



MARKET DAILY

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Major Energy Futures

	Settle	Change
Brent	100.58	0.26
Gas Oil	1329.5	29
Natural Gas	3.114	0.031
RBOB	327.32	-6.62
ULSD	456.94	4.41
WTI	89.44	0.01

Market Commentary

Oil prices finished nearly unchanged on Tuesday as increased crude exports from the Middle East helped ease some supply concerns, while continued attacks in the region kept a floor under prices. Markets also weighed plans by the Group of Seven to release emergency crude and diesel inventories.

Brent crude rose 26 cents, or 0.3%, to settle at \$100.58 a barrel, while WTI increased one cent, or 0.01%, to settle at \$89.44 a barrel.

Additional Middle Eastern barrels reaching the global market have helped offset some of the supply disruptions caused by the war with Iran. Approximately 12 million barrels per day of crude and 2 million barrels per day of refined products have reportedly been moving out of the region by tanker over the past seven to 10 days. Saudi Arabia also reported that 5.8 million barrels had moved through its East-West Pipeline toward the Red Sea export hub of Yanbu.

At the same time, concerns over additional disruptions remain. Attacks on airports in Jazan and Najran in Saudi Arabia, along with continued fighting involving Iran-backed Houthi forces in Yemen, are keeping traders focused on the potential for further interruptions to Middle Eastern energy supplies.

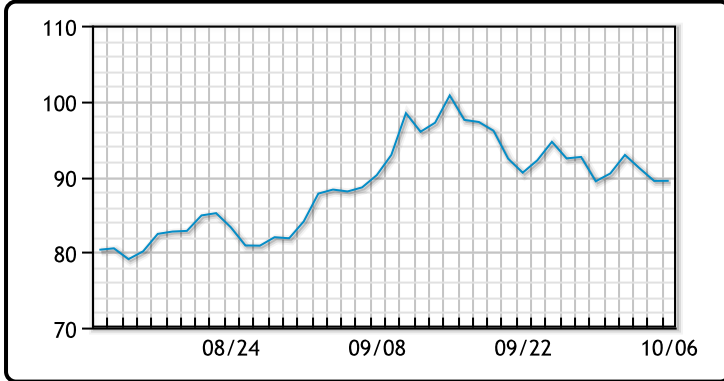
The global diesel market remains another major concern. The G7 has agreed to release 100 million barrels of emergency diesel and crude inventories, with the International Energy Agency expected to discuss the details of the release next week. The move comes as diesel prices remain elevated and supply shortages continue to affect transportation, agriculture and industry.

The EIA also expects the ongoing disruption from the war with Iran to weigh on global petroleum production in 2026. World production is projected to fall from 106.3 million barrels per day in 2025 to 101.1 million barrels per day in 2026, while demand is expected to decline from 104.4 million barrels per day to 102.4 million barrels per day. The agency expects both supply and demand to recover in 2027, with production reaching 109.6 million barrels per day and consumption reaching 104.6 million barrels per day.

U.S. crude inventories will be another focus this week, with the API report due Tuesday and the EIA report Wednesday. Analysts are expecting crude stocks to have increased by approximately 1.7 million barrels for the week ended October 2.

Crude & Product Markets

WTI



BRENT



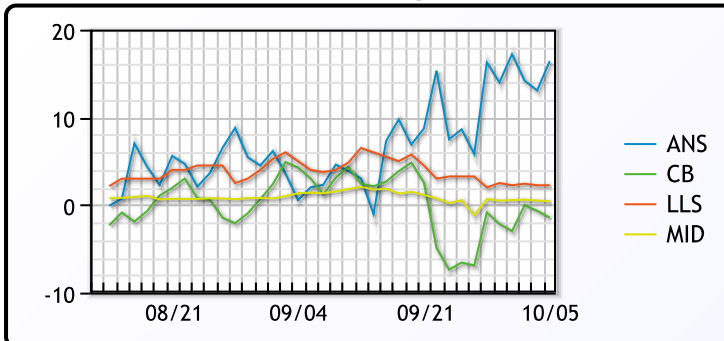
CRUDE

	Last	Week Ago	Month Ago
ANS	105.85	107.62	93.78
BLS	73.2	73.14	68.65
LLS	294.35	288.33	276.01
Mid	89.86	90.98	92.83
WTI	89.43	90.42	91.48

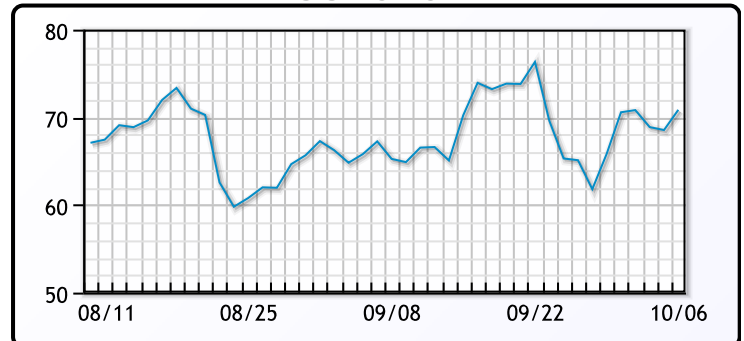
PRODUCTS

	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.105	-0.1088	-0.0925
NYH RBOB	3.3662	3.2655	3.6696
NYH ULSD	4.6252	4.7381	4.6252
USGC 3%	77.99	79.6	74.4

