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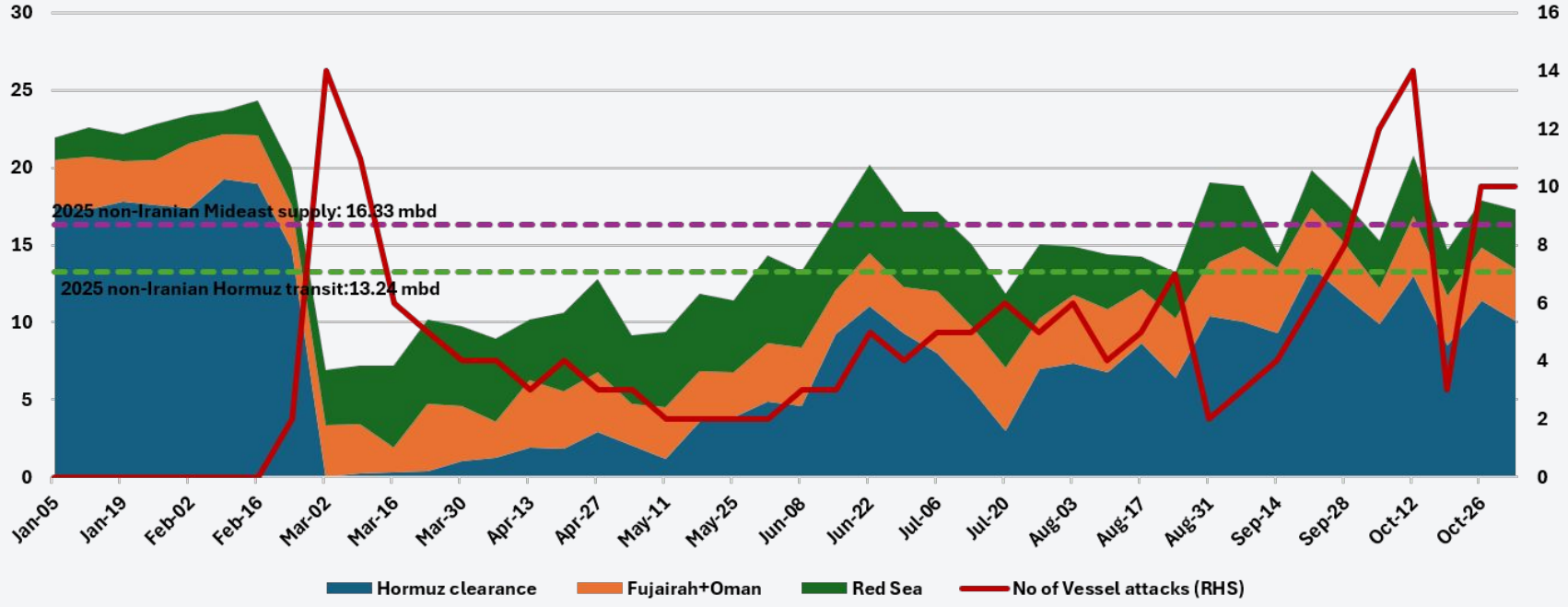
Kpler Pulse: APAC Series

The new rules of Asian crude trading: supply, freight and arbitrage

Middle Eastern crude supply recovers to near pre-war levels

Logistical constraints and renewed attacks test the sustainability of higher Hormuz flows

Non-Iranian Middle Eastern crude supply by origin, mbd; Number of vessel attacks in the region, count

