

The Morning Email: Commitment of Traders (CoT) & Dealer Positions (DP)

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Want something added? Let me know: jgoulding@ghco.com

Disclaimer: All information within this newsletter is meant for internal use at GH Trader's LLC, only. All information has been recorded to the best of my ability. This material is based upon information that I consider reliable, but I do not represent that it is accurate or complete.

Current Positions

	Small Spec			Large Spec			Commercials (Hedgers)			
	Long	Short	Net	Long	Short	Net	Long	Short	Net	
Crude Oil ^	73,676	82,418	(8,742)	215,556	135,281	80,275	1,285,999	1,357,532	(71,533)	Crude Oil
Heating Oil	39,006	29,105	9,901	26,015	16,835	9,180	141,229	160,311	(19,082)	Heating Oil
Unleaded Gas	22,176	15,601	6,575	57,126	13,160	43,966	136,162	186,704	(50,542)	Unleaded Gas
Natural Gas	84,276	35,780	48,496	184,750	400,926	(216,176)	533,524	365,844	167,680	Natural Gas

^ Light Sweet

Week over Week Change

As of	Sml Spec	Lrg Spec	Comm
7/29/2008	Net	Net	Net
Crude Oil	(18,470)	72,033	(53,563)
Heating Oil	(445)	(33,824)	34,267
Unleaded Gas	(43,884)	272,091	(228,208)
Natural Gas	57,238	(296,451)	239,213

Current Positions

	Small Spec			Large Spec			Commercials (Hedgers)			
	Long	Short	Net	Long	Short	Net	Long	Short	Net	
ZF	223,314	223,301	13	333,133	187,148	145,985	973,058	1,119,057	(145,999)	ZF
ZN	287,311	387,370	(100,059)	221,713	320,780	(99,067)	1,450,359	1,251,234	199,125	ZN
ZB	120,790	179,062	(58,272)	118,521	176,728	(58,207)	655,056	538,576	116,480	ZB

Week over Week Change

As of	Sml Spec	Lrg Spec	Comm
7/29/2008	Net	Net	Net
ZF	25,246	(5,357)	(19,890)
ZN	(33,006)	(3,642)	36,647
ZB	2,602	(32,047)	29,447

Current Positions

Small Spec			Large Spec			Commercials		
Long	Short	Net	Long	Short	Net	Long	Short	Net
1,058,762	987,219	71,543	851,711	354,837	496,874	8,477,371	9,045,787	(568,416)

