



MARKET DAILY

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Major Energy Futures		
	Settle	Change
Brent	65.63	-0.49
Gas Oil	648.75	-5.5
Natural Gas	2.828	-0.146
RBOB	207.04	-0.22
ULSD	224.28	-4.69
WTI	62.65	-0.52

Market Commentary

Oil prices extended their decline on Thursday, hitting multi-week lows before paring losses into the close, as supply concerns and geopolitical uncertainty continued to weigh on sentiment.

Brent crude settled at \$65.63, down 49 cents (-0.7%), after touching an intraday low of \$65.01 — its weakest level since June 6. U.S. West Texas Intermediate (WTI) closed at \$62.65, down 52 cents (-0.8%), after dipping to \$61.94, its lowest since June 2.

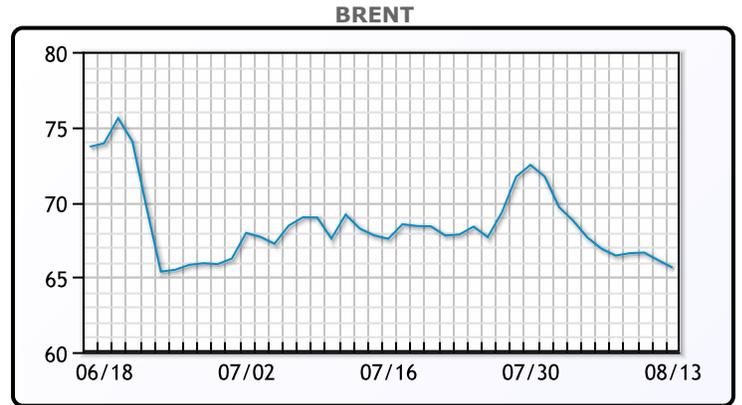
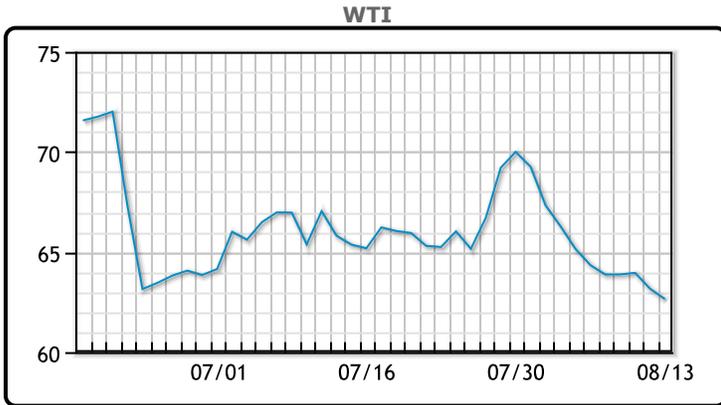
The EIA reported a 3 million barrel build in U.S. crude stocks last week, defying analyst expectations for a draw of 275,000 barrels. The increase was driven in part by a 699,000 bpd rise in net crude imports, as exports remain under pressure from tariff disputes.

The International Energy Agency also raised its forecast for oil supply growth this year but trimmed its demand outlook, adding a bearish undertone to the market.

Geopolitical risks remain in focus ahead of Friday's Trump-Putin meeting in Alaska. Treasury Secretary Scott Bessent said that if talks fail to yield progress on ending the Ukraine war, the U.S. could increase sanctions or impose additional secondary tariffs, urging European allies to follow suit.

Meanwhile, OPEC+ in its monthly report projected higher global oil demand for next year and lowered its non-OPEC supply growth estimate, suggesting a potentially tighter market ahead. Independent analyst Gaurav Sharma noted that even with a moderate 2025 demand growth figure, non-OPEC producers could still meet incremental needs without significant OPEC intervention.