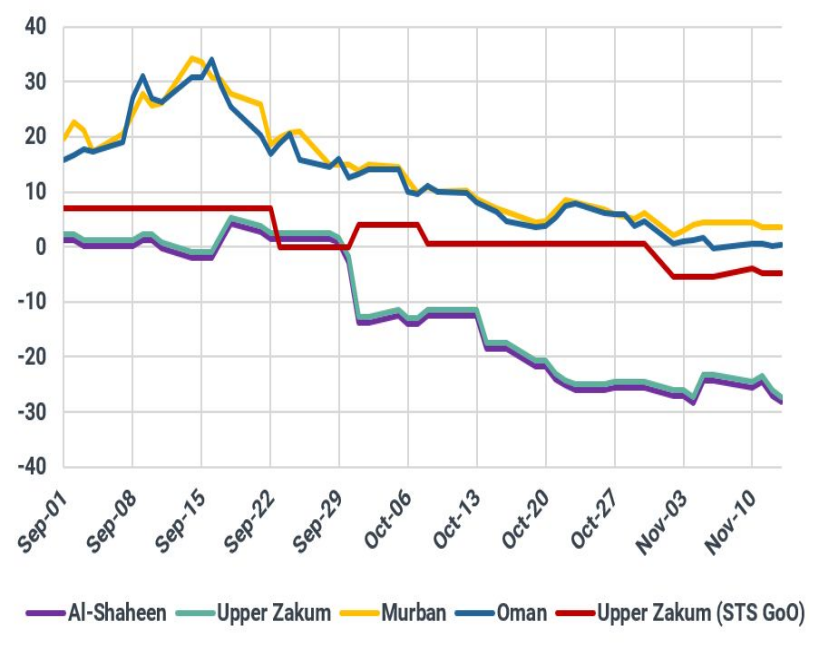


Source: Kpler, UKMTO

Growing spot availability puts further pressure on crude diffs

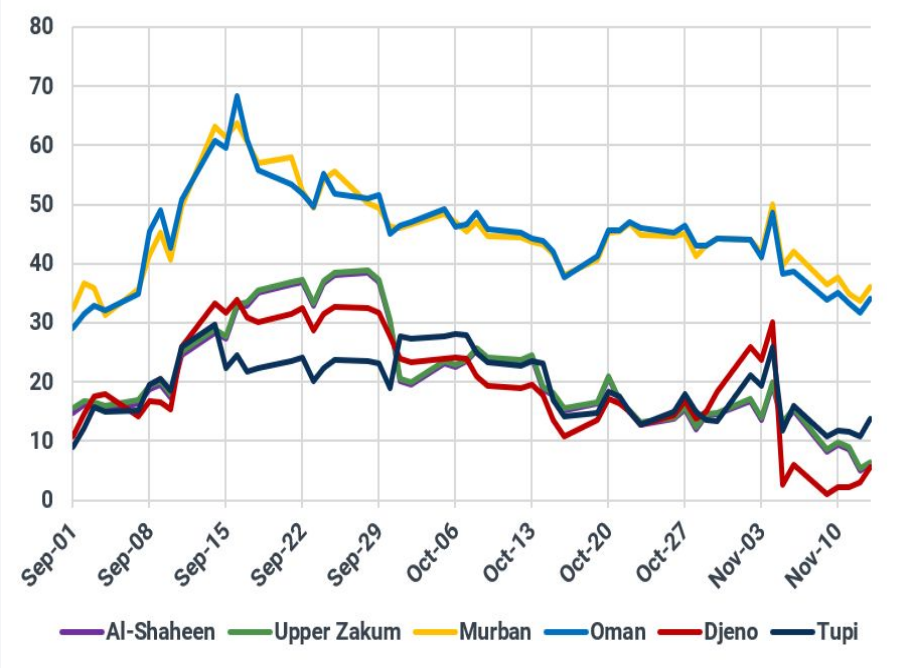
Lower freight costs improve WoS to EoS arbitrage economics, intensifying competition in Asia