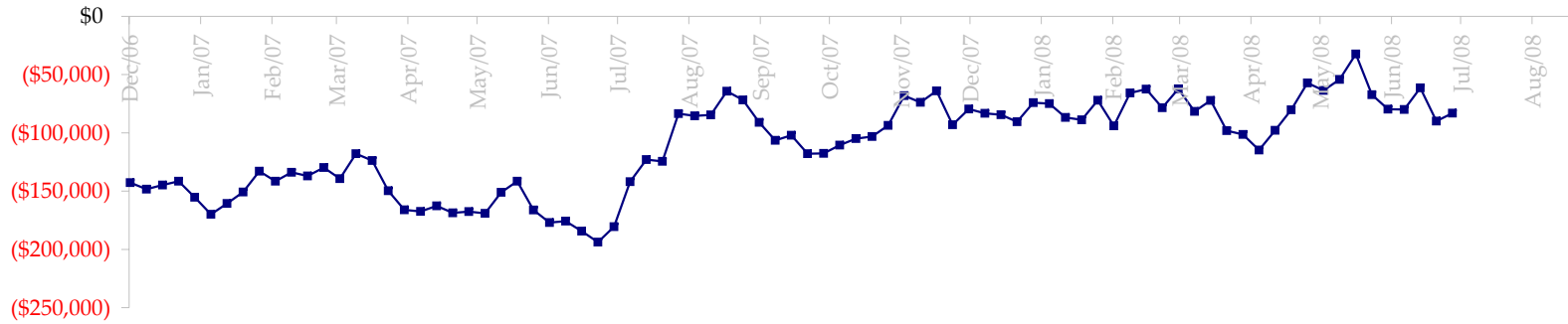
Week over Week Change

As of

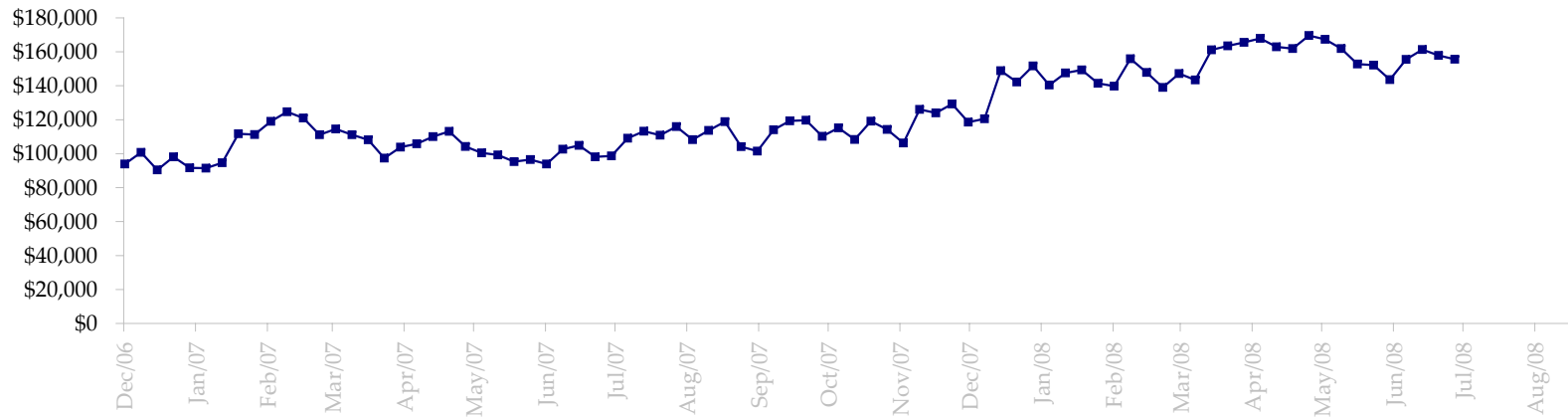
7/29/2008

Sm Spec	Lg Spec	Commrc
39,588	(46,175)	6,588

Fed Agency & GSA Position: Coupons - (\$mln)

