



DAILY MARKET REPORT

MARKETS – DAILY COMMENTS & MARKET DRIVERS

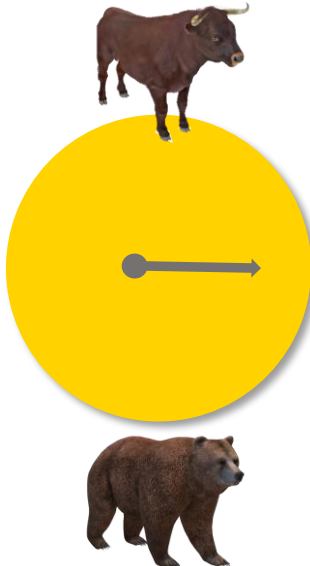
On Thursday, Nov-25 MATIF opened at €469.50, and traded between highs of €477.25 and lows of €469.50, before settling at €475.75, up €5.00 on Wednesday’s settlement.

- On the CBOT, it was a day of pressure for the soybean complex yesterday. Nov’25 soybeans fell back by 6.25c to settle at \$10.37/bu, soy oil Oct’25 fell back by 0.67c to settle at 50.57c/lb, whilst soymeal lost \$0.9 to settle at \$283/T. **Price Impact – Negative**
- Nearby (Nov’25) Brent crude fell back again yesterday, down by \$0.51 to settle at \$67.44/b. Crude oil came under some pressure as the US dollar recorded a recovery against a number of currencies. Relative to the pound and the US dollar recorded a 0.53% increase to \$1=£0.7378. **Price Impact – Mixed**
- Relative to the Euro, and the pound has been weakening, falling to £1=€1.1499 yesterday. The pound has continued to come under pressure today. **Price Impact - Positive**
- US wheat weekly net export sales of 377.5Kt for 2025/2026 were up 24 percent from the previous week, exports of 774.8Kt were up noticeably from the previous week and up 19 percent from the prior 4-week average. **Price Impact - Positive**
- US corn weekly net export sales of 1.232Mt for 2025/2026 were encouraging and primarily for Mexico. Exports of 1.556Mt were also primarily to Mexico. **Price Impact - Positive**
- US soybean weekly net export sales continued to be a little disappointing with China absent from making purchases of US beans. Net sales of 923Kt for 2025/2026 were primarily for Egypt, while exports of 837Kt included 133.4Kt to Spain. **Price Impact - Mixed**
- US ethanol production fell to the lowest level in nearly four months last week according to the US EIA, production dropped to an average of 1.055 million barrels a day. **Price Impact – Negative**

