



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	108.65	1.27
Gas Oil	1329.5	93.5
Natural Gas	3.166	0.032
RBOB	312.71	-2.49
ULSD	434.2	18.2
WTI	96.14	-0.18

Market Commentary

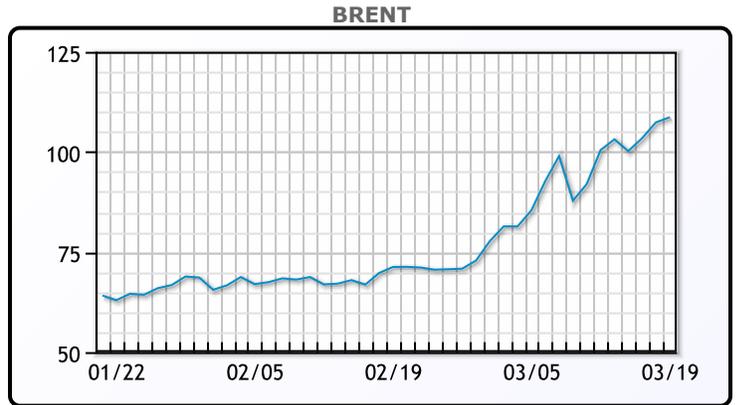
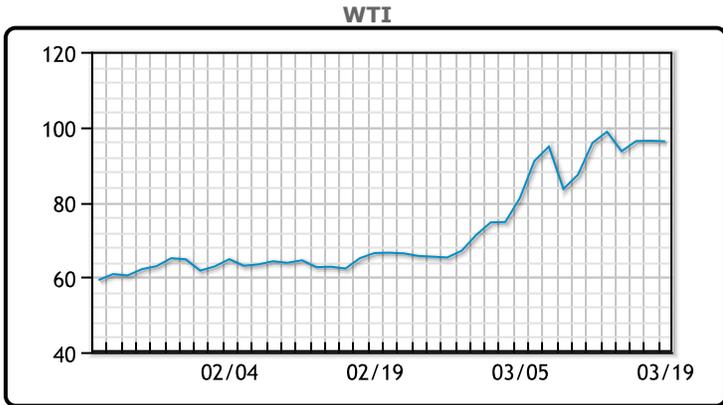
Brent crude rose on Thursday, settling at \$108.65 per barrel, up \$1.27 or 1.18%. Earlier in the session, Brent reached a high of \$119.13, approaching the 3½-year peak seen earlier in March. U.S. West Texas Intermediate (WTI) crude closed at \$96.14 per barrel, down 18 cents or 0.19%, after earlier climbing nearly \$4 to a session high of \$100.02. WTI continues to trade at its widest discount to Brent in 11 years. Meanwhile, Middle East benchmarks Dubai and Oman premiums reached record levels at approximately \$65 per barrel.

Market volatility was driven by overnight attacks on energy facilities in the Middle East. In response, U.S. authorities are considering measures to increase oil supply, including potential releases from the Strategic Petroleum Reserve and the possible removal of sanctions on approximately 140 million barrels of Iranian crude currently stranded on tankers. Analysts note that while this is a relatively modest quantity, it may help temper the recent price rally.

In regional developments, Israel targeted Iran's South Pars gas field, though U.S. officials confirmed that the U.S. and Qatar were not involved. Iran's missile strikes on Qatar's Ras Laffan facilities, including a halt at Shell's 140,000 barrel-per-day Pearl gas-to-liquids plant, caused extensive damage, contributing to a surge in European gas prices to three-year highs. Saudi Arabia intercepted several ballistic missiles and drone attacks on energy infrastructure, including the SAMREF refinery in Yanbu. Kuwait's Mina al-Ahmadi refinery also suffered a limited fire after a drone attack. Oil loadings at the affected ports have since resumed.

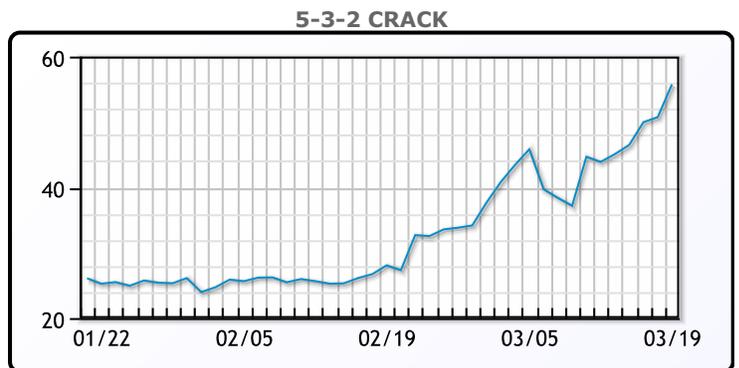
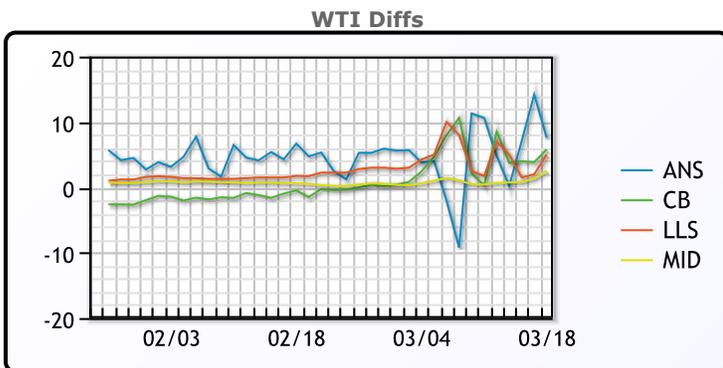
Amid these tensions, the U.S. administration is reportedly weighing the deployment of additional troops to reinforce operations in the region, while domestic oil production from the Permian Basin continues to provide a counterbalance to global supply concerns.

