



MANGA

COFFEE CORPORATION

Market closed on August 20, 2018

ICE: CONTRACT	SETTLE
KCZ8	100,95
KCH9	104,35
KCK9	106,75
KCN9	109,20
KCU9	111,60

BM&F: CONTRACT	SETTLE
ICFZ18	118,75
ICFH19	121,50

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	3,9580

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 430,00
	PADRÃO 1A - FC CERRADO	R\$ 410,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 405,00
	PADRÃO 2 - GOOD CUP DURO	R\$ 395,00
	PADRÃO 3 - GOOD CUP 2 RIADAS	R\$ 385,00
	PADRÃO 4 - DURO RIADO RIO (7/2/1)	R\$ 375,00
	PADRÃO 5 - RIO	R\$ 355,00
	PADRÃO 6A - CONSUMO 600 DEF DURO	R\$ 350,00
	PADRÃO 6B - CONSUMO 600 DEF DURO RIADO RIO	R\$ 330,00

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	-3
NY 2/3 15/16 FC CERRADO	-6
NY 2/3 14/16 FC CERRADO	-9
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	-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)	95
NY 4 15/16 RM (US\$ / 50 KGS)	91
NY 4 14/16 RM (US\$ / 50 KGS)	88

Obs: Fob ideas (Simple exercise).

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

ARBITRAGE: ICE/BM&F (CTS/LB)	
-11,18	December/December
-12,50	March/March

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 3.54% over the week of trade leading up to Tuesday 14th. August; to register a new net short sold position of 100,533 Lots. This net short sold position which is the equivalent of 28,500,660 bags has most likely been further increased, following the period of mixed but overall softer trade which has since followed.

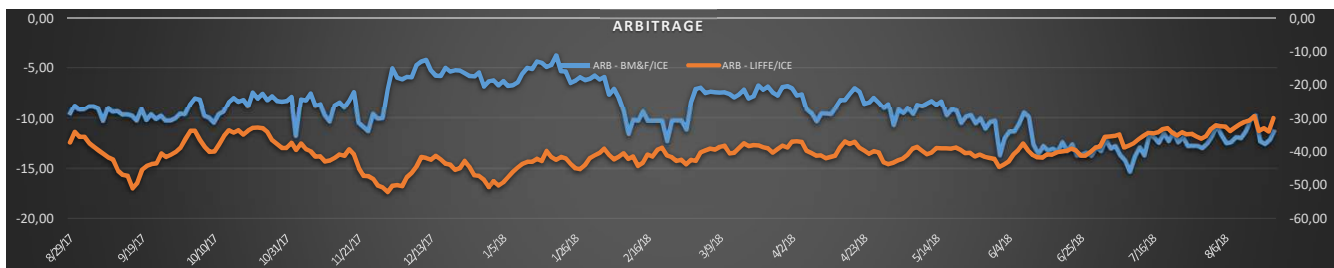
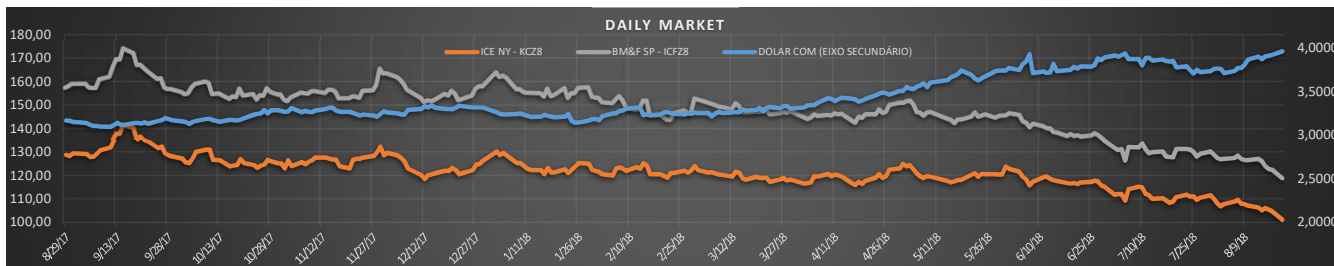
The latest Commitment of Traders report from the London Robusta coffee market has seen the Speculative Non-Commercial sector of this market decrease their net short sold position within this market by 6.15% during the week of trade leading up to Tuesday 14th. August; to register a net short sold position of 31,633 Lots on the day. This net short sold position which is the equivalent of 5,272,167 bags has most likely been increased again, following the period of mixed but overall softer trade, which has since followed.

The soft nature of the reference prices of the New York Arabica coffee market is already dictating that many Arabica coffee farmers globally are struggling to break even with their Arabica coffee production and one would speculate that this is going to have a medium-term impact upon yields, as farmers have the inability to finance the full range of inputs to maintain their crops. While even with the relatively lower costs of producing Robusta coffees, the reference prices of the London market are heading lower and could if they decline further, start to become threatening for medium to longer term global yields.

The problem really is not so much the potential 4% surplus coffee supply that is being forecast for the forthcoming October 2018 to September 2019 coffee year, but the fact that the speculative and fund sectors of the market who are short sold of more than the equivalent of the Vietnam crop. This sector of the market now having short sold in excess of 20% of the potential global coffee supply for the forthcoming coffee year, have accentuated the negative prices that would be expected from a modest surplus supply.

Presently there are no indications other than some excessive monsoon rain issues in south west India of any threatening climatic issues being due for the main stream coffee producers, and weather is of late very unpredictable and could pop up to significantly change coffee market sentiment in the future. Making one speculate that at such time as the speculative and fund sectors of the market and followed by the presently bearish industry sector of the market change their view of the market and one that is so heavily short sold, that the short covering rally would be potentially very aggressive and would take a sharp upside track.

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ASSUNTOS

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CERTIFICAÇÕES
DIRETOR/ADMINISTRATIVO/FINANCEIRO
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