



# MARKET DAILY

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Major Energy Futures		
	Settle	Change
Brent	72.47	0.79
Gas Oil	709	-0.25
Natural Gas	3.045	0.076
RBOB	226.91	8.32
ULSD	241.85	3.72
WTI	70	0.79

### Market Commentary

Oil prices closed about 1% higher on Wednesday as traders focused on U.S. President Donald Trump's tightened timeline for Russia to end the war in Ukraine and new tariff threats targeting countries that trade Russian oil.

Brent crude for September delivery, set to expire Thursday, rose 73 cents (1.01%) to settle at \$73.24. The more actively traded October Brent contract climbed 79 cents (1.1%) to \$72.47. U.S. West Texas Intermediate (WTI) crude gained 79 cents (1.14%) to close at \$70.

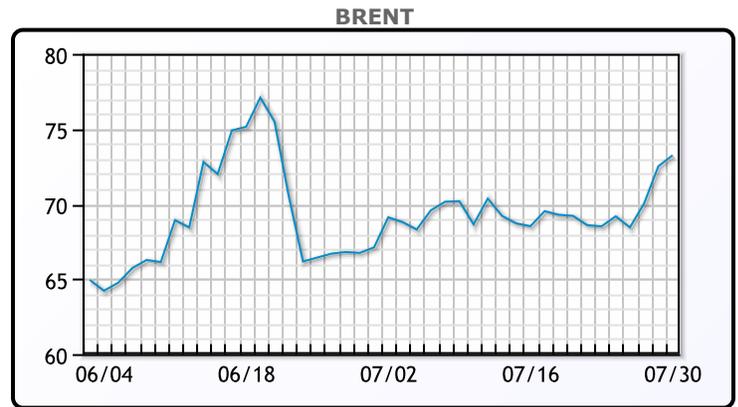
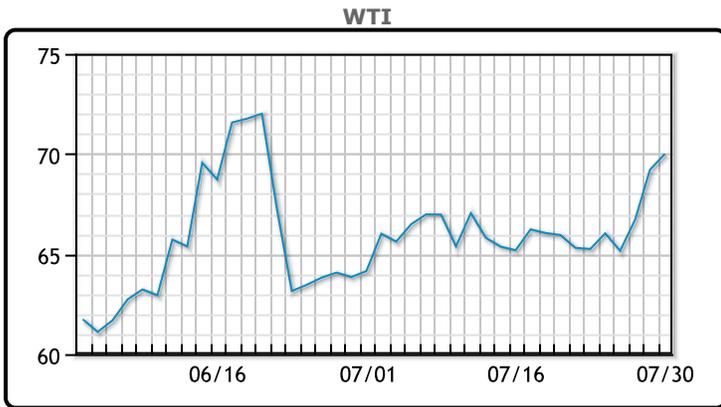
The market had been down nearly 1% earlier in the day but rebounded as Trump announced a shortened deadline of 10 to 12 days—down from 50—to take action against Russia, including potential 100% secondary tariffs on trading partners. The U.S. also imposed a 25% tariff on imports from India effective August 1 and threatened unspecified penalties for countries purchasing Russian oil and weapons, including China.

Analysts noted that India appears willing to comply, which could impact 2.3 million barrels per day of Russian exports—a bullish signal for oil prices.

In inventory news, U.S. crude stocks unexpectedly rose by 7.7 million barrels, while gasoline inventories fell by 2.7 million barrels, surpassing expectations for a 600,000-barrel draw. Distillates increased by 3.6 million barrels, much more than the projected 300,000-barrel build.

U.S. GDP rebounded more than expected in Q2, though much of the gain came from reduced imports. Meanwhile, the Federal Reserve held interest rates steady, with Chairman Powell noting it's still unclear whether a rate cut will come in September.

## Crude & Product Markets

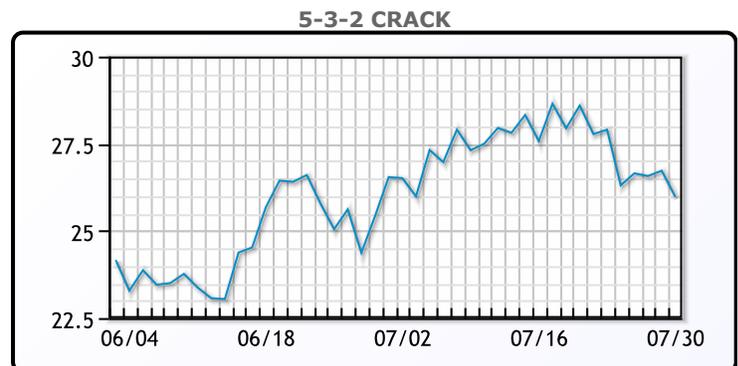
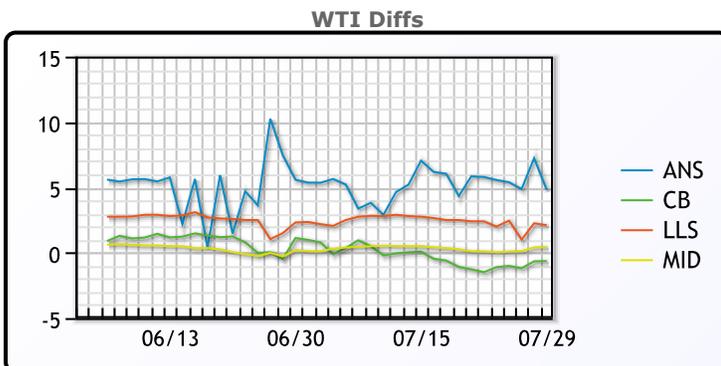


