



MARKET DAILY

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Major Energy Futures		
	Settle	Change
Brent	66.60	0.75
Gas Oil	645.5	-11
Natural Gas	2.89	-0.026
RBOB	209.87	2.62
ULSD	224.03	1.53
WTI	63.42	0.62

Market Commentary

Brent crude rose 75 cents (1.14%) to settle at \$66.60, while U.S. West Texas Intermediate (WTI) gained 62 cents (0.99%) to finish at \$63.42. The move followed last week's losses, with Brent down 1.1% and WTI off 1.7%.

President Donald Trump met Ukrainian President Volodymyr Zelenskyy in Washington, days after inconclusive talks with Russian President Vladimir Putin in Alaska. Trump suggested the possibility of a future trilateral summit with both leaders, saying he believed Putin wanted the war to end. However, he also told Ukraine to abandon hopes of reclaiming Crimea or joining NATO, signaling a negotiating stance more aligned with Moscow's.

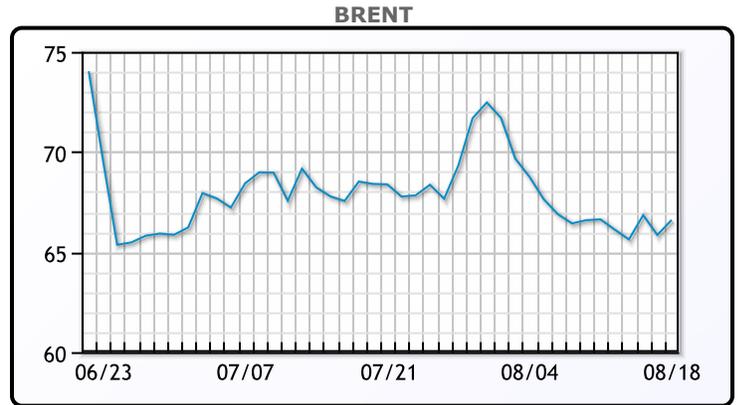
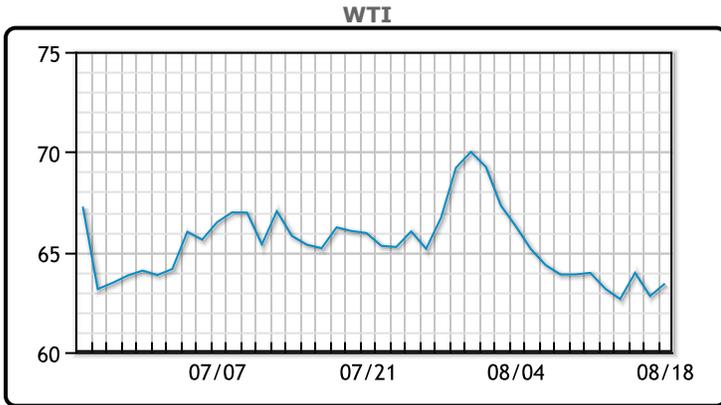
The Alaska talks ended without a breakthrough, but Ukraine continued attacks on Russian energy infrastructure, including drone strikes in the Tambov region that briefly suspended supply flows — a factor that lent support to crude.

Markets also reacted to comments from White House adviser Peter Navarro, who criticized India's purchases of Russian crude as financing the war. Analysts said the remarks, paired with postponed U.S.-India trade talks, underscored the uncertainty surrounding global energy flows.

Beyond geopolitics, investors are awaiting signals from the Federal Reserve, with Chairman Jerome Powell due to speak at the Jackson Hole meeting later this week. Expectations for the Fed's next move on interest rates remain a key driver of demand sentiment.

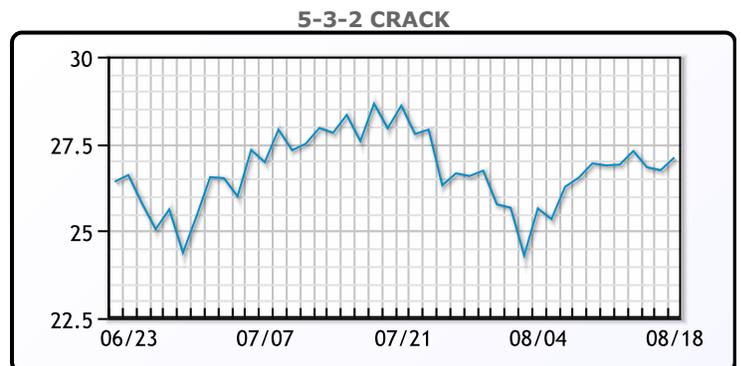
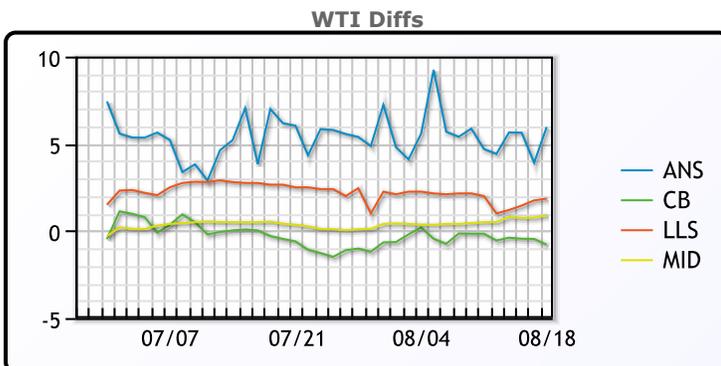
Elsewhere, Middle East dynamics shifted as Hamas accepted a 60-day ceasefire proposal with Israel, raising the prospect of reduced regional tension.

