



MARKET DAILY

<https://www.pflpetroleum.com>
 1865 Veterans Park Dr. Suite 303
 Naples, Florida 34109
 Phone: 239-390-2885
 Fax: 239-949-0611
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Major Energy Futures		
	Settle	Change
Brent	67.64	-1.12
Gas Oil	670.25	5
Natural Gas	3.01	-0.151
RBOB	209.15	-1.64
ULSD	225.02	1.77
WTI	65.16	-1.13

Market Commentary

Brent crude settled at \$67.64, down \$1.12 (-1.63%), while U.S. West Texas Intermediate (WTI) closed at \$65.16, falling \$1.13 (-1.7%). Both benchmarks marked their lowest closes in five weeks.

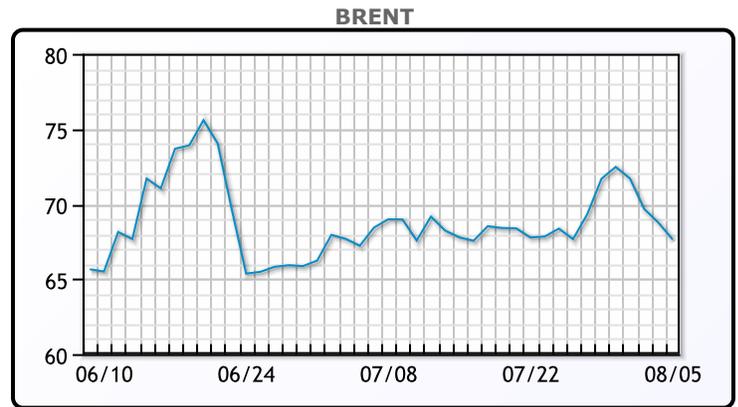
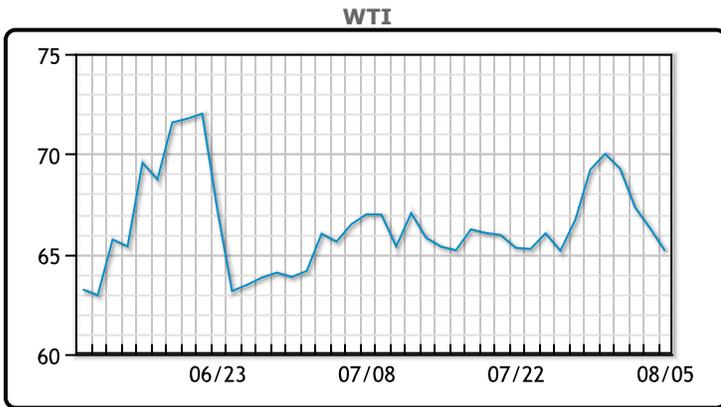
The pressure on prices follows OPEC+'s decision to raise production by 547,000 barrels per day in September, the latest step in reversing its earlier output cuts. The market is now bracing for the group's September 7 meeting, where a further rollback of up to 1.65 million bpd remains on the table.

On the demand side, U.S. economic data showed stagnation in the services sector and softening job growth in July, feeding uncertainty around consumption trends. Analysts also noted continued concern over high input costs.

Geopolitical risks remain in play but offered little support for prices this session. President Trump reiterated threats of 100% secondary tariffs on countries continuing to import Russian crude. India, a top Russian oil buyer, rejected the tariff warnings, heightening tensions with Washington. Roughly 1.75 million bpd of Russian crude exports to India could be at risk if sanctions are enforced.

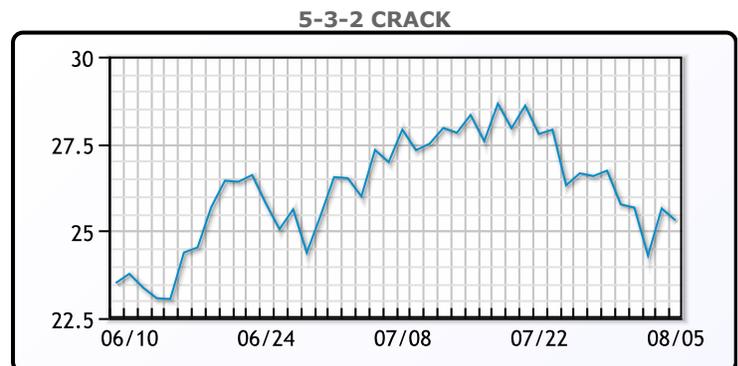
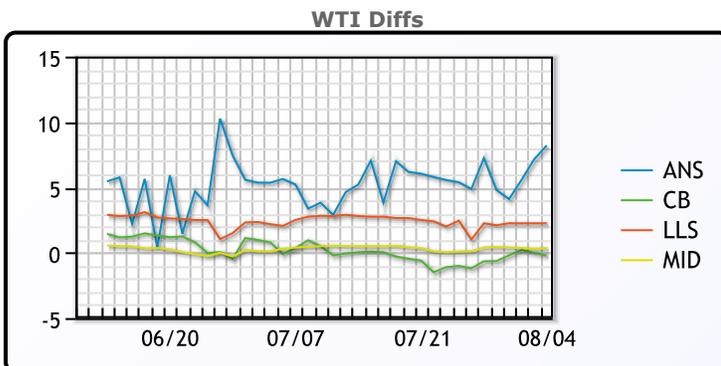
Despite the downside momentum, markets are closely watching for developments later this week as the White House prepares to clarify its position on Russian oil sanctions — a decision that could shift the narrative if supply disruptions materialize.

