



MANGA

COFFEE CORPORATION

Market closed on August 6, 2018

ICE: CONTRACT	SETTLE
KCU8	108,75
KCZ8	112,00
KCH8	115,50
KCK9	117,90
KCN9	120,30

BM&F: CONTRACT	SETTLE
ICFU8	127,30
ICFZ8	129,50

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,7320

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 440,00
	PADRÃO 1A - FC CERRADO	R\$ 425,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 415,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 410,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 390,00
	PADRÃO 4 - DURO RIADO RIO (7/21)	R\$ 380,00
	PADRÃO 5 - RIO	R\$ 375,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 360,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 340,00

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	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	-2
	NY 2/3 14/16 FC SOUTH OF MINAS	-8
	NY 2/3 17/18 GOOD CUP	-3
	NY 3/4 14/16 GOOD CUP	-9
	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	-14
	NY 5/6 12UP 350 DEF COB GRINDERS	-17
	NY 3 17/18 RM (US\$ / 50 KGS)	108
	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)	
-3,25	September/December
-3,50	December/March
-2,40	March/May
-2,40	May/July
-2,35	July/September

ARBITRAGE: ICE/BM&F (CTS/LB)	
-12,51	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 Non-Commercial Speculative sector of this market decrease their net short sold position within the market by 0.44% over the week of trade leading up to Tuesday 31st. July; to register a new net short sold position of 88,624 Lots. This net short-sold position which is the equivalent of 25,124,511 bags has most likely been little changed to perhaps marginally increased again, following the period of mixed but overall softer 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 2.71% during the week of trade leading up to Tuesday 31st. July; to register a net short sold position of 33,969 Lots on the day. This net short sold position which is the equivalent of 5,661,500 bags has most likely been little changed, following the period of mixed but overall sideways trade, which has since followed.

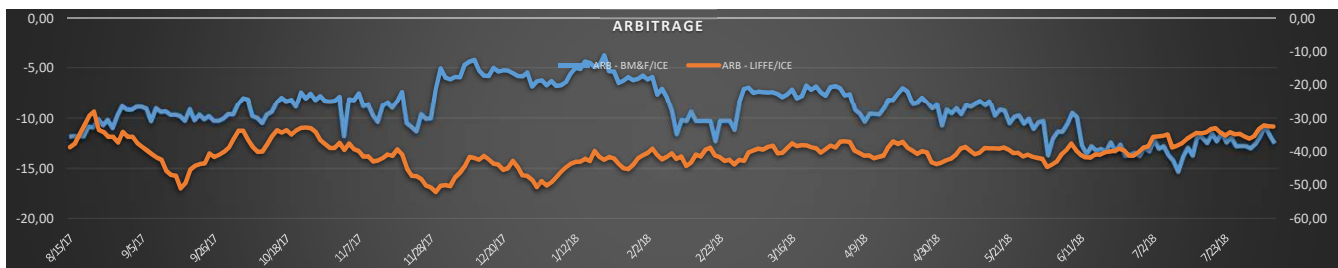
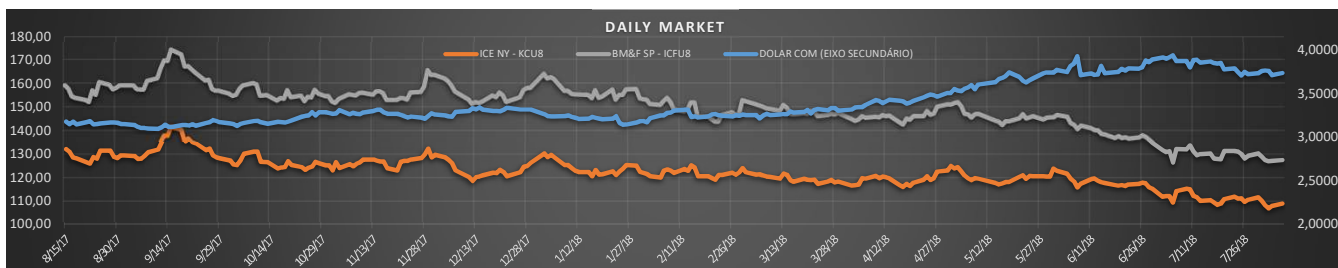
Reuters have held a poll with 11 leading commodity traders and commodity analysts and reported on Friday that the results of the poll point to the global coffee supply surplus for the forthcoming October 2018 to September 2019 Coffee Year, at 5 million bags. The Poll did however indicate that the next 2019 Brazil crop shall be 5.5 million bags lower, which would indicate tightening supply and a recover for the coffee markets during the coming year. In terms of prices the same Reuters Poll indicated that the New York Arabica coffee market shall recover late in the year, to see prices around 130 usc/Lb., by the end of the year. The results of the Poll were to a lesser extent but nevertheless positive in terms of the London Robusta coffee markets, with a year end price level of \$ 1,738.00 per Metric ton foreseen.

Meanwhile in terms of the coffee markets at the end of last week, there was a degree of support coming to the fore, with the Brazil Real showing some renewed muscle. Thus, providing for the perspective of reduced price fixation hedge selling activity out of Brazil for the day and most likely, with some degree of reality to this perception.

The November 2018 to December 2018 contracts arbitrage between the London and New York markets broadened on Friday, to register this at 36.62 usc/Lb., while this equates to 32.96% 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 3,260 bags on Friday; to register these stocks at 2,057,136 bags. There were meanwhile a smaller in number 2,380 bags decrease in the number of bags pending grading for this exchange; to register these pending grading stocks at 103,409 bags.

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WALLAFE VITOR TAVARES

ASSUNTOS

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