



MARKET DAILY

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Major Energy Futures		
	Settle	Change
Brent	67.73	0.06
Gas Oil	680.75	10.5
Natural Gas	2.698	0.074
RBOB	215.85	3.14
ULSD	230.81	4.55
WTI	63.66	0.14

Market Commentary

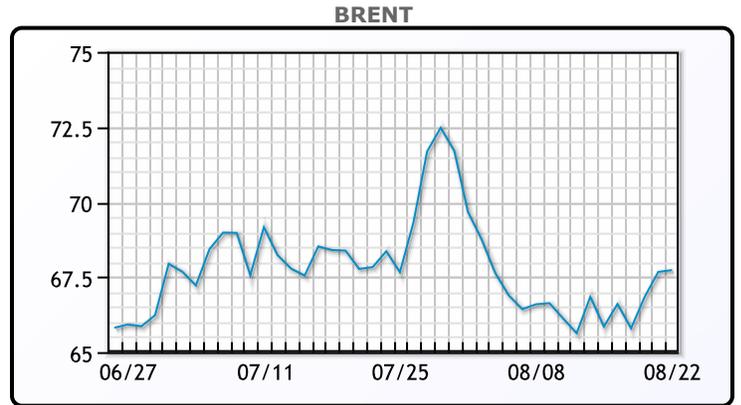
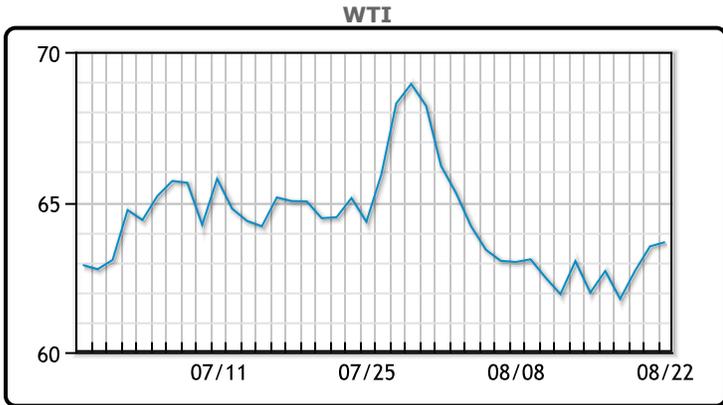
Brent crude settled at \$67.73, up 6 cents (0.09%), while U.S. West Texas Intermediate (WTI) closed at \$63.66, up 14 cents (0.22%). For the week, Brent gained 2.9% and WTI rose 1.4%.

Markets remain focused on the stalled peace process between Russia and Ukraine. President Donald Trump has sought to arrange a summit between Vladimir Putin and Volodymyr Zelenskiy, but little progress has been made. Moscow and Kyiv exchanged new blows this week, including Russian air strikes near the EU border and Ukrainian attacks on oil infrastructure tied to the Druzhba pipeline. ING analysts noted that the less likely a ceasefire appears, the higher the risk of additional U.S. sanctions on Russian energy.

Despite the geopolitical stalemate, crude drew support from U.S. supply data. The EIA reported a 6 million barrel drawdown in inventories for the week ended August 15, far above expectations, while the U.S. oil and gas rig count fell by one to 538, its lowest since mid-July. Both developments suggest tighter domestic supply conditions.

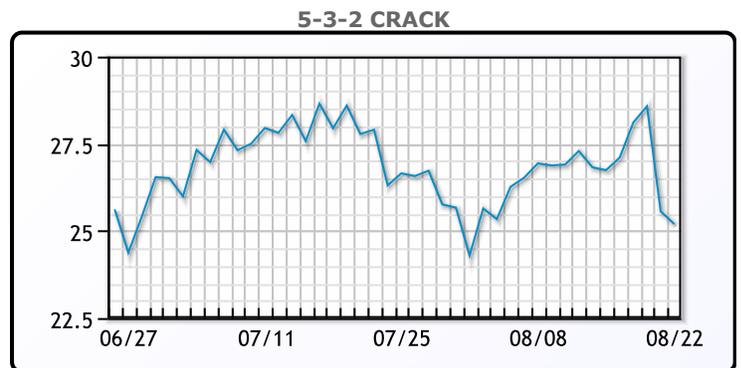
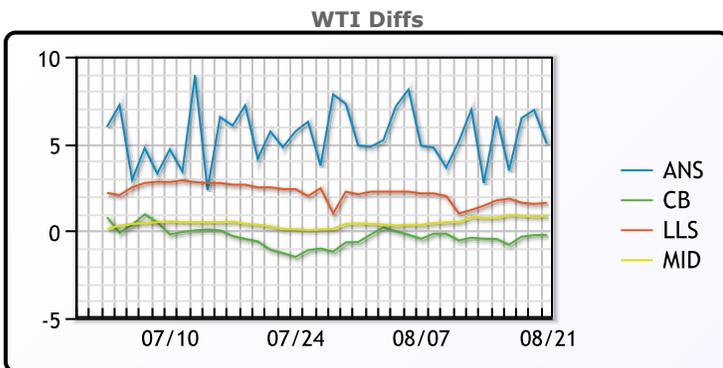
The broader macro backdrop remained mixed. Weak German economic data showed Europe's largest economy contracted 0.3% in Q2, raising demand concerns. Meanwhile, investors looked to the Jackson Hole conference, where Fed Chair Jerome Powell hinted at a possible rate cut next month while acknowledging ongoing inflation risks. Analysts said easier monetary policy could stimulate growth and lend further support to oil demand.

