

Risk Management

Technical Analysis of Commodity Markets: Emphasis on Bar Charts

Mark Waller, Mark Welch, and Wayne D. Purcell*

Supply and demand ultimately determine commodity prices. There is an equilibrium or “market-clearing” price at which the quantity producers supply to the market equals the quantity buyers are willing to take. Demand and supply are balanced at price P_e .

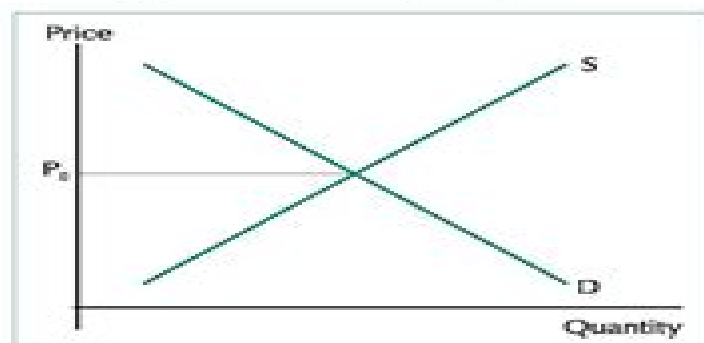


Figure 1.

One of the functions of futures markets is to discover an “equilibrium price” for a future time period. However, supply and demand levels are not known with certainty months or even years into the future. Futures prices vary across a wide range, as estimates of supply and demand are adjusted for changes in weather, economic conditions in Asia that will influence

export buying, or changes in the U.S. dollar that influence the cost of U.S. commodities.

Over time, a chart of prices for cotton futures or for live cattle (the fed cattle futures) will show patterns as the price discovery process responds to actual or perceived changes in supply and/or demand. The study of those chart patterns is called *technical analysis*. Such analysis is based on the notion that price and price patterns in the past are useful in forming expectations about what price will do in the future. Technical analysis is especially useful in determining when to enter and exit the markets in programs designed to manage a firm’s exposure to price risk.

Technical analysis can be complex. Sophisticated mathematical models can be used to help identify changes in the direction of price trend. Econometric models are used by large hedgers and full-time speculators looking for a competitive edge. But when used with discipline, some simple and basic techniques can make big contributions to price risk management programs.

The *trend line* can be used to spot a change in price direction. Connecting two daily price lows in a rising market or highs in a declining market, preferably at least 10 trading days apart, can help establish the trends. As seen in Figure 2, a few days after the daily low at B, the two daily lows at A and B can be connected, and an uptrend line can be drawn and extended up and to the right. This upward trend in price is ex-

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Table of Contents Technical Analysis Commodity Charts

1. Understanding the eBook Technical Analysis Commodity Charts
 - The Rise of Digital Reading Technical Analysis Commodity Charts
 - Advantages of eBooks Over Traditional Books
2. Identifying Technical Analysis Commodity Charts
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Technical Analysis Commodity Charts
 - User-Friendly Interface
4. Exploring eBook Recommendations from Technical Analysis Commodity Charts
 - Personalized Recommendations
 - Technical Analysis Commodity Charts User Reviews and Ratings
 - Technical Analysis Commodity Charts and Bestseller Lists
5. Accessing Technical Analysis Commodity Charts Free and Paid eBooks
 - Technical Analysis Commodity Charts Public Domain eBooks

- Technical Analysis Commodity Charts eBook Subscription Services
- Technical Analysis Commodity Charts Budget-Friendly Options
- 6. Navigating Technical Analysis Commodity Charts eBook Formats
 - ePub, PDF, MOBI, and More
 - Technical Analysis Commodity Charts Compatibility with Devices
 - Technical Analysis Commodity Charts Enhanced eBook Features
- 7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Technical Analysis Commodity Charts
 - Highlighting and Note-Taking Technical Analysis Commodity Charts
 - Interactive Elements Technical Analysis Commodity Charts
- 8. Staying Engaged with Technical Analysis Commodity Charts
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Technical Analysis Commodity Charts
- 9. Balancing eBooks and Physical Books Technical Analysis Commodity Charts
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Technical Analysis Commodity Charts
- 10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
- 11. Cultivating a Reading Routine Technical Analysis Commodity Charts
 - Setting Reading Goals Technical Analysis Commodity Charts
 - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of Technical Analysis Commodity Charts
 - Fact-Checking eBook Content of Technical Analysis Commodity Charts
 - Distinguishing Credible Sources
- 13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development
 - Exploring Educational eBooks

14. Embracing eBook Trends

- Integration of Multimedia Elements
- Interactive and Gamified eBooks

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