

Poten & Partners - Daily Briefing

			PPING RATES & B			Monday, June 5, 2023
	DIRTY TANKER (KT - \$/day)	Spot ICE e Voyage	arnings for vessels us Spot TCE earnings		(no scrubbers) 10 day trend	DEVELOPMENTS
	VLCC, 270	AG-FE	29,800	50,600		
	Suezmax, 130	WAF-UKC	35,400	46,300		Oil rises 1% on Saudi plan to deepen output cuts from July. Oil prices rose by more than 1% a barrel on Monday after top crude
	Aframax, 70	CAR-USG	26,100	63,900		exporter Saudi Arabia pledged to cut production by a further 1
	Panamax, 50	CAR-USG	65,200	71,200	10 days been d	million barrels per day (bpd) from July to counter macroeconomic headwinds that have depressed markets
	CLEAN TANKER (KT - \$/day) MR, 37	Voyage UKC-USAC	Spot TCE earnings 29,400	2023 avg. rate 26,600	10 day trend	Reuters June 5, 2023
	MR, 38	USG-UKC	12,800	10,900		
	LR1, 55	AG-FE	24,700	35,800		Russia's oil and gas budget revenues fell by almost 36% y/y in
S H	LR2, 75	AG-FE	36,800	44,000		May. Russia's federal budget revenues from oil and gas, the lifeblood of its economy, fell almost 36% in May from the same
lï.	TIME CHARTER (KDWT)	1yr eco vessel rate	Yearly trend	Newbuild price	Secondhand 5yr old price (\$M)	month last year and declined by 12% from April, the finance
Р		(\$/day)		(\$M)		ministry said on Monday, as a result of a lower profit-based oil tax
Р	VLCC , 200+	46,000		127.0	99.0	Reuters June 5, 2023
Т	Suezmax, 130-200 Aframax, 80-130	47,000 47,000		82.0 69.0	69.0 65.0	
N	LR2, 80-130	49,000		71.0	67.0	Adani and Total ben on India's LNG recovery. India's liquefied natural gas imports are picking up after years of weak demand, as
G	LR1, 60-80	40,000	/	57.0	50.0	companies such as Total and Adani bet heavily on a turnround in a
R	MR, 42-60	29,000		47.0	43.0	market that has so far defied lofty expectations. Financial Times June 5, 2023
A	Handymax. 30-42	25,000		42.0	35.0	
т	US FLAG (KT - \$/day)	Voyage	Weekly spot rate	2023 avg. rate	10 week trend	New Fortress Energy's LNG project gets Mexico export permit. S
Е	Handy, 38	USG-USAC Weekly spot	78,130	80,672 Current month		energy company New Fortress Energy (NFE) has secured export
s	LNG (\$/day) as of 2-June-2023	rate	Sentiment	rate	2023 avg. rate	permit authorisation from Mexico's Ministry of Energy (SENER) for its Altamira fast liquefied natural gas (LNG) project. The SENER permit
	160M3 Tri-fuel diesel electric (West)	45,000	Increasing	45,000	59,545	allows NFE to export up to 7.8 million metric tonnes of LNG through
&	138-150M3 Steam turbine (West) 160M3 Tri-fuel diesel electric (East)	35,000 45,000	Increasing Increasing	35,000 45,000	32,045 71,995	April 2028. This is expected to provide capacity sufficient to support fast LNG facility through the permitted period.
в	138-150M3 Steam turbine (East)	35,000	Increasing	35,000	38,636	Offshore Technology June 5, 2023
υ	LNG Spot Index Assessment - Baltic	Spot rate	Last Price		Δ Prior assessment day close	
Ν	BLNG1g (Gladstone / Tokyo RV)	(\$/day) 40,351	36,625	A	3,726	European gas imports will lose their 'sense of emergency' but market to survive crisis. European gas imports will lose their 'sense
к				т		of emergency' but a more stable and stronger world gas market will
E	BLNG2g (Sabine / UK Cont RV)	40,236	32,712	T	7,524	survive the current wartime crisis. So believe representatives of leading LNG and LPG shipping companies gathered in Oslo for the
R S	BLNG3g (Sabine / Tokyo RV)	48,531	36,811	^	11,720	Captial Link-DNV Maritime Leaders Summit.
3	LNG Spot Index Assessment - Spark	Spot rate (\$/day)	Last Price		Δ Prior assessment day close	TradeWinds News June 5, 2023
	Spark25S (NWS / Tianjin)	(\$/day) 40,500	40,000	٨	500	
						Feature: US refineries face operational, workforce risks from delayed planned maintenance. The coronavirus pandemic may be
	Spark30S (Sabine Pass / Gate)	40,750	38,250	T Cost TCL and	2,500	officially over, but the longer-term impacts are lingering in the US
	LPG (KT)			Spot TCE rate (\$/day)		refining sector, which has seen a spate of accidents over the past nine months. Some industry players put the onus of recent refining
	VLGC, 44 (AG-Japan)		115.18	102,978		accidents and emissions events on plant maintenance delayed by
	BUNKERS (\$/mt)	VLSFO	115.18 10 day trend	HSFO	MGO	the coronavirus in 2020, compounded by a return of demand in
	BUNKERS (\$/mt) US Gulf	VLSFO 529.0		HSFO 433.0	725.0	
	BUNKERS (\$/mt)	VLSFO		HSFO		the coronavirus in 2020, compounded by a return of demand in 2021 as lockdowns ended.
	BUNKERS (\$/mt) US Gulf Rotterdam	VLSFO 529.0 527.0	10 day trend	HSFO 433.0 445.0	725.0 671.0	the coronavirus in 2020, compounded by a return of demand in 2021 as lockdowns ended.
E	BUNKERS (\$/mt) US Gulf Rotterdam Singapore CRUDE	VLSFO 529.0 527.0 567.0 Source	10 day trend	HSFO 433.0 445.0 434.0 5, (8:30 am CT) Last price	725.0 671.0 693.0 Δ Prior day close	the coronavirus in 2020, compounded by a return of demand in 2021 as lockdowns ended. S&P Global Platts News June 2, 2023 WEBINARS & EVENTS
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