



MARKET DAILY

<https://www.pflpetroleum.com>
 1865 Veterans Park Dr. Suite 303
 Naples, Florida 34109
 Phone: 239-390-2885
 Fax: 239-949-0611
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Major Energy Futures		
	Settle	Change
Brent	67.68	0.54
Gas Oil	683.25	-75
Natural Gas	3.406	-0.161
RBOB	208.24	-13.25
ULSD	229.64	-7.8
WTI	64.92	0.55

Market Commentary

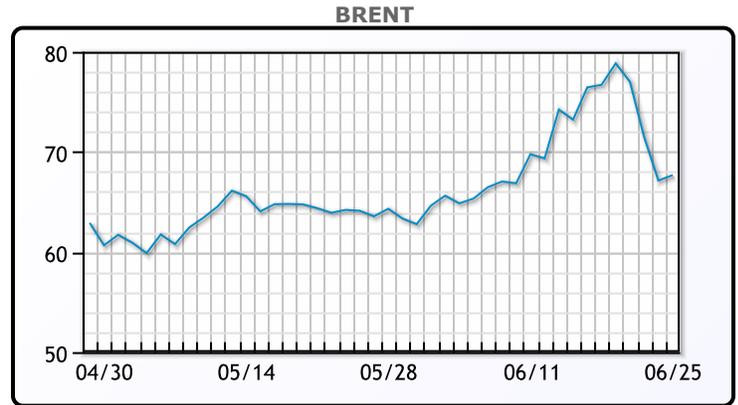
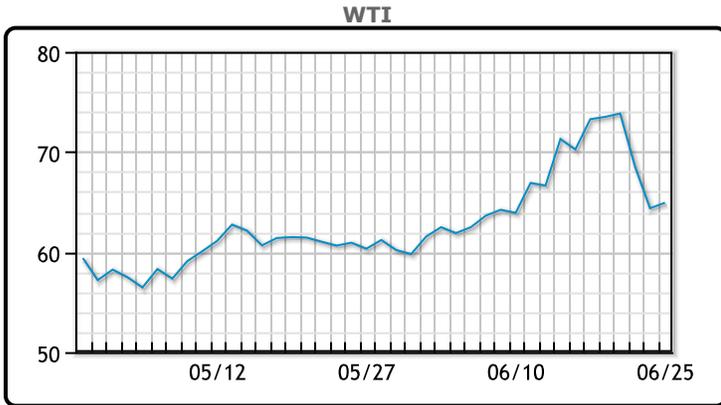
Oil prices rebounded nearly 1% on Wednesday as traders weighed strong U.S. demand signals against easing geopolitical tensions in the Middle East. Brent crude rose 54 cents, or 0.8%, to settle at \$67.68 a barrel, while U.S. West Texas Intermediate (WTI) gained 55 cents, or 0.9%, to close at \$64.92. The gains followed steep declines earlier in the week, when both benchmarks fell around 13% on signs of a truce between Israel and Iran.

Although the ceasefire reduced fears of immediate supply disruptions, analysts noted that risks have not entirely disappeared. Attention shifted to the demand side, as U.S. government data showed crude inventories dropped by 5.8 million barrels—well above expectations for a 797,000-barrel draw. Gasoline stocks also fell unexpectedly by 2.1 million barrels, driven by the highest gasoline demand since December 2021.

Analysts suggested the strong inventory draws helped refocus the market on fundamentals rather than geopolitical concerns. Meanwhile, expectations for a U.S. Federal Reserve rate cut later this year gained traction after mixed macroeconomic data raised concerns about slowing growth. Lower rates could support economic activity and bolster oil demand.

With prices stabilizing after sharp swings, analysts see crude consolidating in the \$65-\$70 range as markets monitor Fed policy and global demand indicators.

