



# MARKET DAILY

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 Jun 20, 2025 4:13 PM

Major Energy Futures		
	Settle	Change
Brent	77.01	-1.84
Gas Oil	758.5	64.25
Natural Gas	3.847	0.138
RBOB	232.95	3.67
ULSD	254.18	2.83
WTI	74.93	-0.21

## Market Commentary

Oil prices fell on Friday as the U.S. unveiled new Iran-related sanctions, signaling a diplomatic tack that calmed fears of an imminent escalation in the Israel-Iran conflict. Brent crude settled down \$1.84, or 2.33%, at \$77.01 a barrel, while U.S. West Texas Intermediate crude for July dropped 21 cents, or 0.28%, to \$74.93. The more actively traded August WTI contract closed at \$73.84. Despite the daily dip, Brent rose 3.6% on the week, and WTI gained 2.7%.

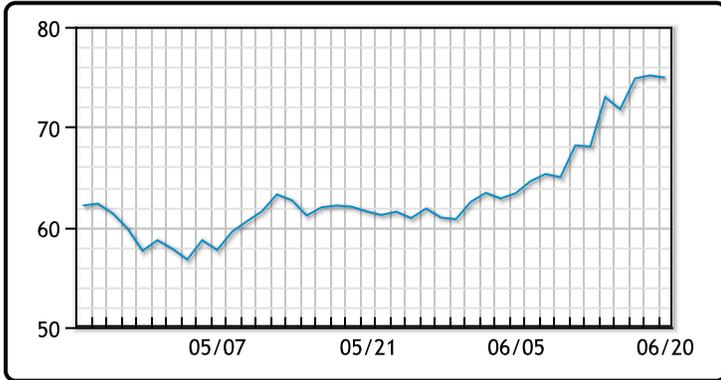
The U.S. Treasury announced sanctions on more than 20 entities and several individuals, including targets in Hong Kong, aimed at curbing Iran's influence through non-military means. Analysts viewed the move as a possible sign the U.S. is seeking to resolve tensions through negotiation rather than immediate military action. This came a day after President Trump indicated he might take up to two weeks to decide whether to join Israel's military campaign.

Oil prices had surged nearly 3% on Thursday after Israel struck Iranian nuclear facilities and Iran launched retaliatory missile attacks. Though both sides have so far avoided damaging key oil infrastructure, analysts warn the situation remains volatile. Any disruption to oil flows through the Strait of Hormuz, a chokepoint for about 20% of global oil, could still push crude toward \$100 a barrel.

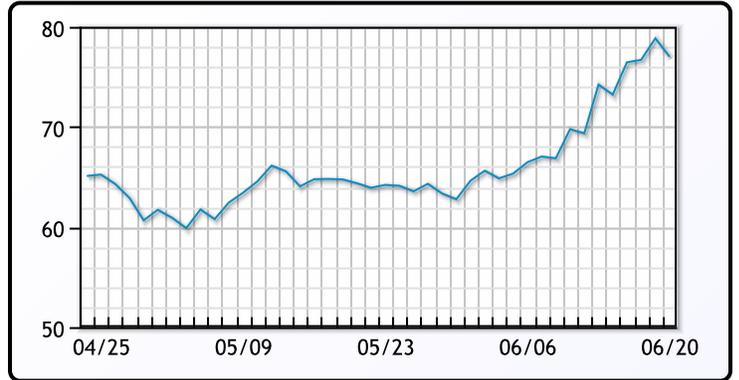
Analysts also noted that while supply remains unaffected, the direction of oil prices hinges on whether the conflict escalates further. UBS's Giovanni Staunovo said there is currently no shortage, but prices would respond quickly to any real threat to infrastructure or shipping lanes.

## Crude & Product Markets

WTI



BRENT



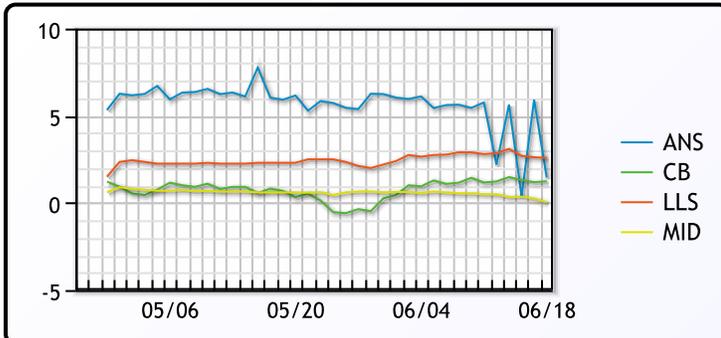
CRUDE

	Last	Week Ago	Month Ago
ANS	76.6	78.62	68.65
BLS	73.2	73.14	68.65
LLS	233.48	214.29	210.48
Mid	75.18	73.32	63.09
WTI	75.14	72.98	62.49

