PLAYBOY'S
COLLEGE FICTION CONTEST WINNER

Light Sweet Crude

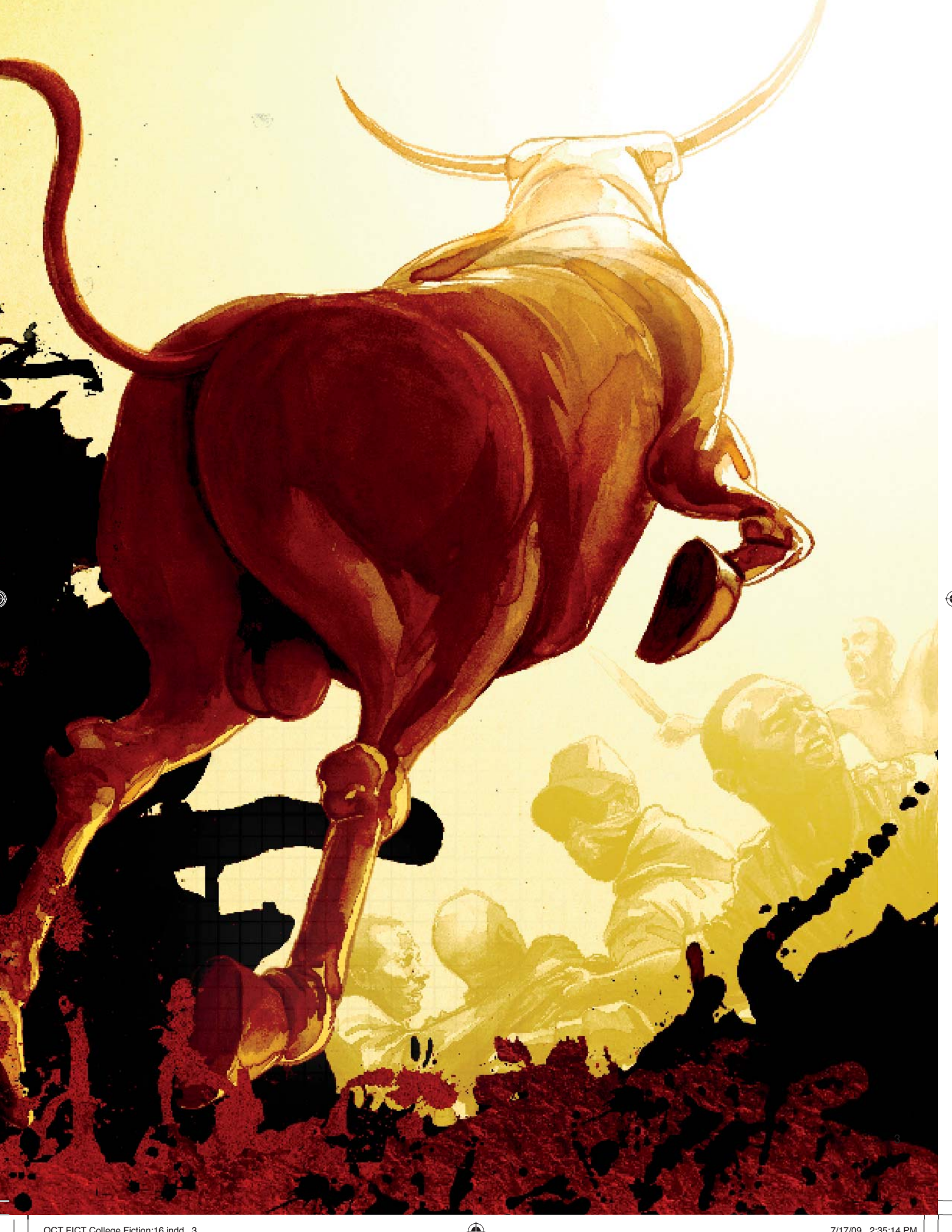
It's the age of peak oil. Losing money on a trade means the other guy knew more than you did. Meet the other guy