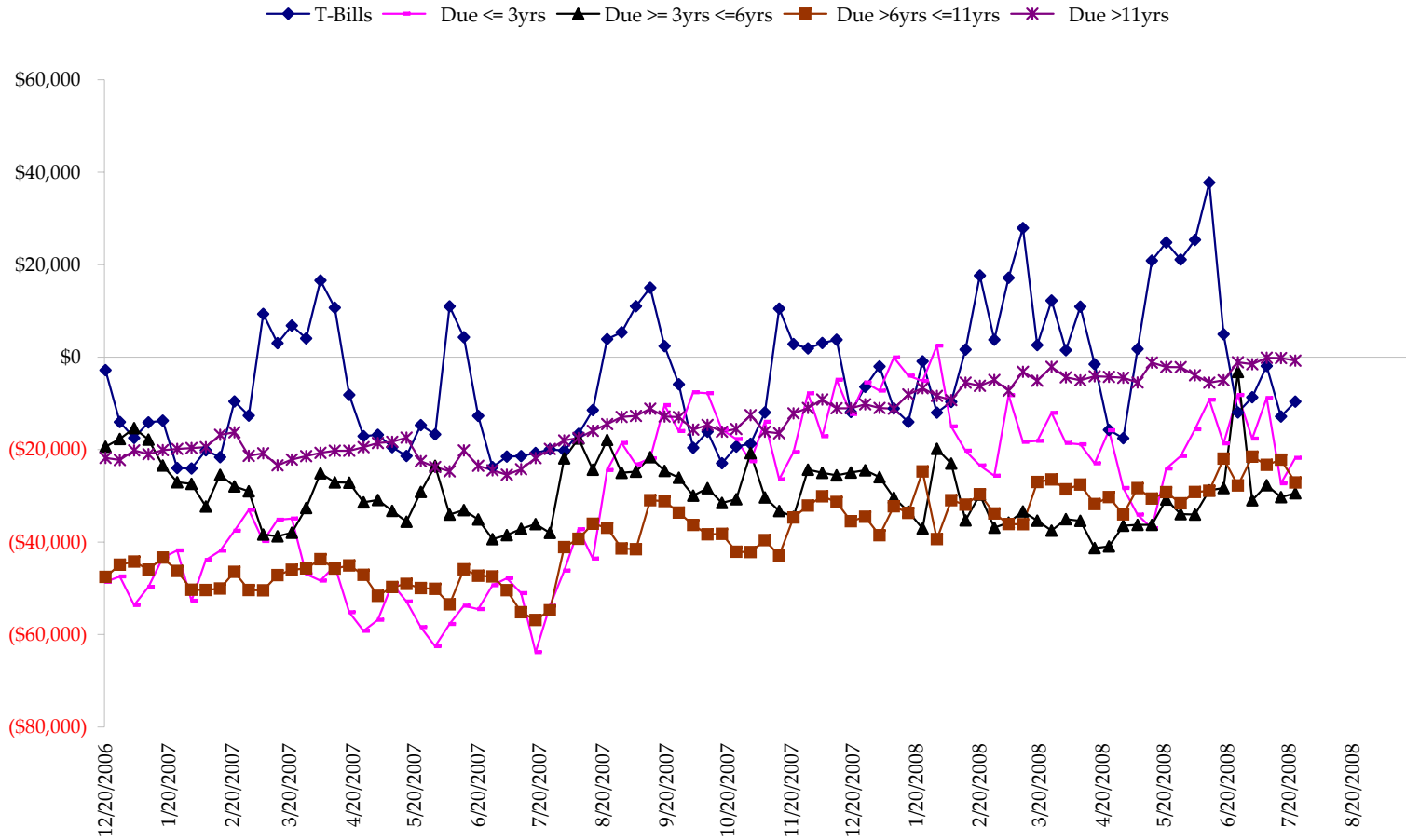


Fed Agency & GSA Position: Coupons - (\$mln)