### CRUDE

	Last	Week Ago	Month Ago
ANS	74.01	72.62	70.88
BLS	73.2	73.14	68.65
LLS	213.06	205.15	200.5
Mid	69.64	67.32	65.64
WTI	69.21	67.23	65.52

### PRODUCTS

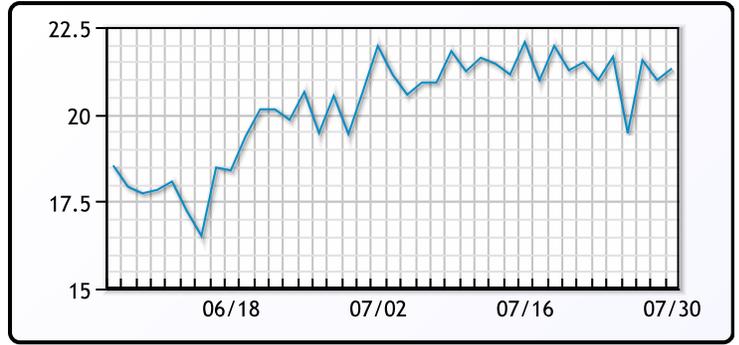
	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.067	-0.0713	-0.065
NYH RBOB	2.2209	2.1117	2.0873
NYH ULSD	2.46915	2.43135	2.3172
USGC 3%	63.54	64.05	62.44



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	81.25	77.25	75.75
IsoButane	95.75	93.5	96.25
Natural Gasoline	139.1	130.3	126.5
Propane	73	69.75	75

CONWAY

	Last	Week Ago	Month Ago
Butane	86	82	82.25
IsoButane	100	97.5	106
Natural Gasoline	143	132.5	127
Propane	69.625	66.875	70.25

MB NON

	Last	Week Ago	Month Ago
Butane	89.25	85.25	85.75
IsoButane	95.75	93.5	96.25
Natural Gasoline	139.75	130.25	124.25
Propane	71.9	67.2	73

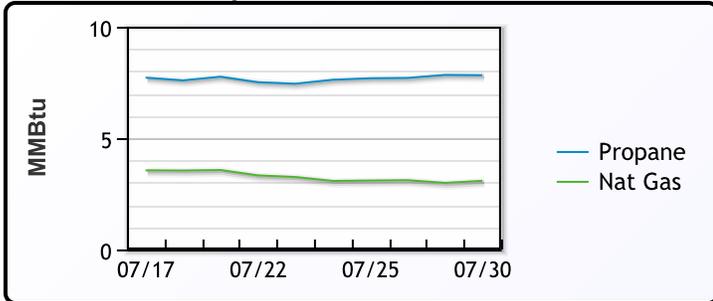
EDMONTON

	Last	Week Ago	Month Ago
Propane	45.4	42.3	48

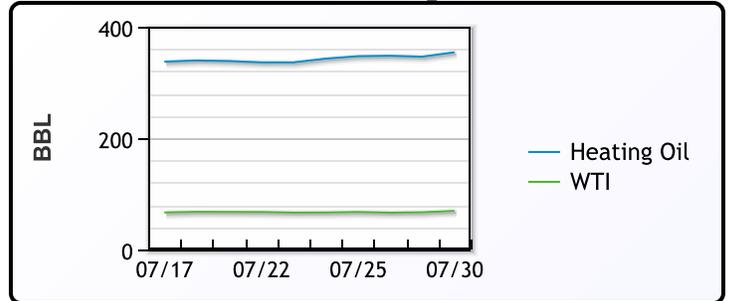
SARNIA

	Last	Week Ago	Month Ago
Propane	78.8	67.8	84.5

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3839	0.0069
DXY	99.836	0.95
Gold	3274.21	-52.41

RATES

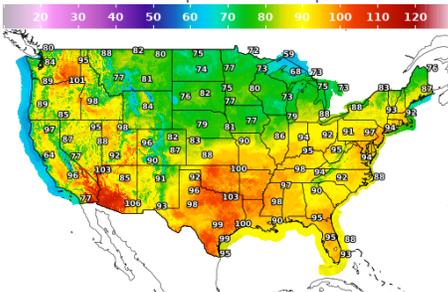
	Last	Change
US 2yr	3.9345	0.0656
US 10yr	4.364	0.0436
CAN 10yr	3.485	0.012

EQUITIES

	Last	Change
Nasdaq	21129.67	31.38
TSX	1625.54	-10.007
S&P 500	6359.7	-11.16

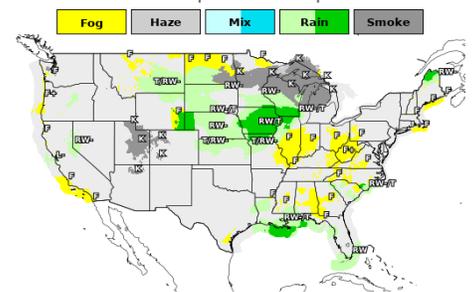
Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	78	53
Conway	73	56
Cushing	99	75
Denver	75	60
Houston	99	75
Mont Belvieu	97	75
Sarnia	81	65
Williston	78	58

Precipitation Map



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