



MARKET DAILY

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Major Energy Futures		
	Settle	Change
Brent	65.85	-0.99
Gas Oil	656.5	3.75
Natural Gas	2.916	0.013
RBOB	207.25	3.88
ULSD	222.5	-0.83
WTI	62.80	-1.16

Market Commentary

Oil prices fell on Friday as markets braced for the outcome of U.S.-Russia peace talks, which could lead to an easing of sanctions on Moscow and increased supply from one of the world's largest producers.

Brent crude settled at \$65.85, down 99 cents (-1.5%), while U.S. West Texas Intermediate (WTI) closed at \$62.80, a drop of \$1.16 (-1.8%). For the week, Brent slipped 1.1% and WTI lost 1.7%.

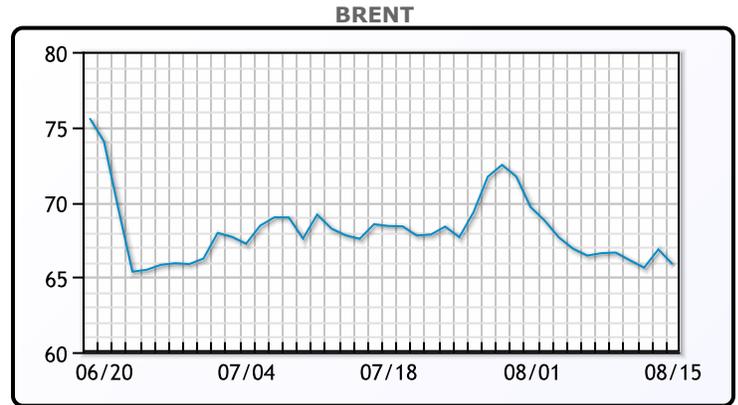
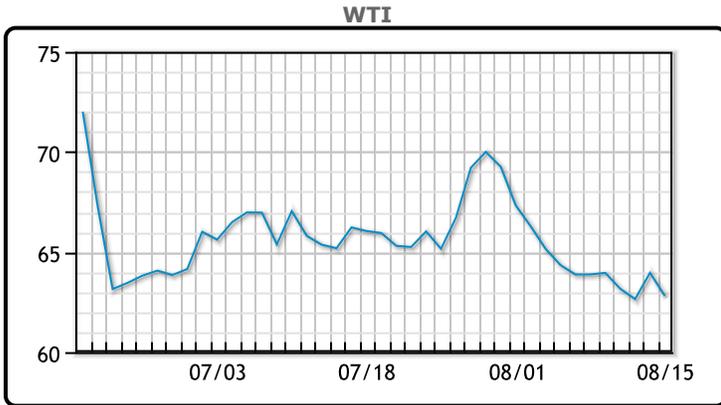
President Donald Trump arrived in Alaska for his meeting with Russian President Vladimir Putin, saying he wants to see a Ukraine ceasefire "today." While Trump expressed optimism about Russia's willingness to end the war, he has also threatened secondary sanctions on countries such as India and potentially China if peace talks fail. Traders noted that an actual ceasefire could pressure oil prices in the near term by raising the prospect of more Russian barrels hitting global markets.

The bearish tone was reinforced by weak Chinese economic data, with factory output growth slowing to an eight-month low and retail sales posting their slowest growth since December. Despite a 8.9% year-on-year rise in July refinery throughput, volumes fell from June's highs, and increased oil product exports suggested softer domestic fuel demand.

Forecasts for a widening market surplus also weighed on sentiment. Bank of America now projects an average surplus of 890,000 barrels per day from July 2025 through June 2026, citing growing OPEC+ supply. The International Energy Agency similarly warned this week that the market looks "bloated" following the group's latest production increases.

On the supply front, the U.S. oil rig count rose by one to 412, according to Baker Hughes, adding to expectations of continued strong output.

Crude & Product Markets

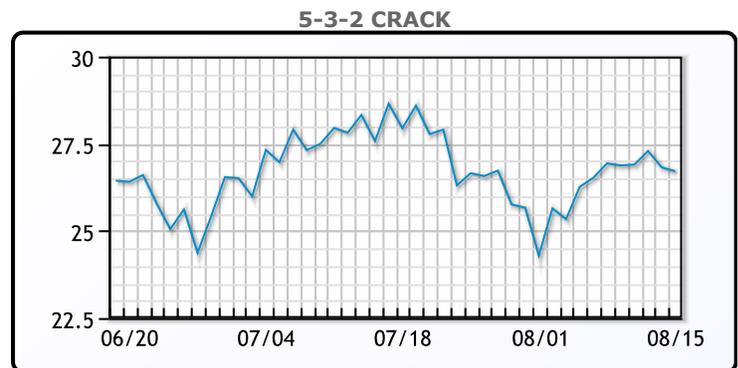
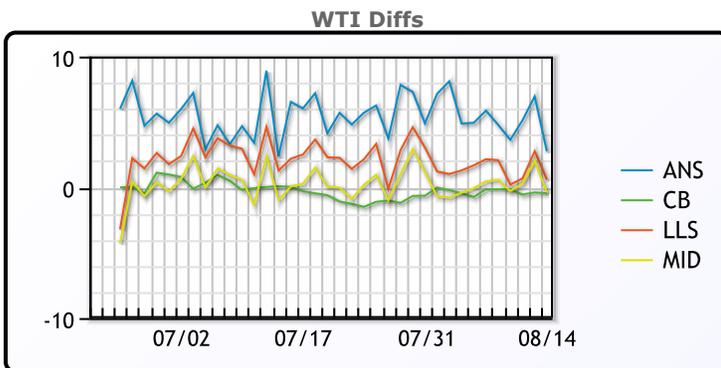


