

To: Shepherd, Ray[rayshepherd@peabodyenergy.com]
From: James Cason
Sent: 2017-02-10T18:58:33-05:00
Importance: Normal
Subject: Re: coal vs. natural gas prices
Received: 2017-02-10T18:58:35-05:00

Ray,

Monday is fine. Have a good weekend.

Jim

Sent from my iPhone

On Feb 10, 2017, at 4:26 PM, Shepherd, Ray <rayshepherd@peabodyenergy.com> wrote:

Mr. Cason

Our smart numbers guys have pulled together a product that I believe is responsive to your request and will be helpful in analyzing costs associated with natural gas and coal. The document discusses:

- NGS historical utilization rates,
- 2020 and 2030 desert SW power dispatch curve,
- NGS delivered coal costs vs. natural gas,
- NGS variable costs vs. natural gas
- Desert SW power prices,
- IHS Desert SW power margins, and
- US Natural gas prices 2016-2025

However, they have asked for “an extension” until Monday. It is in a form that can be useful if you need it today, but if we could clean up some the numbers/assumptions over the weekend, that would be optimal. Please just let me know your preference. Many thanks

Ray Shepherd

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