Crude & Product Markets

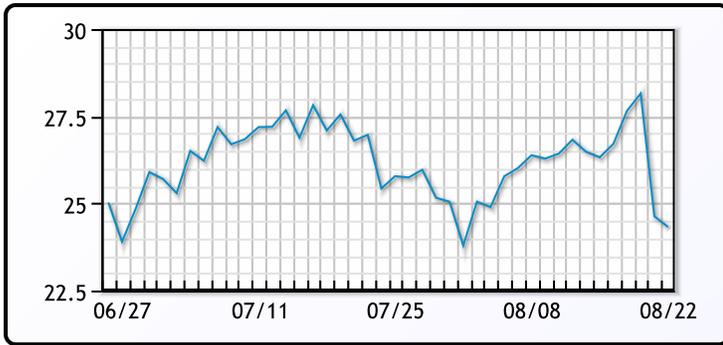


CRUDE			
	Last	Week Ago	Month Ago
ANS	68.93	66.71	72
BLS	73.2	73.14	68.65
LLS	205.94	200.71	204.41
Mid	64.77	63.56	67.31
WTI	63.92	62.8	67.2

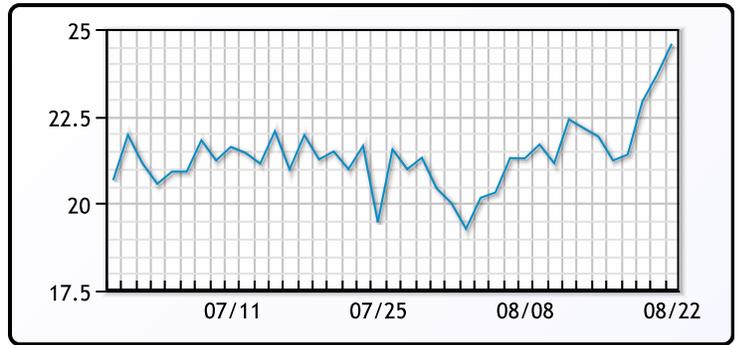
PRODUCTS			
	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.0705	-0.067	-0.0683
NYH RBOB	2.2012	2.115	2.1439
NYH ULSD	2.32785	2.22275	2.5292
USGC 3%	62.63	62.16	64.37



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	76.75	74	76
IsoButane	89.5	88.25	92
Natural Gasoline	130	127.4	131.1
Propane	68.875	66.125	68.125

CONWAY

	Last	Week Ago	Month Ago
Butane	81	79	81.75
IsoButane	94.5	94.75	97
Natural Gasoline	131	130	132.25
Propane	65.75	64.125	65.25

MB NON

	Last	Week Ago	Month Ago
Butane	83.75	81	84
IsoButane	89.5	88.25	92
Natural Gasoline	128.25	126.5	130.25
Propane	69.2	67.7	68

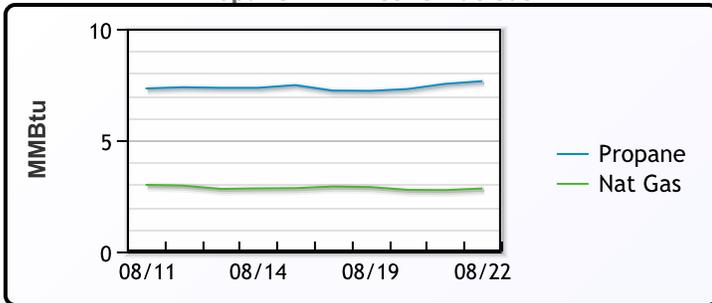
EDMONTON

	Last	Week Ago	Month Ago
Propane	44.3	43	42.4

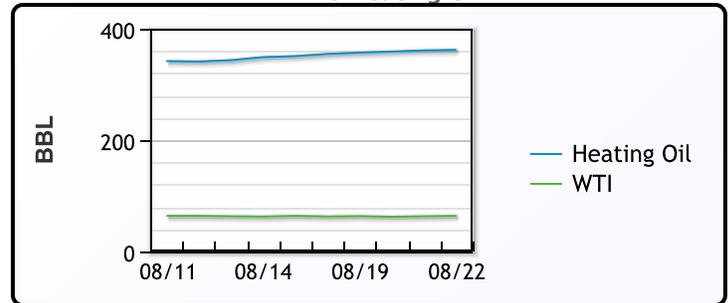
SARNIA

	Last	Week Ago	Month Ago
Propane	79.5	79	67.8

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3825	-0.0086
DXY	97.729	-0.89
Gold	3371.38	32.67

RATES

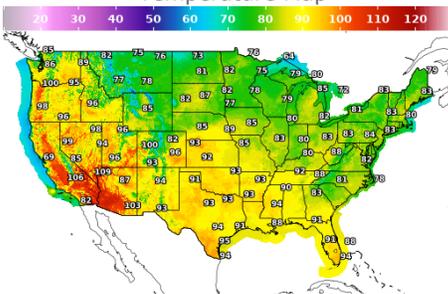
	Last	Change
US 2yr	3.6879	-0.1039
US 10yr	4.2518	-0.0759
CAN 10yr	3.429	-0.05

EQUITIES

	Last	Change
Nasdaq	21496.54	396.23
TSX	1679.98	15.55
S&P 500	6462.61	92.44

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	70	46
Conway	74	59
Cushing	91	68
Denver	81	64
Houston	86	71
Mont Belvieu	83	73
Sarnia	79	59
Williston	68	56

Precipitation Map

