FIS

Tanker FFA Report

05/08/2026

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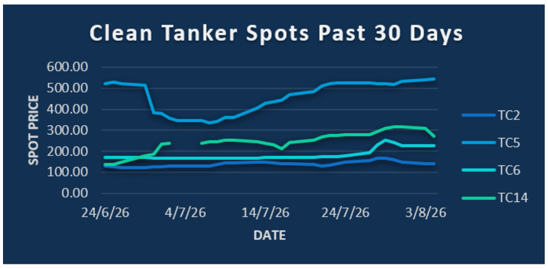
IN THE NEWS [Bloomberg]

Saudi Arabia wants to contain a renewed conflict with Houthi militants through behind-the-scenes diplomacy, according to people familiar with the matter, in a bid to prevent clashes with the Iran-backed group hurting its oil industry and economy. Goldman Sachs Group Inc. senior oil trader Madhav Janakiraman is leaving after about six years with the company, people familiar with the matter said. Two tankers laden with gas and products from the UAE have re-appeared in the Gulf of Oman after gaps in their transponder signals, suggesting they crossed the Strait of Hormuz dark. The API reported US crude inventories rose 2.7M bbl last week, according to a document seen by Bloomberg. The US has assisted more than 1,000 vessels in traveling across the Strait of Hormuz over the past three months, US Central Command says in a post on X.

COMING TODAY (All times London)
RatingDog's China services & composite PMIs // 9am: Eurozone S&P Global Services PMI, PPI
9am: Genscape weekly crude inventory report for Europe's ARA region
10am: Russia's Finance Ministry publishes federal budget's oil and gas revenues in July
1:15pm: US ADP employment change for July // 2:45pm: S&P Global US services PMI for July
3pm: US ISM services index for July // 3:30pm: EIA weekly report on US oil inventories, supply and demand
Earnings: ; Phillips 66; Suncor Energy; EOG Resources; Oxy; Helleniq Energy



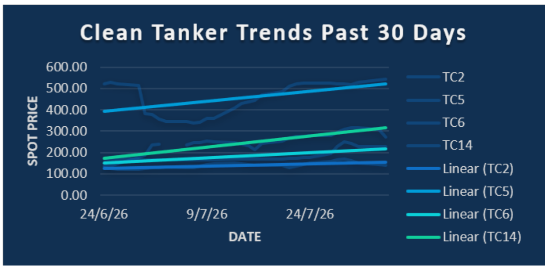
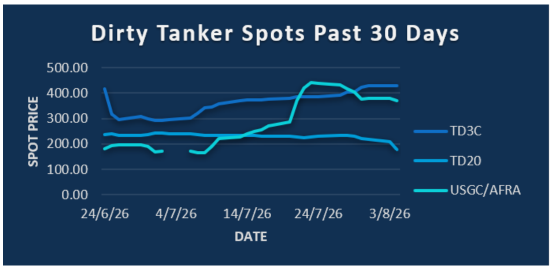


Chart source: Baltic exchange

CPP TRADE RECAP & COMMENTARY

TC2 Aug traded ws145. Sep traded ws150.
TC5 Q4 trades ws325 down to ws315.
TC6 Aug traded ws200 & ws192.5. Sep trades ws225 down to ws210.
TC14 Aug traded ws255 down to ws225. Sep trades ws230.
BLPG3 Sep traded $230 down to $226. Oct trades $204. Oct-Nov traded $196 & $195. Nov trades $190. Q4 trades $188 & $187. BLPG1 Sep/ BLPG3 Sep trades -$42.



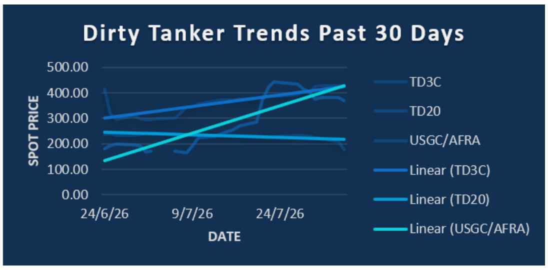


Chart source: Baltic exchange

DPP TRADE RECAP & COMMENTARY

TD3C Aug traded ws420 down to ws395. Sep traded ws365 down to ws352.5. Oct trades ws300. Q4 traded ws280 & ws275. Q1 traded $35.85 down to $35.75. Q2 traded $26.75 & $26.6.
TD20 Aug traded ws187.5 down to ws175. Sep traded ws200 down to ws185. Q4 traded ws186 down to ws180. Cal27 traded $20.5.
USGC/UKC Balmo traded ws315. Aug traded between ws325-275 with ws275 trading last. Sep traded ws260 down to ws235. Aug/Sep traded ws50 & ws40. Q4 traded ws240 down to ws225 with ws227.5 trading last. Cal27 traded $38.35 down to $37.75. Cal28 traded $33.5.

