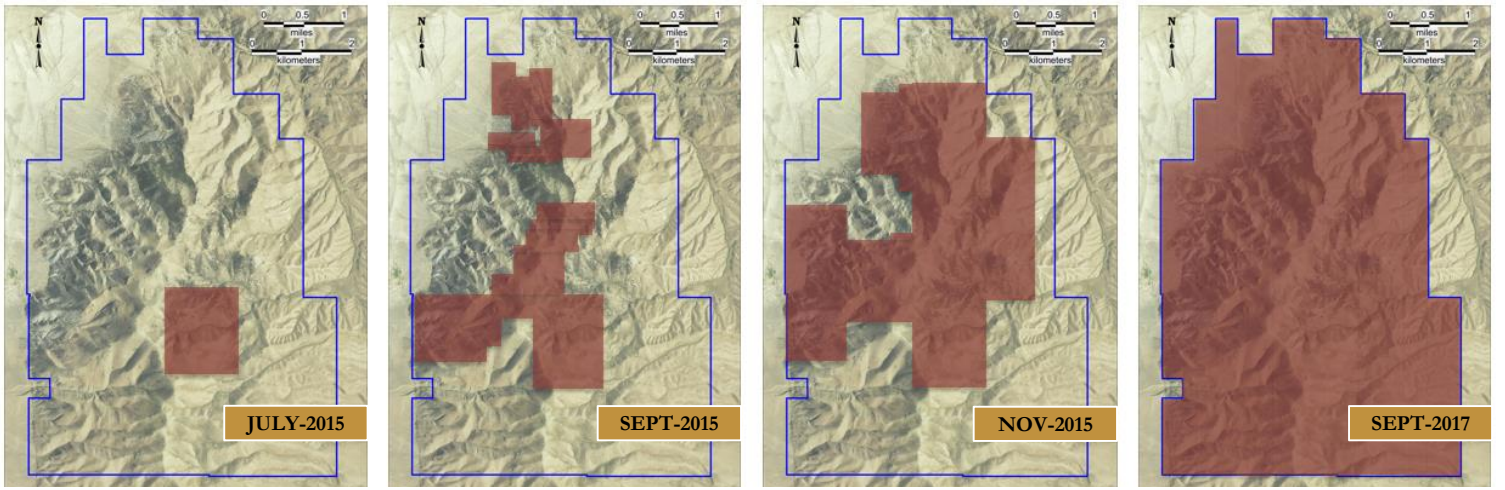


Figure: Schematic sketch of the volcanic complex underlying the Keystone Project. The Paleozoic sediments are intruded by a complex of intrusions ranging from diorite to quartz rhyolite. Each intrusion has a set of daughter dikes and extrusive facies. The hypabyssal rhyolite creates a quartz rich rhyolite tuff that overlies the Upper Plate on both sides of the dome. The Walti Pluton is Quartz Monzonite and forms a skarn. The Mud Springs Monzonite forms dacite dikes and a thick sequence of dacite vitrophyre. Likewise, the Gund Diorite forms both andesite dikes and some andesite flows. Calcite outcrops and quartzite meta breccia outcrops overlie and flank three sides of the Mud Springs Pluton suggesting that the pluton is overlain by a crater lake.

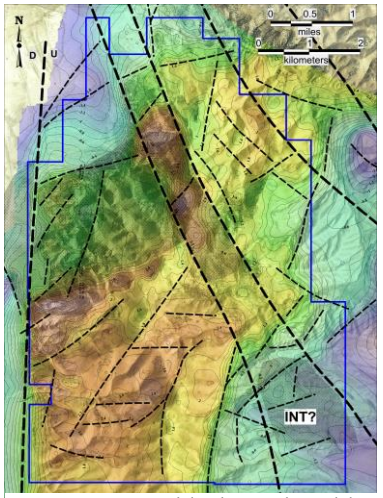
Keystone Exploration 2016 - 2017

Systematic, district-wide exploration begins at Keystone

- **Consolidated the entire district** for the first time in history
- Initiated **model-driven, modern day-exploration** programs: digital data organization & map representation and mapping geology of the entire district
- Completed **district-wide gravity survey** in 2016 ahead of initial 2016 drilling program - identified a strong NNW-trending structural zone (see gravity map below)
- U.S. Gold Corp. completed a scout drilling program late in 2016 - targeting stratigraphic, lithologic and deposit model information (up to 1800 feet deep)
- All holes intersected **thick intervals of permissive host rocks**, including Devonian Horse Canyon, Wenban limestone Formations, and also Roberts Mtn Formation
- Extensive surface geochemistry, **further refined targets** with: stream sediment, altered cobble, rock and soil sampling