Selected crude diffs vs Dubai, FOB basis, $/bbl



Source: Argus Media

Selected crude diffs vs ICE Brent, DES China basis, $/bbl

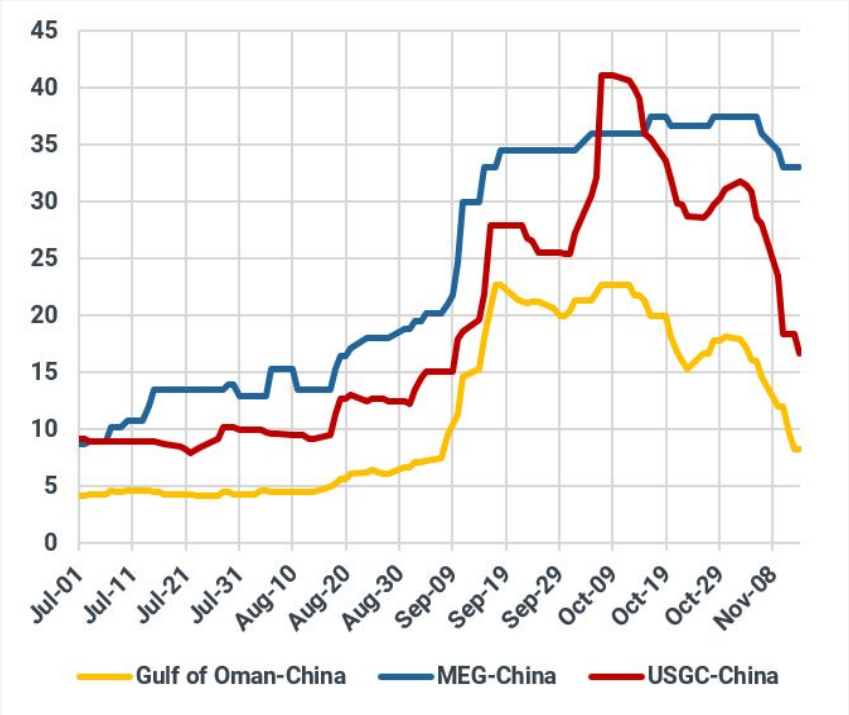


Source: Argus Media

Freight rates retreat but remain well above summer levels

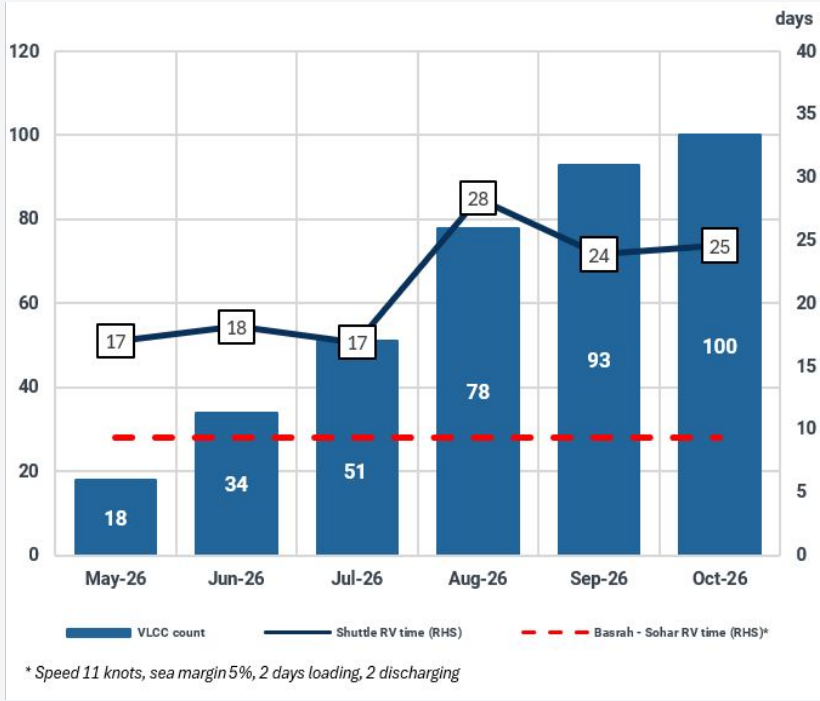
War-risk premiums, robust crude exports and constrained tanker availability continue to support rates

