



MANGA

COFFEE CORPORATION

Market closed on February 26, 2018

ICE: CONTRACT	SETTLE
KCK8	121,90
KCN8	124,05
KCU8	126,30
KCZ8	129,70
KCH9	133,05

BM&F: CONTRACT	SETTLE
ICFK8	147,65
ICFN8	151,25

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,2330

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 470,00
	PADRÃO 1A - FC CERRADO	R\$ 450,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 440,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 430,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 420,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 410,00
	PADRÃO 5 - RIO	R\$ 400,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 410,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 390,00

Note: Standard qualities considering 25% of screen 17/18 and 20% of leakage (maximum of 0,5% of impurity), except quality 6A and 6B.

FOB: NET SELLER	QUALITY - CONSIDERING THE STRING	FEBRUARY/JULY
	NY 2/3 17/18 FC CERRADO	8
	NY 2/3 15/16 FC CERRADO	5
	NY 2/3 14/16 FC CERRADO	2
	NY 2/3 17/18 FC SOUTH OF MINAS	5
	NY 2/3 14/16 FC SOUTH OF MINAS	-1
	NY 2/3 17/18 GOOD CUP	2
	NY 3/4 14/16 GOOD CUP	-4
	NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	0
	NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-6
	NY 5/6 13UP 300 DEF COB GRINDERS	-4
	NY 5/6 12UP 350 DEF COB GRINDERS	-8
	NY 3 17/18 RM (US\$ / 50 KGS)	129
	NY 4 15/16 RM (US\$ / 50 KGS)	126
	NY 4 14/16 RM (US\$ / 50 KGS)	122

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-2,15	March/May
-2,25	May/July
-3,40	July/September
-3,35	September/December
-2,00	December/March

ARBITRAGE: ICE/BM&F (CTS/LB)	
-10,28	March/March
-9,71	May/May

Coffee Market Report

The latest Commitment of Traders report from the New York Arabica coffee market has seen the Non-Commercial Speculative sector of this market increase their net short sold position within the market by 22,66% during the week of trade leading up to Tuesday 20th. February, to register a net short sold position of 58,554 Lots on the day. This net short-sold position which is the equivalent of 16,599,800 bags has most likely been once again marginally decreased, following the period of mixed but overall more positive trade, which has since followed.

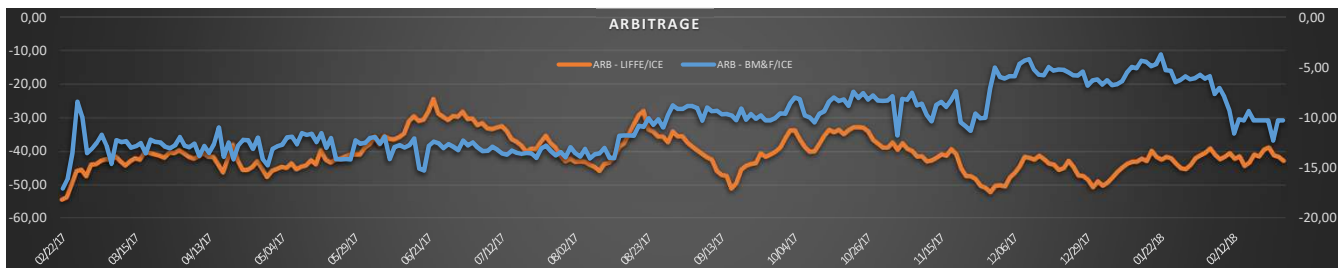
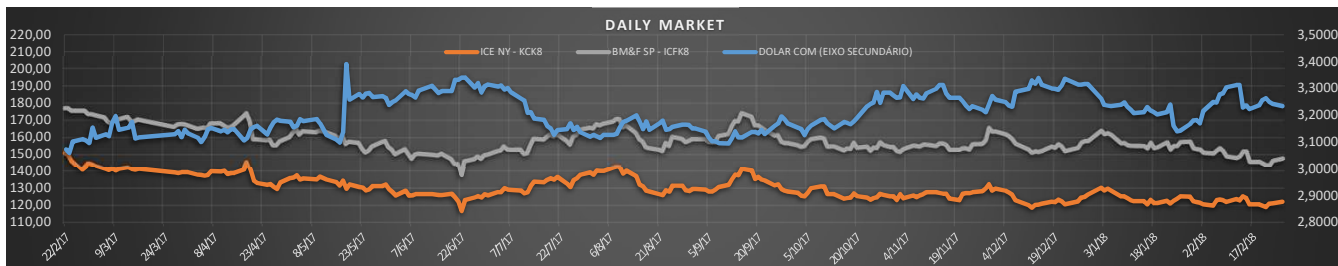
The latest Commitment of Traders report from the London Robusta coffee market has seen the Speculative Non-Commercial sector of this market increase their net short sold position within this market by 20,94% during the week of trade leading up to Tuesday 20th. February, to register a net short sold position of 14,621 Lots on the day. This net short sold position which is the equivalent of 2,436,833 bags has most likely been increased a little further, following the period of mixed but overall more negative trade, which has since followed.

The extensive net short sold positions held by the speculative and managed money fund sectors within the New York market and to a lesser degree within the London market, comes with the perspective for rising coffee supply for the second half of the year, with the advent of a larger new Brazil crop. This does by nature of the negative influence that the short selling activity have upon the reference prices of these markets have upon physical coffee prices, really hurt the producers for the present and keep the main stream consumer market industries relatively complacent.

But one must question how much more appetite has the speculative sector of the market got in terms of further short selling activity and might it be that the markets are likely to stabilize at the present levels and once the perception is that the downside is over, that speculative profit taking might come to the fore and to bring back some corrective buoyancy for the markets. The question is when and one might speculate that while the present speculative trend is to sell against the prospects of the larger new Brazil crop, that the Brazilian farmers who shall have only negligible carry over stocks into the new crop, shall not be aggressive sellers of their larger new crop.

Rather than with time in hand to sell these new crop Brazil coffees and a need to rebuild their stocks, that the Brazilian coffee farmers shall ahead of the new crop show some degree of price resistance for forward sales and hold back for higher value from the exporters. This could if this scenario were to become a fact and an indication that there might not after all be a flood of coffees coming to the market at the end of the year and particularly so in terms of the new Brazil Arabica coffee crop, be the trigger for some speculative profit taking and buying back into the New York market and with some new-found buoyancy for the market forthcoming.

Source: iandmsmith.com



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ASSUNTOS

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TRAFFIC/QUALIDADE
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DIRETOR/QUALIDADE/COMERCIAL
CERTIFICAÇÕES
DIRETOR/ADMINISTRATIVO/FINANCEIRO
TORRADO E MOIDO/PROJETOS
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