

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 ^	71,239	81,745	(10,506)	208,692	134,075	74,617	1,298,072	1,362,183	(64,111)	Crude Oil
Heating Oil	39,325	31,539	7,786	26,146	13,164	12,982	134,175	154,942	(20,767)	Heating Oil
Unleaded Gas	19,278	16,340	2,938	56,937	10,980	45,957	140,071	188,966	(48,895)	Unleaded Gas
Natural Gas	82,756	38,371	44,385	185,303	387,364	(202,061)	525,101	367,425	157,676	Natural Gas

^ Light Sweet

As of	Week over Week Change			
	Sml Spec	Lrg Spec	Comm	
	Net	Net	Net	
8/19/2008	Crude Oil	(18,101)	63,070	(44,968)
	Heating Oil	2,826	(32,108)	29,284
	Unleaded Gas	(40,374)	247,842	(207,468)
	Natural Gas	54,891	(276,678)	221,787

Current Positions

	Small Spec			Large Spec			Commercials (Hedgers)			
	Long	Short	Net	Long	Short	Net	Long	Short	Net	
ZF	266,144	240,278	25,866	434,547	200,480	234,067	963,534	1,223,467	(259,933)	ZF
ZN	375,446	424,906	(49,460)	243,977	259,725	(15,748)	1,479,584	1,414,376	65,208	ZN
ZB	136,133	191,256	(55,123)	99,811	164,016	(64,205)	686,843	567,514	119,329	ZB

Week over Week Change

As of	Week over Week Change		
	Sml Spec Net	Lrg Spec Net	Comm Net
8/19/2008	ZF 1,944	(1,798)	(145)
	ZN 1,998	6,665	(8,664)
	ZB (3,827)	(15,127)	18,954

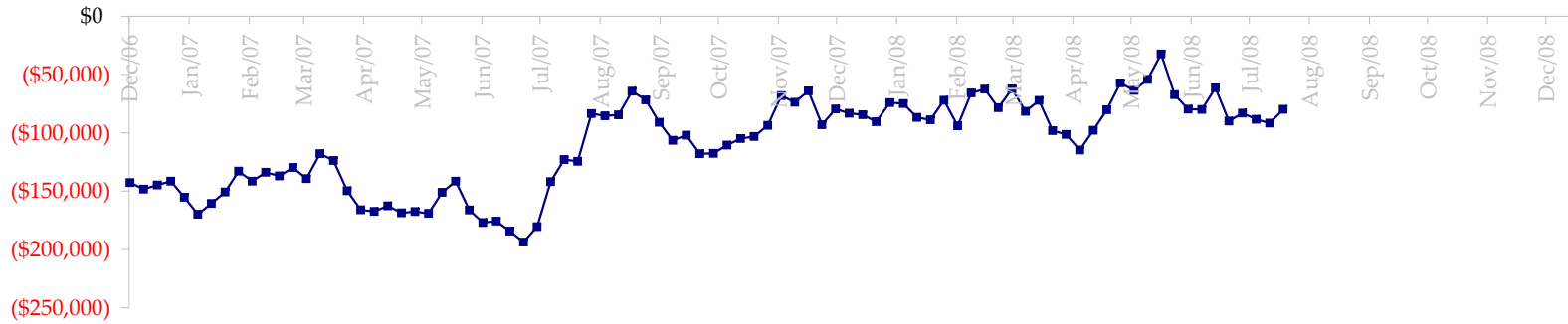
Current Positions

Small Spec			Large Spec			Commercials		
Long	Short	Net	Long	Short	Net	Long	Short	Net
1,197,752	1,119,751	78,001	1,019,182	344,431	674,751	8,605,128	9,357,880	(752,752)