VLCC freight rates to China by route, $/bbl



Source: Argus Media

GoO "shuttle" VLCC fleet size and round-voyage time

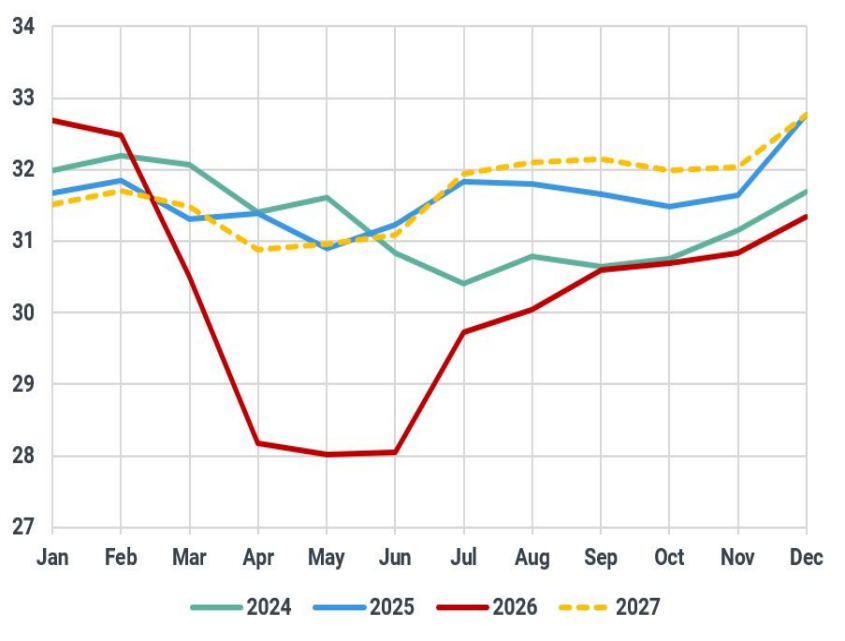


Source: Kpler

Limited upside in Asian refinery demand exacerbates oversupply pressure

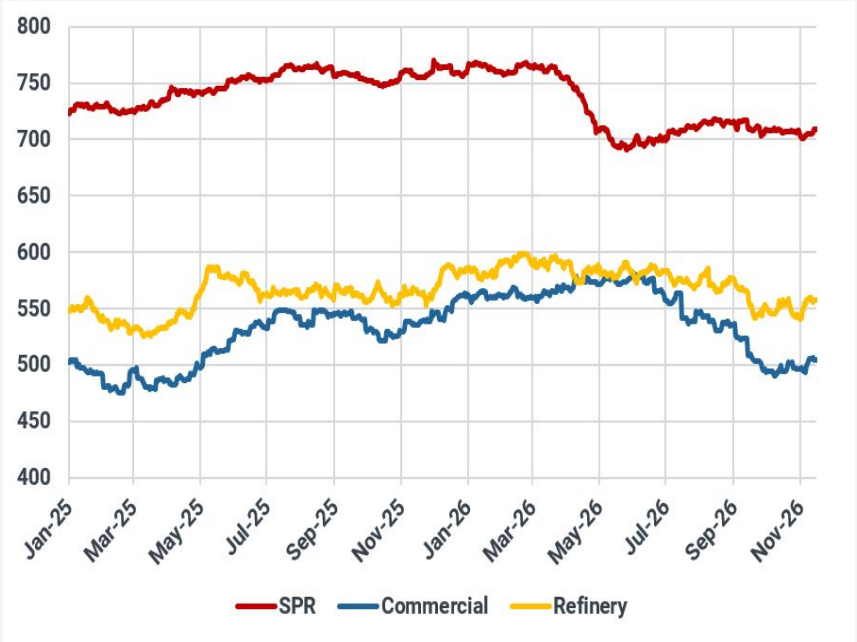
Current oil prices are unlikely to trigger an active restocking cycle

Asian refinery intake demand, mbd



Source: Kpler

Asian onshore crude oil inventories by tanker type, mb



Source: Kpler

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Beyond the Headlines: What AI Can Actually Do for You

An agent is only as powerful as the tools you give it.

Kun Chen, Lead Market Solutions, Kpler

Nov 17 2026



Every week, a smarter model

CLOSED-WEIGHT FLAGSHIP

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So why hasn’t your workday changed that much?

Meet your new hire



The Potential

The smartest analyst in the world

Unmatched analytical reasoning and limitless knowledge capacity, ready on day one.

Day One Setup & Constraints

- No Kpler login
- No market data workstation
- No systems, no email
- Just a desk and a notepad

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An AI agent is only as capable as its tools allow.

What makes a tool powerful for an agent

Reach

Every Kpler dataset, in plain language. No dataset names, no filters, no exports.

Understanding

A full catalogue with context: definitions, units, coverage. The agent knows what the data means.

Fit

Works inside the AI you already use, or machine-to-machine with no chat at all.

Combination

Your own data and other providers, alongside Kpler, in one workflow.

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What a well-equipped agent can do

SCHEDULED

The Trader's Morning

The trader's morning reports that runs automatically using tools that AI

AUTONOMOUS & EXPANSION

Is the Arb Real?

Start from a US-to-Singapore crude arbitrage. The agent tests it against fixtures, flows as they were known at the time, and market insights.

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Live Demo

The Trader's Morning

Next week, there'll be another smarter model.

Good. With Kpler MCP, you can use it on day one.

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What would your agent do with the right tools?



Trading & Analytics

Connect Kpler MCP to the AI you already use, such as **Claude**, **ChatGPT**, or **MS Copilot**.



Data & Infrastructure

Connect to Kpler directly through your own data pipelines, **machine-to-machine**.



Any Other Questions?

Reach out to our team for tailored assistance and custom implementation support.

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