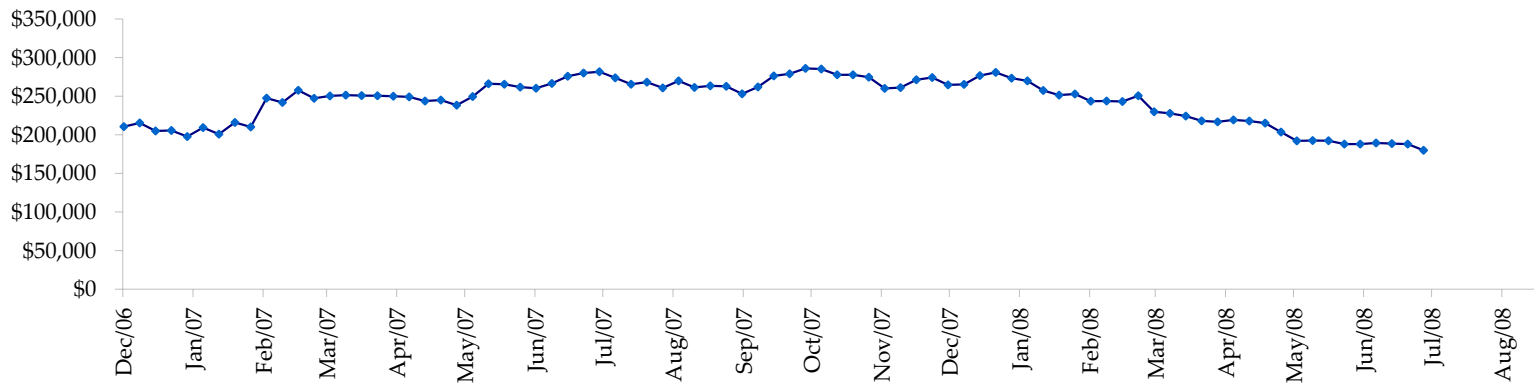


Treasury Coupon Positions by Maturity

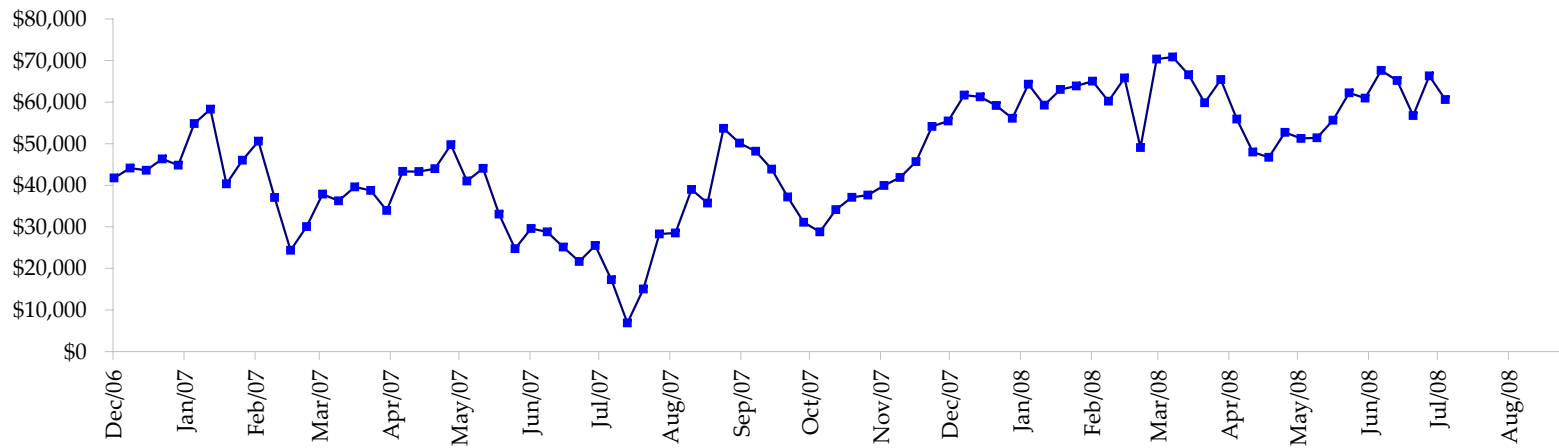
All dates are 'as of'.



Total Corporate Position - (\$mln)



Total Mortgage Position - (\$mln)



We are interested in the last column, CIT % OI. That stands for Commercial Index Traders, percent Open Interest.

This table, compliments of CommitmentofTraders.com

Supplemental Commitments of Traders Report breaking out the Commercial Index Traders (CIT).														
Analysis of open interest -with option deltas- as of 07/29/2008														
Summary prepared by www.Commitments of Traders .com														
Commodity	Small Sp			Large Sp			Commerc			CIT			Total	CIT
	NonRepo			Non Com	- No CIT		Comm	- No CIT		Long	Short	Net	Open	% OI
	Long	Short	Net	Long	Short	Net	Long	Short	Net	Long	Short	Net	Interest	
Wheat	29463	55265	-25802	41956	70762	-28806	32743	150655	-117912	207262	34742	172520	436309	39%
K C Wheat	16972	26992	-10020	11745	10716	1029	33257	50850	-17593	27561	975	26586	105891	25%
Corn	153624	267004	-113380	175878	71403	104475	504330	867830	-363500	417229	44824	372405	1939753	19%
Soybeans	54478	82433	-27955	82357	27739	54618	83171	258568	-175397	162496	13762	148734	552608	26%
Soybean Oil	27161	20159	7002	32463	23320	9143	81032	164807	-83775	71601	3972	67629	296292	22%
Cotton	22175	15178	6997	36916	31155	5761	81157	198474	-117317	113559	8999	104560	379775	27%
Lean Hogs	28869	35512	-6643	31904	33320	-1416	14624	121457	-106833	116860	1966	114894	256020	44%
Lv Cattle	26067	65111	-39044	48692	42773	5919	33666	150220	-116554	153519	3839	149680	356559	41%
Feeder	5350	12748	-7398	7383	6085	1298	4422	5025	-603	9018	2315	6703	34952	19%
Cocoa	13461	5414	8047	45916	32055	13861	58102	106120	-48018	28784	2673	26111	168374	15%
Sugar No 11	88605	62089	26516	127421	74482	52939	225594	650755	-425161	421264	75559	345705	1117624	30%
Coffee	8875	6573	2302	26714	12623	14091	38917	113315	-74398	61203	3200	58003	201013	28%
			-179378			232912			-1647061			1593530	5845170	27%