

Growth Stocks Weekly

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Performance: 1996 116.9%; 1997 28.1%; 1998 36.4%; 1999 39.4%; 2000 180.9%; 2001 -50.5%; 2002 18.7%; 2003 28.8%; 2004 166.7%; 2005 28.2%; 2006 153.3%; 2007 8.8%; 2008 -25.2%

Junior Resource Sector Research

September 19, 2008

"The next phase of history's greatest commodity boom ... should make commodity stocks even greater out-performers" – Don Cox, BMO Chief Global Strategist

The momentum phase of the great commodities super cycle was put on pause this year with the forced de-leveraging of the U.S. financial system. However, when you research commodity price charts going back over two hundred years, the evidence suggests that 18 to 23 years is the benchmark for the length of a commodity bull. The current cycle is in year 7.

Copper, known as "the metal with a Ph.D. in economics," was setting new record highs as recently as July. Well-respected BCA Research recently stated that commodities are "on an eventual path toward a mania-like overshoot." It's our opinion that conviction and excitement levels will soon be stronger than ever. With the U.S. dollar under continued pressure following the historic bailout of the financial system, the world's metals will see further upward pressure. What we've seen so far is just a warm-up. Some of the world's top prognosticators and global strategists are forecasting \$6/lb to +\$8/lb copper prices this cycle. Mining shares are currently discounting long-term copper at \$0.66/lb (RBC). Closing price Sept 19 \$3.21/lb.

We have had barely one billion people consuming two thirds of the world's available natural resources. Another 5.6 billion people get by on the other third. It's that 5.6 billion that want more of the essentials. Emerging economies like China, India, Russia and Brazil, with 10 times as many people as the U.S., are increasingly flexing their economic muscle. They are plowing trillions of dollars into new roads, bridges, water-treatment plants, nuclear energy, electrical capacity, ports, airports, and gleaming new office towers, and will continue to do so for at least the next decade or two. They are playing "catch up" to the U.S. and Europe. What the "West" achieved during the post-world-war boom and even during the industrial revolution is being massively over-shadowed by their build out of infrastructure. And all this requires tons and tons of copper.

An average U.S. home contains 400 pounds of copper. A new automobile contains around 50 pounds of copper (the "green" Toyota Prius uses five times more copper than a gasoline powered car). A Boeing 747 jet contains 9,000 pounds of copper. A big General Electric locomotive contains around 16,000 pounds of copper. China is the largest consumer of copper in the world. It used about 9 billion pounds of it in 2007... a 9% increase from the year before. The potential demand here is extraordinary. That means owning copper producers and near-producers for the long term. Our top pick for capital gains ...

Bell Copper Corporation (BCU-TSX Venture & BCUFF-USA)

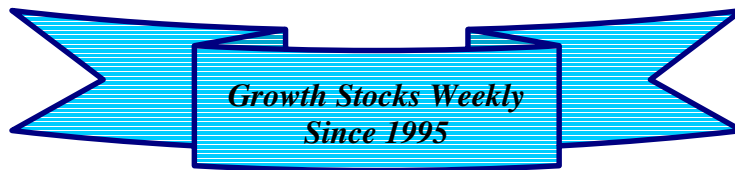
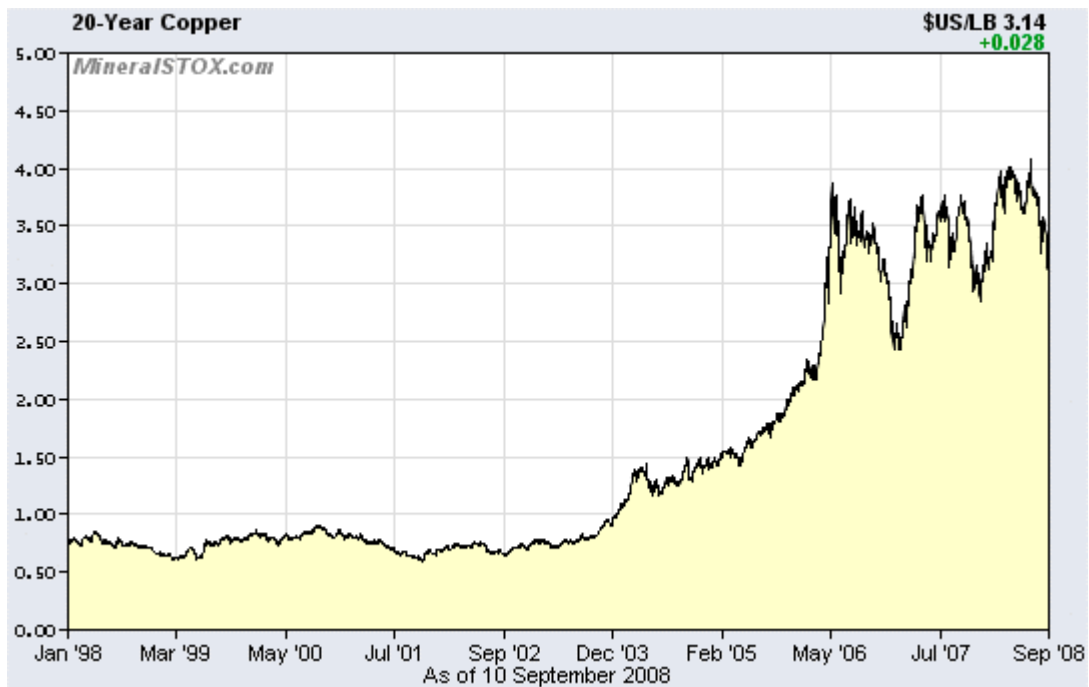
Bell Copper Corporation (BCU-TSX Venture Exchange & BCUFF-USA) has assembled an exceptional portfolio of properties located in some of the world's premier/stable copper producing regions. With two advanced development projects, one discovery project, and a handful of large porphyry-type exploration projects, several of which have near-term potential to become discovery projects in their own right, Bell will attract increasing industry attention. As the focus comes off the world's financial issues, off-take demand for essential commodities will resume while supplies remain constrained by declining production and a complete absence of new discoveries over the past 10 years.

Bell is primarily focused on the development to production of its [La Balsa](#) +205 million/lbs (43-101 Resource) and growing copper project in Mexico and its former producing [Granduc](#) copper mine (+1 billion/lb Copper potential) in British Columbia, Canada. Both of these development-stage projects have significant infrastructure in place, often the biggest obstacle to new project development in an era of rising development costs. This is a tremendous advantage and provides substantial unrecognized value to these assets.

Bell is also continuing exploration and development of an exceptional [pipeline](#) of potentially world class "company-maker" copper projects, including its recent high-grade copper discovery at [Sombrero Butte](#) in Arizona (targeting a medium sized porphyry deposit). And excitement continues to build around what could be a potential giant at the [Kabba](#) project in Arizona where Bell has outlined a potential porphyry system with surface dimensions of approximately 15 square kilometers.

Bell is recognized as having one of the top copper-porphyry exploration teams on the planet, including four Ph.D.'s with 15 to 35 years of industry experience each, focused on targeting large porphyry deposits, the ones that generate significant interest from major global copper companies like RTZ, BHP and Freeport. Do not be surprised if you see Bell Copper dealing with these and other copper-focused cash-rich companies looking to replace depleting resources.

20-Year Copper Performance: A Bullish Trend of Higher Lows & Higher Highs



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