Crude & Product Markets



CRUDE			
	Last	Week Ago	Month Ago
ANS	74.49	74.1	70.37
BLS	73.2	73.14	68.65
LLS	202.56	212.08	203.48
Mid	66.64	70.4	67.45
WTI	66.29	70	67

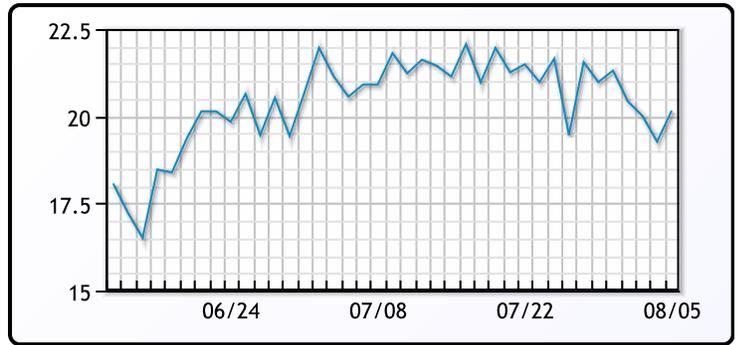
PRODUCTS			
	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.0673	-0.067	-0.0625
NYH RBOB	2.1665	2.2039	2.1386
NYH ULSD	2.31605	2.42065	2.3798
USGC 3%	62.75	64.96	62.08



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	76.5	79.5	76.25
IsoButane	93.5	94.75	92
Natural Gasoline	131.9	133.4	130.8
Propane	68.5	71.625	72.75

CONWAY

	Last	Week Ago	Month Ago
Butane	81.25	84.5	81
IsoButane	97.25	98	102
Natural Gasoline	133.75	139	132
Propane	66.375	68	69.125

MB NON

	Last	Week Ago	Month Ago
Butane	83.5	87.5	84.25
IsoButane	93.5	94.75	92
Natural Gasoline	130	138.25	131
Propane	68.2	72	71.6

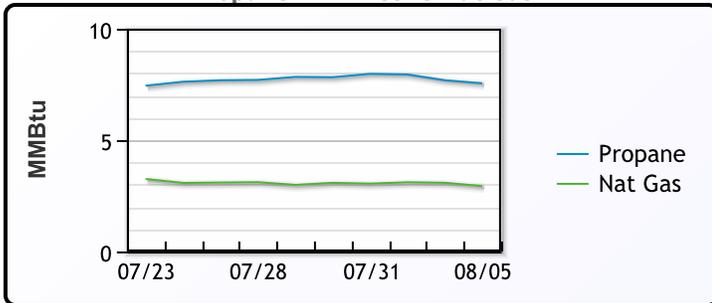
EDMONTON

	Last	Week Ago	Month Ago
Propane	43.6	45.1	54.5

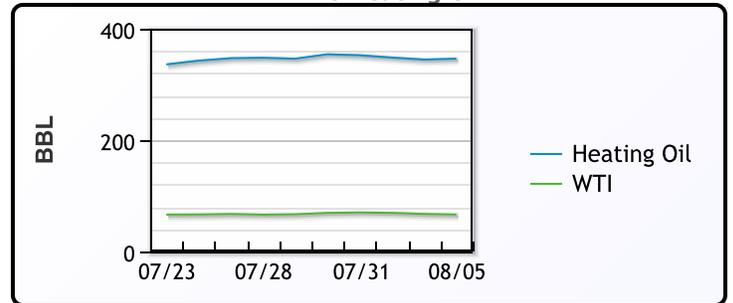
SARNIA

	Last	Week Ago	Month Ago
Propane	84	78.8	85

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3777	-0.0002
DXY	98.763	-0.021
Gold	3380.07	6.48

RATES

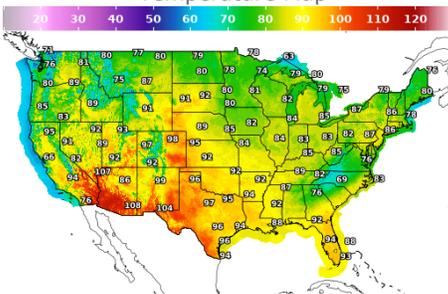
	Last	Change
US 2yr	3.7181	0.0429
US 10yr	4.2021	0.0098
CAN 10yr	3.379	-0.003

EQUITIES

	Last	Change
Nasdaq	20916.55	-137.03
TSX	1637.96	32.669
S&P 500	6299.17	-30.77

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	75	51
Conway	77	64
Cushing	91	69
Denver	96	65
Houston	93	74
Mont Belvieu	93	74
Sarnia	79	62
Williston	81	65

Precipitation Map