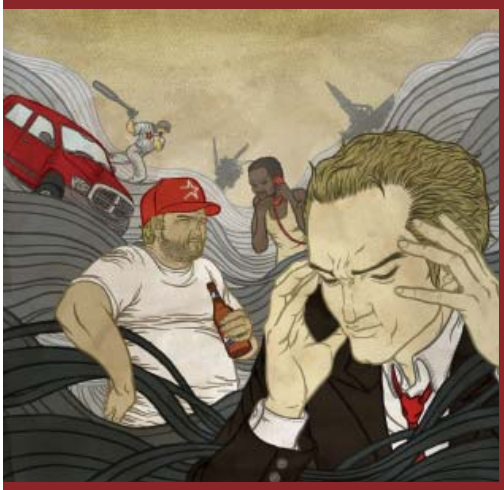
by Christopher Feliciano Arnold

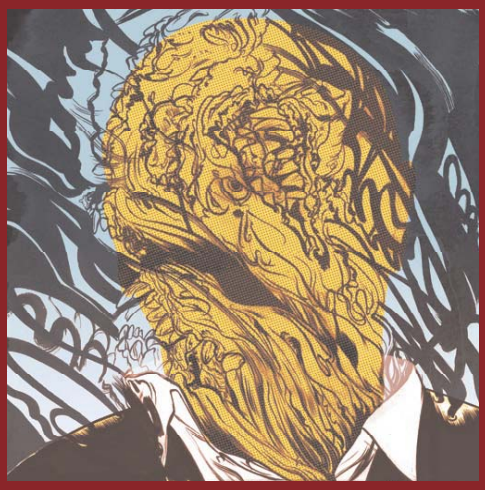
In downtown Houston, energy capital of the world, nobody bothers to turn out the lights. Even now, at four in the morning, the skyline glares outside my apartment window. I towel sweat from my face, mile 10 on the stationary bike, and watch Bloomberg's update on the overnight commodities trade. Crude is heading lower, testing resistance at $80.03 a barrel. Refineries have been humming at top capacity for weeks, and tomorrow's EIA report will show stockpiles at record highs. There's simply no reason to buy oil this morning. Unless you know something.

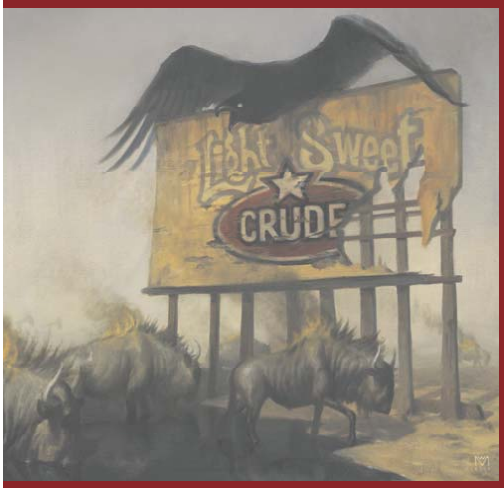
One thing I know is that 400 miles west, in Ozona, Dad is probably awake in bed, a heating pad on his back. Thirty years as a roustabout in the oil fields, maintaining pipelines, repairing drills in the noon heat, and lately Mom says he's too sore to sleep. Sore is how I remember him, coming home at dusk with black hands, aching joints. He'd swallow two Advils and a beer before tossing the football with me under the light in the driveway while the pumps rose and fell on the horizon. That's the curse of the West Texas oil worker: In country so flat, the fields are never out of sight.