Crude & Product Markets

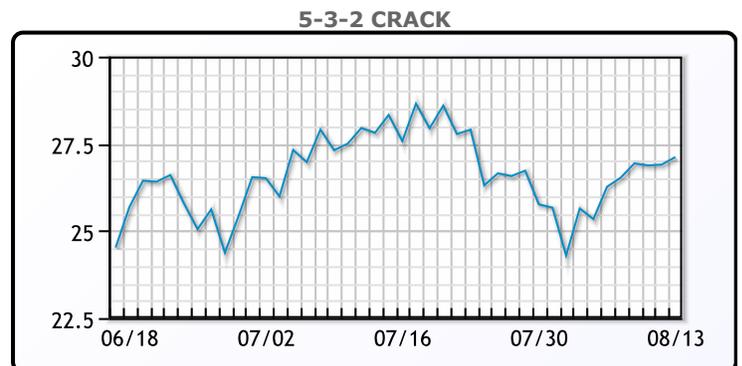
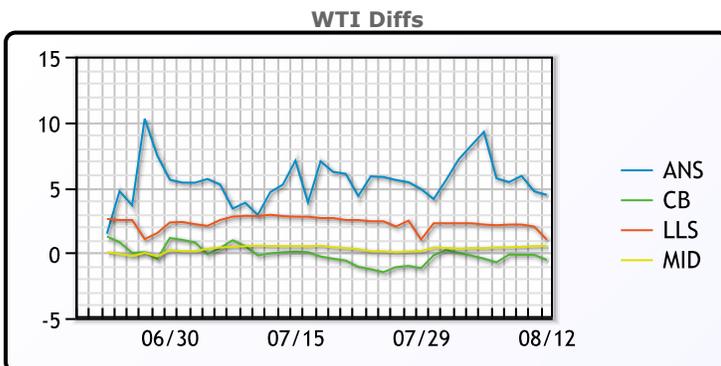


CRUDE

	Last	Week Ago	Month Ago
ANS	67.59	69.28	75.49
BLS	73.2	73.14	68.65
LLS	200.51	201.59	206.63
Mid	63.68	64.28	68.95
WTI	63.17	63.88	68.45

PRODUCTS

	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.0683	-0.0675	-0.0628
NYH RBOB	2.1394	2.134	2.207
NYH ULSD	2.2416	2.269	2.4574
USGC 3%	61.65	61.89	65.03



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	74.625	75.5	80.25
IsoButane	89	92.5	95
Natural Gasoline	126.4	130.4	134.5
Propane	67.25	67.625	74.125

CONWAY

	Last	Week Ago	Month Ago
Butane	79.5	80.5	84
IsoButane	95.5	96.5	101.25
Natural Gasoline	129	132	135.5
Propane	65	65.875	69.375

MB NON

	Last	Week Ago	Month Ago
Butane	81.625	82.5	88.25
IsoButane	89	92.5	95
Natural Gasoline	125.75	129	134.5
Propane	66.5	67.9	72.8

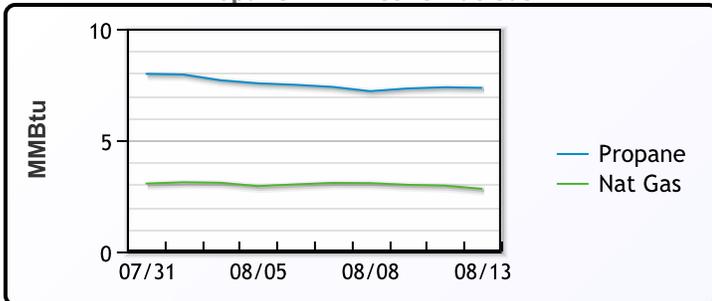
EDMONTON

	Last	Week Ago	Month Ago
Propane	42.9	43	55.8

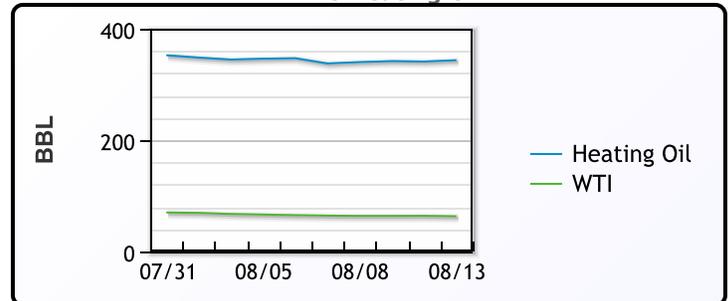
SARNIA

	Last	Week Ago	Month Ago
Propane	68.3	84	84.8

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3762	-0.001
DXY	97.826	-0.27101
Gold	3356.99	8.73

RATES

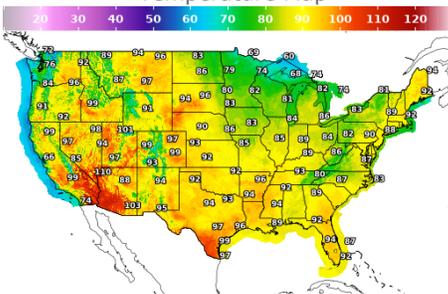
	Last	Change
US 2yr	3.6766	-0.0542
US 10yr	4.2345	-0.0543
CAN 10yr	3.394	-0.04

EQUITIES

	Last	Change
Nasdaq	21713.14	31.24
TSX	1661.18	4.286
S&P 500	6466.58	20.82

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	70	55
Conway	76	53
Cushing	91	70
Denver	96	61
Houston	96	77
Mont Belvieu	93	76
Sarnia	79	69
Williston	92	59

Precipitation Map

