



MANGA

COFFEE CORPORATION

Market closed on **April 23, 2018**

ICE: CONTRACT	SETTLE
KCN8	118,95
KCU8	121,00
KCZ8	124,50
KCH9	128,00
KCK9	130,30

BM&F: CONTRACT	SETTLE
ICFU8	146,00
ICFZ8	147,60

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,4530

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 460,00
	PADRÃO 1A - FC CERRADO	R\$ 450,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 440,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 425,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 415,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 410,00
	PADRÃO 5 - RIO	R\$ 400,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 380,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 360,00

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: QUALITY - CONSIDERING THE STRING	APR/JULY
NET BUYER	
NY 2/3 17/18 FC CERRADO	1
NY 2/3 15/16 FC CERRADO	-2
NY 2/3 14/16 FC CERRADO	-5
NY 2/3 17/18 FC SOUTH OF MINAS	-1
NY 2/3 14/16 FC SOUTH OF MINAS	-7
NY 2/3 17/18 GOOD CUP	-6
NY 3/4 14/16 GOOD CUP	-12
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-8
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-14
NY 5/6 13UP 300 DEF COB GRINDERS	-15
NY 5/6 12UP 350 DEF COB GRINDERS	-18
NY 3 17/18 RM (US\$ / 50 KGS)	120
NY 4 15/16 RM (US\$ / 50 KGS)	117
NY 4 14/16 RM (US\$ / 50 KGS)	113

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-2,05	July/September
-3,50	September/December
-3,50	December/March
-2,30	March/May
-2,20	May/July

ARBITRAGE: ICE/BM&F (CTS/LB)	
-10,63	September/September
-12,92	December/December

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 22.86% during the week of trade leading up to Tuesday 17th. April; to register a net short sold position of 70,577 Lots on the day. This net short sold position which is the equivalent of 20,008,267 bags has most likely been since reduced, 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 6.75% during the week of trade leading up to Tuesday 17th. April; to register a net short sold position of 18,323 Lots on the day. This net short sold position which is the equivalent of 3,053,833 bags is probably little changed, following the period of mixed but overall sideways trade, which has since followed.

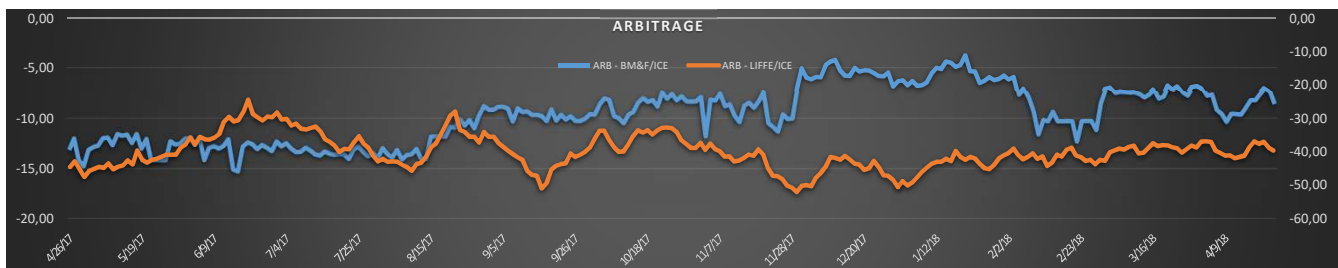
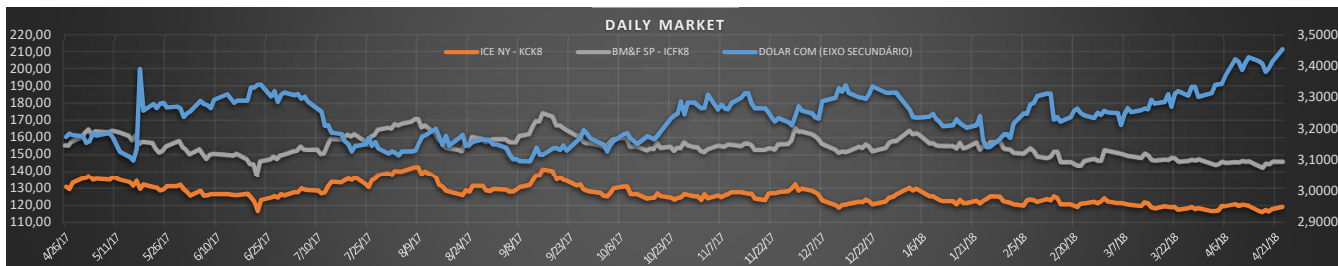
The speculative net short sold position within the New York washed Arabica coffee market as at Tuesday last week is the equivalent of approximately 30% of the global washed Arabica production and in terms of Arabica coffee in general, the equivalent of approximately 20% of this years forecasted Arabica production. These are fascinating percentages of speculative selling of coffees that do not exist and would make one question where the point of exhaustion is, on the part of this sector of the New York market.

Likewise, to make one speculate how violent might be the corrective reaction, should any unforeseen weather-related incident occur to turn this market bullish rather than the prevailing bearish sentiment that prevails. The latter is unlikely but there is the Brazil frost season to the fore, which with the uncertainty of global weather patterns, has still to be watched.

Following the string of forecasts from respected coffee trade houses and commodity brokerage houses that have pegged the forthcoming new Brazil coffee crop that range between 58 million and as much as 65 million bags, Sudden Financial have increased their earlier forecast for a new Brazil crop of 58 million bags, to between 60 million and 62 million bags. Further fueling the bearish sentiment within the coffee markets, which lack any form of supportive fundamental news for the present.

The July 2018 to July 2018 contracts arbitrage between the London and New York markets broadened on Friday, to register this at 37.91 usc/Lb., while this equates to 32.21% price discount for the London Robusta coffee market. The Certified washed Arabica coffee stocks held against the New York exchange were seen to increase by 7,280 bags on Friday; to register these stocks at 1,979,472 bags. There were meanwhile a larger in number 10,970 bags decrease to the number of bags pending grading for this exchange; to register these pending grading stocks at 61,089 bags.

Source: iandmsmith.com



COLABORADORES

CRISTIANE DAMASCENO
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JOSÉ ANTONIO DOS SANTOS MANGA
KELLY APARECIDA FERREIRA
LEONARDO SOARES
LILIAN G. TRIGOLO
MARCOS EDUARDO CLAUDINO
PATRICIA TOMAZ DE ASSIS
RODRIGO BARBALAT
SANDRA GOMES
WALLAFE VITOR TAVARES

ASSUNTOS

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