



MARKET DAILY

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 Aug 14, 2025 4:54 PM

Major Energy Futures		
	Settle	Change
Brent	66.84	1.21
Gas Oil	652.5	-11.25
Natural Gas	2.841	0.02
RBOB	210.92	-0.4
ULSD	223.45	-0.13
WTI	63.96	1.31

Market Commentary

Brent crude rose \$1.21 (1.8%) to settle at \$66.84, while U.S. West Texas Intermediate (WTI) gained \$1.31 (2.1%) to close at \$63.96. The rally lifted both benchmarks out of technically oversold territory for the first time in three sessions and marked Brent's highest close since August 6.

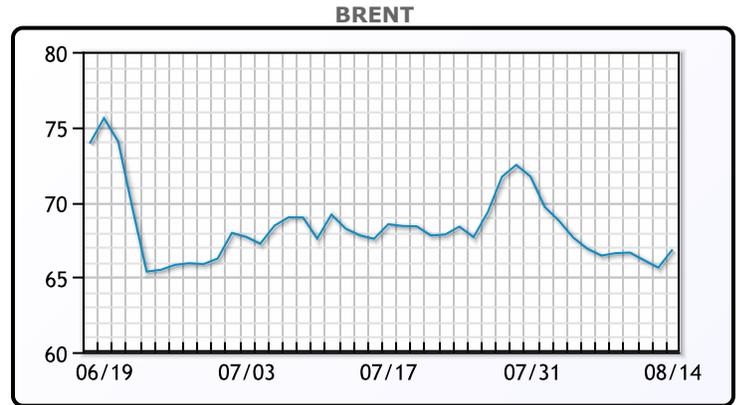
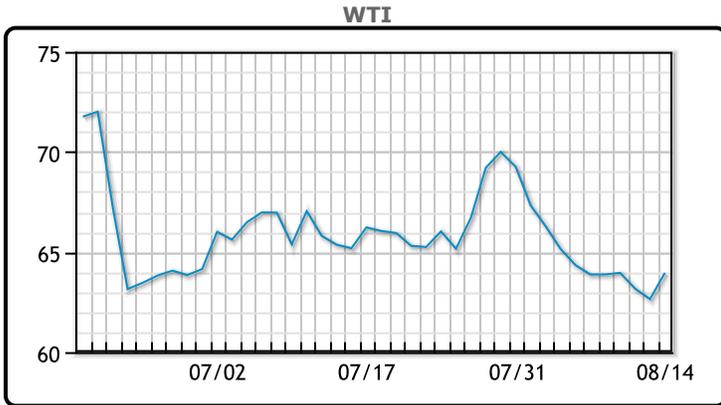
The gains came after President Donald Trump warned of "severe consequences" if Friday's meeting with Russian President Vladimir Putin in Alaska fails to produce a peace deal in Ukraine. While Trump has suggested Putin may be ready to negotiate, he has also threatened tougher economic measures — including secondary tariffs on Russian crude buyers such as China and India — if the war continues. Russia was the world's second-largest oil producer in 2024, and any agreement that eases sanctions could release additional supply onto the global market.

Analysts noted that the uncertainty surrounding the talks has added a geopolitical risk premium to prices, even as some remain skeptical that Washington would pursue measures significantly disrupting oil flows.

Expectations of easier U.S. monetary policy added further support. Traders are increasingly betting the Federal Reserve will cut rates in September, potentially by as much as half a percentage point, following July inflation data showing a moderate increase in consumer prices and recent signs of labor market weakness. Lower rates reduce borrowing costs, which can spur economic growth and boost oil demand.

Elsewhere, a survey of Norwegian oil and gas producers showed investments are expected to peak this year and decline in 2026 as major projects wrap up. Norway currently produces about 2% of global oil and has been Europe's largest pipeline gas supplier since Russia's 2022 invasion of Ukraine.

Crude & Product Markets

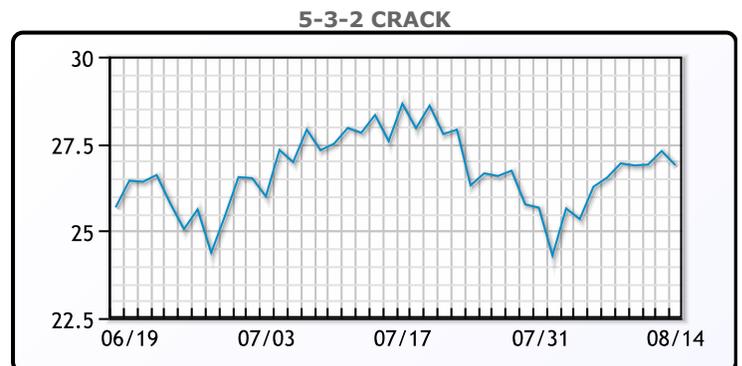
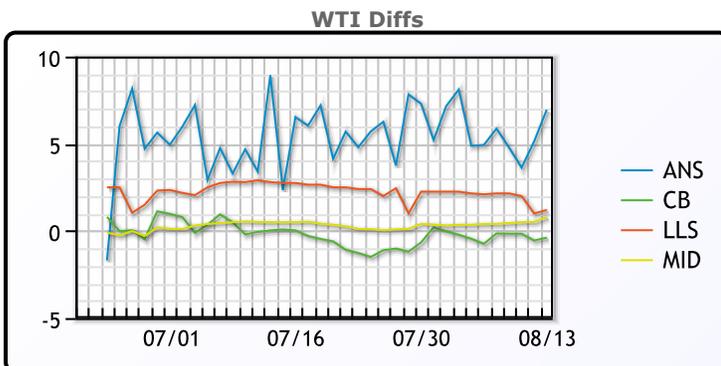