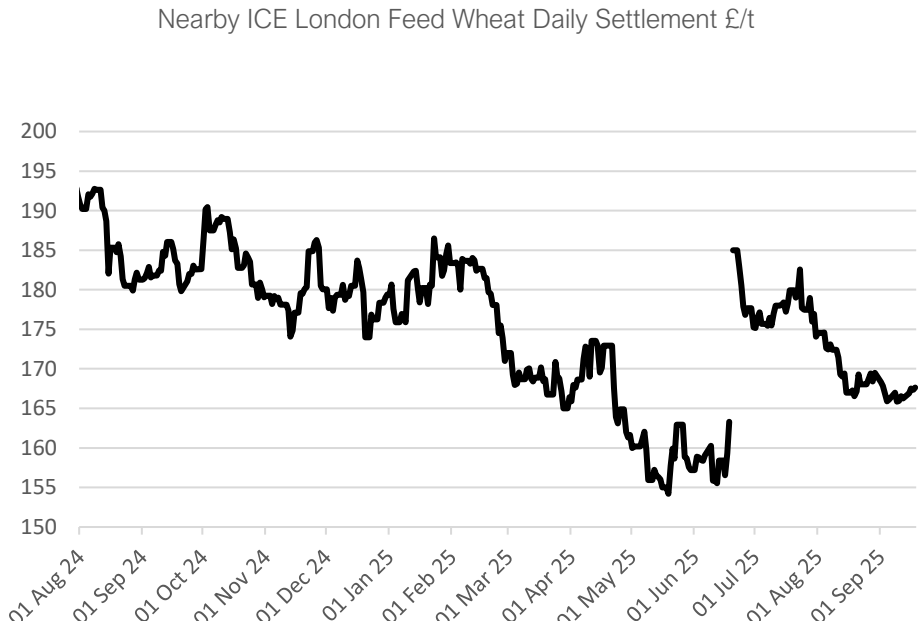
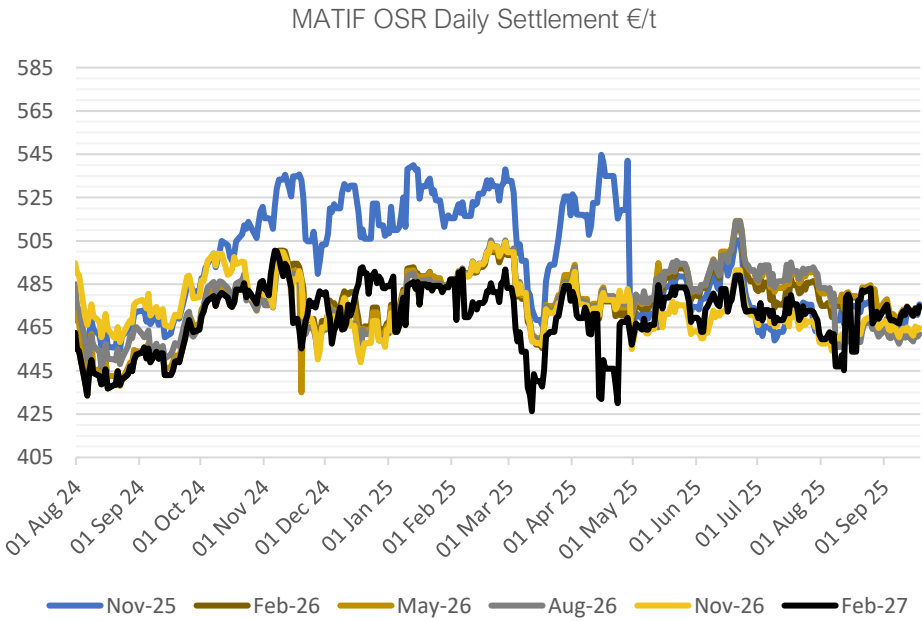
OSR Portfolio 2025/26

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| Delivered OSR Prices | Daily Change | Sep-25 | Oct-25 | Nov-25 | Dec-25 | Jan-26 |
|----------------------|--------------|--------|--------|--------|--------|--------|
| Erith | £2 | £417 | £418 | £419 | £420 | £421 |
| Liverpool | -£2 | £415 | £416 | £417 | £418 | £419 |
| Chettisham | POA | POA | POA | POA | POA | POA |
| Stratford | -£2 | £415 | £416 | £417 | £418 | £419 |
| Berwick | -£2 | £402 | £403 | £404 | £405 | £406 |
| Montrose | -£2 | POA | POA | £399 | £400 | £401 |
| Whitehill/Murphy | -£2 | POA | POA | £394 | £395 | £396 |

