



MARKET DAILY

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Major Energy Futures

	Settle	Change
Brent	104.82	-1.01
Gas Oil	1490.75	-30.25
Natural Gas	2.901	-0.028
RBOB	350.73	1.98
ULSD	511.39	-1.55
WTI	101.91	-0.52

Market Commentary

Oil prices settled about 1% lower on Thursday but remained above \$100 a barrel, as concerns over Saudi supply disruptions eased somewhat following reports that additional Saudi crude could reach global markets. Brent crude futures fell \$1.01, or 0.95%, to \$104.82 a barrel, while WTI fell 52 cents, or 0.5%, to \$101.91 a barrel. Both benchmarks had fallen about 3% on Wednesday.

Saudi Arabia is offering additional crude cargoes to Asian refiners through ship-to-ship transfers off Oman's Sohar port, helping offset some of the disruption caused by attacks on the East-West pipeline to the Red Sea. Saudi Arabia is also seeking to restore about half of the pipeline's capacity within days after drone attacks halted the link last week. The East-West pipeline supplies Saudi Arabia's Red Sea export hub at Yanbu, where crude loadings were suspended earlier this week. Saudi Arabia also canceled some crude cargoes to European customers. A prolonged pipeline outage could affect as much as 4% of global oil supply, although Energy Secretary Chris Wright said crude should be flowing through the pipeline within days. Three pumping stations serving the pipeline were damaged in last week's attack, and the full repair timeline remains unclear.

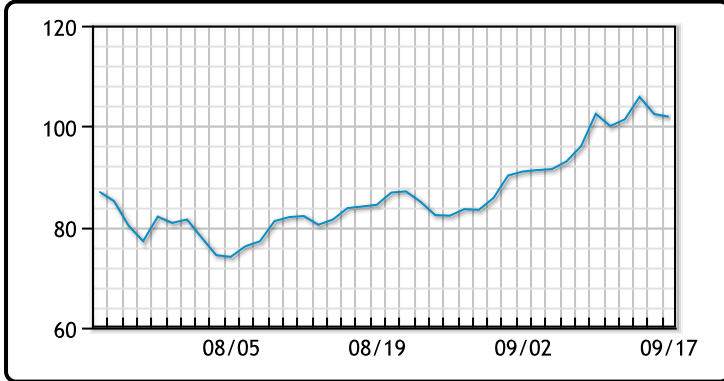
The physical oil market remains tight. Tanker traffic through the Strait of Hormuz continues to fall, while continued fighting between Saudi Arabia and the Iran-backed Houthis is keeping Red Sea shipping and regional energy infrastructure at risk of further disruption.

Diesel supplies continue to be another major source of pressure on energy markets. Disruptions to energy infrastructure in the Middle East and Russia are constraining fuel availability, while European gasoil futures and U.S. ultra-low sulfur diesel futures both reached record settlement levels earlier this week.

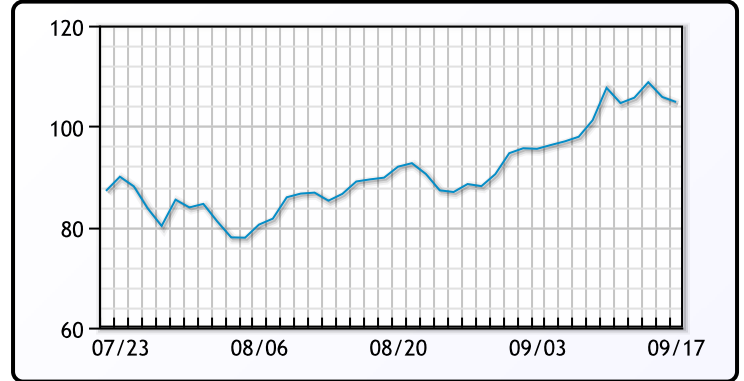
A Ukrainian drone attack also damaged a refinery in Yaroslavl, Russia, on Thursday, causing a fire that was later extinguished. Continued disruptions to refining capacity in Russia are adding further pressure to an already tight global diesel market.

Crude & Product Markets

WTI



BRENT



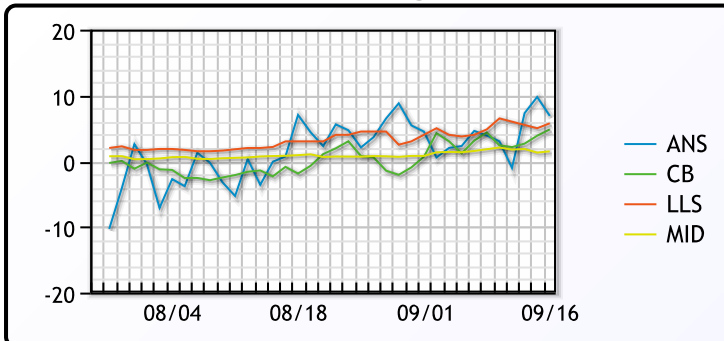
CRUDE

	Last	Week Ago	Month Ago
ANS	109.31	99.01	89.42
BLS	73.2	73.14	68.65
LLS	280.95	288	264.57
Mid	103.92	101.81	83.31
WTI	102.43	100.05	82.4