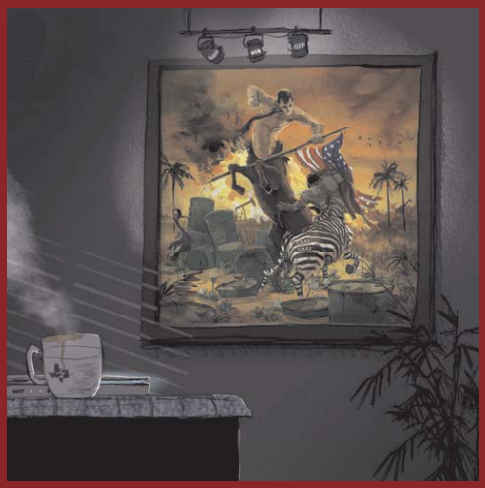
ILLUSTRATION BY MICHAEL MARSICANO

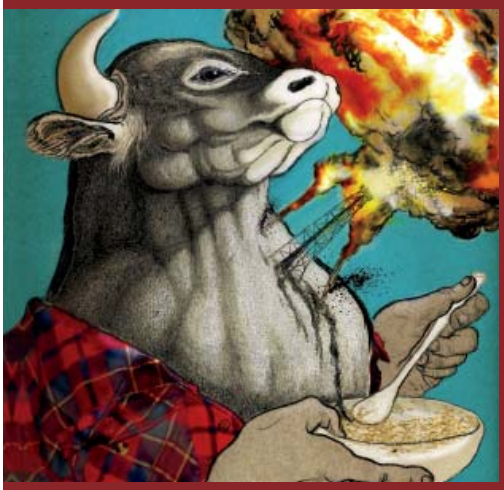












AMONG THE STUDENTS WHO ENTERED THIS YEAR'S WRITING CONTEST, PAUL KEILANY OF THE UNIVERSITY OF TENNESSEE AT CHATTANOOGA RECEIVED SECOND PRIZE FOR "INSTANT RELIEF." THE THREE THIRD-PLACE WINNERS ARE JAMEY BRADBURY OF THE UNIVERSITY OF NORTH CAROLINA AT GREENSBORO FOR "WOMEN AND CHILDREN," JEREMY LAKASZCYCK OF THE UNIVERSITY OF MASSACHUSETTS BOSTON FOR "USEFUL THINGS" AND JOHN TALAGA OF THE UNIVERSITY OF SAN FRANCISCO FOR "THE HUNTING PARTY." STUDENTS IN THE ILLUSTRATION CLASS AT NEW YORK'S PRESTIGIOUS SCHOOL OF VISUAL ARTS COMPETED TO ILLUSTRATE THE FIRST-PLACE STORY. THE WINNING ENTRY, BY MICHAEL MARSICANO, IS ON THE TITLE PAGE. THIS PAGE FEATURES THE ILLUSTRATIONS BY THE RUNNERS-UP. SHOWN ABOVE, CLOCKWISE FROM TOP LEFT, IS THE WORK OF STUDENTS DONG YUN LEE, RAY JONES, ERIC LOSH, JOHN MACCONNELL, YURIKO KATORI AND MARTIN WITTFOOTH.

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The freeway is bright and empty. Above the city, heat lightning turns clouds into flashbulbs as I drive through the Whataburger for coffee. By the time I park downtown crude has fallen another 15 cents. It's going to be a steep slide today. At this moment I own 500 October futures contracts, each representing 1,000 barrels. Every penny counts, and as the price breaks the $80 floor, I picture all that oil—three tankers' worth—making its way across the Atlantic, losing value by the second. But daydreaming is for rookies. Over the next six weeks I'll buy and sell these contracts dozens of times, and when those tankers come to port, the crude in their hulls will just be data in my trading log.

Technically that money belongs to Centaur Global Energy Resources Fund. Our clients pay Centaur to make big bets with their money. I make the biggest bets and almost always win. Thirty-two years old, a certified rainmaker, authorized for 200 million. But in eight years behind the trading desk I've never held a position this big. Blow $40 million and I can say good-bye to my allowance.

But the bosses trust me. The NYMEX market for light, sweet crude is the most liquid in the world. Information is priority one. If you're losing, it's because the other guy knows what you don't. That other guy is me. The corner of the global market where I am not to be fucked with is the Niger Delta—home to some of the purest, most easily refined crude on the planet. New patch being drilled? I already knew that. Pipeline shutting down? Knew that too. What other traders hear as fact, I know as rumor. What other traders hear as rumor, I know as fact. A mosquito can't suck a drop of blood in the Delta without me hearing.

The sun won't be up for an hour and already I'm boiling in my suit. Entering the air-conditioned building is like walking into an ice age. Behind the security desk Terrence snores. The terminal beeps when I slide my card, and he jolts awake with a snort. I hand him a cup of coffee.

"Just what the doctor ordered," he says, peeling the lid open. "You giving up on sleep entirely, Mr. Hunter?"

"We're supposed to do that every day?"

"Some of us try to."

(continued on page 000)

"I'll have to remember that," I say and step into the elevator, hit the button for the 61st floor.

●

At 5:30 A.M.—11:30 A.M. West Africa time—I call my friend Isaac in Waterside. Isaac is my eyes and ears in the Delta. Finding a contact like him is not easy or cheap. But if you're willing to pay, there is always someone willing to talk. Isaac knows what I need to hear, and he speaks good English. The call goes straight to voice mail. Cell coverage in the Delta leaves something to be desired, but Isaac will get back to me when he has a signal.

I sip coffee and check my screens: crude testing $79. In a couple hours when my staff arrives, I'll sit behind the turret, barking buy orders into the phone bank while everyone watches crude slide, wondering if I'm off my fucking rocker. Kyle, our red-eyed intern, will scratch his head and jot notes on his yellow legal pad, thinking this isn't what he learned in technical analysis class. Then there's Jake Riley, a salty-haired prick who's been in the oil business as long as I've been alive. He'll quietly fill orders, salivating, hoping today is the day I go bankrupt and he regains his place at the top of the lineup. Jake used to sit behind the nice granite desk, and he wants it back. I know because he told me, a drunken confession in the restroom at the company Christmas party.

"Trust me, Hunter, you lucky fuck," he said, leaning against the urinal. "Luck runs out."

