



MANGA

COFFEE CORPORATION

Market closed on **June 26, 2018**

ICE: CONTRACT	SETTLE
KCU8	117,70
KCZ8	121,10
KCH8	124,60
KCK9	126,95
KCN9	129,20

BM&F: CONTRACT	SETTLE
ICFUB	137,90
ICFZ8	141,35

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,7980

MARKET	PRICE IDEAS FROM BUYERS	
PADRÃO 0 - CEREJA		R\$ 480,00
PADRÃO 1A - FC CERRADO		R\$ 460,00
PADRÃO 1B - FC SOUTH OF MINAS		R\$ 450,00
PADRÃO 2 - GOOD CUP DURO		R\$ 435,00
PADRÃO 3 - GOOD CUP 2 RIADAS		R\$ 425,00
PADRÃO 4 - DURO RIADO RIO (7/2/1)		R\$ 415,00
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	JUL/SEPT
NET SELLER NY 2/3 17/18 FC CERRADO	-5
NY 2/3 15/16 FC CERRADO	-8
NY 2/3 14/16 FC CERRADO	-11
NY 2/3 17/18 FC SOUTH OF MINAS	-8
NY 2/3 14/16 FC SOUTH OF MINAS	-14
NY 2/3 17/18 GOOD CUP	-11
NY 3/4 14/16 GOOD CUP	-17
NY 2/3 17/18 GOOD CUP 2 RIOY CUPS	-14
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-20
NY 5/6 13UP 300 DEF COB GRINDERS	-23
NY 5/6 12UP 350 DEF COB GRINDERS	-26
NY 3 17/18 RM (US\$ / 50 KGS)	110
NY 4 15/16 RM (US\$ / 50 KGS)	107
NY 4 14/16 RM (US\$ / 50 KGS)	103

Obs: Fob ideas (Simple exercise).

SPREAD: ICE (CTS/LB)	
-3,40	September/December
-3,50	December/March
-2,35	March/May
-2,25	May/July
-2,05	July/September

ARBITRAGE: ICE/BM&F (CTS/LB)	
-13,45	September/September
-14,24	December/December

Coffee Market Report

The latest Commitment of Traders report from the New York Arabica coffee market has seen the shorter term in nature Managed Money fund sector of this market increase their net short sold position within the market by 30.07% over the week of trade leading up to Tuesday 19th, June; to register a new net short sold position of 66,156 Lots. Meanwhile the longer term in nature Index Fund sector of this market increased their net long position within the market by 18.28%, to register a net long position of 39,503 Lots on the day.

Over the same week, the Non-Commercial Speculative sector of this market increased their net short sold position within this market by 25.72%, to register a net short sold position of 60,409 Lots. This net short sold position which is the equivalent of 17,125,684 bags has most likely been little modestly reduced, following the period of mixed by overall modestly more positive trade that has since followed and likewise, that of the managed money fund sector of the market.

The evidence of this extensive net short sold status of the New York market would tend to indicate that the market might be considered to be somewhat oversold, but with a number of respected reports forecasting a global coffee surplus supply of between 6 million to 8 million bags for the coming October 2018 to September 2019 coffee year, there is little in the way of fundamental news to encourage short term speculative short covering.

