



MARKET DAILY

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Major Energy Futures		
	Settle	Change
Brent	107.38	3.96
Gas Oil	1259.25	5.75
Natural Gas	3.065	0.01
RBOB	309.85	12.31
ULSD	419.78	17.83
WTI	96.32	0.11

Market Commentary

Oil prices climbed on Wednesday as escalating attacks on energy infrastructure across the Middle East heightened concerns over prolonged supply disruptions. Brent crude settled at \$107.38 per barrel, up nearly \$4, or 3.8%, while U.S. West Texas Intermediate (WTI) crude settled at \$96.32, up 11 cents, or 0.1%. Brent briefly traded near \$110 and has now held above \$100 for a second straight session.

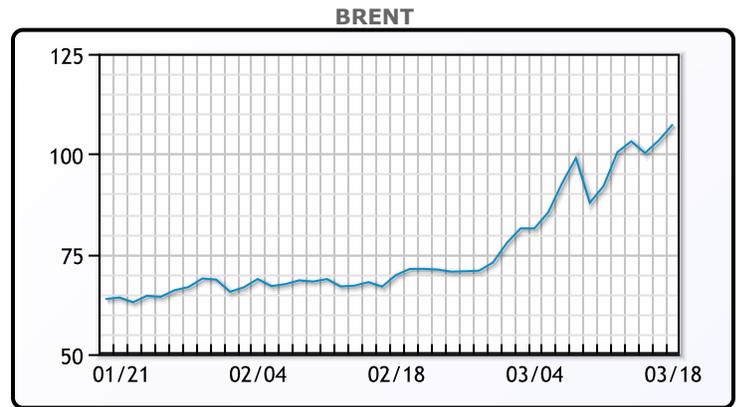
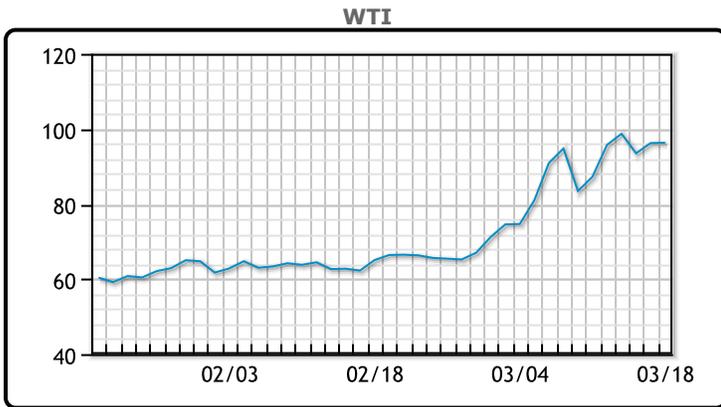
The gains followed a major escalation after Iran's South Pars gas field was struck, prompting threats of further attacks across the region. Qatar's Ras Laffan industrial hub also sustained significant damage from missile strikes, raising fears of broader disruptions to critical energy infrastructure.

The Strait of Hormuz remains effectively closed, with the conflict continuing to disrupt a key transit route that normally carries about 20% of global oil and LNG supply. Total Middle East production losses are estimated between 7-10 million barrels per day, or up to 10% of global demand.

Some offsetting supply developments emerged, including the restart of crude exports from Iraq's Kirkuk fields and efforts to reroute flows from Libya. In the U.S., policymakers introduced temporary measures to ease fuel costs, including a waiver of shipping restrictions and regulatory flexibility on gasoline.

Despite these measures, markets remain tightly balanced, with prices supported by ongoing geopolitical risk and uncertainty surrounding the duration and severity of supply disruptions.

Crude & Product Markets

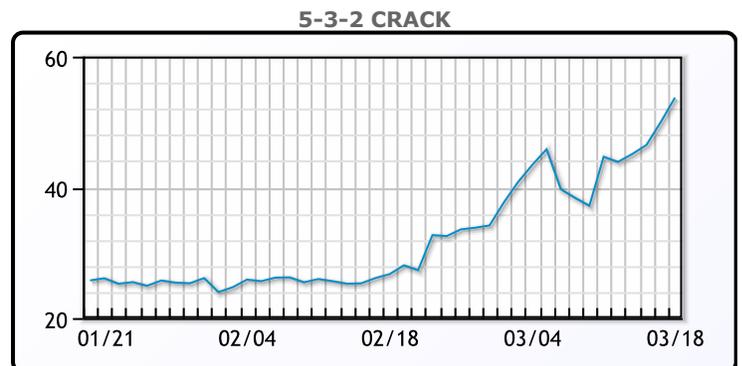
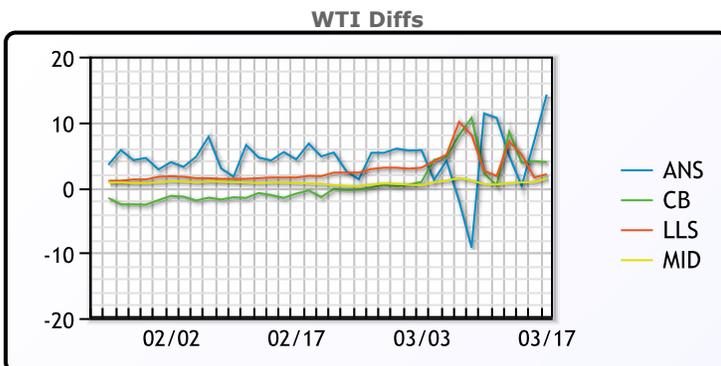