●

Dad is driving to Houston today, six hours from Ozona to see the Astros retire Jeff Bagwell's number at Minute Maid Park. Bags is Dad's favorite player of the modern era. Fifteen years, an entire career, with the same team. "You don't see players with that sense of loyalty anymore," Dad tells anyone who wants to argue over it. He has the tickets already, first baseline, third deck. Maybe with binoculars we'll be able to see. Dad will pay for his own parking, his own beer and peanuts. He won't accept a dime from me.

Last time we went to a game together, during the NLCS two seasons ago, we sat in Centaur's luxury box. Panoramic view. Plasma televisions. Open bar and seafood buffet. At the bottom of the fourth, while Clemens was pitching shutout baseball, Dad left without shaking any hands. "He's feeling a little under the weather," I told my bosses.

You'd think a father would brag if his son landed him in a skybox for a play-off game. But not Dad. To him it's not an honest living, end of story. A thousand times I've offered to pay off the mortgage so he can retire before his back quits on him. A millionaire for a son and he's eating Hamburger Helper three nights a week, canceling Mom's magazine subscriptions so he can scrounge a dollar here, a dollar there.

When Dad looks at me he sees the men in suits who drive around the oil fields in Ozona, peering at the pumps, taking notes on their clipboards. "Playing with oil" is what he calls my line of business. Traders,

bankers, wildcatters—they're all the same crooks to him. He doesn't understand what it means to create wealth. Last year I contributed $600,000 to the federal tax coffers. Nine thousand in property taxes. Roads were built with my money. Schools were improved. I donated $30,000 to charities. Tax deductible but $30,000 nonetheless. Children in West Africa are sleeping under mosquito nets that I paid for.

Dad's aching back keeps him awake, but I stay up too, considering winter weather projections, Atlantic trade routes, the next Hurricane Katrina, energy reform in Congress, bombings in Iraq, pipeline disruptions in Waterside. Knowledge is capital. Seventy-hour weeks. Sleepless nights. Skipped vacations. Being too exhausted on Friday nights to go out and meet someone.

We're more alike than he knows. I'd tell him so, but we never get further than the Astros or the weather before he passes the phone to Mom.

●

At seven A.M. my staff assembles for the preanalytics meeting. Fifteen people clutching coffee cups. I write the day's objective on the white board: DOUBLE DOWN UNDER 78! I explain how I want the orders spread. Kyle scrapes a dry pen on his notepad, afraid he'll miss something. "Sir," he says, "the EIA number is going to be big tomorrow. It might be a good idea to hedge our bets."

"There's a million fucking pens in this office, Kyle," I say. "Throw that one away."

"Yes, sir," he says, putting the dry pen in his pocket. "I guess what I mean is that if we hedge——"

"Let me worry about that," I say. "That's what they pay me for."

"Don't sweat it, kid," Jake says, digging something from underneath his fingernail. "If the big dog says we're covered, we're covered."

Afterward they wait at their desks for the NYMEX to open in New York. At eight A.M. the screens take off. They reach for their phones. The floor erupts in a flurry of voices, the sound of energy coursing around the globe. From my office window, everywhere I look, I see the age of peak oil. Planes streaking across the sky. Cranes lifting steel beams, coughing exhaust. Expressways clogged with cars. Construction workers spreading hot, black asphalt. Even here in the office, Kyle hurrying past with a tray of coffee cups.

By 10 A.M. short sellers smell blood, and crude is testing $78. I get my call back from Isaac, four P.M. his time.

"Soon," he says, voice echoing in the shaky connection. "Exactly when I do not know."

"Does 'soon' help me, Isaac?"

"No, sir."

"I need to know a time. I need to know as soon as you know. Understand?"

"Of course, sir."

"Good," I say, checking my screens. "Then call back when you can help me."

"Yes, sir."

I turn to the turret, call out an order for 500 more contracts. Everyone freezes, peering through my office window. I get

up from my desk and stick my head out the door: "Did I stutter? Five zero zero!"

They get moving.

●

Isaac and I have never met. He oversees an offshore platform for Shell in the Delta. He has a wife and three daughters. I hear their voices, sometimes, in the background during our calls. Someday, he tells me, he wants them to visit the Grand Canyon.

I visited Nigeria once, toured the creeks via helicopter, taking notes as we swooped over platforms and barges. On the water below, oil executives zipped around in speedboats. The executives are from dozens of different countries, but they all want the same thing—to finish their inspections and get back to their hotels in Abuja for a massage and a buffet before the flight home.

