

IVANHOE RISK ASSESSMENT

THE RISKS ASSOCIATED WITH IVANHOE ENERGY'S OPERATIONS IN ECUADOR

This Risk Assessment highlights the controversial history of Canadian-based Ivanhoe Energy and the significant risk facing the company and investors over its Pungapayacu venture in Ecuador's rainforests. The Assessment includes current financial information, company background and legacy issues, speculation of stock 'pump-and-dump' schemes, and extensive in-country investigation of the Pungapayacu project, including contract controversies, Ivanhoe's questionable HTL technology, and opposition of the Kichwa indigenous peoples on whose land Ivanhoe seeks to drill.

Legacy Liabilities

Current Ivanhoe Co-Chairman and CEO Robert Friedland was previously CEO of the now bankrupt Galactic Mines, responsible for one of the worst mining disasters and Superfund sites in the U.S. The Summitville mine disaster was the largest cyanide and lead release into fresh water river systems in U.S. history. The toxic spill earned Friedland the dubious nickname 'Toxic Bob' and 'The Ugly Canadian' by affected communities, NGOs, and disgruntled investors whom were allegorized by his handling of the events and the bankruptcy of Galactic Mines¹.

Company Controversies

Ivanhoe Energy was formed in 1999 by a merger of two unsuccessful Robert Friedland companies — Black Gas Energy Ltd. and Runway².

Since its new incarnation as one company, Ivanhoe Energy has raised eyebrows over its off-sourced mega-deals in the works, proprietary but untested technologies to recover untraditional oil and gas deposits, and a stock scandal over the company's questionable collusion with CBS MarketWatch reporter Thom Calabrese — a company shareholder who provided favorable stock recommendations that fueled the company's rally in share price despite little justification from quarterly reports, earnings statements, or project advances³.

Large spikes in Ivanhoe stock price can be traced to a potential major Qatar gas play, exploration progress in China, a possible Iraq venture, advancements in unique gas-to-liquid and heavy-to-light oil technology, or an uptick in reserves. All were heavily publicized and hyped, but few actually happened⁴. Others fell far short of ex-



COMPANY BACKGROUND

INTERNET FACTSHEET: www.ivanhoeenergy.com

Ivanhoe Energy is an international heavy oil development and production company. Core operations are in Canada, Ecuador, China and Mongolia, with business development activities worldwide.

Ivanhoe seeks to deploy technologically innovative methods and proprietary technologies in the development and recovery of heavy oil and other oil and gas assets. This includes the application of a patented, HTL, Heavy-to-Light heavy oil upgrading process.

Ivanhoe Energy Inc. is the parent company of the group and is responsible for Canadian and U.S. operations. Operations outside the U.S. and Canada are carried out through subsidiary companies: Latin American projects through Ivanhoe Energy Latin America Inc., China and Southeast Asia projects through Serving Energy Ltd., and projects in the Middle East and North Africa through Ivanhoe Energy MENA Inc.

Sector: Oil and Gas Exploration and Production

Key Officers

Executive Co-Chairman and Chief Executive Officer: Robert Friedland
President and Chief Operating Officer: David Dyck
Chairman, Ivanhoe Latin America Inc.: David Martin

Financials

S & P Quality Ranking: C
S & P Creditability Quotient Potential: 36%
Relative Strength Rank: Weak
Share Price: \$1.17⁵
Market Capitalization: 432.61M
Avg. Vol (m): 745,927

¹ Friedland and Firm's Operations Seem Agony Expansion, 2000

² RUNWAY: THE NO. 1, 2001, 11 JANUARY 2001

Ivanhoe Energy Earnings Report

ML Morrison



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