CRUDE

	Last	Week Ago	Month Ago
ANS	110.41	100.54	67.06
BLS	73.2	73.14	68.65
LLS	293.31	262.41	218.29
Mid	97.59	96.39	62.85
WTI	96.21	95.73	62.33

PRODUCTS

	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.1063	-0.1013	-0.0733
NYH RBOB	2.8934	2.7346	1.8954
NYH ULSD	3.9308	3.7439	2.31035
USGC 3%	91.73	93.58	49.09



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	104.1	105.5	77.4
IsoButane	107.1	103.8	77.4
Natural Gasoline	212.3	166.3	128.3
Propane	78.1	72.5	62.5

CONWAY

	Last	Week Ago	Month Ago
Butane	104	90	78.3
IsoButane	115	110	93
Natural Gasoline	196	160	126
Propane	71.3	65.4	58.8

MB NON

	Last	Week Ago	Month Ago
Butane	107.1	99.9	77.4
IsoButane	106.6	110	78.5
Natural Gasoline	212.2	166.2	128.2
Propane	73.9	69	59.7

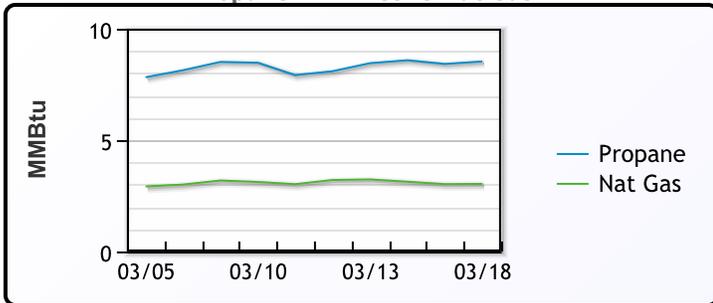
EDMONTON

	Last	Week Ago	Month Ago
Propane	48.3	42.4	35.8

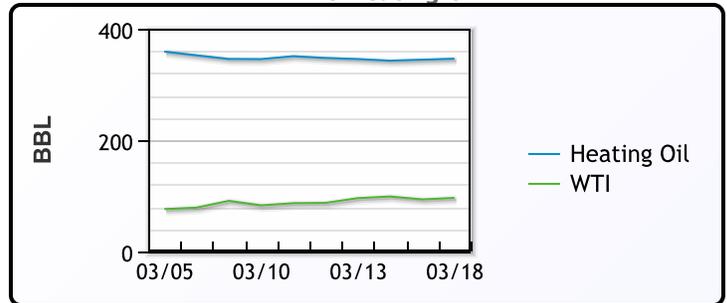
SARNIA

	Last	Week Ago	Month Ago
Propane	119.6	125.3	117.3

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3722	0.0031
DXY	100.086	0.511
Gold	4841.15	-164.46

RATES

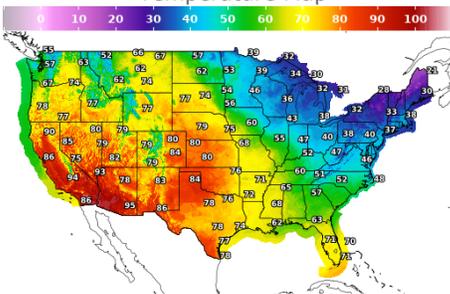
	Last	Change
US 2yr	3.7603	0.0867
US 10yr	4.2591	0.0606
CAN 10yr	3.445	0.06

EQUITIES

	Last	Change
Nasdaq	22166.37	-313.16
TSX	1884.89	-30.833
S&P 500	6636.64	-79.45

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	63	43
Conway	42	19
Cushing	76	49
Denver	79	52
Houston	73	44
Mont Belvieu	70	44
Sarnia	33	19
Williston	65	42

Precipitation Map