The pipelines are vast, pumping over a million barrels a day of sweet, low-sulfur crude. Compared with the Niger Delta, West Texas is a sour, used-up prom queen. You'd think Nigeria would be enjoying a golden age, but no. A classic case of the resource curse. Here they are sitting on 36 billion barrels of dinosaur juice, and instead of nationalizing and using the revenues to diversify their economy, they take the quick payday from companies like Shell, Korea National Oil, Willbros. And by "quick payday" I mean millions in the pockets of select politicians who retire early in Europe. Long story short, less than one percent of the oil revenue finds its way into the hands of the local citizens. Corruption in Nigeria is a part of life, like breathing. Isaac tells me an ambulance will not pick up victims of a car accident unless someone at the scene pays cash.

But there are always Robin Hoods in a story like this. Case in point, MEND, the Movement for the Emancipation of the Nigerian Delta. Depending on who you ask, they are heroes, patriots, rebels or terrorists. In reality they are members of the Ijaw ethnic community who've figured out that with guns and speedboats they can fuck with the global oil trade. They fund operations with proceeds from stolen oil. Cold War–era firearms, $3 cell phones and they're in business, sabotaging pipelines, kidnapping Western oil workers for ransom, demanding millions for environmental cleanup and school projects. The oil companies pay up to avoid having to halt production. When it comes to kidnapping, MEND is efficient and exceedingly nice. One German oil worker held for three weeks was allowed to watch his favorite soccer matches. Unfortunately, without his pills, he caught malaria and almost died. When he finally returned home, MEND sent him $2,000 U.S. and a letter apologizing for the inconvenience.

●

When the NYMEX closes at 1:30, I get a call from Steve Finney. Finney works for the Department of Homeland Security, a liaison between the CIA and the SEC. He monitors the markets for unusual trading that might indicate a potential terror attack.

"Oil's sinking," he says. "But my screens show big buy orders. Tell me what you know."

Steve Finney wouldn't know a big buy order if it hit him in the nuts. He's a bright guy, but last I heard his annual budget is about equal to what Centaur spends each month on printer paper. With a four-person staff monitoring $6 trillion of global assets, Steve is a sea turtle hunting a great white shark.

"Volatile market," I say.

Steve can barely scratch the surface of our trades. His screens show him only what's happening on the open market. At Centaur we spread orders over three Alternative Trading Systems—Liquidnet, Posit, Turquoise—take your pick. The SEC calls them dark pools. We call them privacy. In this business, if your left hand knows what your right hand is doing, too much information has leaked. If anyone sees big money moving on October contracts, the market reacts and we don't get the price we want. You can't make money that way.

"People are talking about you, Hunter," Finney says.

"Only believe the good stuff," I tell him. "Now get back to your homework, Steve-O. I've got a meeting."

●

On my 16th birthday Dad let me drive his truck out to the field office of Pioneer Natural Resources where he picked up his paycheck. I remember taking every turn carefully. When we pulled into the gravel parking lot, Samuel J. Allen III pulled his Cadillac in right beside us, a shiny red hardtop with sun-bleached longhorns affixed to the hood. Mr. Allen, one of the original Texas wildcatters, built Pioneer from the ground up. His name came up frequently in the *Ozona Stockman,* on the evening news and at our dinner table. Even the dogs in Ozona knew Mr. Allen on account of the Milk Bones he kept in his suit pocket.

"Well, looky here," Mr. Allen said. "You're behind the wheel already?"

"Yes, sir."

He looked at my dad. "Time flies, don't it, Richard?"

"It does, sir."

"Well, listen," Mr. Allen said, reaching into his pocket. "I want you to take this card. And come summer vacation you decide you'd like to earn a little money like your old man here, you just come see me."

"Thank you, sir," I said.

"You have a dog at home?"

"Yes, sir."

"Here," he said, pulling a Baggie from his other pocket. "Feed him one of these."

I took a Milk Bone and said thank you. He straightened his bolo tie and walked inside. Dad followed to get his check. I sat in the driver's seat, looking over Mr. Allen's gold-embossed card. When Dad came out he told me to slide over. He got behind the wheel and backed out slowly, careful not to hit the Cadillac. When we pulled onto the expressway he stomped the gas, engine straining under the hood.

"Let me see that card," he said.

"Do you think he meant what he said?"

Dad rolled down the window, let the card flutter away.

"Hey!"

"I'll tell you everything you need to know about Mr. Allen," he said. "He strikes a new patch and strolls down to the tavern to buy everyone a round of bourbon."

"What's wrong with that?"

"What's wrong?" Dad said. "He makes another million, maybe more. Rest of us keep our nine bucks an hour. You understand what I'm telling you? A man dressed like him offers you a job, you walk the other way."

"He offered you a job."

