FIS

Tanker FFA Report

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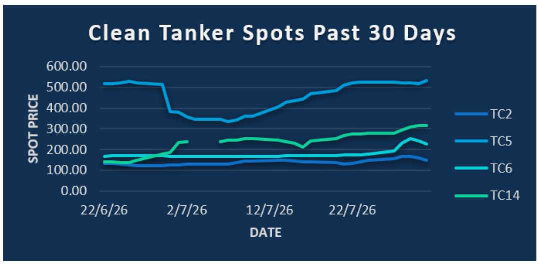
IN THE NEWS [Bloomberg]

President Donald Trump said new Iran talks would begin Monday afternoon after he called off a planned attack. Ukrainian forces struck Rosneft PJSC's refinery in Russia's Saratov as part of a record barrage of drones. BP Plc's decision to put its UK North Sea business up for sale marks a critical moment for the country's dwindling oil and gas industry as new Prime Minister Andy Burnham weighs whether to allow new drilling. Abu Dhabi National Oil Co., the UAE's state oil company, said it would change how it prices its crude, months after wild swings in the benchmark it has been using to underpin sales. The Caspian Pipeline Consortium continues to operate with oil intake at 100,000 tons a day from Aug. 1, Kazakhstan's Energy Ministry said.
Hedge funds boosted bullish wagers on US oil at the fastest pace since March as supply disruptions from Iran to the Red and Black Seas are set to once again boost demand for American crude.

COMING TODAY (All times London)

RatingDog China factory PMI for July // Eurozone S&P Global manufacturing PMI, 9am
S&P Global US manufacturing PMI, 2:45pm // Bloomberg to publish the bulk of its monthly oil tanker tracker stories for July
Earnings: Diamondback Energy
Holidays: Canada; Australia



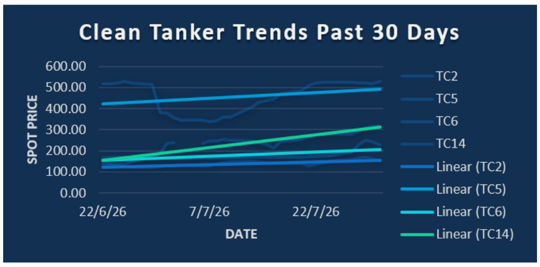
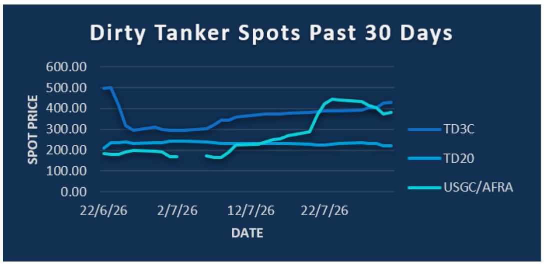


Chart source: Baltic exchange

CPP TRADE RECAP & COMMENTARY

TC2 Aug traded ws150. Sep traded ws158 & ws156. Aug/Sep traded ws-7. Q4 traded ws156 & ws154.
TC5 Q4 traded ws325.
TC6 Aug/Sep traded ws-10 & ws-15. Aug+Sep traded ws230.5.
TC14 Aug traded ws290. Sep traded ws265 & ws270.
BLPG3 Aug traded $260. Sep traded $229. Q4 traded $194 & $195.



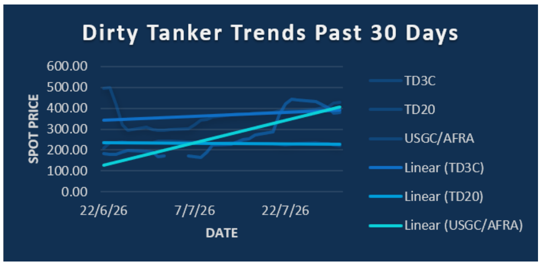


Chart source: Baltic exchange

DPP TRADE RECAP & COMMENTARY

TD3C Aug traded ws405. Sep traded ws352.5 & ws360. Aug/Sep traded ws50. Q4 traded ws277.5. Q1 traded $35.5 & $35. Cal27 traded $25. Apr27-Dec27 strip traded $21.58.
TD20 Aug traded ws212.5 & ws215. Sep traded ws217.5 down to ws215 before trading ws217 last. Aug+Sep traded ws215. Q4 traded ws191 & ws192.
USGC/UKC Aug traded ws340 up to ws367.5 with ws355 trading last. Sep traded between ws277-290 with ws280 trading last. Oct traded ws260. Q4 traded ws250 up to ws257.5 with ws255 trading last.