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TC2	ws	$/mt	$ +/-
Balmo	**145.50**	23.18	+0.88
Aug-26	**145.00**	23.10	+0.80
Sep-26	**150.00**	23.90	+0.00
Oct-26	**152.25**	24.25	+0.20
Nov-26	**154.25**	24.57	-0.16
Dec-26	**159.75**	25.45	+0.04
Jan-27		23.50	+0.05
Q4(26)	**155.50**	24.77	+0.04
Q1(27)		22.70	+0.00
Q2(27)		21.45	+0.00
Q3(27)		18.70	+0.00
CAL(27)		21.20	+0.00
CAL(28)		18.30	+0.00

Flat Rate	15.93
Spot	141.25
Spot +/-	-0.63
Month To Date	141.57

TC5	ws	$/mt	$ +/-
Balmo	**300.00**	67.62	-5.52
Aug-26	**320.00**	72.13	-3.44
Sep-26	**327.50**	73.82	-3.32
Oct-26	**315.00**	71.00	-3.49
Nov-26	**310.00**	69.87	-2.87
Dec-26	**310.00**	69.87	-2.65
Jan-27		62.85	-0.45
Q4(26)	**311.75**	70.27	-2.99
Q1(27)		60.50	-0.90
Q2(27)		51.45	+0.25
Q3(27)		45.40	+1.35
CAL(27)		52.40	+0.40
CAL(28)		43.35	+0.25

Flat Rate	22.54
Spot	541.88
Spot +/-	2.50
Month To Date	540.63

TC6	ws	$/mt	$ +/-
Balmo	**188.75**	14.99	-0.48
Aug-26	**192.50**	15.28	-0.32
Sep-26	**207.50**	16.48	-0.93
Oct-26	**237.50**	18.86	-0.48
Nov-26	**244.00**	19.37	-0.40
Dec-26	**249.50**	19.81	-0.40
Jan-27		20.45	+0.00
Q4(26)	**243.75**	19.35	-0.42
Q1(27)		19.95	+0.00
Q2(27)		17.55	+0.00
Q3(27)		15.05	+0.00
CAL(27)		17.25	+0.00
CAL(28)		11.55	+0.00

Flat Rate	7.94
Spot	226.11
Spot +/-	-1.67
Month To Date	226.95

TC14	ws	$/mt	$ +/-
Balmo	**217.75**	49.08	-8.34
Aug-26	**225.00**	50.72	-7.33
Sep-26	**230.00**	51.84	-3.94
Oct-26	**220.50**	49.70	-2.59
Nov-26	**219.50**	49.48	-2.59
Dec-26	**218.50**	49.25	-1.80
Jan-27		43.70	-0.90
Q4(26)	**219.50**	49.48	-2.31
Q1(27)		41.70	-0.90
Q2(27)		36.60	-0.45
Q3(27)		32.80	-0.60
CAL(27)		36.85	-0.50
CAL(28)		33.00	-0.30

Flat Rate	22.54
Spot	271.43
Spot +/-	-37.14
Month To Date	290.00

TD3C	ws	$/mt	$ +/-
Balmo	**391.00**	79.02	-3.64
Aug-26	**395.00**	79.83	-3.03
Sep-26	**348.00**	70.33	-0.40
Oct-26	**296.50**	59.92	+0.20
Nov-26	**270.00**	54.57	-0.10
Dec-26	**258.50**	52.24	-0.10
Jan-27		38.10	+0.45
Q4(26)	**275.00**	55.58	+0.00
Q1(27)		35.60	+0.60
Q2(27)		26.75	+0.75
Q3(27)		18.75	+0.30
CAL(27)		25.50	+0.50
CAL(28)		16.30	+0.10

Flat Rate	20.21
Spot	429.44
Spot +/-	0.00
Month To Date	429.44

TD20	ws	$/mt	$ +/-
Balmo	**173.00**	30.66	-4.70
Aug-26	**175.00**	31.01	-4.43
Sep-26	**185.00**	32.78	-2.66
Oct-26	**182.00**	32.25	-1.77
Nov-26	**180.50**	31.98	-1.37
Dec-26	**177.50**	31.45	-1.11
Jan-27		27.20	-1.15
Q4(26)	**180.00**	31.90	-1.42
Q1(27)		25.15	-1.30
Q2(27)		18.95	-0.90
Q3(27)		16.70	-0.90
CAL(27)		20.50	-1.05
CAL(28)		17.90	-0.20

Flat Rate	17.72
Spot	176.94
Spot +/-	-30.56
Month To Date	192.22

AFRA	ws	$/mt	$ +/-
Balmo	**263.00**	55.26	-15.65
Aug-26	**275.00**	57.78	-13.66
Sep-26	**235.00**	49.37	-6.30
Oct-26	**235.50**	49.48	-3.89
Nov-26	**226.50**	47.59	-3.99
Dec-26	**220.50**	46.33	-3.57
Jan-27		43.60	-1.70
Q4(26)	**227.50**	47.80	-3.83
Q1(27)		42.05	-1.10
Q2(27)		37.40	-0.90
Q3(27)		34.75	-0.65
CAL(27)		38.00	-1.20
CAL(28)		33.50	-0.10

Flat Rate	21.01
Spot	380.56
Spot +/-	-11.12
Month To Date	375.00

BLPG1	$/mt	$ +/-
Balmo		
Aug-26	209.90	-0.10
Sep-26	183.25	-4.75
Oct-26	165.15	-4.75
Nov-26	155.15	-4.85
Dec-26	145.15	-4.95
Jan-27	100.75	-5.70
Q4(26)	155.15	-4.85
Q1(27)	96.10	-4.75
Q2(27)	92.10	-1.90
Q3(27)	86.05	-0.95
CAL(27)	89.30	-2.60
CAL(28)	69.90	+0.00

Spot	211.00
Spot +/-	-2.00
Month To Date	211.00