



MARKET DAILY

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Major Energy Futures		
	Settle	Change
Brent	68.80	1.07
Gas Oil	690	1.25
Natural Gas	2.696	-0.002
RBOB	214.83	-1.02
ULSD	234.75	3.94
WTI	64.80	1.14

Market Commentary

Brent crude settled at \$68.80, up \$1.07 (1.58%), while West Texas Intermediate (WTI) closed at \$64.80, up \$1.14 (1.79%).

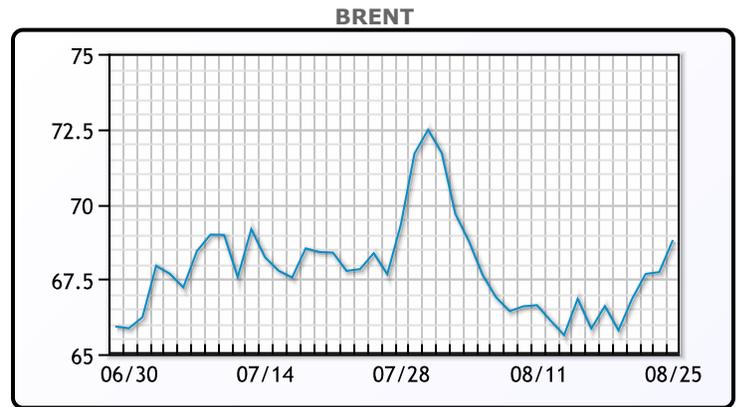
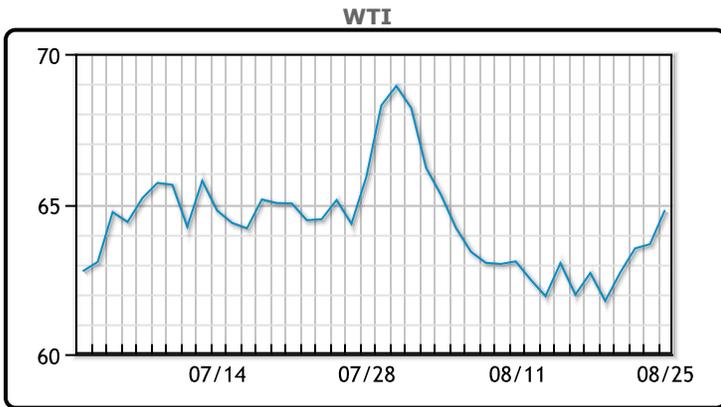
President Donald Trump reiterated Friday that Russia faces sanctions if peace talks fail to show progress within two weeks, while also threatening steep tariffs on India for its Russian oil purchases. Over the weekend, Vice President JD Vance said Moscow had made "significant concessions" toward a negotiated settlement, but peace remains elusive.

Ukraine continued to escalate pressure on Russia's energy sector. A drone strike on Sunday set off a major fire at the Ust-Luga fuel export terminal, and another attack has left the Novoshakhtinsk refinery burning for four straight days. The refinery has a capacity of about 100,000 barrels per day, mostly for export.

While the potential for disrupted Russian flows added bullish momentum, traders also noted a counterweight: OPEC+ is reversing earlier cuts and adding millions of barrels to the market. Eight members of the group are expected to approve another output hike at their September 7 meeting.

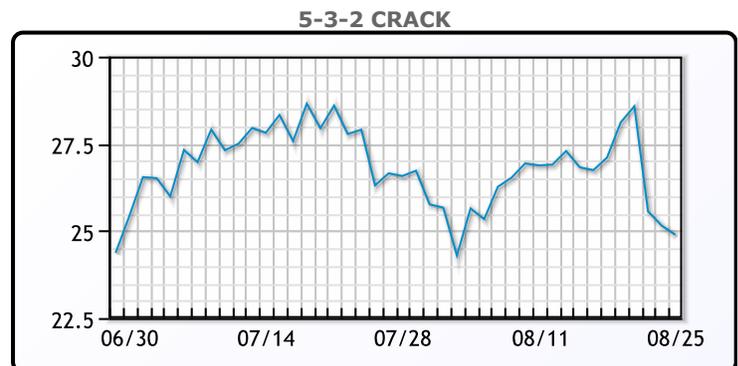
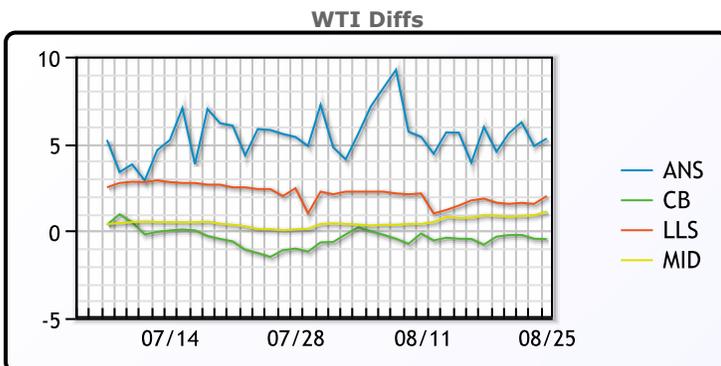
The broader macro backdrop offered support as well. Federal Reserve Chair Jerome Powell hinted Friday at a possible September rate cut, which could stimulate growth and boost fuel demand. Still, analysts cautioned that enthusiasm may be limited, as Trump's tariff threats raise concerns about weaker global growth and demand destruction.