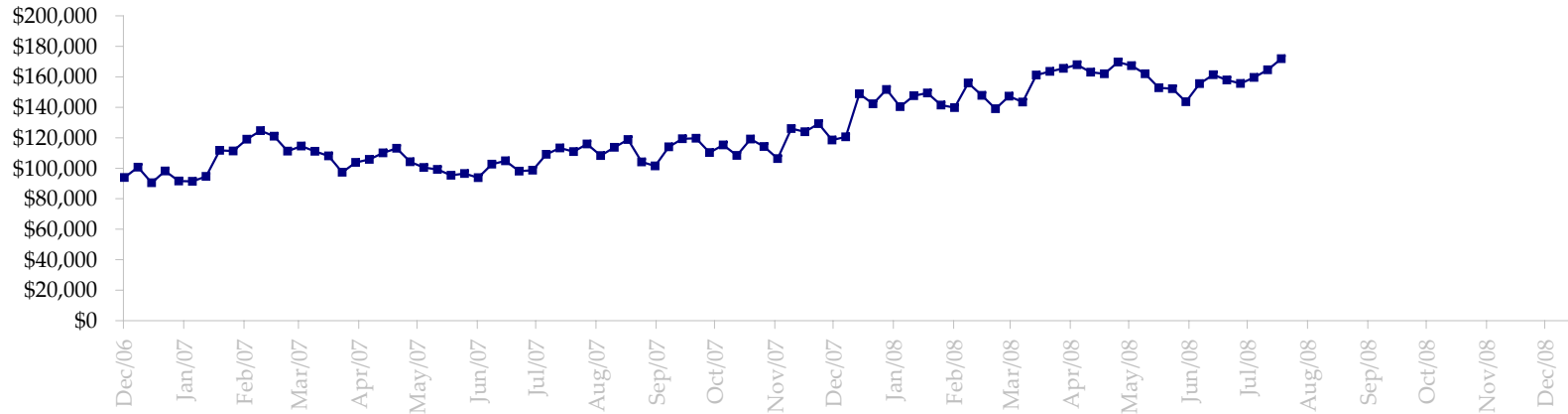
Week over Week Change

As of	Sm Spec	Lg Spec	Commrc
8/19/2008	(43,649)	5,891	37,759

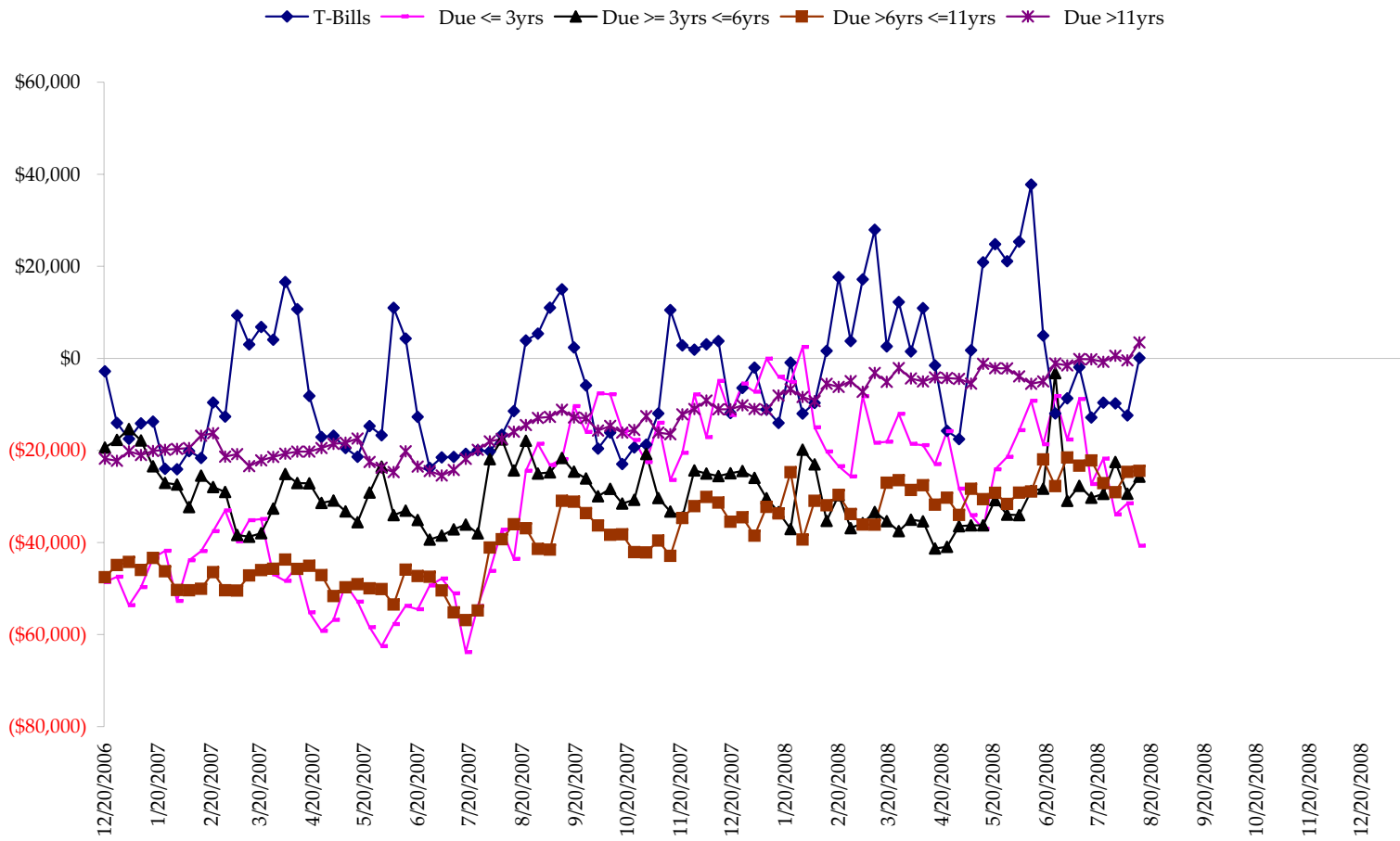
Total US Government Total Securities: Coupons - (\$mln)