Crude & Product Markets



CRUDE			
	Last	Week Ago	Month Ago
ANS	103.87	98.91	70.52
BLS	73.2	73.14	68.65
LLS	290.25	276.73	221.75
Mid	98.87	99.46	65.52
WTI	96.32	98.71	65.19

PRODUCTS			
	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.1075	-0.105	-0.0733
NYH RBOB	2.856	2.8114	1.9465
NYH ULSD	4.1228	3.9347	2.4227
USGC 3%	102.44	94.72	51.49



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	110.8	100.1	78.1
IsoButane	113.8	102.6	78.1
Natural Gasoline	220.5	178	132.8
Propane	78.1	74.1	63

CONWAY

	Last	Week Ago	Month Ago
Butane	107.5	93	78.5
IsoButane	120	110	93
Natural Gasoline	203	165	129.5
Propane	71	66.5	59.8

MB NON

	Last	Week Ago	Month Ago
Butane	113.7	103.1	78.1
IsoButane	113.3	104.6	79.3
Natural Gasoline	220.5	178	132.7
Propane	74.6	70.6	60.6

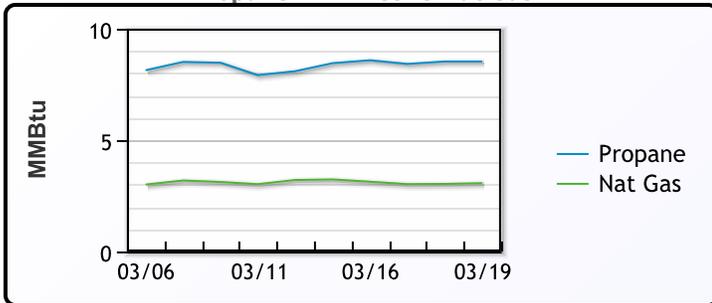
EDMONTON

	Last	Week Ago	Month Ago
Propane	48	43.5	36.8

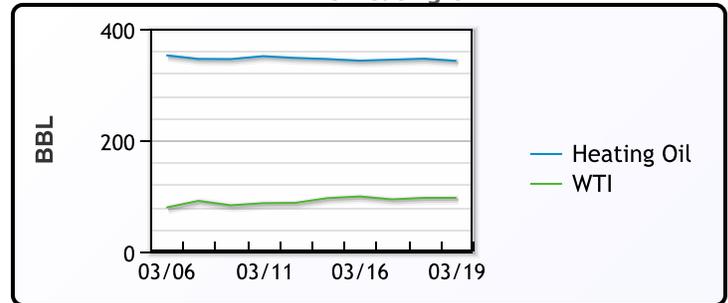
SARNIA

	Last	Week Ago	Month Ago
Propane	119.6	125.4	117.4

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3742	0.001
DXY	99.2	-0.886
Gold	4656.62	-161.88

RATES

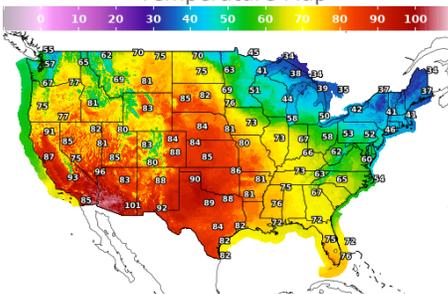
	Last	Change
US 2yr	3.7966	0.0237
US 10yr	4.2571	-0.0079
CAN 10yr	3.44	-0.014

EQUITIES

	Last	Change
Nasdaq	22090.69	-61.73
TSX	1862.12	-22.396
S&P 500	6607.45	-17.25

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	64	48
Conway	39	19
Cushing	85	52
Denver	83	56
Houston	79	50
Mont Belvieu	77	50
Sarnia	46	33
Williston	74	44

Precipitation Map