Succeeding where others have failed: U.S. Gold Corp. consolidated the entire Keystone District for the first time in history (from 2015-2017)

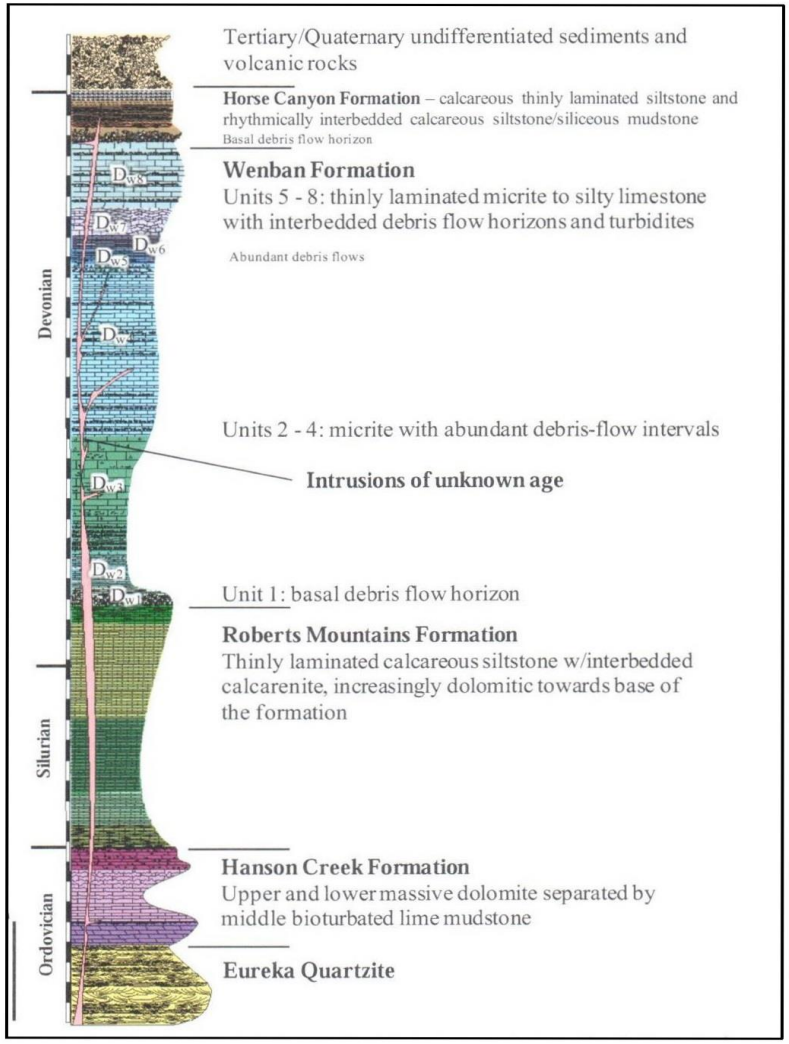


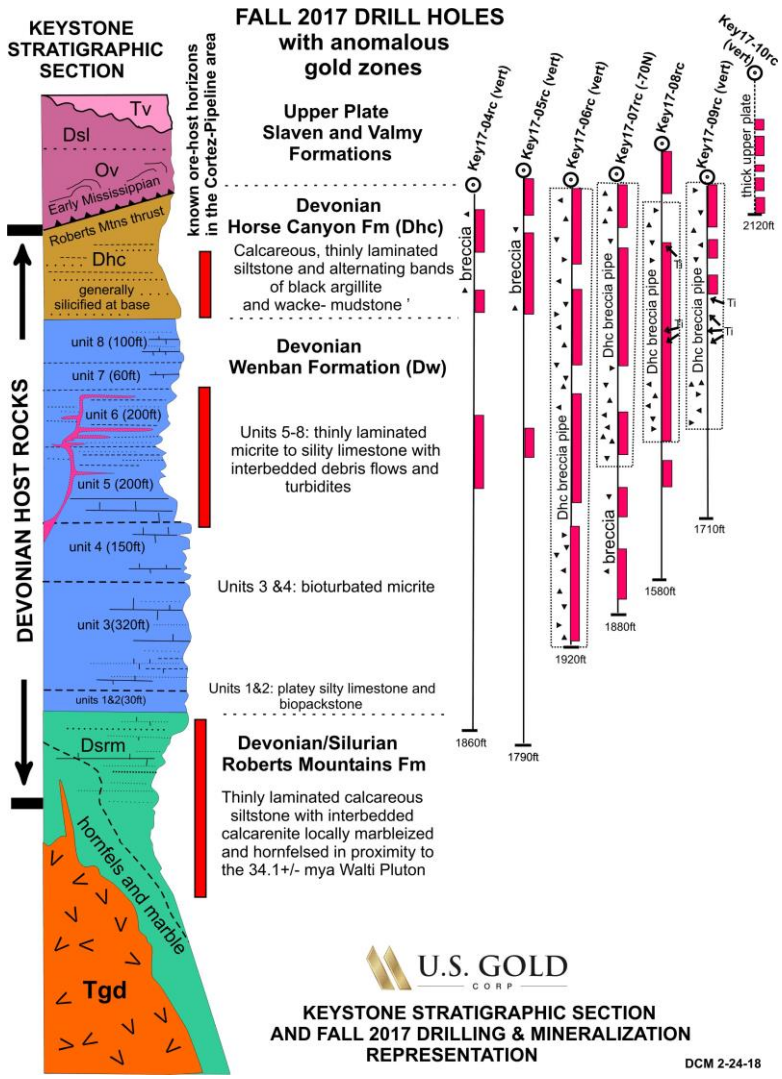
Keystone Residual Gravity with interpretation

Keystone 2017 Drilling Stratigraphy

Strong similarities to sizeable deposits at the north of the Cortez Trend

Figure 1-Stratigraphy of the Cortez area (after Creel and Bradley, 2013)