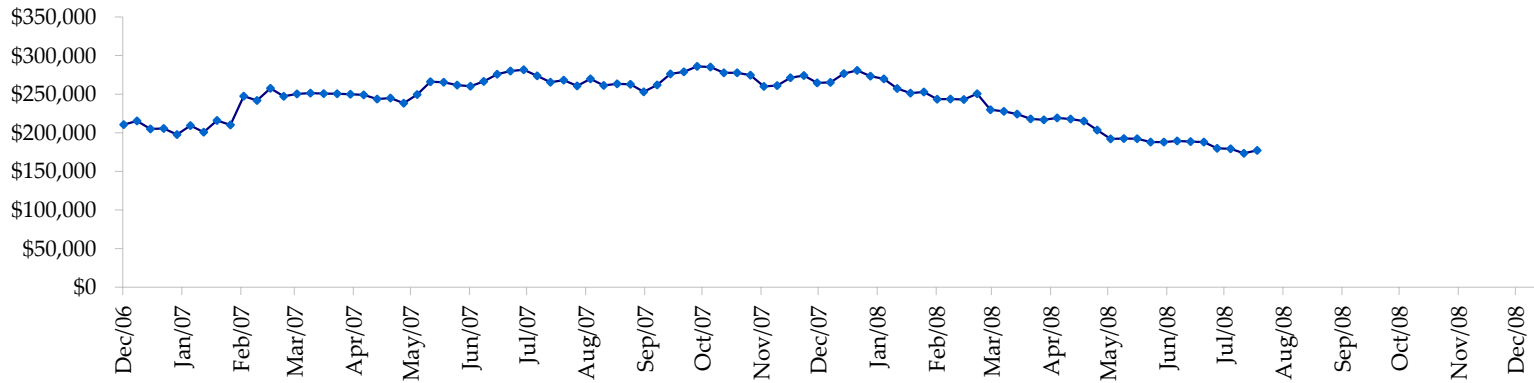
Fed Agency & GSE Total Securities: Coupons - (\$mln)



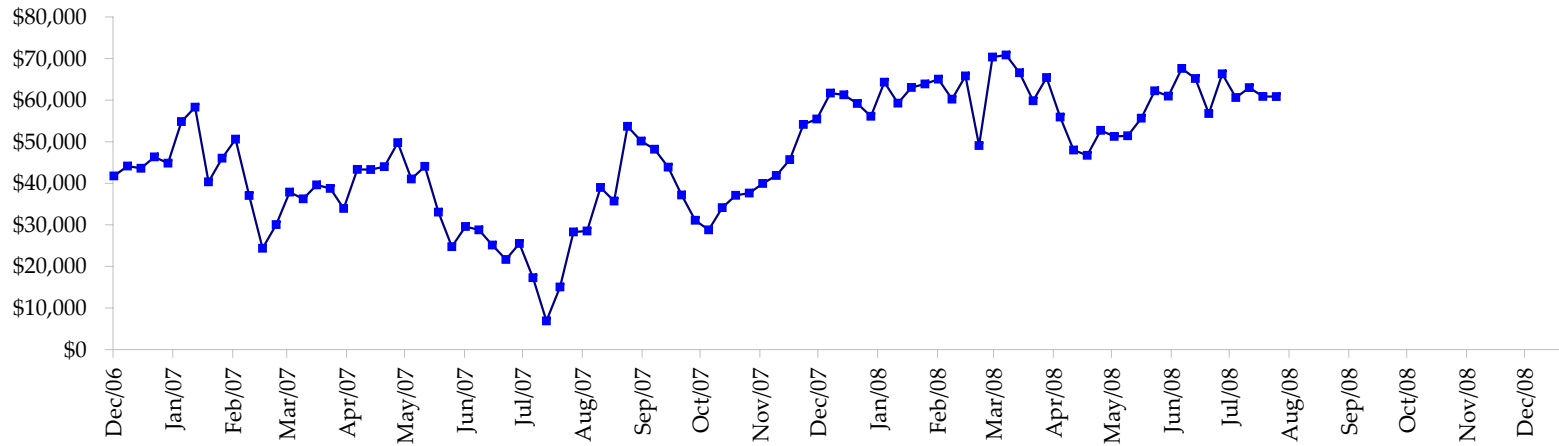
All dates are 'as of'.



