



MANGA

COFFEE CORPORATION

Market closed on August 21, 2018

ICE: CONTRACT	SETTLE
KCZ8	101,80
KCH9	105,15
KCK9	107,55
KCN9	110,00
KCU9	112,40

BM&F: CONTRACT	SETTLE
ICFZ18	117,00
ICFH19	121,50

DOL: CONTRACT	SETTLE
DOL COM - DOLAR COMMERCIAL	4,0390

MARKET	PRICE IDEAS FROM BUYERS	
	PADRÃO 0 - CEREJA	R\$ 440,00
	PADRÃO 1A - FC CERRADO	R\$ 415,00
	PADRÃO 1B - FC SOUTH OF MINAS	R\$ 410,00
	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	-4
NY 2/3 15/16 FC CERRADO	-7
NY 2/3 14/16 FC CERRADO	-10
NY 2/3 17/18 FC SOUTH OF MINAS	-6
NY 2/3 14/16 FC SOUTH OF MINAS	-12
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	-11
NY 3/4 14/16 GOOD CUP 2 RIOY CUPS	-17
NY 5/6 13UP 300 DEF COB GRINDERS	-18
NY 5/6 12UP 350 DEF COB GRINDERS	-21
NY 3 17/18 RM (US\$ / 50 KGS)	93
NY 4 15/16 RM (US\$ / 50 KGS)	90
NY 4 14/16 RM (US\$ / 50 KGS)	87

Obs: Fob ideas (Simple exercise).

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

ARBITRAGE: ICE/BM&F (CTS/LB)	
-13,35	December/December
-13,30	March/March

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 3.39% over the week of trade leading up to Tuesday 14th. August, to register a new net short sold position of 97,727 Lots. Meanwhile the longer term in nature Index Fund sector of this market decreased their net long position within the market by 0.08%, to register a net long position of 47,969 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 3.54%, to register a 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 softer trade that has since followed and likewise, that of the managed money fund sector of the market.

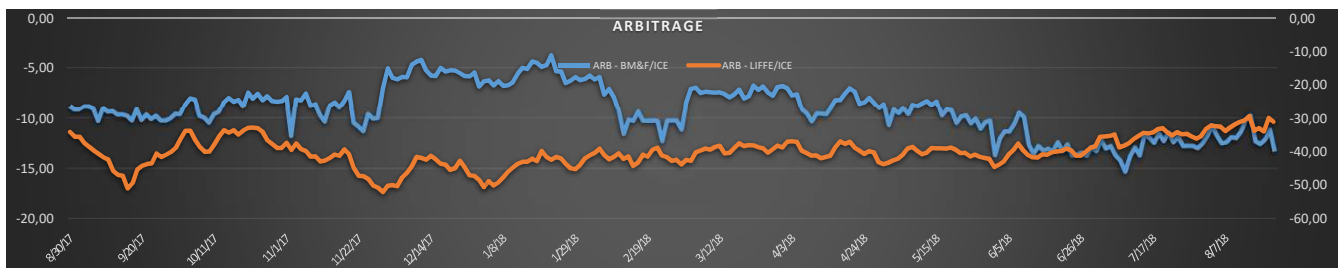
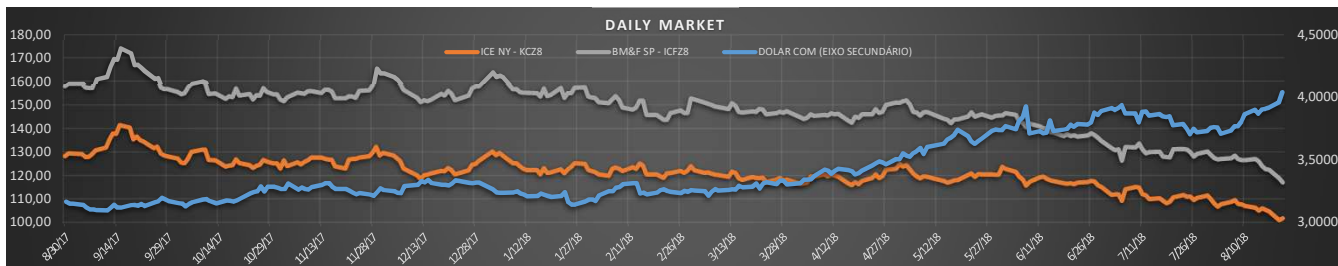
The New York market and despite the extensive and new record net short sold position that is held by speculative and fund sectors of the market, took another tumble in late trade yesterday and to see the second delivery month of the market hitting and over twelve year low. This situation is becoming a disaster for the global Arabica coffee producers, as even though some have the advantage of some degree of assistance from weakening currencies relative to the U.S. dollar, the decline in the dollar reference prices of the New York market is far more severe than the assistance that comes with weakening exchange rates.

Meanwhile one would think that most industry buyers would already be holding some forward cover, from scale down buying over the past few weeks of declining value within the New York market. A factor that would limit the potential from much in the way of short term support from the industries, for the soft Arabica coffee market. Albeit that the unsustainable for the producers lows in the New York market and along with many industry buyers now returning from their summer holidays, might still attract some increased volumes of industry buying support.

The November 2018 to December 2018 contracts arbitrage between the London and New York markets narrowed yesterday, to register this at 29.92 usc/Lb., while this equates to 29.64% 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 9,645 bags yesterday; to register these stocks at 2,137,795 bags. There were meanwhile a larger in number 12,690 bags decrease in the number of bags pending grading for this exchange; to register these pending grading stocks at 225,935 bags.

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ASSUNTOS

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RECEPÇÃO
DIRETOR/QUALIDADE/COMERCIAL
CERTIFICAÇÕES
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