Crude & Product Markets



CRUDE			
	Last	Week Ago	Month Ago
ANS	69.38	68.3	71.67
BLS	73.2	73.14	68.65
LLS	202.4	201.92	206.26
Mid	64.32	63.44	67.6
WTI	63.42	62.65	67.34

PRODUCTS			
	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.068	-0.068	-0.068
NYH RBOB	2.1527	2.1234	2.1699
NYH ULSD	2.23825	2.2388	2.473
USGC 3%	60.59	62.16	64.09



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	78.9	79.4	66.1
IsoButane	81.9	82.4	93.6
Natural Gasoline	126	128.5	132.4
Propane	66	67.4	71

CONWAY

	Last	Week Ago	Month Ago
Butane	78.5	80.3	83.6
IsoButane	90	94	98
Natural Gasoline	130.3	132	134.1
Propane	64.4	66	67.6

MB NON

	Last	Week Ago	Month Ago
Butane	81.9	82.4	86.1
IsoButane	89.4	89.4	93.6
Natural Gasoline	126	128.5	132.4
Propane	65.1	66.5	69.8

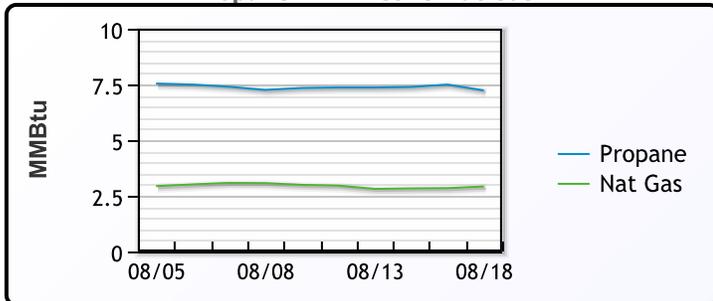
EDMONTON

	Last	Week Ago	Month Ago
Propane	41.4	43	52.6

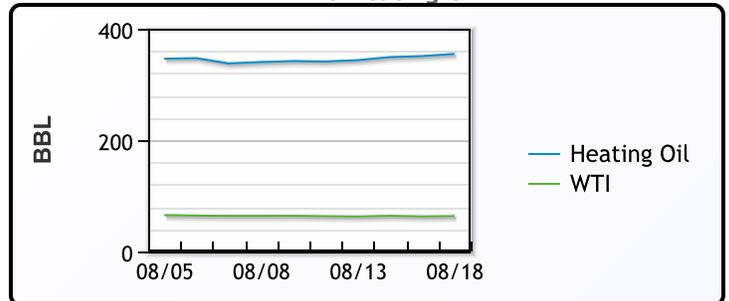
SARNIA

	Last	Week Ago	Month Ago
Propane	79.3	68.3	80.6

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.381	0.0007
DXY	98.16	-0.00701
Gold	3334.91	2.19

RATES

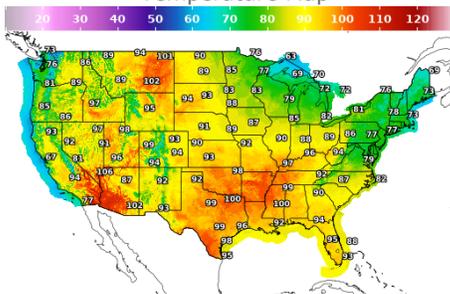
	Last	Change
US 2yr	3.7587	-0.0042
US 10yr	4.3316	-0.0019
CAN 10yr	3.49	0.036

EQUITIES

	Last	Change
Nasdaq	21629.77	6.79
TSX	1654.958	0.272
S&P 500	6449.15	-0.65

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	77	52
Conway	81	64
Cushing	98	75
Denver	87	62
Houston	98	77
Mont Belvieu	97	77
Sarnia	78	58
Williston	87	65

Precipitation Map