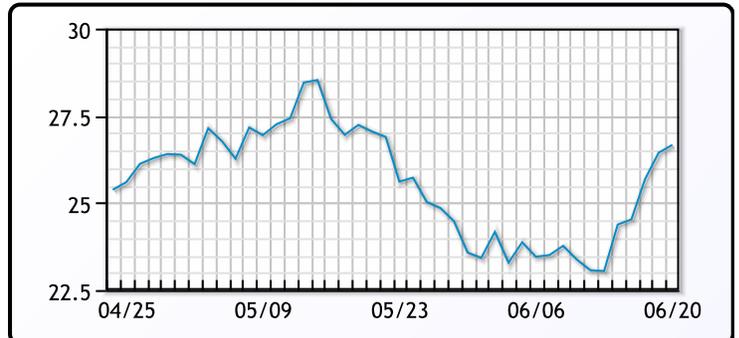
PRODUCTS

	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.0786	-0.0716	-0.0738
NYH RBOB	2.3061	2.2451	2.1593
NYH ULSD	2.5459	2.3762	2.1481
USGC 3%	71.1	66.45	57.4

WTI Diffs



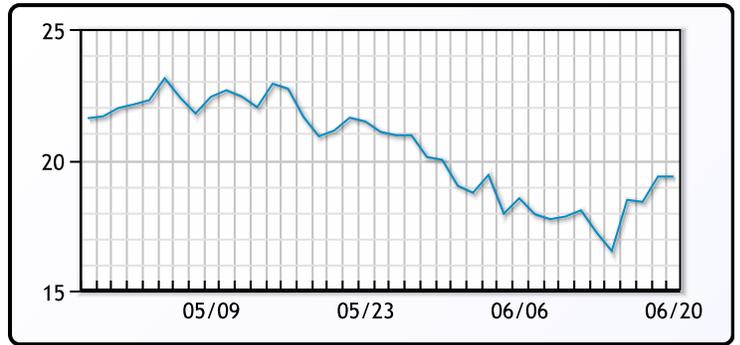
5-3-2 CRACK



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	95.5	91.75	85.5
IsoButane	105	104	89.5
Natural Gasoline	143.8	134	132
Propane	81.875	81.25	77

CONWAY

	Last	Week Ago	Month Ago
Butane	92.5	88	82.5
IsoButane	107	109	103
Natural Gasoline	147	141	130.5
Propane	77.875	77.125	73.875

MB NON

	Last	Week Ago	Month Ago
Butane	97.5	93.75	87.5
IsoButane	105	104	89.5
Natural Gasoline	144.5	140	130.75
Propane	81	75.9	77.4

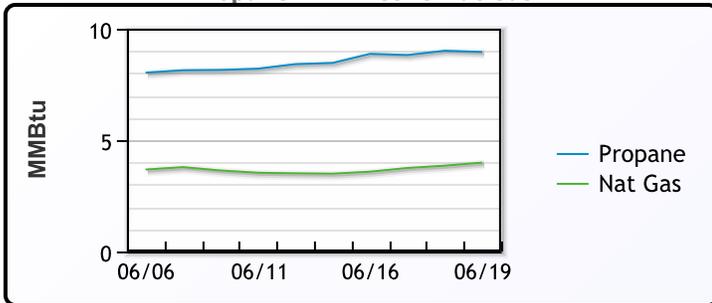
EDMONTON

	Last	Week Ago	Month Ago
Propane	55	50.4	51.9

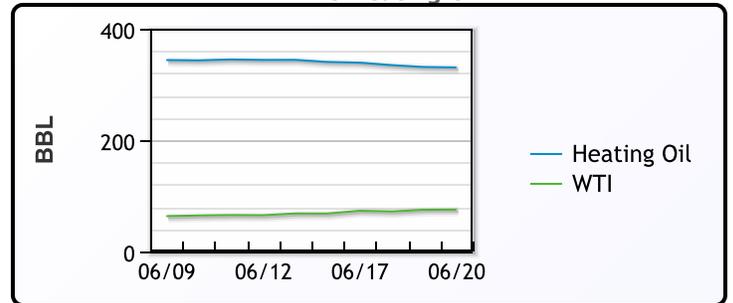
SARNIA

	Last	Week Ago	Month Ago
Propane	79.5	72	76.3

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3739	0.0039
DXY	98.805	-0.10001
Gold	3365.34	-5.56

RATES

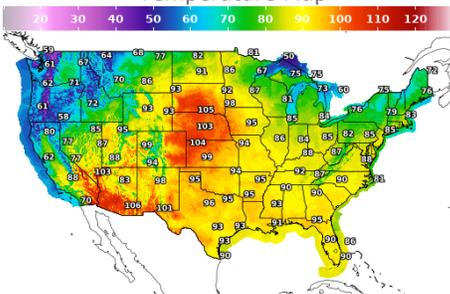
	Last	Change
US 2yr	3.9035	-0.0379
US 10yr	4.3751	-0.0158
CAN 10yr	3.304	-0.029

EQUITIES

	Last	Change
Nasdaq	19447.41	-98.86
TSX	1576.98	0.198
S&P 500	5965.73	-15.14

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	56	51
Conway	83	61
Cushing	91	75
Denver	98	65
Houston	93	78
Mont Belvieu	92	78
Sarnia	77	60
Williston	77	58

Precipitation Map