Crude & Product Markets

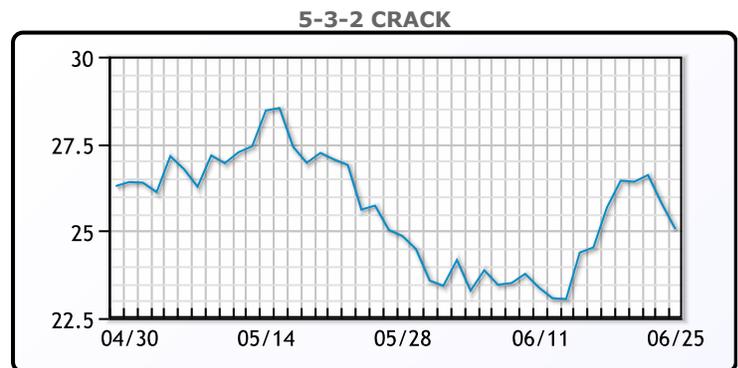
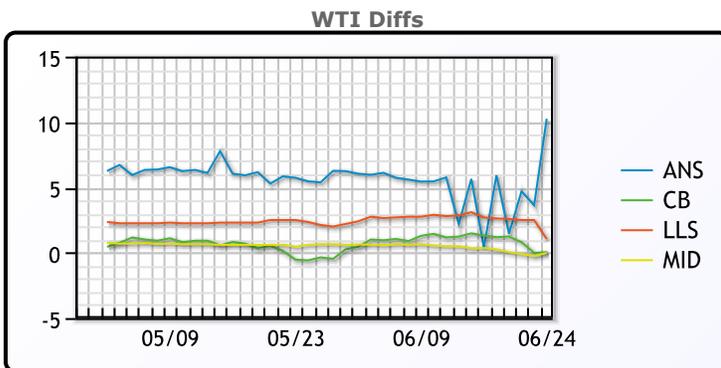


CRUDE

	Last	Week Ago	Month Ago
ANS	75.63	76.6	67.56
BLS	73.2	73.14	68.65
LLS	208.89	227.19	207.55
Mid	65.37	75.18	62.83
WTI	65.38	75.14	62.18

PRODUCTS

	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.0746	-0.0707	-0.074
NYH RBOB	2.0832	2.3061	2.1322
NYH ULSD	2.29385	2.5459	2.1023
USGC 3%	58.81	71.1	58.3



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	77.5	95	83.25
IsoButane	99.5	104.25	88
Natural Gasoline	128	144	127.3
Propane	75	82	76

CONWAY

	Last	Week Ago	Month Ago
Butane	83.5	91.25	80
IsoButane	103	104.5	100.5
Natural Gasoline	130.5	146.5	128.5
Propane	72	77.625	72.875

MB NON

	Last	Week Ago	Month Ago
Butane	87.5	97	85.25
IsoButane	99.5	104.25	88
Natural Gasoline	127	144	127
Propane	75.2	81.4	75.8

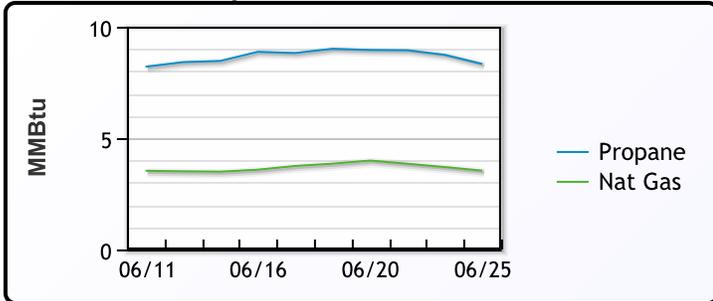
EDMONTON

	Last	Week Ago	Month Ago
Propane	53.1	55	49.5

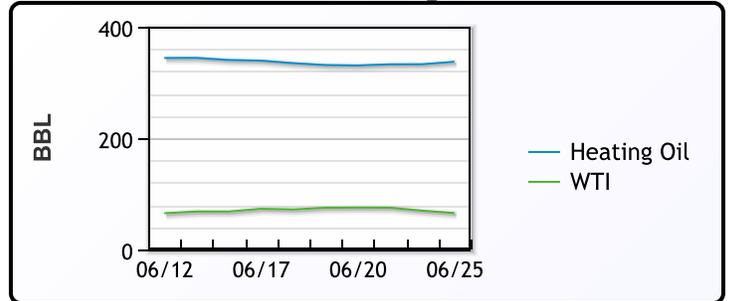
SARNIA

	Last	Week Ago	Month Ago
Propane	81	77.5	72.3

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3725	0
DXY	97.701	-0.157
Gold	3332.79	9.12

RATES

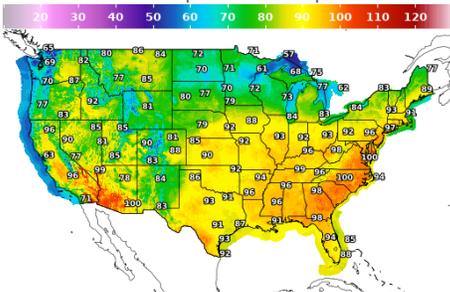
	Last	Change
US 2yr	3.7786	-0.0465
US 10yr	4.2886	-0.0059
CAN 10yr	3.323	0.053

EQUITIES

	Last	Change
Nasdaq	19973.55	61.02
TSX	1581.67	-10.378
S&P 500	6092.16	-0.02

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	75	51
Conway	70	56
Cushing	89	74
Denver	77	60
Houston	85	75
Mont Belvieu	85	75
Sarnia	77	63
Williston	76	57

Precipitation Map

