



MARKET DAILY

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Major Energy Futures		
	Settle	Change
Brent	69.67	-2.03
Gas Oil	681.75	-3
Natural Gas	3.083	0.061
RBOB	211.86	-2.82
ULSD	229.99	-1.47
WTI	67.33	-1.93

Market Commentary

Brent crude settled down \$2.03 (2.83%) at \$69.67, while U.S. West Texas Intermediate (WTI) fell \$1.93 (2.79%) to \$67.33. Despite Friday's losses, Brent posted a weekly gain of nearly 6%, and WTI rose 6.29% for the week.

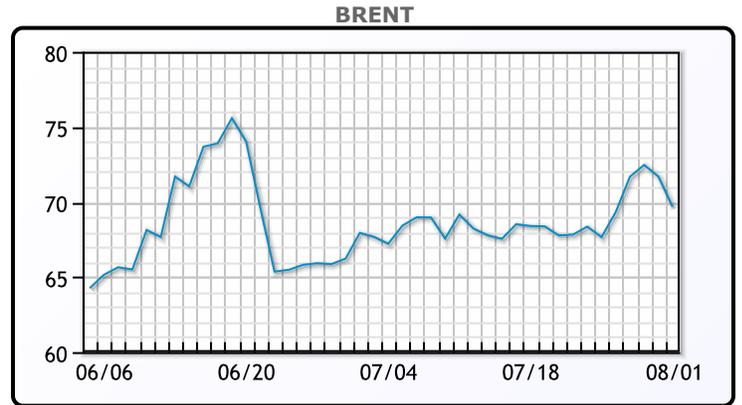
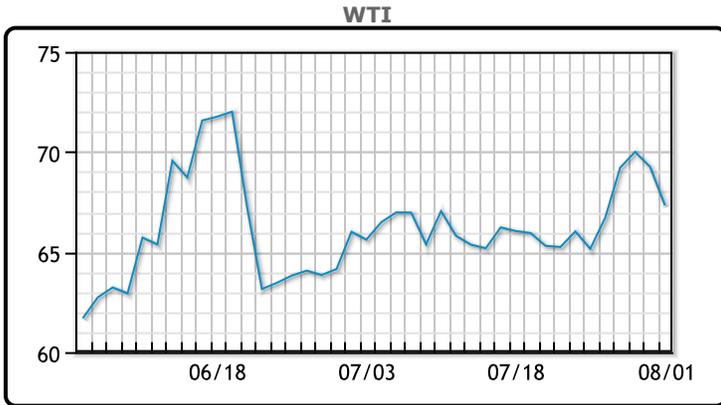
OPEC+ may agree as soon as Sunday to raise production by 548,000 barrels per day in September, according to sources familiar with the talks, though a smaller increase is still possible.

The downside pressure was compounded by a weaker-than-expected U.S. jobs report, which showed just 73,000 jobs added in July, pushing unemployment up to 4.2% from 4.1%. Analysts noted that the Federal Reserve's decision to hold interest rates steady on Wednesday has drawn criticism from President Trump and Republicans, who argue the Fed is misjudging the economic climate.

Trade policy continued to shape market outlooks. On Thursday, Trump signed an executive order imposing tariffs of 10% to 41% on imports from countries that missed the August 1 trade deal deadline, including Canada, India, and Taiwan. Countries like the EU, South Korea, Japan, and the UK secured agreements and avoided penalties.

Despite the day's drop, broader bullish sentiment remained due to geopolitical risks. Trump's threat to impose 100% secondary tariffs on Russian crude buyers has raised concerns of disrupted trade flows. JP Morgan analysts noted that up to 2.75 million bpd of Russian oil exports could be at risk, especially if major buyers China and India face penalties.

Crude & Product Markets

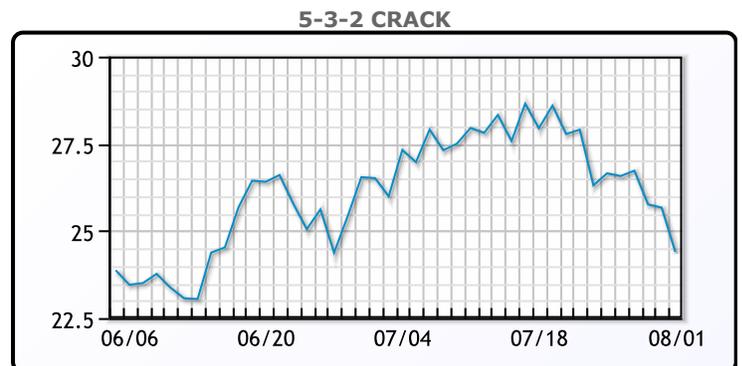
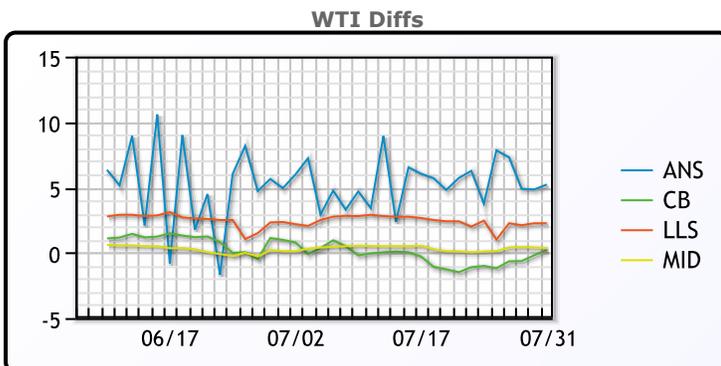


