

Poten & Partners - Daily Briefing

| Journal 4,9 Call Alla Ling Display Control Address (February 10, February 10, | | SHI | PPING RATES & BI | UNKERS (9:30 a | am ET) | | Thursday, September 21, 2 | |
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| | 10.00 000 | | $\sim\sim$ | | | 97.0 | Reuters September 21, 2023 | |
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| 1000 10000000000000000000000000 | | Weekly spot | | Current month | | 2023 avg. rate | | |
| B B DB DB <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Europe Gas Prices Gain After Flows Drop at Biggest US LNG Plant.</td> | | | | | | | Europe Gas Prices Gain After Flows Drop at Biggest US LNG Plant. | |
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| No. 200 No. 200 No. 200 No. 200 No. 200 No. 1990 No. | | | | 103,333 | | | Bloomberg News September 21, 2023 | |
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| Interaction devicesA Prior assessment day donemarket lure: bets from global players like Skell.Spark235 (plws / Tanjin)195,50194,220 $2,250$ $3,500$ UV Cir (IT)Spot rate (S/m) 3001 IC rateUV Cir (IT)Spot rate (S/m) 3001 IC rateUV Cir (IT)Spot rate (S/m) 157.50 $105,780$ UV Cir (IT)Spot rate (S/m) 1000 IC rateUV Cir (IT)Spot rate (S/m)IS RUUV Rice (R)Spot rate (S/m)IS RUBrothIE RUDiffer (S/m)VITINI Cir (IT)Spot rate (S/m)BrothIE RU PROVESpot rate (S/m)BrothIE RU PROVEIE RU PROVEBrothIE RU PROVESpot rate (S/m)BrothIE RU PROVEIE RU PROVEBrothIE RU PROVEIE RU PROVE | BLNG3g (Sabine / Tokvo KV) | 220,844 | 219,219 | ^ | | 1,625 | final terms for a record number of seven offshore exploration | |
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| SparkdS (sabine Pars / Gate) 199,230 199,730 0.500 VLG, 44 (AG. Japan) 175,26 165,788 Mice / | | | | ŵ | | | Hellenic Shipping News September 21, 2023 | |
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| Owner Convertient First of the second seco | | | | | | | MISC is transferring ownership of the two vessels to Nissen Kaiun which at the same entered into a charter agreement with Eaglestar | |
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| ©2022 Poten & Partners NEW YORK LONDON HOUSTON PERTH ATHENS SINGAPORE GUANGZHOU Contract of the services contract of the | N Brent B WTI E WTI G PRODUCTS G PRODUCTS Heating Oil Heating Oil P NATURAL GAS R US Henry Hub I UK National Balancing Point C NATURAL GAS LIQUIDS E US Mont Belvieu Propane (Spot) PRICE SPREADS (5/bbl) ICE RBOB Gasoline/Brent Crack Spread R Regional Greenhouse Gas Initiative Spot Dec-23 C California Carbon Allowances R Spot B 23-Dec O Dec24/Dec23 N European Union Allowances (WCA) I Spot P Dec-22 R Washington Carbon Allowances (WCA) I Spot Spot Spot E Low Carbon Fuel Standard S Spot | ICE NYMEX Source NYMEX Source NYMEX ICE Source BGC BGC BGC BGC BGC BGC BGC BGC BGC BGC | Unit \$/bbl \$/bbl Unit ¢/gal ¢/gal Unit \$/MMBtu Last Price (¢/gal) 73.93 ICE DN MARKET DAILY - Unit \$/ton | 93.85 90.22 Last price 2.69 12.22 Last price (\$/mt) 385.16 14.25 14.31 81D 14.25 14.50 81D 36.75 37.35 2.80 81D 81D 81D 81D 81D 36.75 37.35 2.80 81D 81D 81,31 82.80 81D 81,31 82.80 81D 81,31 82.80 81D 81,31 82.80 81D 81,31 82.80 81D 83,30 81,31 82.80 81D 83,30 81,31 82.80 81,31 82.80 81,31 82.80 81,31 82.80 81,31 82.80 81,31 82.80 81,31 82.80 81,31 82.80 81,31 82.80 81,31 82.80 81,31 82.80 81,31 81, | <u>ተ</u> ተ | 0.32 -0.06 Δ Prior day close 0.55 10.51 Δ Prior day close -0.04 0.62 Δ Prior day close (¢/gal) 0.00 Δ Prior day close (¢/gal) 0.03 Ο 0.13 Ο 0.13 | September 27. The global LNG market is in flux, with significant new capacity under development in the US, Qatar and elsewhere even as commercial terms for future supply remain unclear. Recent FIDs in the US and expected projects, will boost supply, likely putting downward pressure on prices by mid-decade. With Brent- related pricing seemingly peaking, all eyes are on the US to stabilize North American prices. In Asia Pacific, buyers seek long-term LNG but are resisting perceived high prices. In Europe, buyers appear to favor spot and short-term markets as elevated prices wane. Join Poten's panel of LNG analysts for a timely webinar on September 27 as we examine the latest trends impacting the markets. Bard International Forum LNG Global 2023: October 2-4, Cartegena, Columbia M S&P 500 United States 3,842.93 1.88 A FTSE 100 United Kingdom 7,702.55 2.9210 R DAX Germany 15,606.82 -174.77 K CURRENCIES Region/Country Last value A Prior day or 4/5 S S/JIY Y Japan 147.43 0.002 | |