CRUDE

	Last	Week Ago	Month Ago
ANS	66.71	69.75	73.51
BLS	73.2	73.14	68.65
LLS	200.71	201.73	205.37
Mid	63.56	64.33	67.05
WTI	63.96	63.88	66.98

PRODUCTS

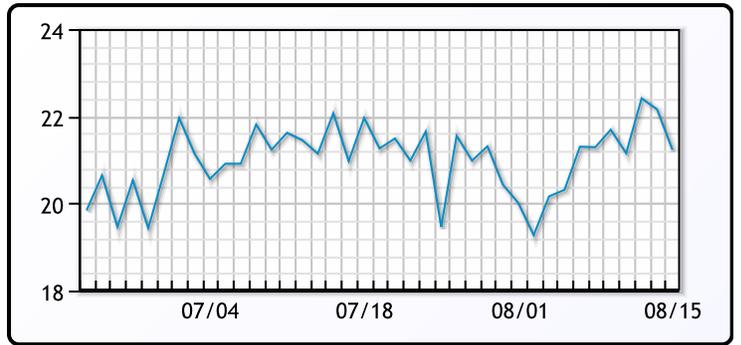
	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.068	-0.068	-0.0628
NYH RBOB	2.115	2.1501	2.1816
NYH ULSD	2.22275	2.28225	2.4152
USGC 3%	62.91	62.32	63.97



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	74	75.25	79
IsoButane	88.25	87	95
Natural Gasoline	127.4	128.5	132
Propane	66.125	67	72.375

CONWAY

	Last	Week Ago	Month Ago
Butane	79	80.25	83
IsoButane	94.75	94	101
Natural Gasoline	130	132	134.25
Propane	64.125	66	68.125

MB NON

	Last	Week Ago	Month Ago
Butane	81	82.25	87
IsoButane	88.25	87	95
Natural Gasoline	126.5	128.25	132.875
Propane	67.7	65.5	71.7

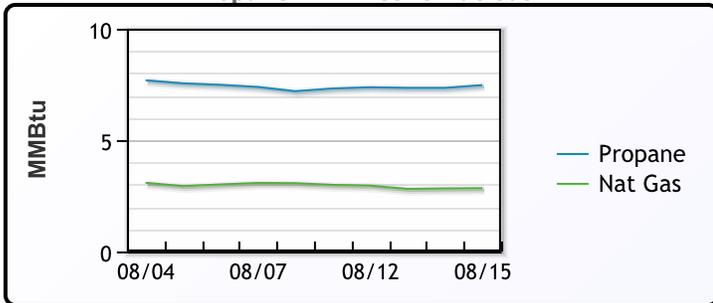
EDMONTON

	Last	Week Ago	Month Ago
Propane	43	41.9	55.5

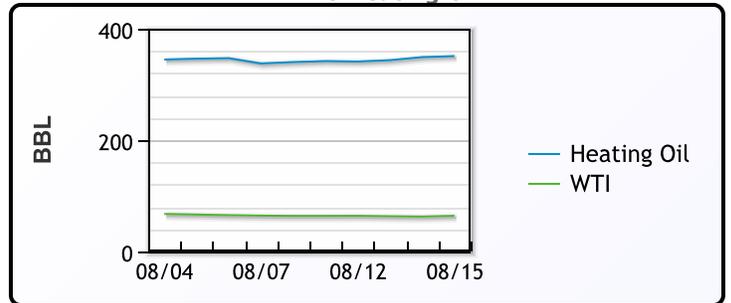
SARNIA

	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	1.3819	0.0002
DXY	97.862	-0.39201
Gold	3336.28	0.89

RATES

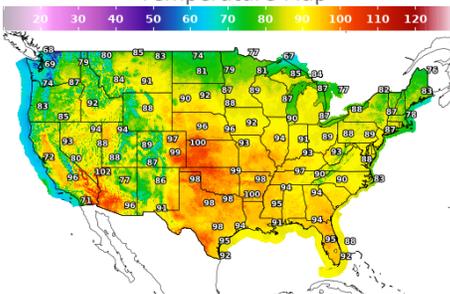
	Last	Change
US 2yr	3.7485	0.0161
US 10yr	4.3179	0.033
CAN 10yr	3.454	0.043

EQUITIES

	Last	Change
Nasdaq	21622.98	-87.69
TSX	1654.69	-1.749
S&P 500	6449.8	-18.74

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	72	50
Conway	77	59
Cushing	95	75
Denver	90	64
Houston	93	79
Mont Belvieu	91	79
Sarnia	84	63
Williston	78	55

Precipitation Map

