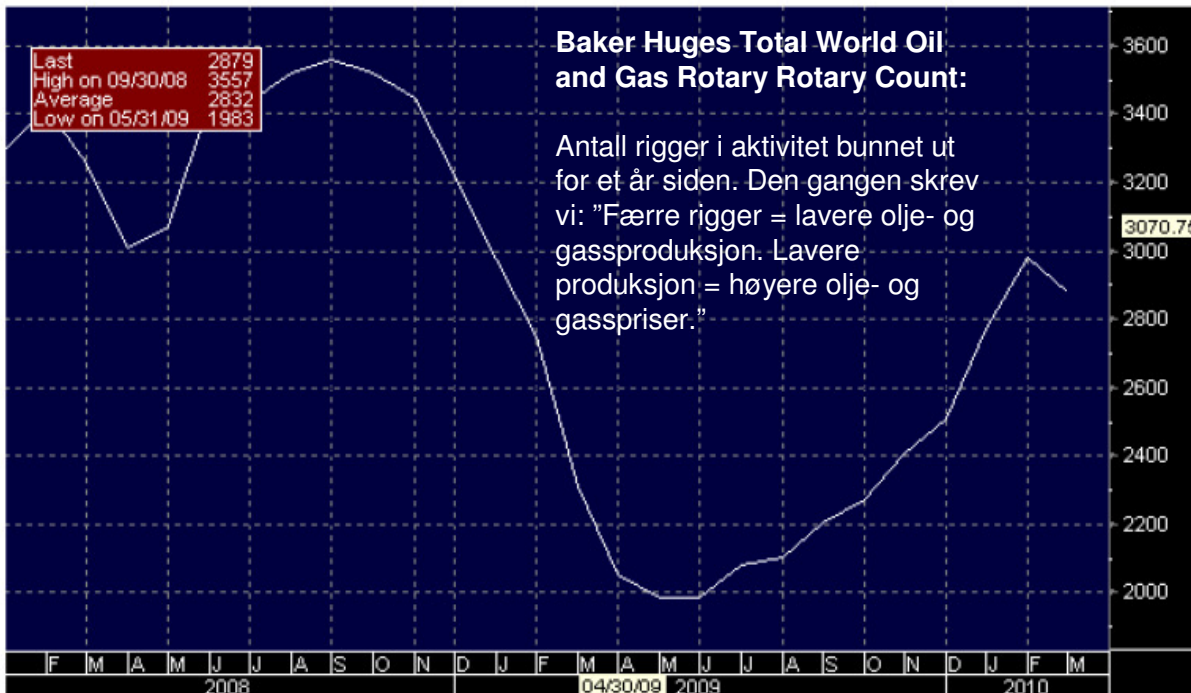


I dag presenterte oljeserviceselskapet Schlumberger sine resultater for første kvartal og vi gir en liten oppfølging på hva sjefen selv, Andrew Gould, sa om riggutnyttelsen for ett år siden.

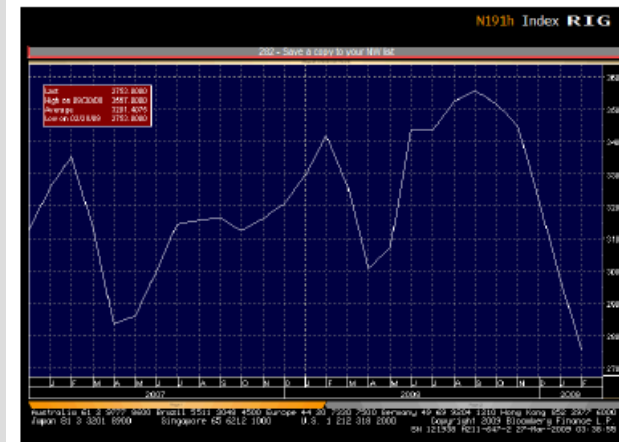
Ved dagens presentasjon sier Gould:
 "Higher oil prices are leading to tangible evidence that operators are contemplating higher levels of activity than originally planned in international markets."

"Finally, I am on record as saying that I felt international margins would bottom at the end of the second quarter of 2010. I am pleased to report I was mistaken. International margins appear to have bottomed and are now likely to resume a positive trend—absent any exceptional circumstances."



Dette sa Andrew Gould for ett år siden (SigmaSignalet uke 13 – 2009):

Færre rigger = lavere olje- og gassproduksjon. Lavere produksjon = høyere olje- og gasspriser.



Andrew Gould, sjefen i Schlumberger (verdens største oljeserviceselskap), nevnte tidligere denne uken et innlegg på Howarth Well Energy Conference:

"Today's excess capacity is probably not much more than six million barrels a day, representing less than 7% of the world's daily consumption figure – a figure very different from the 25% overhang of the mid-80s, but very similar to the 6,7% estimated as a world-wide post-peak decline rate by the IEA last year. Obviously, if you do not invest this situation will only get worse."

SIGMA ENERGY er et åpent aksjefond som investerer i selskaper over hele verden som bidrar til å løse utfordringene i energisektoren. Energi bør være **KJERNEN** i din portefølje av investeringer de neste 10 årene.

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Uken etter startet oljeservicesektoren i USA (Philadelphia Oil Service Index) en stigende trend og har siden steget 60 %.