Total Corporate Securities - (\$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 08/19/2008																		
Summary prepared by www. Commitments of Traders .com																		
Commodity	Small Spc NonRepo			Large Sp Non Com			- No CIT			Commerc Comm			- No CIT			CIT	Total Open Interest	CIT % OI
	Long	Short	Net	Long	Short	Net	Long	Short	Net	Long	Short	Net	Long	Short	Net			
Wheat	31244	55676	-24432	40844	57541	-16697	30939	168064	-137125	197412	19158	178254	437858	40%				
K C Wheat	19156	29230	-10074	16754	6006	10748	31613	55449	-23836	23952	790	23162	106232	21%				
Corn	149288	246780	-97492	152894	85519	67375	498836	819093	-320257	400581	50207	350374	1933672	18%				
Soybeans	49533	79005	-29472	69612	34203	35409	95700	242207	-146507	154651	14083	140568	566097	24%				
Soybean Oil	21712	19009	2703	18547	26764	-8217	107288	175064	-67776	80271	6981	73290	316241	23%				
Cotton	18827	18237	590	29767	36991	-7224	81186	173734	-92548	108066	8884	99182	366511	27%				
Lean Hogs	24311	31368	-7057	33805	28796	5009	11413	122688	-111275	114709	1387	113322	252232	44%				
Lv Cattle	22135	58873	-36738	49549	47985	1564	32578	139801	-107223	146320	3924	142396	318658	44%				
Feeder	5002	12616	-7614	8113	5581	2532	5543	6663	-1120	7790	1587	6203	36483	17%				
Cocoa	9920	8667	1253	38587	31579	7008	52953	84154	-31201	26043	3103	22940	141677	16%				
Sugar No 11	107452	70860	36592	137839	57697	80142	224382	679825	-455443	416695	77985	338710	1154085	29%				
Coffee	5729	7821	-2092	24029	17975	6054	37004	98096	-61092	60042	2912	57130	173694	32%				
			-173833			183703			-1555403			1545531	5803440	26%				

← Most Current Date

Supplemental Commitments of Traders Report breaking out the Commercial Index Traders (CIT).																		
Analysis of open interest -with option deltas- as of 08/12/2008																		
Summary prepared by www. Commitments of Traders .com																		
Commodity	Small Spc NonRepo			Large Sp Non Com			- No CIT			Commerc Comm			- No CIT			CIT	Total Open Interest	CIT % OI
	Long	Short	Net	Long	Short	Net	Long	Short	Net	Long	Short	Net	Long	Short	Net			
Wheat	30229	56831	-26602	42166	64996	-22830	35970	157830	-121860	196964	25672	171292	442906	38%				
K C Wheat	19101	29843	-10742	14189	8614	5575	30177	48593	-18416	24476	893	23583	103695	22%				
Corn	163060	272341	-109281	150460	88479	61981	519087	824032	-304945	401968	49724	352244	1958525	17%				
Soybeans	48522	82142	-33620	72199	33377	38822	95152	242743	-147591	155728	13339	142389	561309	25%				
Soybean Oil	23972	21024	2948	18281	28076	-9795	114121	176981	-62860	77700	7993	69707	320641	21%				
Cotton	19027	15772	3255	31882	37156	-5274	84397	183388	-98991	109951	8941	101010	377303	26%				
Lean Hogs	25009	33097	-8088	35011	29503	5508	15104	127898	-112794	117179	1805	115374	261576	44%				
Lv Cattle	22600	58489	-35889	50076	46381	3695	33024	145645	-112621	148023	3207	144816	321728	45%				
Feeder	5643	13997	-8354	8229	4737	3492	5900	7002	-1102	7733	1769	5964	37671	15%				
Cocoa	11239	5780	5459	41436	28710	12726	54339	96075	-41736	26451	2900	23551	147983	15%				
Sugar No 11	101066	63412	37654	139147	55925	83222	216087	675188	-459101	415069	76845	338224	1134983	29%				
Coffee	8765	6688	2077	26601	14762	11839	32639	103919	-71280	60345	2981	57364	174348	32%				
			-181183			188961			-1553297			1545518	5842668	26%				

← Prior Week's Date