CRUDE

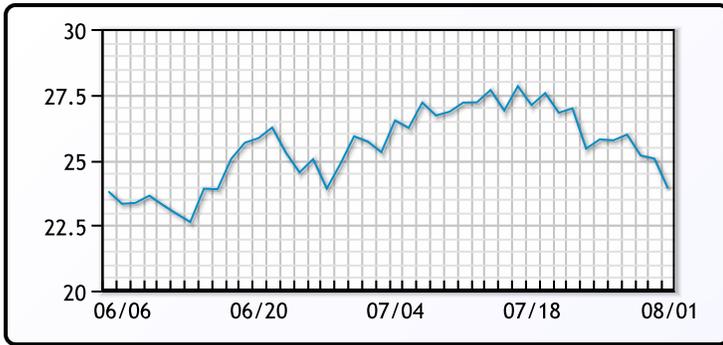
	Last	Week Ago	Month Ago
ANS	74.47	70.98	71.09
BLS	73.2	73.14	68.65
LLS	205.64	204.45	201.39
Mid	69.62	66.23	65.22
WTI	69.26	66.11	65.11

PRODUCTS

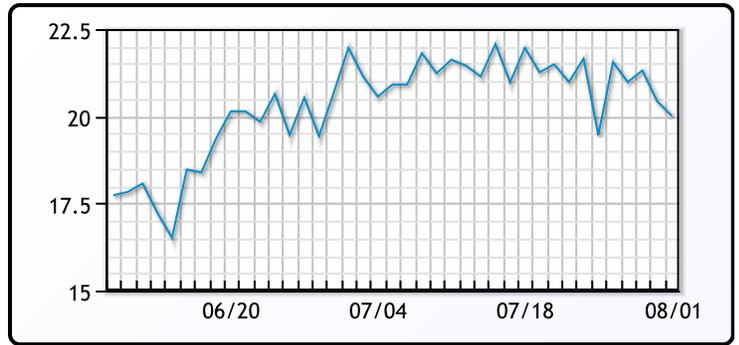
	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.067	-0.0643	-0.065
NYH RBOB	2.1486	2.1045	2.1203
NYH ULSD	2.2983	2.42465	2.3369
USGC 3%	64.21	62.79	61.1



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	79.125	77.25	76
IsoButane	95	95	95
Natural Gasoline	137.4	130.4	125.3
Propane	70.375	70.5	72.25

CONWAY

	Last	Week Ago	Month Ago
Butane	83.25	82.5	80.5
IsoButane	96.5	99	103
Natural Gasoline	137	132.5	129.5
Propane	67.5	67.625	68.375

MB NON

	Last	Week Ago	Month Ago
Butane	86.125	85.25	84
IsoButane	95	95	95
Natural Gasoline	133.25	130	127.75
Propane	73	69.7	73

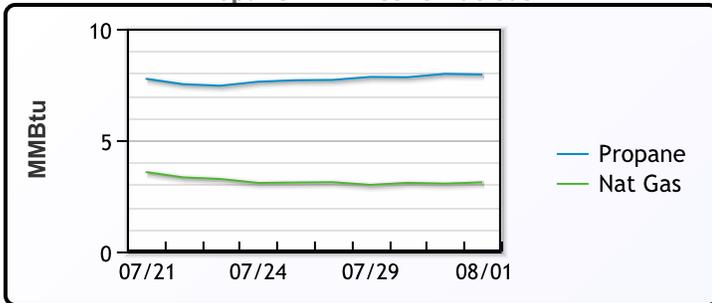
EDMONTON

	Last	Week Ago	Month Ago
Propane	46	44.5	47.6

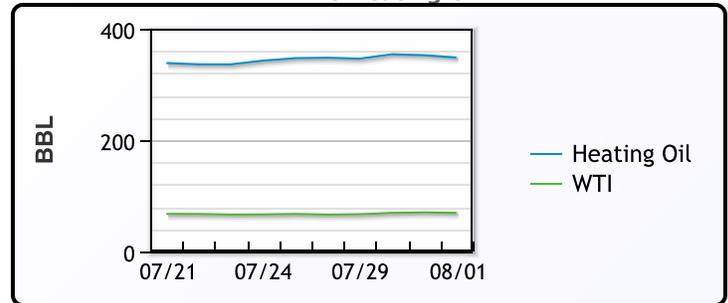
SARNIA

	Last	Week Ago	Month Ago
Propane	84	78.8	85

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3785	-0.0071
DXY	98.736	-1.232
Gold	3360.17	70.24

RATES

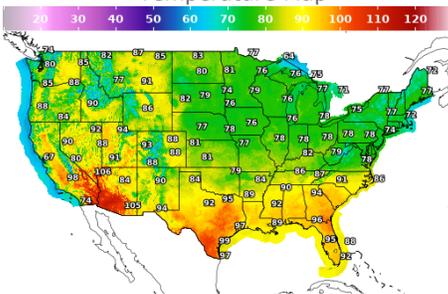
	Last	Change
US 2yr	3.6858	-0.2713
US 10yr	4.2139	-0.1601
CAN 10yr	3.382	-0.076

EQUITIES

	Last	Change
Nasdaq	20650.13	-472.32
TSX	1605.29	-15.236
S&P 500	6238.01	-101.38

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	81	55
Conway	80	55
Cushing	78	70
Denver	83	58
Houston	96	79
Mont Belvieu	94	79
Sarnia	73	57
Williston	85	62

Precipitation Map

