Grid Metals CEO Robin Dunbar on Record Cesium Intercepts in Manitoba

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Cesium is what happens when a “minor metal” stops behaving like a footnote and starts acting like a constraint.

On InvestorNews.com, host Tracy Hughes opened her conversation with Robin Dunbar—President, CEO, and Director of **Grid Metals Corp.** **(TSXV: GRDM | OTCQB: MSMGF)**—by placing the company where it actually operates: Manitoba, with a portfolio that spans nickel-copper-PGMs at Makwa (under an option and joint venture agreement with Teck Resources Limited, which can earn up to a 70% interest by spending and paying a total of CAD$17.3 million), copper-nickel at Mayville (with an NI 43-101 open-pit resource of 32 million tonnes grading 0.61% CuEq), lithium at Donner (an NI 43-101 resource of 6.8 million tonnes grading 1.39% Li_2O, with Grid holding 75%), and the lithium–cesium story now pulling attention toward Falcon West, about 110 kilometres east of Winnipeg along the Trans-Canada Highway.

Hughes didn’t waste time getting to the point. “In our InvestorTalk earlier today, you were talking about cesium,” she said, noting the “huge following” Grid has drawn on short-form video explaining why it matters. Dunbar’s answer came out with the kind of practiced urgency that suggests he has had the same conversation with end-users, financiers, and skeptics—often in the same week. “Cesium is a fascinating metal and an opportunity in the critical metal space,” he said, before narrowing the market to a startling scarcity: “There have only been three producing deposits of cesium ever globally, and there are currently only three juniors with active drill programs…

globally.”

The scarcity, in Dunbar’s telling, isn’t merely academic. Cesium’s best-known public-facing role is invisible: atomic clocks that underpin global positioning. But he framed it as an enabling material with both mundane and strategic pull—“high-tech and military applications,” plus drilling fluids for deep wells, and “a growing array of uses in optical and solar.” And then the line that matters most in a market built on continuity of supply: “We’re seeing interest from end users because there’s a huge shortage of cesium feedstock in the world right now.”

From there, the interview snapped into geology and economics—the two languages junior miners must speak at once. Grid’s recent work at Falcon West has focused on a flat-lying pegmatite system where cesium occurs alongside lithium and rubidium. “The zone we’re drilling starts at about 20 metres down,” Dunbar explained, describing “a 1 to 3 metre zone of the mineralization we’re looking for.” The target mineral is pollucite, the principal host of high-grade cesium. “When we drill and we get pollucite, the grades we’re getting are as high as 27% over a metre,” he said, pausing just long enough for the number to register. “Globally, to find pollucite, there are just a few occurrences—it’s very hard to find.”

A December 4, 2025 Grid Metals news release put those kinds of numbers into market-standard intervals, reporting high-grade intercepts including **3.45 metres grading 16.8% Cs_2O** (LU25-09) and **4.0 metres grading 10.4% Cs_2O**, with a **1.2-metre sub-interval at 27.1% Cs_2O** (LU25-08)—results the company described as “amongst the highest Cs_2O drill intercepts reported globally, in recent years.”

Hughes, speaking for an audience that lives somewhere between capital markets and chemistry, asked Dunbar to “dumb down

rubidium.” He obliged by placing it in the family: rubidium is “a sister metal to cesium,” with overlapping physical properties—“very high conductivity, photovoltaic properties”—but a very different extraction reality. Cesium can occur in pollucite at extraordinary concentrations, he said, while rubidium typically sits dispersed in lepidolite and mica, “and tends to only get to a maximum of 2% to 3% in very high-grade materials.” In other words: interesting, potentially useful, but rarely the main event—unless new applications and new processing routes change the equation.

The money question arrived quickly. Hughes recalled that Dunbar had said earlier that Grid is “fully funded into next year” for developing the cesium project. Dunbar confirmed it and supplied the detail investors always want but rarely get cleanly: “Yes. We just raised CAD$4 million. Most of that was from a strategic investor—a very sophisticated mining investor—who likes what we’re doing, particularly in the cesium space.” He described the cadence of the work: 67 holes completed, initial results released, and “another 50-odd holes” expected to deliver assays in January. In the background is the milestone that turns “interesting” into “bankable”: “We hope to be able to get a resource sometime in the first half of next year. That would be one of the very few cesium resources out there globally.”

In the company’s December 4 release, those operational details were framed with the specificity the market demands: **67 drill holes totaling 3,035 metres** in phase one, assays pending on the remainder, and high-grade cesium now outlined over “approximately 100 metres” of strike, with the enrichment trend “open in multiple directions” and a second phase expected to begin in mid-January 2026.

Dunbar’s most compelling explanation, though, wasn’t about grade—it was about *pathway*. He made the case that cesium is not

just rare; it is operationally unusual in a way that changes the financing math. “The development path for cesium is also unique because you don’t need a lot of capital,” he said. You mine shallow material, crush it, and use ore sorting—technology he called “very well established” for cesium ore. “For crushing and ore sorting, you don’t need a plant, you don’t need tailings, you don’t need water,” he said, describing a flow sheet that reads like a rebuke to the multi-year, multi-permit reality of conventional milling. “So capex is very low, and permitting is much faster because you don’t have tailings or a mill.”

That same theme appears—more formally—in the company’s disclosure around Falcon West, which describes cesium-rich pollucite ore as amenable to crushing and ore sorting to create a high-value pollucite concentrate, potentially avoiding the need for a conventional mill and tailings facility and lowering capital intensity.

Then came the pricing comparison—the one that turns heads even among hardened commodity investors. “If you look at cesium carbonate on a chemical basis, it’s about 20 times the price of lithium carbonate,” Dunbar said, offering a shorthand for value density. Grid’s December 4 release cited a benchmark cesium carbonate price of **US$218,000 per tonne**, “approximately twenty times” lithium carbonate, underscoring why a small tonnage story can still matter if the product is the right one.

Hughes pressed on a point that often separates credible discoveries from lucky anecdotes: how do you find something this rare in the first place? Dunbar’s answer was equal parts method and contingency—the real story of grassroots exploration. Grid’s core focus has long been the Bird River Greenstone Belt in southeastern Manitoba. In the process of base-metal work, the company identified lithium pegmatites and built a lithium resource between 2019 and 2022, while keeping an eye on regional

infrastructure and nearby processing history. But Falcon West emerged from a different kind of evidence: old logs, half-forgotten holes, and a local geologist with core “in his garage.”

“In our research, we found the next greenstone belt about 100 km to the south,” he said. “One report from around 2000… had drilled some holes, and in the logs there was some cesium.” The clue mattered because of pegmatite fractionation. “As a pegmatite gets more complex, you get lithium and then rubidium and cesium and tantalum—cesium is the last one,” he explained. “So if you have cesium in the system, you probably have lithium somewhere.” Grid acquired the showing, recovered the stored core, and assayed it. “We got some high-grade cesium hits,” he said. “So we said, okay.”

The market context arrived in the same breath: comparable valuations, visible scarcity, and what might be the most persuasive sentence a junior miner can hear from industry. “We started talking to people and hearing, ‘If you have cesium, we’ll buy it from you,’” Dunbar said. That was the “go” switch. Grid began drilling tightly—“similar to drilling high-grade gold,” he said—aiming to define what could be a starter open pit, the kind of footprint that fits both the geology and the permitting logic.

At that point in the interview, Dunbar explained that there are broader pegmatite targets in the district and that longer-term exploration will come. But, he said, “first things first: we want a resource and then potentially some cash flow going forward as a number one priority.”

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