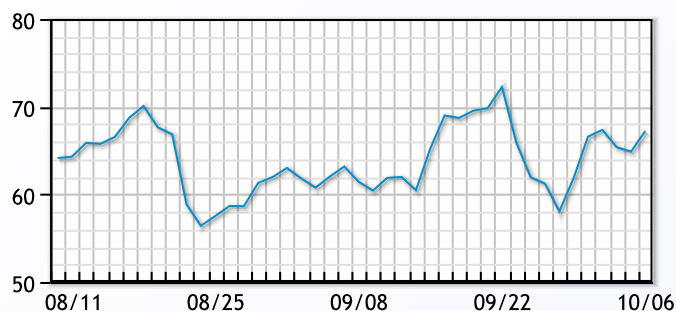
WTI Diffs



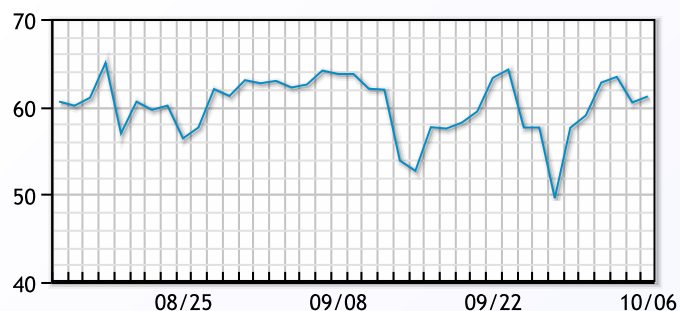
5-3-2 CRACK



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	144.8	127.6	117.8
IsoButane	147.8	130.6	120.8
Natural Gasoline	208	201.5	198.5
Propane	93.3	88.9	80

MB NON

	Last	Week Ago	Month Ago
Butane	147.8	130.6	120.7
IsoButane	158.8	142.6	142.8
Natural Gasoline	208	201.5	198.5
Propane	90.4	85.5	77.2

CONWAY

	Last	Week Ago	Month Ago
Butane	158	136	122
IsoButane	195	150	148
Natural Gasoline	210	203	201.3
Propane	87.1	79.5	69.8

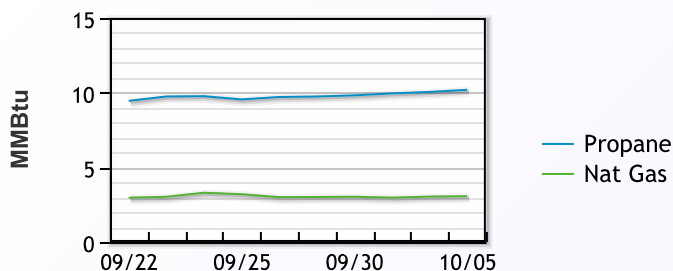
EDMONTON

	Last	Week Ago	Month Ago
Propane	64.1	56.5	46.8

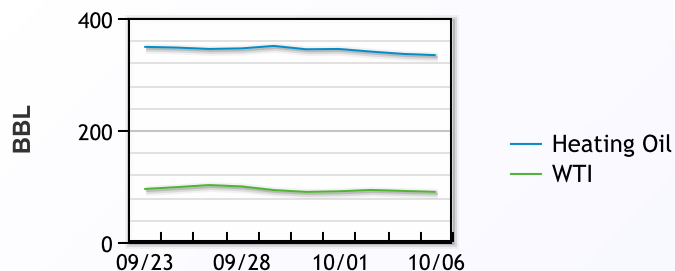
SARNIA

	Last	Week Ago	Month Ago
Propane	106.1	101.4	88.3

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.4215	-0.0045
DXY	101.856	-0.311
Gold	4167.43	27.93

RATES

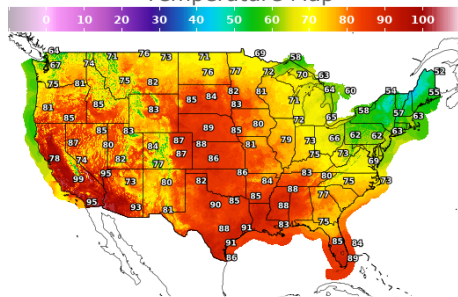
	Last	Change
US 2yr	4.8017	-0.0105
US 10yr	5.2793	-0.0253
CAN 10yr	3.928	-0.022

EQUITIES

	Last	Change
Nasdaq	27608.9	131.59
TSX	2097.64	7.463
S&P 500	7823.02	49.07

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	70	46
Conway	68	46
Cushing	84	55
Denver	86	56
Houston	91	71
Mont Belvieu	90	71
Sarnia	64	38
Williston	70	49

Precipitation Map