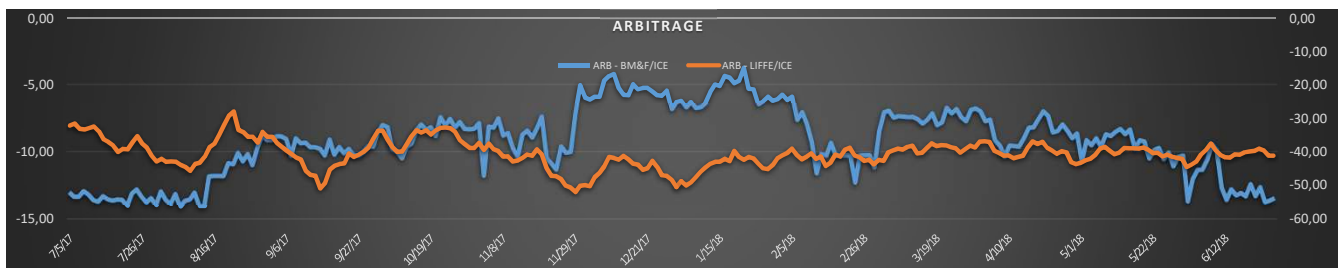
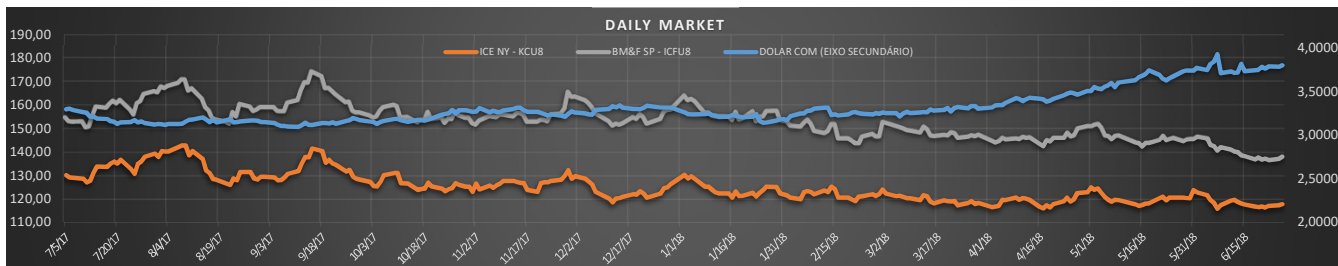
But meanwhile the coffee producers with steadily rising production costs that come with the natural forces of inflation in terms of labor, farm inputs and capital equipment replacement requirements, are obliged to sell their coffees against the dismal reference prices of the coffee terminal markets. This has to finally have some impact upon the medium to longer term production yields within many producer countries, as the farmers struggle to finance the full range of inputs that are necessary for the health of their coffee trees and their farm yields.

Meanwhile the weather conditions for coffee producers globally have so far this year, brought to the fore nothing other than the prospects for good growing conditions and with no forecasts as of yet, for any potential climatic problems due to develop later in the year. Therefore, and while one can never completely discount the chances of frost in Brazil, the weather has no impact upon market sentiment for the speculative fund sector of the coffee markets, who hold the reins of the market firmly in hand.

The September 2018 to September 2018 contracts arbitrage between the London and New York markets broadened yesterday, to register this at 41.18 usc/Lb., while this equates to 35.14% price discount for the London Robusta coffee market.

The Certified washed Arabica coffee stocks held against the New York exchange were seen to decrease by 177 bags yesterday; to register these stocks at 2,054,255 bags. There were meanwhile a larger in number 888 bags increase in the number of bags pending grading for this exchange; to register these pending grading stocks at 25,586 bags.

Source: <http://www.iandmsmith.com>



COLABORADORES

CRISTIANE DAMASCENO
ERICKSEN SOUZA
GLAUCIENE PARANHOS DE SOUZA
JOSÉ ANTONIO DOS SANTOS MANGA
KELLY APARECIDA FERREIRA
LEONARDO SOARES
MARCOS EDUARDO CLAUDINO
PATRÍCIA TOMAZ DE ASSIS
RODRIGO BARBALAT
SANDRA GOMES
WALLAFE VITOR TAVARES

ASSUNTOS

ADMINISTRATIVO
TRAFFIC/QUALIDADE
RECEPÇÃO
DIRETOR/QUALIDADE/COMERCIAL
CERTIFICAÇÕES
DIRETOR/ADMINISTRATIVO/FINANCEIRO
COMERCIAL
ASSISTENTE ADM/FINANCEIRO
COMERCIAL/TRADING
CLASSIFICAÇÃO
CLASSIFICAÇÃO/EMBARCADOR

SKYPE

mcc.fiscal
ericksen_wcs@hotmail.com
live.secretaria_4359
mangajao
kelly-ferreira1
iss_82
-
mcc.adrielle
barbalat
sandra.gomes.mangacoffee
wallafe.vit7@live.com

E-MAIL

fiscal@mangacoffee.com.br
traffic@mangacoffee.com.br
secretaria@mangacoffee.com.br
manga@mangacoffee.com.br
certificacao@mangacoffee.com.br
leonardo@mangacoffee.com.br
comercial@mangacoffee.com.br
adm@mangacoffee.com.br
trading@mangacoffee.com.br
-
classificacao@mangacoffee.com.br

CEL. / WHATSAPP

+55 35 9 8810 5347
+55 35 9 9199 4980
+55 35 9 9800 1785
+55 35 9 8433 3280
+55 35 9 8817 3837
+55 35 9 8722 3328
+55 35 9 8898 8100
+55 35 9 9237 6798
+55 11 9 5060 7799
+55 35 9 8834 5601
+55 35 9 9215 0026

CEL. ADICIONAL

-
+55 35 9 8721 5876
+55 35 9 8879 9169
-
+55 35 9 8722 3328
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+55 35 9 8705 7164
+55 35 9 8839 8466