



MANGA

COFFEE CORPORATION

Market closed on July 11, 2018

| ICE: CONTRACT | SETTLE |
|---------------|--------|
| KCU8 | 112,05 |
| KCZ8 | 115,60 |
| KCH8 | 119,25 |
| KCK9 | 121,75 |
| KCN9 | 124,15 |

| BM&F: CONTRACT | SETTLE |
|----------------|--------|
| ICFUB | 131,10 |
| ICFZ8 | 134,35 |

| DOL: CONTRACT | SETTLE |
|----------------------------|--------|
| DOL COM - DOLAR COMMERCIAL | 3,8820 |

| MARKET | PRICE IDEAS FROM BUYERS | |
|--------|--------------------------------------------|------------|
| | PADRÃO 0 - CEREJA | R\$ 490,00 |
| | PADRÃO 1A - FC CERRADO | R\$ 460,00 |
| | PADRÃO 1B - FC SOUTH OF MINAS | R\$ 450,00 |
| | 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\$ 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: NET SELLER | QUALITY - CONSIDERING THE STRING | JUL/SEPT |
|-----------------|-----------------------------------|----------|
| | NY 2/3 17/18 FC CERRADO | -2 |
| | NY 2/3 15/16 FC CERRADO | -5 |
| | NY 2/3 14/16 FC CERRADO | -8 |
| | NY 2/3 17/18 FC SOUTH OF MINAS | -4 |
| | NY 2/3 14/16 FC SOUTH OF MINAS | -10 |
| | NY 2/3 17/18 GOOD CUP | -9 |
| | NY 3/4 14/16 GOOD CUP | -15 |
| | NY 2/3 17/18 GOOD CUP 2 RIOY CUPS | -12 |
| | NY 3/4 14/16 GOOD CUP 2 RIOY CUPS | -18 |
| | NY 5/6 13UP 300 DEF COB GRINDERS | -19 |
| | NY 5/6 12UP 350 DEF COB GRINDERS | -22 |
| | NY 3 17/18 RM (US\$ / 50 KGS) | 107 |
| | NY 4 15/16 RM (US\$ / 50 KGS) | 104 |
| | NY 4 14/16 RM (US\$ / 50 KGS) | 100 |

Obs: Fob ideas (Simple exercise).

| SPREAD: ICE (CTS/LB) | |
|----------------------|--------------------|
| -3,55 | September/December |
| -3,65 | December/March |
| -2,50 | March/May |
| -2,40 | May/July |
| -2,35 | July/September |

| ARBITRAGE: ICE/BM&F (CTS/LB) | |
|------------------------------|---------------------|
| -12,94 | September/September |
| -14,04 | December/December |

Coffee Market Report

The European Coffee Federation ECF have reported that the port warehouse stocks held within reporting warehouses in the ports in Belgium, Germany, France and Italy increased by 239,900 bags or 2.14% during the month of May, to register these stocks at the end of the month at 11,434,533 bags. These stocks do not however include the unreported stocks from the industry on site inventory stocks, the transit bulk container stocks and stocks being held within non-reporting warehouses throughout Western and Eastern Europe.

The combination of West and East Europe consuming approximately 1.05 million bags of coffee a week, one might guess that the additional stocks that were not included in the report, could contribute as much as 2.5 million bags to the reported stocks. Thus, indicating that as at the end of May, the European coffee stocks might have been close to the equivalent of close to a relatively safe, thirteen weeks of Western and Eastern European roasting demand. A factor that supports the prevailing bearish sentiment, on the part of the speculative sector of the coffee markets and likewise, contributes to complacency on the part of the consumer market industries.

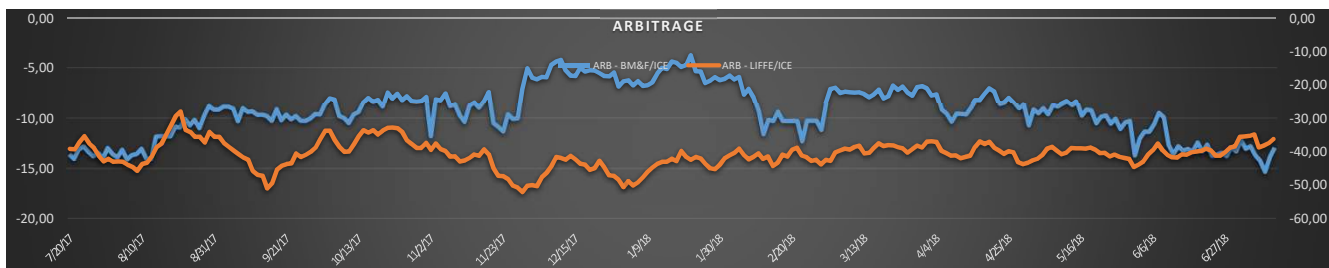
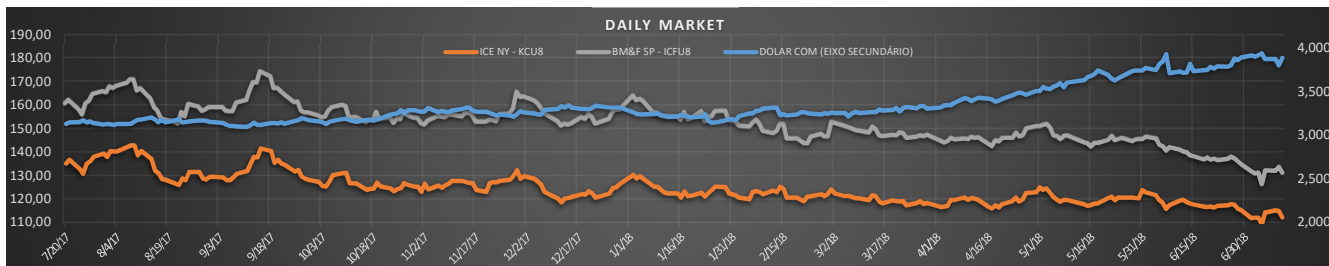
The latest Commitment of Traders report from the New York Arabica coffee market has seen the shorter term in nature Managed Money fund sector of this market increase their net short sold position within the market by 22.15% over the week of trade leading up to Tuesday 3rd July, to register a new net short sold position of 82,323 Lots. Meanwhile the longer term in nature Index Fund sector of this market increased their net long position within the market by 12.78%, to register a net long position of 43,486 Lots on the day.

To correct an error in yesterday's report, the Non-Commercial Speculative sector of this market increased their net short sold position within this market by 20.42%, to register a new record net short sold position of 73,139 Lots. This net short sold position which is the equivalent of 20,734,582 bags has most likely been trimmed, following the period of buoyant trade which has since followed.

The September 2018 to September 2018 contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 37.46 usc/Lb., while this equates to 32.63% 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 500 bags yesterday, to register these stocks at 2,045,307 bags. There was an increase by 5,749 bags to the number of bags pending grading for this exchange, to register these pending grading stocks at 31,052 bags.

<http://www.iandmsmith.com>



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MARCOS EDUARDO CLAUDINO
PATRÍCIA TOMAZ DE ASSIS
SANDRA GOMES
WALLAFE VITOR TAVARES

ASSUNTOS

ADMINISTRATIVO
TRAFFIC/QUALIDADE
RECEPÇÃO
DIRETOR/QUALIDADE/COMERCIAL
CERTIFICAÇÕES
DIRETOR/ADMINISTRATIVO/FINANCEIRO
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ASSISTENTE ADM/FINANCEIRO
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