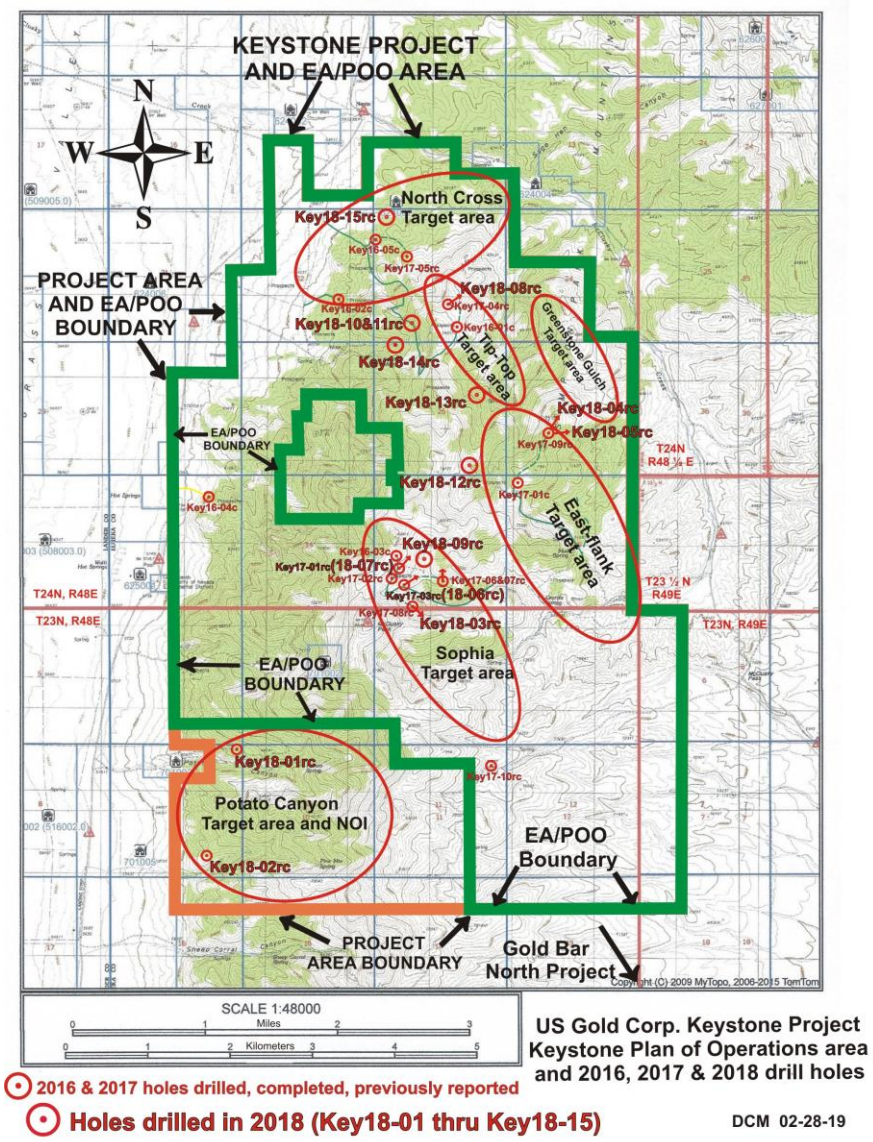




Keystone Exploration 2018

Early stage, systematic exploration complete – primed for discovery

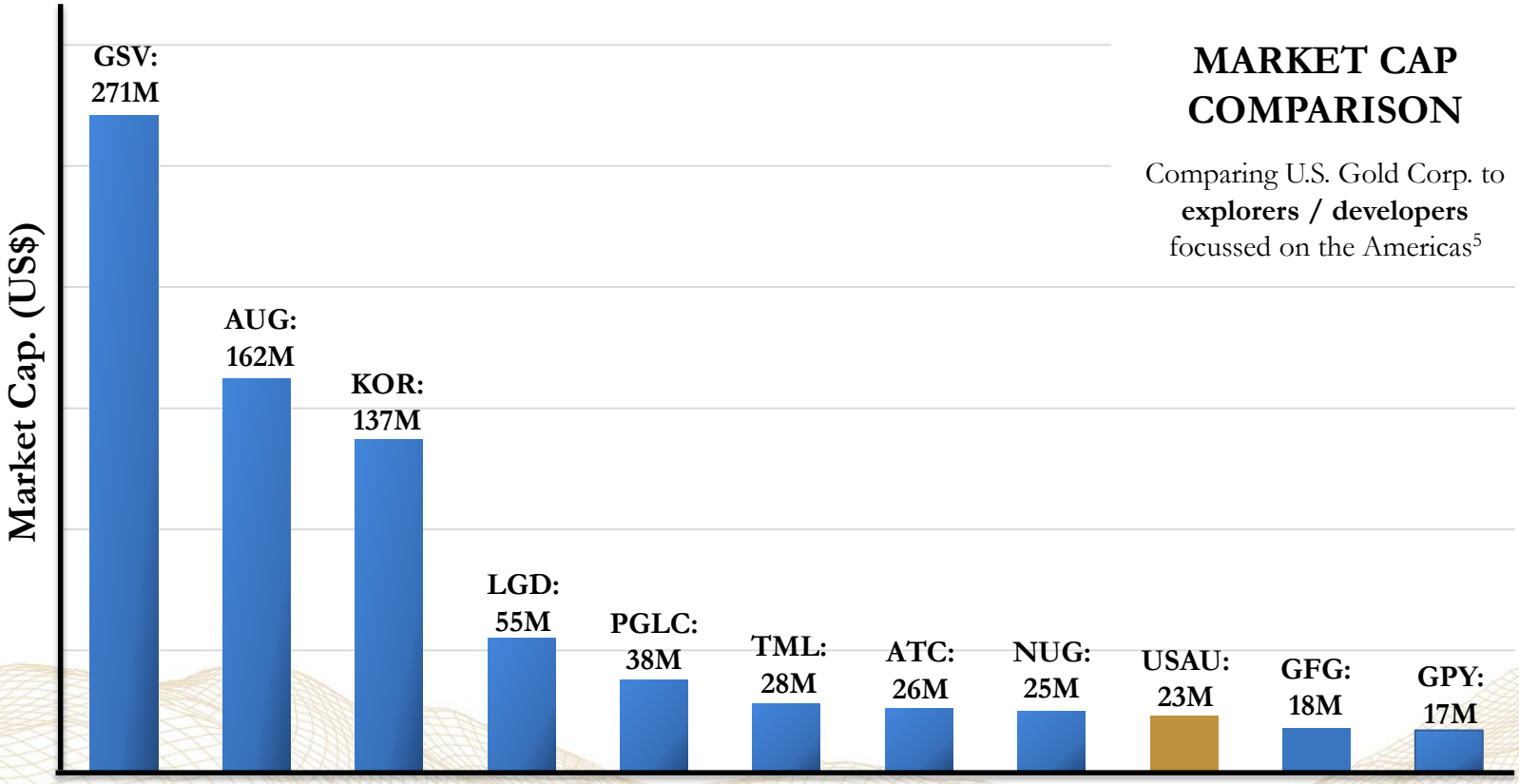
- 2018 drilling, comprised of a total of fifteen holes, and was conducted in two phases - totalling 25,310 feet (7,714 m)
  - Phase 1: provided "scout" drill tests within several broad new target areas (limited by permitting constraints)
  - Phase 2: provided a first test to several drill targets in areas previously inaccessible
- Finalized Environmental Assessment (EA) and Plan of Operations (POO) in Q3, 2018 – **no drilling restrictions in 2019**
- **Numerous holes** intersected significant gold assay intervals
- Drilling at Keystone continues to show that all of the **right ingredients** are present for big, **Carlin-type, gold deposits**.
- Finding the **right structure** and **feeder zones** that would host these styles of big deposits is now the **focus of our 2019 program**