Crude & Product Markets

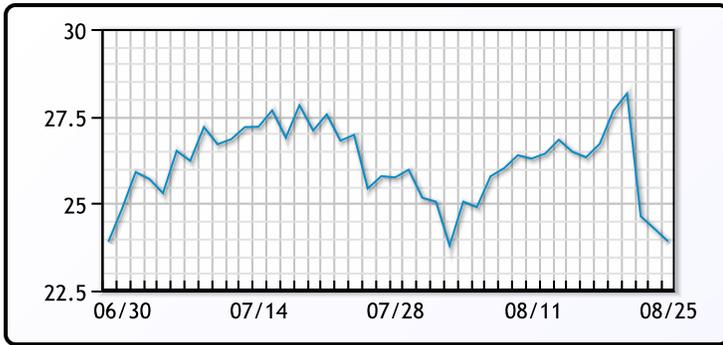


CRUDE	Last	Week Ago	Month Ago
ANS	70.6	68.82	70.98
BLS	73.2	73.14	68.65
LLS	207.66	202.4	204.45
Mid	66.4	64.03	66.23
WTI	65.3	63.21	66.11

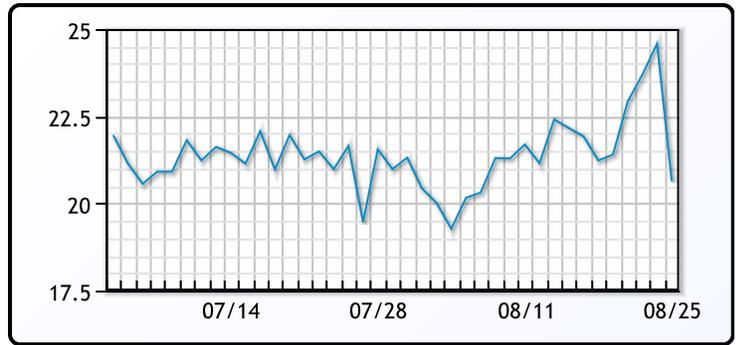
PRODUCTS	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.0705	-0.068	-0.067
NYH RBOB	2.1788	2.1733	2.1045
NYH ULSD	2.34705	2.2828	2.42465
USGC 3%	62.28	61.96	62.79



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	81	78.9	82.1
IsoButane	84	81.9	85.1
Natural Gasoline	130.8	126	130.9
Propane	69.6	66	70.5

CONWAY

	Last	Week Ago	Month Ago
Butane	81.3	78.5	82.5
IsoButane	94	90	98
Natural Gasoline	132.6	130.3	132
Propane	66.3	64.4	67.4

MB NON

	Last	Week Ago	Month Ago
Butane	84	81.9	85.1
IsoButane	89.8	89.4	93.4
Natural Gasoline	130.7	126	130.9
Propane	68.7	65.1	69.6

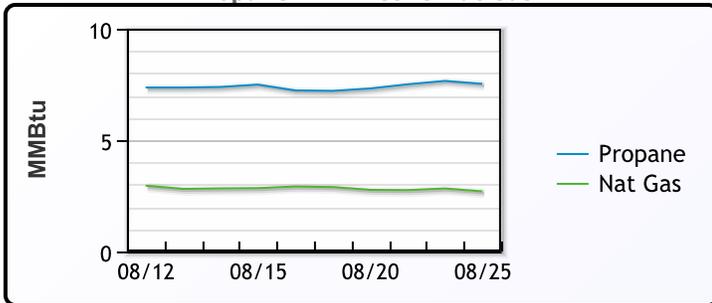
EDMONTON

	Last	Week Ago	Month Ago
Propane	43.3	41.4	44.4

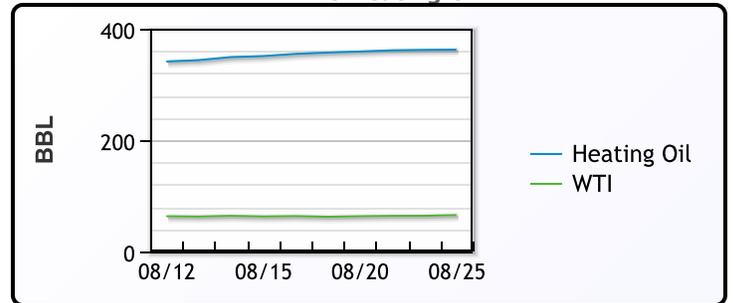
SARNIA

	Last	Week Ago	Month Ago
Propane	79.9	79.3	78.8

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.386	0
DXY	98.43001	0.71401
Gold	3353.5	-12.39

RATES

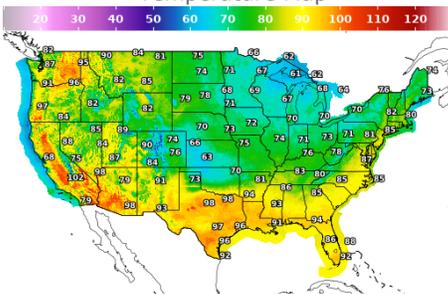
	Last	Change
US 2yr	3.7235	0.0272
US 10yr	4.2751	0.0214
CAN 10yr	3.472	0.037

EQUITIES

	Last	Change
Nasdaq	21449.29	-47.25
TSX	1669.967	-9.753
S&P 500	6439.32	-27.59

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	82	53
Conway	72	49
Cushing	72	64
Denver	71	59
Houston	94	74
Mont Belvieu	94	74
Sarnia	68	55
Williston	78	50

Precipitation Map