"That's different. Ozona was different back then. And you're different. You've got something between your ears, son, so use it. I don't care if you sell pink panties so long as you stay out of oil."

And so I listened. Picked up my grades. Went to UT Austin. McCombs School of Business. Took an internship with Centaur running risk analytics. Dad was proud of me, waking up early every day, riding high. After graduation the only full-time spot Centaur could offer was at the oil desk. I hadn't forgotten what Dad told me, but I knew why he didn't want me rising in the oil business. He thought I'd think less of him if I saw the fields from higher on the ladder. He'd spent 30 years pulling crude out of the desert. He'd lifted me on his back. Now it was only fair for our family to get some of those profits.

"Now I guess I'm an oilman too," I said when I took the job.

"No," he said. "You're not."

●

Six o'clock, midnight in the Delta, and my staff is gone, coffee cups tipped over on their desks. Only Kyle remains, straightening out his little area by the copy machine. Checking my screens, I'm startled by the phone. Isaac. The connection is scratchy, but I can hear him whispering.

"Today, sir," he says.

"Today, as in tomorrow for me?"

"Yes. Tomorrow for you."

Like every other person with access to oil in Nigeria, Isaac is trying to get his share. Not by stealing oil directly but by letting MEND know where it should strike and when. I pull up a map. Bonga field is the largest in the Delta, pipelines running along the shore and up the creeks like veins.

"North Bonga?" I say. North Bonga, we could be looking at a 250,000-barrel-a-day drop in output.

"I'm not sure, sir."

"Southwest?" Southwest Bonga, maybe 50,000 barrels.

"I cannot say."

Being intelligent, Isaac doesn't trust white people. He knows when and where MEND will move tomorrow, but he'll supply only the when. If word gets out he's sharing information he could be in trouble with Shell or with MEND. Hard to say which would be worse. But I've told him 100 times there's no reward without risk.

"Isaac," I say. "You're not being a friend here."

"I really must go, sir. My house is sleeping——" I listen for the sound of his girls in

the background, but there's nothing.

"I have other friends, Isaac."

His breath mixes with static on the line. "I can only say, sir, that this will be very, very big. They are serious now. They have declared war now."

North Bonga it is. "Good, Isaac," I say. "I'm proud of you."

"Thank you, sir. You too, sir." Last week I wired him $750. This week I'll send double.

"Okay then, get some sleep."

The ball game starts in an hour. North Bonga. If I'd known earlier, I would have snatched up a thousand more contracts. Fear and speculation alone will pop oil over $80. But the ATS systems are closed now. I log in to my FOREX account, key in the order and stare at the screen, finger suspended over the ENTER key. But I can't do it. I'm not about to place a $75 million order on the open market where everyone can see it. I save the order, log off and lock up the office. Kyle strolls along the desks, making a big show of cleaning up everyone's coffee cups.

"You know we have a janitor," I tell him. "He gets paid to do that."

"I know," he says. "It's just that my advisor tells us extra effort is what leads to a job."

"Have it your way," I say, stepping into the elevator. On the ride down I put my hands on the rail and stretch my legs, loosen up after a long day at the screens.

Somewhere in Waterside speedboats are being fueled, rifles cleaned and loaded. Men are painting themselves with white chalk, winding amulets around their necks. Isaac tells me they believe it makes them bulletproof.

●

The sun sinks behind the downtown skyline, a warm orange glow through the glass enclosure at Minute Maid Park. Dad and I sip beer, drop peanut shells at our feet. From our seats you can barely make out the number five, in honor of Bags, branded on all three bases.

"When are they going to retract the roof?" he asks. Dad doesn't think much of air-conditioned baseball.

"After the seventh," I say.

Before the opening pitch the JumboTron plays highlights from Bagwell's career. Bags and his ridiculous stance, left arm hanging over the plate. His hand was broken three times by inside pitches and still he refused to change that stance. They show a clip of his 400th career home run and Dad whistles as if he were watching it for the first time. Bags would have hit 600 if it weren't for his shoulder. After the highlight reel Bagwell takes the field with his wife and two daughters. The crowd erupts, his little girls clapping harder than anyone in the stadium. Nolan Ryan introduces them. Other teammates tell stories. A teenage girl next to us cries, a kid not old enough to remember a time when Bagwell wasn't on the Astros. Finally, Bags steps to the microphone.

"This is an amazing day," he says. "To have your number retired, I really can't believe it."

"You'd think he would have prepared

something better," I say.

"Quiet," Dad says. "His actions speak for themselves."