U.S. Gold Corp. peer comparison

Compelling value with considerable potential upside

Pre-tax NPV of $178.5 million versus the company's market capitalization of ~ $23 million



MARKET CAP COMPARISON

Comparing U.S. Gold Corp. to **explorers / developers** focussed on the Americas[5]

[5] Source: Companies' market capitalizations as of April 30, 2019, sourced from: https://finance.yahoo.com/
Companies: Gold Standard Ventures, Corvus Gold, Auryn Resources, Liberty Gold, Pershing Gold, Treasury Metals Inc., NuLegacy Gold, ATAC Resources, Golden Predator Mining, U.S. Gold Corp., GFG Resources.
[5] The market capitalization of other companies is not necessarily indicative of the future performance of U.S. Gold Corp.

Directors, Management & Technical Advisory Team

Directors	
John N. Braca	Chairman
Edward M. Karr	Director
The Honorable Ryan K. Zinke	Director
Timothy M. Janke	Director
James Dale Davidson	Director
Andrew Kaplan	Director

CONSIDERABLE MINING, CAPITAL MARKETS, M&A AND GOVERNANCE EXPERIENCE. SERIAL ENTREPRENEURS WITH SUCCESSFUL TRACK RECORDS

Management Team	
Edward Karr	President & CEO
Dave Mathewson	VP Exploration
David Rector	COO, Secretary
Ted Sharp	CFO
Ken Coleman	Project Geologist

RENOWNED EXPLORERS, PROLIFIC COMPANY BUILDERS WITH SUBSTANIAL EXPERIENCE OF RAISING CAPITAL

Technical Advisory Team	
Tom Chapin	Senior Consulting Geologist
Jim Wright	Geophysical Advisor
Joe Laravie	Digital Mapping Specialist
Brion Theriault	Contract Geologist

SUBSTANTIAL NEVADA & CORTEZ TREND EXPERIENCE WITH BARRICK & NEWMONT

The U.S. Gold Corp. Opportunity

Tight share structure & aggressively advancing two world-class assets

- **World-class 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 **renowned explorers and proven company builders**, who have made, and financed, the discovery and development of numerous world class gold assets
- Copper King offers exposure to **compelling value**, and potential near-term production in **mining friendly Wyoming**.
- Keystone offers exposure to significant potential exploration upside – an entire district on **Nevada's prolific Cortez Trend**.
- The company has a **tight share structure** (19.8M shares outstanding), with a large audience - listed on **NASDAQ**

DEVELOPMENT PACKAGE

Exciting combination of a later stage development asset and 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

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