



MARKET DAILY

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Major Energy Futures		
	Settle	Change
Brent	67.73	0.5
Gas Oil	692.75	15
Natural Gas	3.526	-0.086
RBOB	209.9	-0.33
ULSD	236.01	1.13
WTI	65.24	0.32

Market Commentary

Oil prices inched higher on Thursday, supported by tightening U.S. crude inventories and rising demand from the summer driving season, though gains were capped by easing fears of supply disruptions from the Middle East. Brent crude settled up just 5 cents, or 0.07%, at \$67.73 a barrel, while U.S. West Texas Intermediate (WTI) crude rose 32 cents, or 0.49%, to \$65.24.

The modest uptick followed a nearly 1% climb on Wednesday, as government data revealed U.S. crude stocks fell by 5.8 million barrels last week—far exceeding analyst expectations. Gasoline demand also picked up as the driving season gained momentum, signaling that U.S. fuel consumption remains resilient despite broader economic uncertainties.

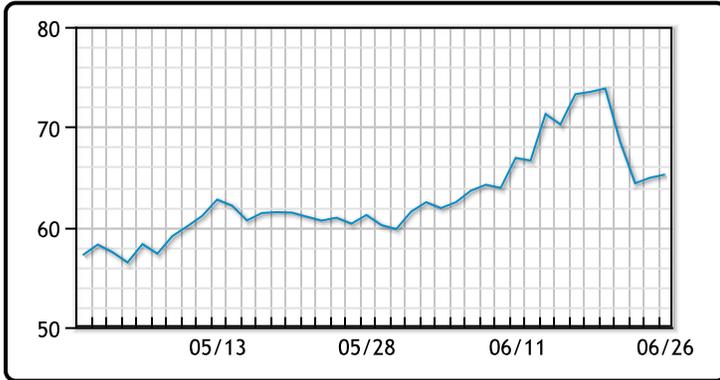
Adding to the bullish tone, a weakening U.S. dollar—hitting a three-year low—made oil cheaper for foreign buyers and helped support prices. This came amid renewed speculation of interest rate cuts, fueled by reports that President Trump may soon nominate a new Federal Reserve chair.

However, optimism was tempered by signs of geopolitical de-escalation. Israeli Prime Minister Benjamin Netanyahu and President Trump both signaled a willingness to pursue diplomatic solutions with Iran. Trump emphasized continued pressure on Tehran, particularly on oil sales, but also hinted at potential leniency to support Iran's economic recovery.

Overall, the market appeared to be balancing tighter inventories and firm U.S. demand with diminishing Middle East supply risks and macroeconomic headwinds, keeping crude prices relatively stable near the \$65-\$68 range.

Crude & Product Markets

WTI



BRENT



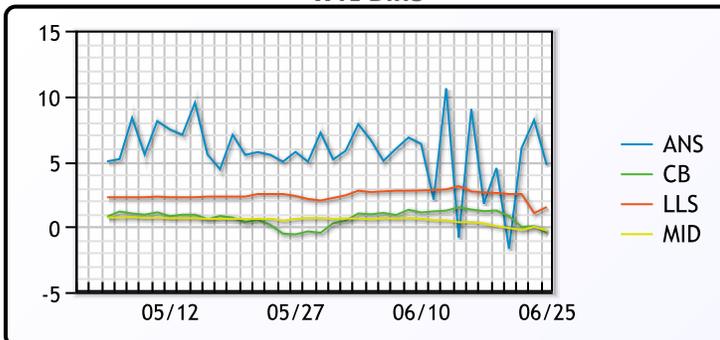
CRUDE

	Last	Week Ago	Month Ago
ANS	70.82	79.63	67.56
BLS	73.2	73.14	68.65
LLS	209.46	230.86	207.55
Mid	65.82	74.83	62.83
WTI	66.11	74.93	62.18

PRODUCTS

	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.0765	-0.0746	-0.074
NYH RBOB	2.0965	2.327	2.1322
NYH ULSD	2.3701	2.5543	2.1023
USGC 3%	63.58	68.93	58.3

WTI Diffs



5-3-2 CRACK



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	77	95	83.25
IsoButane	99	104.25	88
Natural Gasoline	127.9	143.8	127.3
Propane	74	82	76

CONWAY

	Last	Week Ago	Month Ago
Butane	83.5	91.25	80
IsoButane	103.5	104.5	100.5
Natural Gasoline	129.5	146.5	128.5
Propane	71	77.625	72.875

MB NON

	Last	Week Ago	Month Ago
Butane	87	97	85.25
IsoButane	99	104.25	88
Natural Gasoline	125.25	144	127
Propane	74	81	75.8

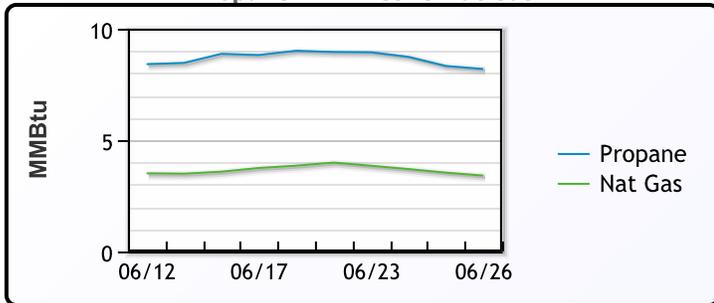
EDMONTON

	Last	Week Ago	Month Ago
Propane	49	55	49.5

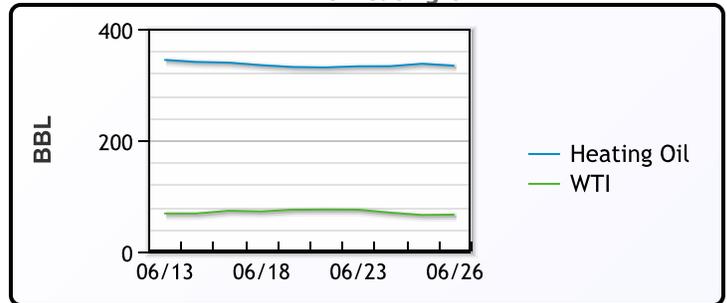
SARNIA

	Last	Week Ago	Month Ago
Propane	72	79.5	72.3

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3642	-0.0084
DXY	97.335	-0.344
Gold	3330.2	-2.13

RATES

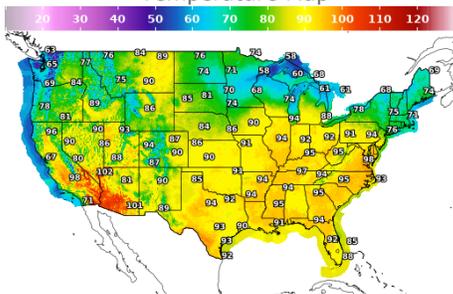
	Last	Change
US 2yr	3.7173	-0.0634
US 10yr	4.2436	-0.047
CAN 10yr	3.34	0.017

EQUITIES

	Last	Change
Nasdaq	20167.91	194.36
TSX	1592.26	11.138
S&P 500	6141.02	48.86

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	71	52
Conway	73	58
Cushing	89	73
Denver	89	55
Houston	88	74
Mont Belvieu	88	74
Sarnia	83	67
Williston	87	57

Precipitation Map