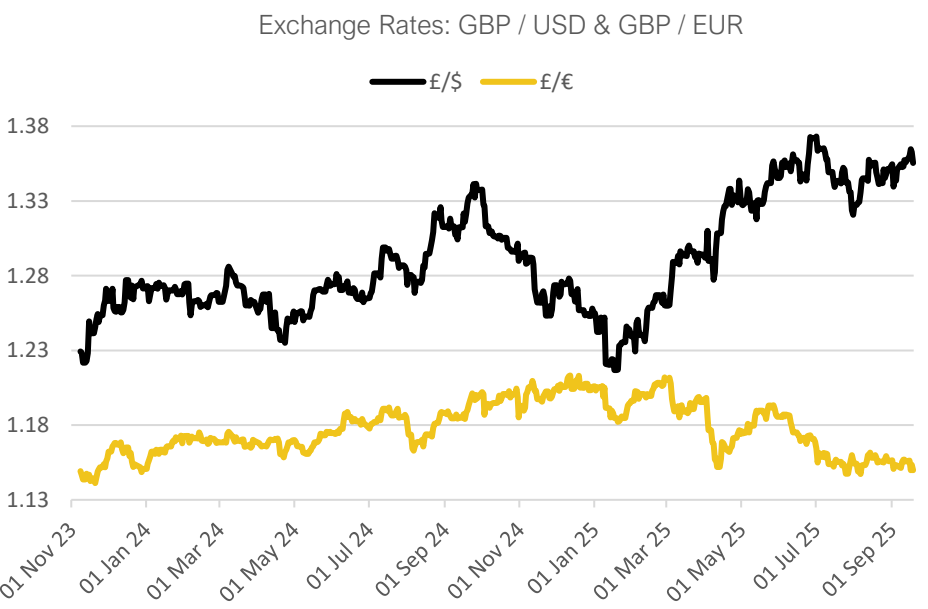
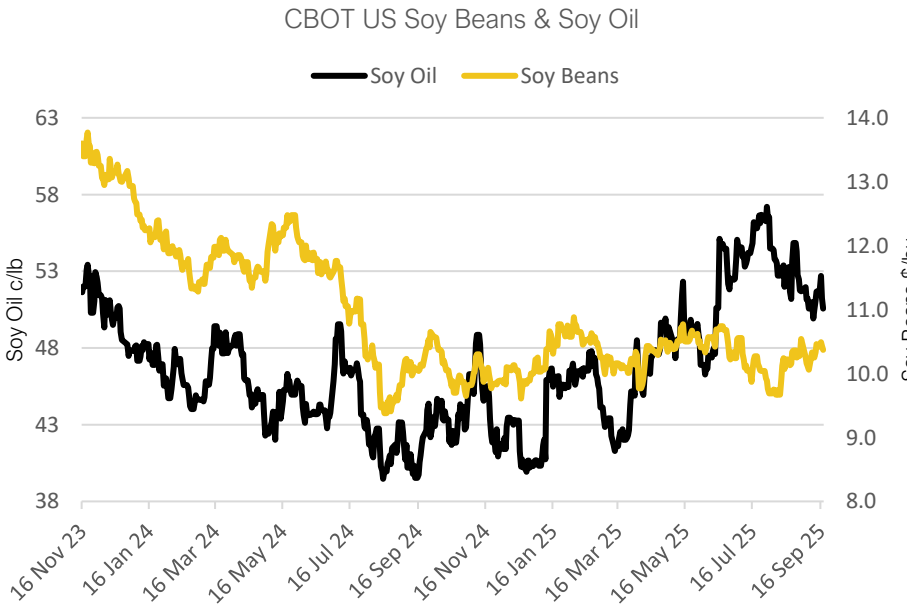


MARKET TRENDS & CURRENCY



| CBOT US Soy Complex – Settlement 18.09.2025 | | | |
|---|---------|--------|--------------|
| Contract | \$ | Month | Daily Change |
| Soybeans (\$/bu) | \$10.37 | Nov-25 | -6.25c |
| Soy Oil (c/lb) | 50.57c | Oct-25 | -0.67c |
| Soy Meal (\$/T) | \$283 | Oct-25 | -\$0.90 |

| ICE London Feed Wheat – Settlement 18.09.2025 | | |
|---|---------|--------------|
| Delivery Month | £/t | Daily Change |
| Nov-25 | £167.65 | £0.30 |
| Jan-26 | £171.40 | £0.40 |
| May-26 | £178.90 | £0.60 |
| Nov-26 | £184.25 | £0.55 |



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Restore UK OSR Self Sufficiency – Boost Economic Growth – Reverse Biodiversity Declines – Level the Playing Field for UK Farmers
SAVE OUR YELLOW FIELDS! – [View the Campaign Here](#)