



# MARKET DAILY

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## Major Energy Futures

	Settle	Change
Brent	66.47	1.13
Gas Oil	631.75	8.75
Natural Gas	3.784	-0.039
RBOB	207.68	2.89
ULSD	212.53	2.44
WTI	64.58	1.21

## Market Commentary

Oil prices rose more than \$1 a barrel on Friday and were on track for their first weekly gain in three weeks, buoyed by a solid U.S. jobs report and renewed trade talks between Presidents Trump and Xi. Brent crude climbed 1.96% to \$66.62, while U.S. West Texas Intermediate rose 2.11% to \$64.71.

The U.S. Labor Department reported steady unemployment at 4.2% and a gain of 139,000 jobs in May, signaling a moderate cooling in labor demand. Analysts noted the data increases the likelihood of a Federal Reserve interest rate cut, which could spur economic activity and boost oil demand.

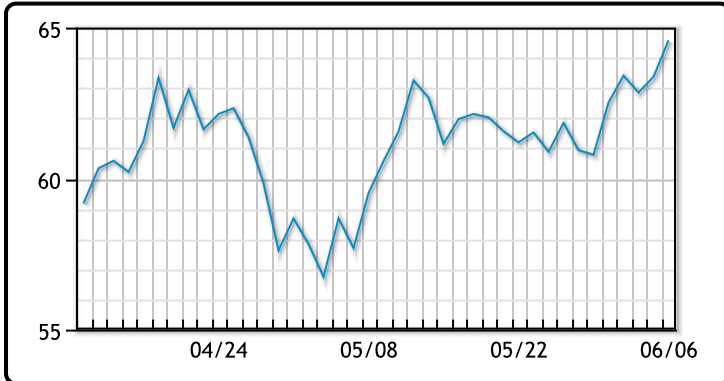
Trade optimism also supported prices, with both Chinese and U.S. officials describing the recent Trump-Xi call as positive. Canadian officials remain in discussions with the U.S. to ease trade tensions, adding to the sense of improved global economic prospects.

Despite OPEC+ plans to boost July output by 411,000 barrels per day, analysts believe rising summer demand may absorb the extra supply. Saudi Arabia, meanwhile, cut its July prices for Asian buyers to near two-month lows, a smaller drop than expected.

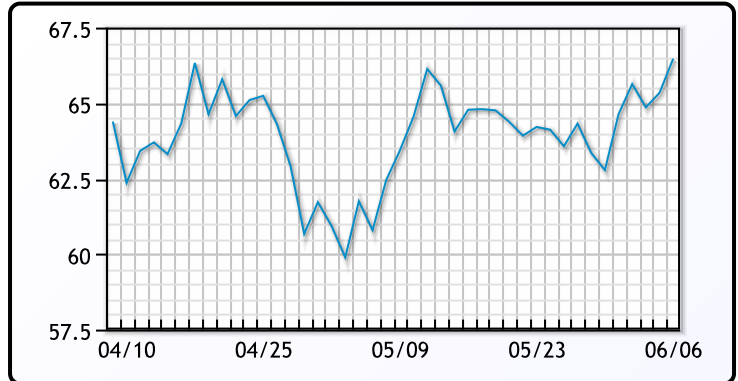
Geopolitical risks persist, with potential U.S. sanctions on Venezuela and Israeli threats against Iran adding upside pressure. However, HSBC forecasts the oil market could move into surplus by Q4 2025 if OPEC+ accelerates its output increases beyond the summer peak.

## Crude & Product Markets

WTI



BRENT



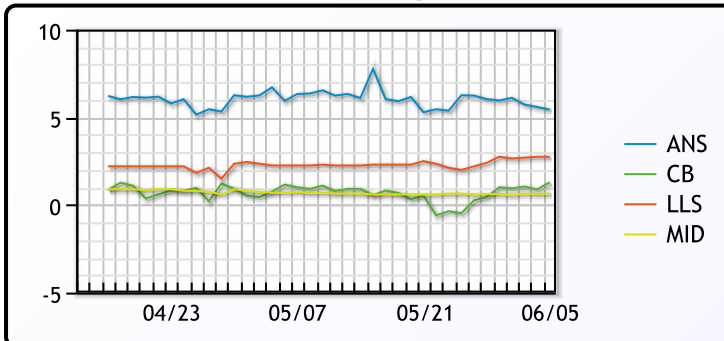
CRUDE

	Last	Week Ago	Month Ago
ANS	68.81	66.75	63.46
BLS	73.2	73.14	68.65
LLS	203.84	213.12	201.77
Mid	64.02	61.41	57.87
WTI	63.37	60.79	57.13

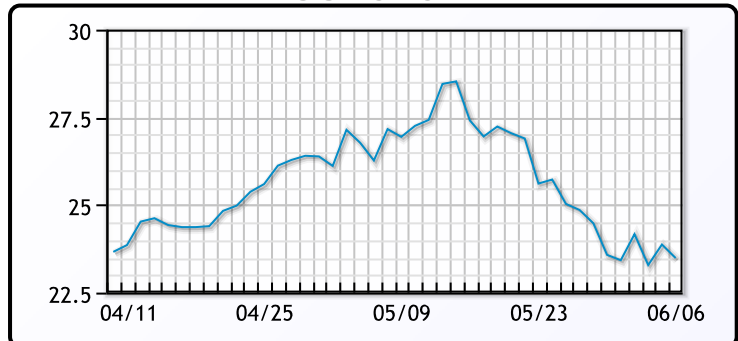
PRODUCTS

	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.1675	-0.1692	-0.1421
NYH RBOB	2.0804	2.0151	2.0483
NYH ULSD	2.10825	2.0029	1.982
USGC 3%	60.23	59.92	55.07