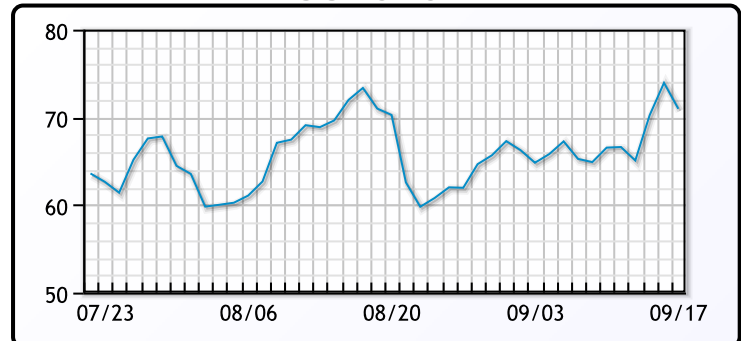
PRODUCTS

	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.0938	-0.09	-0.093
NYH RBOB	3.575	3.6572	3.2466
NYH ULSD	5.1753	4.9993	4.3079
USGC 3%	76.45	80.23	67.75

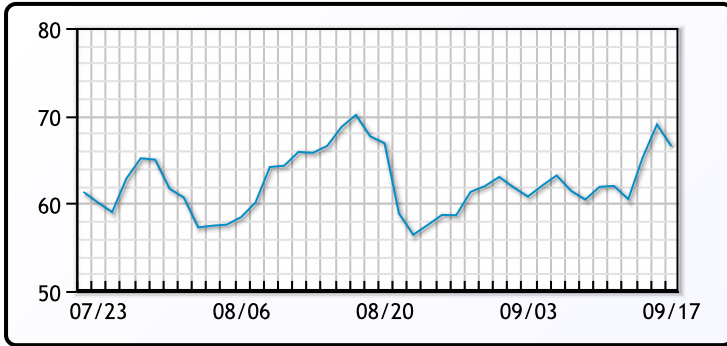
WTI Diffs



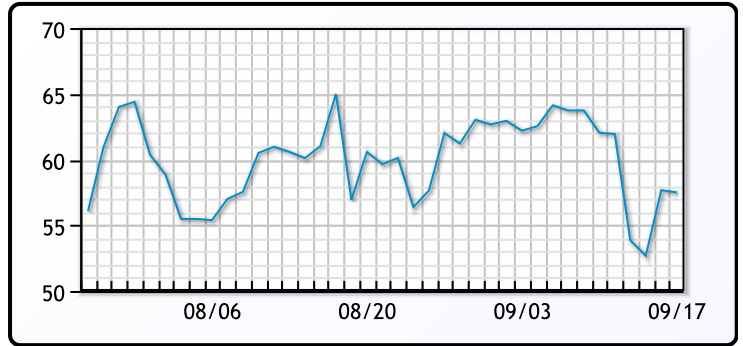
5-3-2 CRACK



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	131.1	125.9	100.6
IsoButane	134.1	128.9	103.6
Natural Gasoline	212	208	181.3
Propane	86.7	86.4	71.1

MB NON

	Last	Week Ago	Month Ago
Butane	134.1	128.9	103.6
IsoButane	141.9	148.9	150.1
Natural Gasoline	212	208	181.2
Propane	83.2	83.4	68.4

CONWAY

	Last	Week Ago	Month Ago
Butane	136.3	131	102.5
IsoButane	148	158	155
Natural Gasoline	210	210	178.3
Propane	77.8	75	62.5

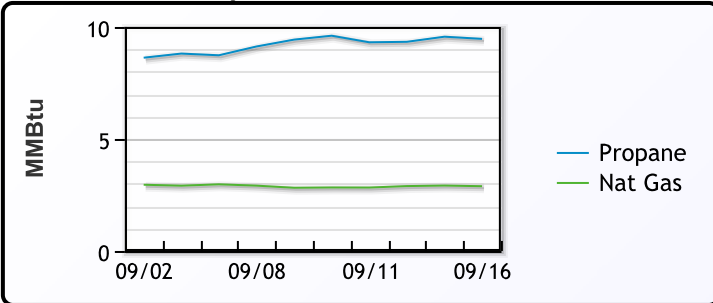
EDMONTON

	Last	Week Ago	Month Ago
Propane	54.8	52	39.5

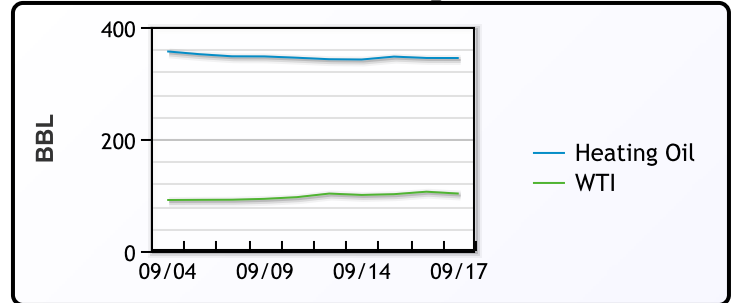
SARNIA

	Last	Week Ago	Month Ago
Propane	97.8	93	79.3

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.3991	0.0003
DXY	100.21	-0.042
Gold	4343.16	79.51

RATES

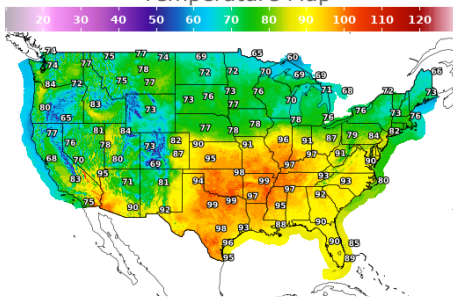
	Last	Change
US 2yr	4.6726	-0.0633
US 10yr	4.9344	-0.0881
CAN 10yr	3.821	-0.121

EQUITIES

	Last	Change
Nasdaq	26418.3	439.87
TSX	2107.43	16.479
S&P 500	7642.11	90.3

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	70	41
Conway	66	47
Cushing	97	75
Denver	77	62
Houston	87	79
Mont Belvieu	87	79
Sarnia	68	63
Williston	69	43

Precipitation Map