After the ceremony and a standing ovation, the Astros take the field for the opening pitch. The crowd is on its feet the entire first inning, a flurry of inflatable bats and foam fingers cheering Houston to an early lead, but by the end of the third the Pirates are up by two runs and the fans are slumped in their seats, their energy spent during the pregame. Dad squints at the scoreboard, takes it all in silently. I can't help but look at the Centaur luxury box.

"Let's go on over," I say. "Bags is supposed to walk through for a meet and greet."

"No thanks," Dad says, cracking a peanut.

"Nolan Ryan too, probably. We can get a ball signed."

"I'm sure they don't want to be there any more than I do," he says.

"Fine," I say, and for the first time in my life I want Dad's team to get their asses kicked. I want the day spoiled for him. He drives all the way over here like maybe it's time to start fresh, but then he sits back like I'm the one who's supposed to be doing the talking, like whatever froze up between us, it's my job to thaw out. I check my phone, 8:30. Crude is down to $77.60 on the FOREX. Fuck me. I finish my beer and get up from my seat. "I'll be back in 20 minutes," I say.

"Say hello to Mr. Bagwell for me," he says. He crushes a shell with the tip of his shoe.

I hustle down the corridor, and the crowd cheers for a big hit. I find a quiet corner near the restrooms and dial the office, hoping to Christ that Kyle is there washing windows or whatever the fuck he does this late.

"Centaur Global Energy, this is——"

"Kyle," I say, "grab a pencil."

"Yes, sir."

"Have Ernesto let you into my office. Log on to my terminal. Open the FOREX host—are you getting this?"

"Yes, sir."

I walk him through the entire order. I tell him my password, tell him that if he utters one digit of that password to anyone, I'll skewer his nuts and hang them above the copy machine like mistletoe.

"Now," I say, before he hits ENTER, "I want you to read back to me what you see on the screen."

"Okay," he says. The kid is nervous; you can hear it in his voice as he confirms the details. Reminds me of my first big order. "Are you sure you don't want to come here yourself?"

"I can't," I say. "I'm with someone. Just make sure you've done everything I've told you, to the letter. If not, Kyle, I guarantee you'll be lucky to find a job dishing biscuits and gravy at the Whataburger, understand?"

"Yes, sir."

"Okay. Now press ENTER."

"I did it."

"Good," I say. "Now go home and forget about it. Take tomorrow off. Call someone up. Take her someplace nice. It's on me.

You deserve it."

When I return to our section it's the top of the seventh. They've retracted the roof. The skyline is bright against the dusk. I stand for a second in the breeze, scanning the rows for our seats. The Astros are down by a run and facing the top of the Pirates lineup. Between pitches, that nervous blend of cheering and chatter that only happens in close games. Dad sits with an empty beer cup in his hand, peanut shells scattered at his feet. He pulls off his cap, adjusts the bill, puts it on again.

"I wondered if you were coming back," he says. "I'm going to get out of here. Beat the rush."

"Are you kidding? It's a one-run game," I say. "Let's grab some more beers. Talk."

"If you wanted to talk so bad you'd of sat here with me instead of heading over to meet your friends."

"That's not where I was," I said. "We have a new kid at work. He was having some trouble."

"Well, I've got work to do at home tomorrow," he says, getting up.

"Where you going?"

"I saw what I came to see."

"Hold on a second."

I follow him up the steps and down the corridor, but he keeps walking, hands in his pockets, sliding his way through the crowd. He doesn't stop until we're in the parking garage. He climbs into his truck, a Dodge Ram, the only thing he's ever let me buy for him and only because I had it delivered to his driveway. He didn't drive it for a year. Coming out to Ozona for Thanksgiving and Christmas, I'd check the odometer. He'd put only 30 miles on it. Mom made him drive it here tonight, probably, because his old rig couldn't take the August heat.

"It's hard on him," Mom told me. "After 30 years in those fields, certain attitudes are tough to shake. But he worries about you. He tells me so."

But I can't understand how he isn't proud of a son who's outdone every other kid from Ozona. A son who sometimes imagines buying Pioneer Natural Resources, having every pump dismantled so that his dad could watch the sunset without a time card on his mind.

"Why in hell would you drive home tonight?"

"Cup of coffee and I'll make it just fine."

"It's not about making it," I say. "It's about seeing where I live for once."

"Your mother's told me all about where you live."

"You've made your point, all right? I'm an asshole, everyone I work with is an asshole. But give it a rest for once. For one night."

He starts the engine. "Have it your way," he says.

●

I unlock my apartment door. Dad takes a look around. Hardwood floors. Granite countertop. Plasma TV. Stainless-steel appliances. Part of me wants him to see all of it, to know what sort of life can be his if he wants it. Part of me wants to cover everything up.