CRUDE

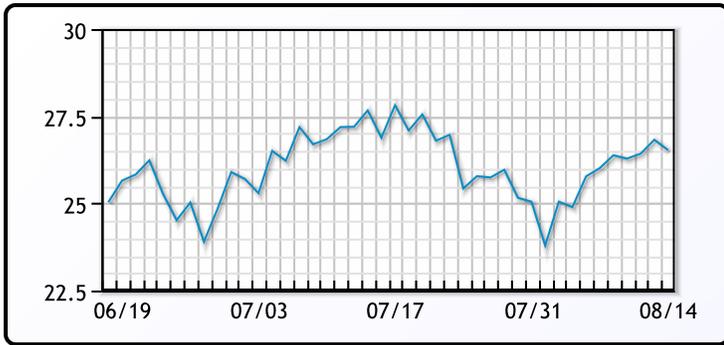
	Last	Week Ago	Month Ago
ANS	69.6	69.75	70.81
BLS	73.2	73.14	68.65
LLS	202.56	201.47	205.74
Mid	63.44	64.33	68.95
WTI	62.65	63.88	68.45

PRODUCTS

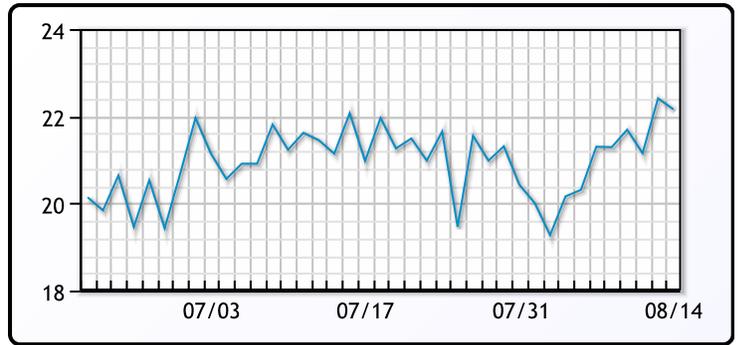
	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.067	-0.068	-0.0628
NYH RBOB	2.1517	2.1501	2.1854
NYH ULSD	2.2305	2.28225	2.3998
USGC 3%	62.16	62.32	65.03



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	79.9	79	67.5
IsoButane	82.9	82	95.3
Natural Gasoline	127.4	128.5	132
Propane	68.6	66.4	73.3

CONWAY

	Last	Week Ago	Month Ago
Butane	80	79.9	84
IsoButane	91	94.5	99.8
Natural Gasoline	131	131.9	133.8
Propane	66	64.9	69.5

MB NON

	Last	Week Ago	Month Ago
Butane	82.9	82	87.5
IsoButane	90.4	92.5	95.8
Natural Gasoline	127.4	128.5	132
Propane	67.7	65.5	71.7

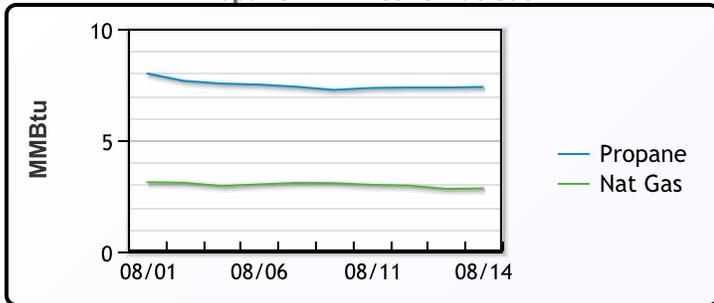
EDMONTON

	Last	Week Ago	Month Ago
Propane	43	41.9	55.5

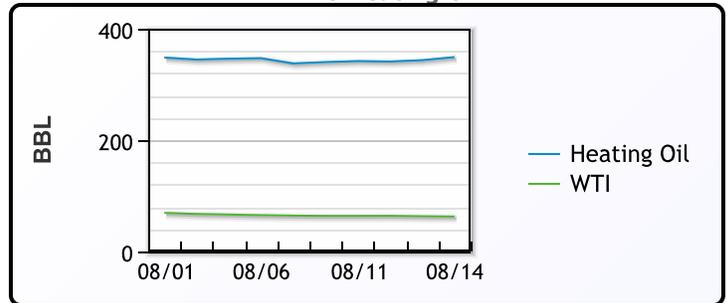
SARNIA

	Last	Week Ago	Month Ago
Propane	79	83.2	84.8

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3818	0.0059
DXY	98.21	0.37
Gold	3335.73	-20.13

RATES

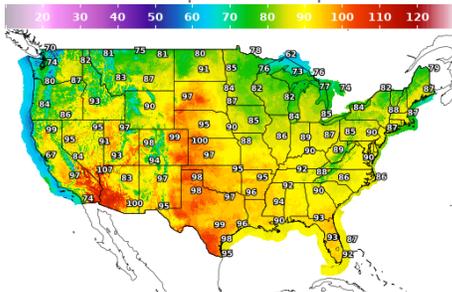
	Last	Change
US 2yr	3.7303	0.0558
US 10yr	4.2829	0.0503
CAN 10yr	3.411	0.014

EQUITIES

	Last	Change
Nasdaq	21710.67	-2.47
TSX	1656.44	-4.961
S&P 500	6468.54	1.96

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	64	47
Conway	85	62
Cushing	94	71
Denver	96	67
Houston	96	78
Mont Belvieu	95	78
Sarnia	80	64
Williston	78	65

Precipitation Map

