

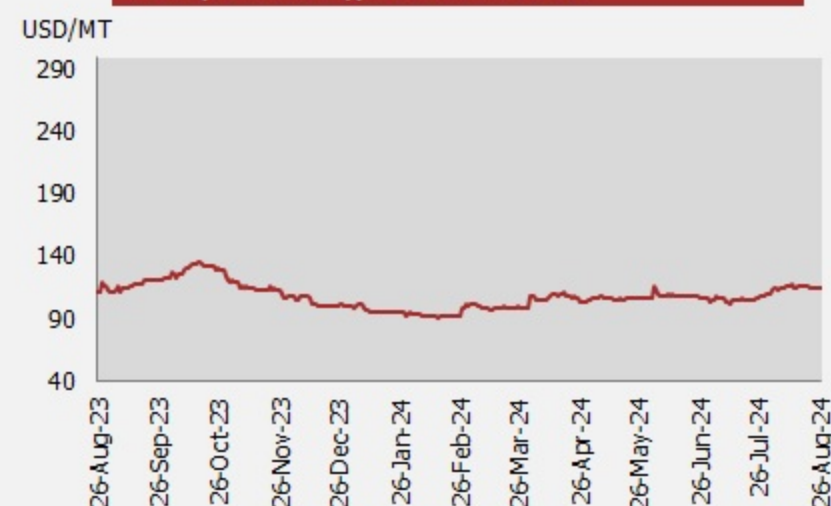
Arablight crude up 0.1% WoW



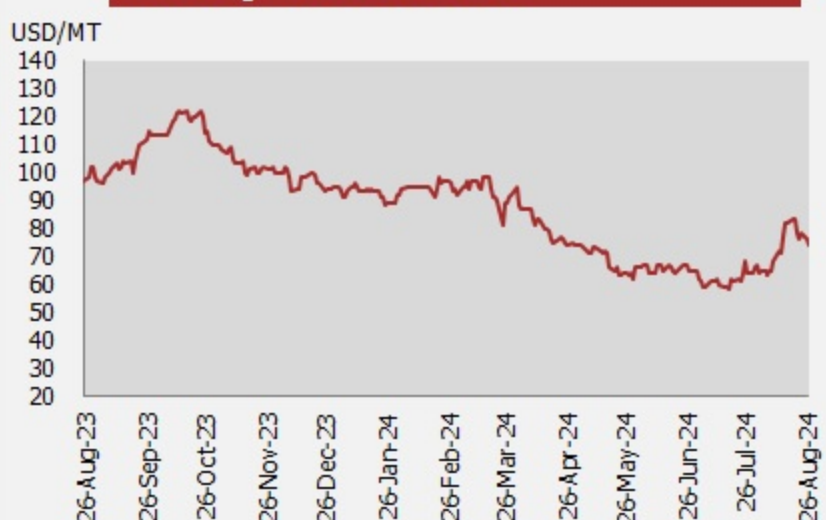
Cotton (COTLOOKA) up 2.7% WoW



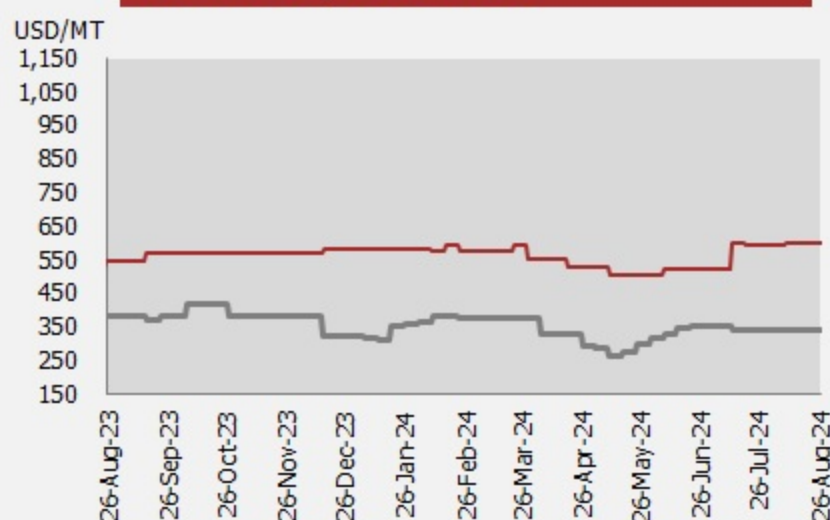
Coal (Richards Bay) down 1.4% WoW



CRC margins down 8.4% WoW



DAP 0% WoW, UREA 0% WoW



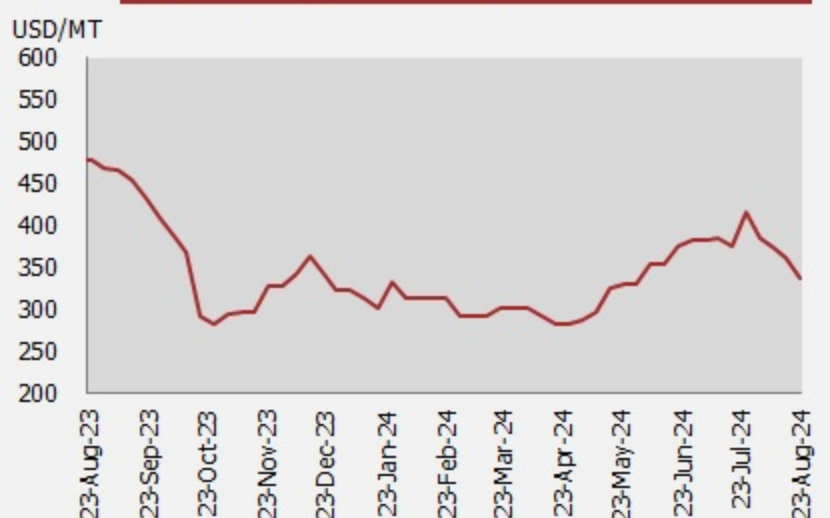
Palm Oil up 3.5% WoW



Steel scrap down 0.9% WoW



PVC margins down 6.3% WoW



PTA margins up 0.1% WoW



Alfalah CLSA Research

	19-Aug-24	26-Aug-24	WoW chng	WoW chng %	FYTD chng %	CYTD chng %
Arab Light	80.51	80.59	0.08	0.1%	2.8%	0.21%
COTLOOKA	78.60	80.75	2.15	2.7%	-10.5%	-11.65%
COAL	117.00	115.40	(1.60)	-1.4%	15.9%	14.26%
CRC	83.00	76.00	(7.00)	-8.4%	-7.3%	-20.00%
DAP	597.50	597.50	-	0.0%	34.3%	3.02%
UREA	342.50	342.50	-	0.0%	12.9%	6.20%
Palm Oil	894.00	925.04	31.04	3.5%	15.8%	15.24%
Steel Scrap	373.50	370.00	(3.50)	-0.9%	-3.7%	-12.18%
*PVC Margins ³	360.00	337.50	(22.50)	-6.3%	-16.1%	4.65%
*PTA Margins ⁴	106.80	106.90	0.10	0.1%	-14.5%	18.91%

Source: Bloomberg
*last updated on 23rd Aug 2024

Impact of commodity move for week ending 26-Aug-24

- ¹ Coal Positive for Cement
- ² CRC Margins Negative for Steel
- ³ PVC Margins Negative for EPCL
- ⁴ PTA Margins Positive for LOTTICHEM