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TC2	ws	$/mt	$ +/-
Balmo	**150.00**	23.90	-2.75
Aug-26	**150.00**	23.90	+0.92
Sep-26	**157.00**	25.01	-1.43
Oct-26	**151.25**	24.09	-1.87
Nov-26	**156.00**	24.85	+0.52
Dec-26	**160.75**	25.61	+0.12
Jan-27	**23.20**	23.20	-3.40
Q4(26)	**156.00**	24.85	-0.28
Q1(27)	**22.70**	22.70	-2.79
Q2(27)		21.45	-1.40
Q3(27)		18.70	-2.75
CAL(27)		21.20	-0.25
CAL(28)		18.30	-0.15

Flat Rate	15.93
Spot	150.00
Spot +/-	-10.63
Month To Date	143.14

TC5	ws	$/mt	$ +/-
Balmo	**324.25**	73.09	+5.07
Aug-26	**324.25**	73.09	-22.43
Sep-26	**342.75**	77.26	+5.13
Oct-26	**330.50**	74.49	-0.45
Nov-26	**322.75**	72.75	+1.41
Dec-26	**321.75**	72.52	+1.35
Jan-27	**60.30**	60.30	-11.60
Q4(26)	**325.00**	73.26	-7.61
Q1(27)	**60.40**	60.40	-11.05
Q2(27)		50.50	-7.45
Q3(27)		43.20	-5.20
CAL(27)		50.90	+2.45
CAL(28)		42.15	+3.55

Flat Rate	22.54
Spot	530.63
Spot +/-	11.88
Month To Date	443.26

TC6	ws	$/mt	$ +/-
Balmo	**220.00**	17.47	-1.99
Aug-26	**220.00**	17.47	+2.96
Sep-26	**235.00**	18.66	-1.19
Oct-26	**245.00**	19.45	-0.40
Nov-26	**250.00**	19.85	+0.00
Dec-26	**255.00**	20.25	+0.00
Jan-27	**20.00**	20.00	-0.64
Q4(26)	**250.00**	19.85	+1.79
Q1(27)	**19.95**	19.95	-0.30
Q2(27)		17.55	-2.20
Q3(27)		15.05	-2.35
CAL(27)		17.25	+0.00
CAL(28)		11.55	+0.00

Flat Rate	7.94
Spot	226.11
Spot +/-	-15.83
Month To Date	181.87

TC14	ws	$/mt	$ +/-
Balmo	**285.00**	64.24	-3.32
Aug-26	**285.00**	64.24	+5.80
Sep-26	**265.00**	59.73	-5.07
Oct-26	**239.00**	53.87	-5.86
Nov-26	**240.00**	54.10	-0.56
Dec-26	**241.00**	54.32	-1.01
Jan-27	**43.65**	43.65	-12.70
Q4(26)	**240.00**	54.10	-6.87
Q1(27)	**43.00**	43.00	-12.45
Q2(27)		37.10	-6.00
Q3(27)		33.50	-3.80
CAL(27)		37.50	-0.30
CAL(28)		33.30	+0.00

Flat Rate	22.54
Spot	317.14
Spot +/-	0.00
Month To Date	260.86

TD3C	ws	$/mt	$ +/-
Balmo	**410.00**	82.86	-3.74
Aug-26	**410.00**	82.86	+9.04
Sep-26	**360.00**	72.76	-6.06
Oct-26	**297.75**	60.18	-9.55
Nov-26	**273.00**	55.17	-3.03
Dec-26	**261.75**	52.90	-1.67
Jan-27	**37.55**	37.55	-14.59
Q4(26)	**277.50**	56.08	-18.04
Q1(27)	**35.15**	35.15	-19.82
Q2(27)		25.90	-8.30
Q3(27)		18.45	-6.55
CAL(27)		25.00	+0.60
CAL(28)		16.20	+0.00

Flat Rate	20.21
Spot	428.89
Spot +/-	4.56
Month To Date	365.05

TD20	ws	$/mt	$ +/-
Balmo	**215.00**	38.10	-3.37
Aug-26	**215.00**	38.10	-3.32
Sep-26	**217.00**	38.45	-4.08
Oct-26	**197.00**	34.91	-3.63
Nov-26	**191.50**	33.93	-1.77
Dec-26	**187.50**	33.23	-1.68
Jan-27	**28.60**	28.60	-5.51
Q4(26)	**192.00**	34.02	-6.73
Q1(27)	**26.80**	26.80	-8.11
Q2(27)		20.05	-6.95
Q3(27)		17.80	-2.55
CAL(27)		21.75	-0.25
CAL(28)		18.20	+0.05

Flat Rate	17.72
Spot	219.22
Spot +/-	-3.20
Month To Date	232.47

AFRA	ws	$/mt	$ +/-
Balmo	**355.00**	74.59	-11.56
Aug-26	**355.00**	74.59	+11.03
Sep-26	**280.00**	58.83	-17.86
Oct-26	**257.00**	54.00	-9.03
Nov-26	**253.00**	53.16	-2.10
Dec-26	**247.50**	52.00	-0.21
Jan-27	**45.00**	45.00	-5.11
Q4(26)	**252.50**	53.05	-12.87
Q1(27)	**43.60**	43.60	-8.93
Q2(27)		38.90	-5.10
Q3(27)		36.00	-3.25
CAL(27)		39.65	-0.10
CAL(28)		33.70	-0.30

Flat Rate	21.01
Spot	375.11
Spot +/-	5.17
Month To Date	294.05

BLPG1	$/mt	$ +/-
Balmo		
Aug-26	210.00	-26.55
Sep-26	188.10	-21.90
Oct-26	169.90	-22.40
Nov-26	160.00	-9.75
Dec-26	150.10	-9.75
Jan-27	106.95	-43.00
Q4(26)	160.00	-52.95
Q1(27)	100.85	-59.00
Q2(27)	94.00	-6.85
Q3(27)	87.00	-7.00
CAL(27)	91.90	+0.00
CAL(28)	69.90	+0.00

Spot	213.00
Spot +/-	0.00
Month To Date	237.98