"It all looks expensive," he says, peering out the picture window at the traffic below, streams of lights flowing in and out of the city.

"I think I can afford it," I say.

"I didn't say you couldn't afford it," he says. "I said it all looks expensive."

This from a man who never once in 30 years rewarded himself for a job well done, whose idea of a vacation is watching a football game in its entirety. He takes a place on the couch and removes his cap. Underneath on his forehead are the last places the sun hasn't touched. I bring him a beer and we watch *SportsCenter*. The leather squeaks as he shifts in his seat. Houston shines through the windows, office lights checkering the buildings.

"You could use a woman's touch in here," he says.

"No time for that."

"Some things you make time for."

"It's not that easy...."

We finish our beers, yawning. I bring him a towel and show him to the guest bedroom. In the living room, I take a seat on the couch, open my laptop, tune the TV to Bloomberg. I look around the apartment, eyelids heavy, head swimming in beer. In my father's mind none of this is earned. A fortune made by playing with numbers on a screen. For my father oil is a steaming black mess rising from the earth. But pulling West Texas sour from the desert is a dead man's business. There's a reason why it fetches only $50 a barrel. He hates that fact of capitalism. But I wish he could see that my job just means that he did his job right. Isn't that how it's supposed to work in America? Your kids do better—that's the dream. It can be done. Our family, we did it.

I watch my screens, thinking of Isaac and his family in Waterside, what he'll do with the money I send. Jewelry for his wife, new clothes for the children. Savings for a trip to the Grand Canyon. I think about MEND skimming the surf in speedboats, hungry for what's theirs. The overnight trade flows in waves across my screen, orders racing past, millions of dollars a minute. A little before two o'clock the price spikes across the board, my 200,000 barrels instantly worth $80 a pop again. Bloomberg can't explain it. Right now traders across the world are scrambling for their phones, trying to figure out what I knew yesterday.

Usually a win this big would leave me sweating, restless. But tonight I can barely keep my eyes open. I check on Dad. It's the first time anyone's used the guest room since Mom visited months ago. Dad's on top of the covers in his clothes, boots set neatly at the edge of the bed. He's on his back, mouth open a little, and I listen carefully for his breathing to see if he's awake or sleeping. Leaving the door open, I hop on the exercise bike, turn up the volume on the television, hoping maybe he'll come out here, see the reality of this business. Staying alert. Digging for what the next guy doesn't know. Outworking the sun. Taking heads. I want him to see how I've fought to bring us here, to bring us a piece of the profits.

Soon Bloomberg reports oil at $81.54 and climbing on supply chain disruptions in

the Niger Delta. Victory. This morning old Jake Riley will skip the pre-analytics meeting, his pussy way of flipping me the bird. Kyle will sleep in for once, wake up and tune into CNBC, start jotting notes on his little pad. Steve Finney will call, wondering how I knew to place an overnight order for 1,000 contracts on the open FOREX. I'll tell him it was our intern. Even the blind squirrel finds a nut now and then. I'll offer the kid a job on our staff.

I put coffee on, fix some hot cereal and spread my papers and notes out on the kitchen table. It's not even three A.M., but Dad will smell the grounds, pull himself out of bed and find his son eating the same old oatmeal for breakfast, still working. He'll see the discipline I learned from watching him.

Bloomberg runs an update. Nigerian output cut by 17 percent. MEND. Live video. Something's not right. This is no friendly kidnapping. This is four explosions. Six oil workers hanging from the rafters of an offshore rig. A message: LEAVE OUR COUNTRY OR DIE IN IT. I examine the men on the screen. The images are grainy, bodies swinging in the wind, police waiting in the sun for orders. MEND wouldn't kill Isaac. They couldn't know that he was talking to me. They need him. He's their friend. But the video cuts out, and I realize I wouldn't know Isaac if I saw him.

An analyst comes on screen, predicting $90 crude. He says $100 isn't out of the picture. The price keeps ticking up—$83.15…$83.34…$83.60. Nobody saw this coming. Steve Finney will call today. Not me but my bosses. He'll want an explanation for how Centaur's chief oil trader knew to grab a thousand contracts after hours. Homeland Security will be curious to know why I didn't hedge that bet.

A light comes on. Dad walks down the hallway holding his back. He squints at the clock, at me with my oatmeal. He pours a cup of coffee, sits at the table, looks over my shoulder at the laptop. I close the screen.

"You don't have to put that away," he says. "Go ahead. Let's see what you've gotten yourself into."

I turn off the television. "Nothing, Dad," I say, spoon trembling in my hand. "Just work."

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