



# MANGA

COFFEE CORPORATION

Market closed on July 17, 2018

| ICE: CONTRACT | SETTLE |
|---------------|--------|
| KCU8          | 109,25 |
| KCZ8          | 112,75 |
| KCH8          | 116,35 |
| KCK9          | 118,80 |
| KCN9          | 121,20 |

| BM&F: CONTRACT | SETTLE |
|----------------|--------|
| ICFUB          | 128,00 |
| ICFZ8          | 130,50 |

| DOL: CONTRACT              | SETTLE |
|----------------------------|--------|
| DOL COM - DOLAR COMMERCIAL | 3,8460 |

| 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\$ 425,00 |
|        | PADRÃO 3 - GOOD CUP 2 RIADAS               | R\$ 415,00 |
|        | PADRÃO 4 - DURO RIADO RIO (7/21)           | R\$ 405,00 |
|        | PADRÃO 5 - RIO                             | R\$ 395,00 |
|        | PADRÃO 6A - CONSUMO 600 DEF DURO           | R\$ 375,00 |
|        | PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO | R\$ 355,00 |

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           | 0        |
|                 | NY 2/3 15/16 FC CERRADO           | -3       |
|                 | NY 2/3 14/16 FC CERRADO           | -6       |
|                 | NY 2/3 17/18 FC SOUTH OF MINAS    | -3       |
|                 | NY 2/3 14/16 FC SOUTH OF MINAS    | -9       |
|                 | 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 | -9       |
|                 | NY 3/4 14/16 GOOD CUP 2 RIOY CUPS | -15      |
|                 | NY 5/6 13UP 300 DEF COB GRINDERS  | -16      |
|                 | NY 5/6 12UP 350 DEF COB GRINDERS  | -19      |
|                 | 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)     | 101      |

Obs: Fob ideas (Simple exercise).

| SPREAD: ICE (CTS/LB) |                    |
|----------------------|--------------------|
| -3,50                | September/December |
| -3,60                | December/March     |
| -2,45                | March/May          |
| -2,40                | May/July           |
| -2,35                | July/September     |

| ARBITRAGE: ICE/BM&F (CTS/LB) |                     |
|------------------------------|---------------------|
| -12,49                       | September/September |
| -14,10                       | 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 0.68% over the week of trade leading up to Tuesday 10th. July, to register a new net short sold position of 82,885 Lots. Meanwhile the longer term in nature Index Fund sector of this market increased their net long position within the market by 1.71%, to register a net long position of 44,230 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 1.79%, to register a net short sold position of 74,448 Lots. This net short sold position which is the equivalent of 21,105,678 bags has most likely been further increased, following the period of negative trade that has since followed and likewise, that of the managed money fund sector of the market.

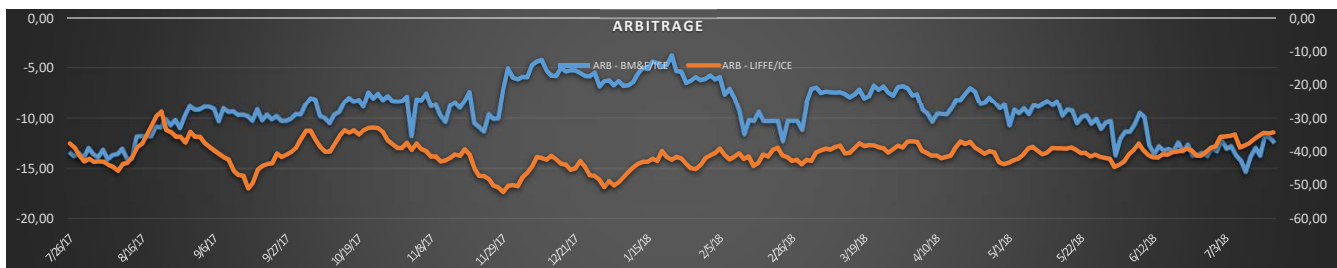
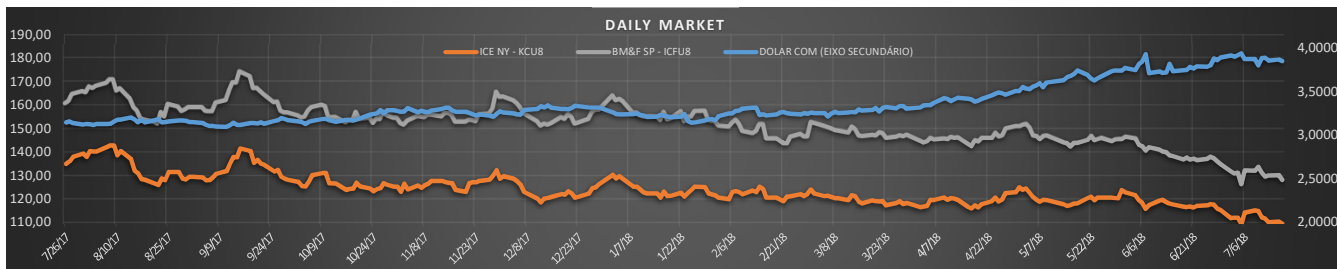
The Green Coffee Association of the U.S.A. have announced that the countries port warehouse stocks decreased by 23,366 bags or 0.34% during the month of June, to register these stocks at 6,844,229 bags at the end of the month. The overall Green Coffee stocks reported, do not include the in-transit bulk container coffees or the onsite roaster inventories, which with an approximate combined U.S.A. and Canadian weekly consumption that is supported by these stocks of approximately 570,000 bags per week, would conservatively have been at least 1.1 million bags. If one is to consider the additional unreported stocks the end month stocks, this would equate to more than thirteen and half weeks of roasting activity, which most would consider to be a safe reserve.

While this is anyhow ahead of the traditionally slower summer roasting season in North America, which would further extend the apparent North American stock cover and contribute towards only limited short term industry demand for new coffees from the producer countries. Contributing to the prevailing lackluster nature of the physical coffee trade and doing little to inspire support, from the speculative and fund sectors of the market. Bearish sentiment that is further being fueled with the advent of the larger new Brazil crop that is anticipated to soon start impacting upon consumer market supply and ahead of what is now being forecast, to be another large Vietnam crop to come to the fore at the end of the year.

The September 2018 to September 2018 contracts arbitrage between the London and New York markets broadened yesterday, to register this at 34.55 usc/Lb., while this equates to 31.32% 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 571 bags yesterday, to register these stocks at 2,047,453 bags. There were meanwhile a larger in number 2,329 bags increase in the number of bags pending grading for this exchange, to register these pending grading stocks at 40,669 bags.

<http://www.iandmsmith.com>



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### ASSUNTOS

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RECEPÇÃO  
DIRETOR/QUALIDADE/COMERCIAL  
CERTIFICAÇÕES  
DIRETOR/ADMINISTRATIVO/FINANCEIRO  
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