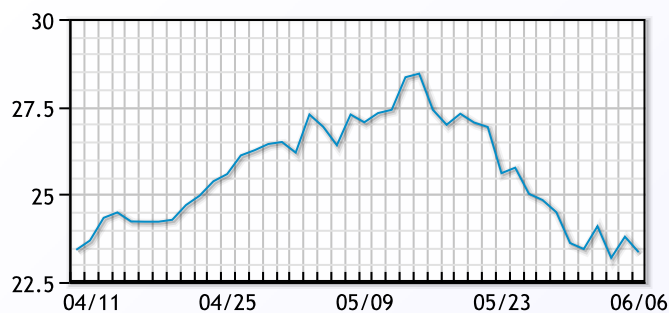
WTI Diffs



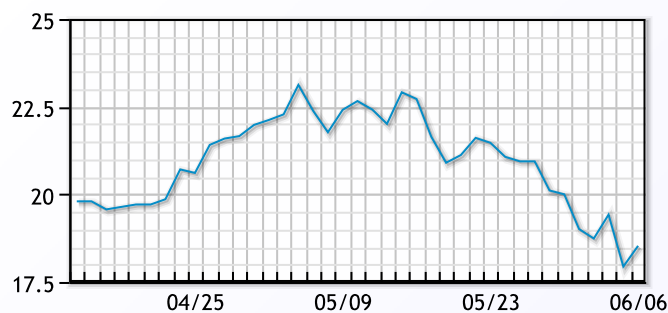
5-3-2 CRACK



3-2-1 Crack



Gulf 3-2-1 Crack



## NGLs

## MB

	Last	Week Ago	Month Ago
Butane	83	80.5	86
IsoButane	97	87.25	90.5
Natural Gasoline	126.9	124.8	127.8
Propane	74.5	73.875	71.5

## MB NON

	Last	Week Ago	Month Ago
Butane	85	82.5	88
IsoButane	97	87.25	90.5
Natural Gasoline	128.5	122.25	131.75
Propane	72.9	74.1	70

## CONWAY

	Last	Week Ago	Month Ago
Butane	79	77.5	82.75
IsoButane	98	96	94.5
Natural Gasoline	132	123.5	131
Propane	71.625	70.625	68.25

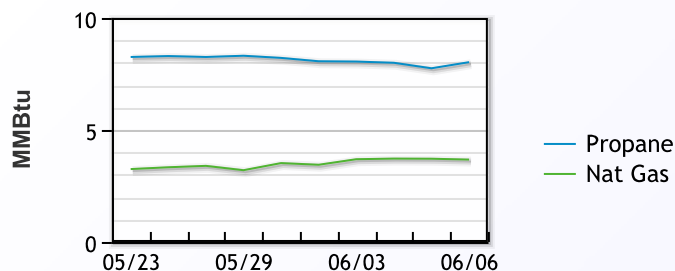
## EDMONTON

	Last	Week Ago	Month Ago
Propane	70.9	48.8	66.8

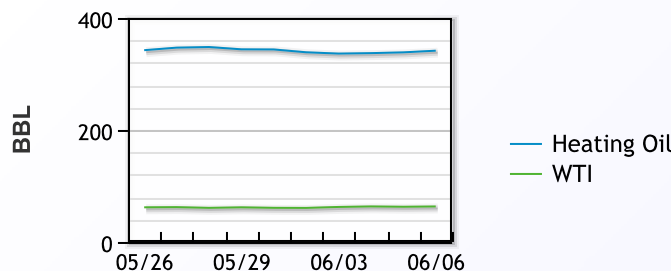
## SARNIA

	Last	Week Ago	Month Ago
Propane	68.5	73	73.5

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



## FX

	Last	Change
CAD	1.3697	0.0022
DXY	99.161	0.42
Gold	3316.83	-35.82

## RATES

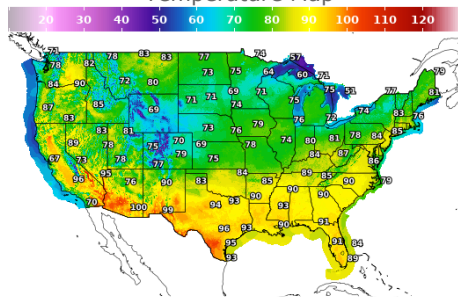
	Last	Change
US 2yr	4.0365	0.1164
US 10yr	4.5116	0.121
CAN 10yr	3.351	0.096

## EQUITIES

	Last	Change
Nasdaq	19542.13	243.68
TSX	1578.75	6.468
S&P 500	6008.47	69.17

## Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	79	58
Conway	82	52
Cushing	79	66
Denver	68	52
Houston	93	77
Mont Belvieu	92	77
Sarnia	69	59
Williston	78	47

Precipitation Map

