



MARKET DAILY

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Major Energy Futures

	Settle	Change
Brent	100.20	-0.38
Gas Oil	1421	-53.5
Natural Gas	3.203	0.048
RBOB	323.42	2.7
ULSD	462.27	2.42
WTI	88.28	-1.16

Market Commentary

Oil prices moved lower on Wednesday after a volatile trading session as markets reacted to plans by the International Energy Agency to accelerate emergency oil stock releases, with a focus on diesel supplies. Continued concerns over disruptions in the Middle East, the war in Ukraine and an approaching storm in the Gulf of Mexico limited the decline.

Brent crude futures fell 38 cents, or 0.38%, to settle at \$100.20 a barrel, while U.S. West Texas Intermediate (WTI) crude fell \$1.16, or 1.3%, to settle at \$88.28 a barrel.

The IEA said previously announced emergency stock releases could be brought to market more quickly, potentially putting around 100 million barrels into the market. France also plans to release 10 million barrels of diesel from its strategic reserves as governments work to ease tight fuel supplies and record-high prices.

The latest EIA data provided some additional support to crude prices, with U.S. crude inventories falling by 3.2 million barrels to 424.1 million barrels during the week ended October 2. Analysts had been expecting a 1.7-million-barrel increase. Distillate inventories also declined, while gasoline stocks increased.

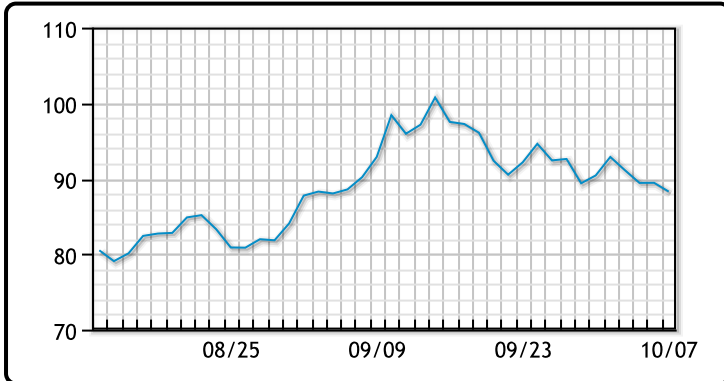
Supply concerns remain a major factor in the market. Fighting involving Iran-backed Houthi forces continued in Yemen, including an attack on Aden's international airport, while the broader conflict in the Middle East continues to threaten regional energy infrastructure and exports. Ongoing attacks involving Russia and Ukraine are also affecting energy markets, with strikes on Russian oil facilities adding further pressure to global fuel supplies.

The approaching storm in the Gulf of Mexico is creating another potential supply disruption. Forecasters expect the storm to become the first Atlantic hurricane of 2026 and potentially affect oil and natural gas operations along the U.S. Gulf Coast. The Gulf currently produces approximately 2.05 million barrels of crude oil per day, or about 15% of total U.S. production.

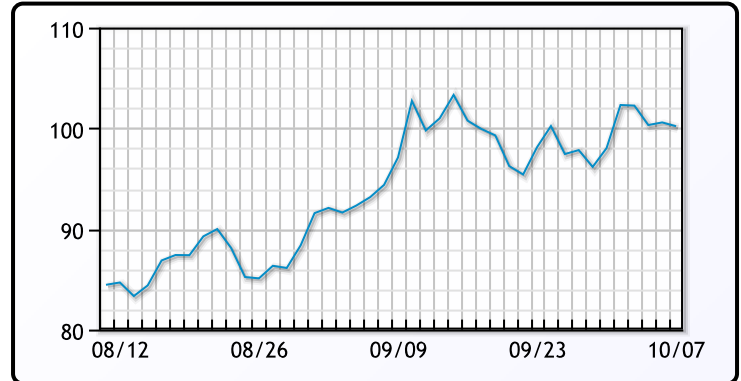
With geopolitical risks already affecting global energy markets, the possibility of Gulf production and refining disruptions adds another layer of uncertainty. Estimates suggest approximately 11.2 million barrels of oil production could be affected over the course of the storm.

Crude & Product Markets

WTI



BRENT



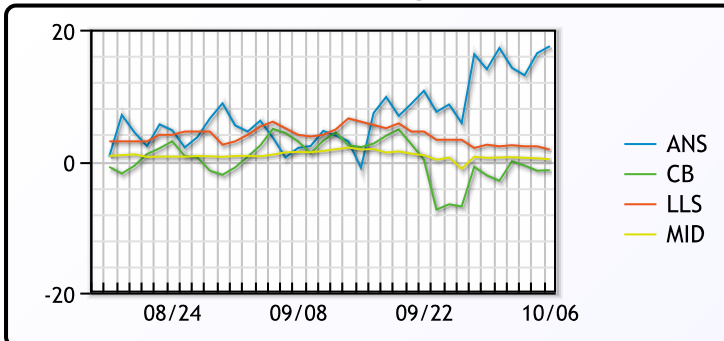
CRUDE

	Last	Week Ago	Month Ago
ANS	106.92	107.05	93.78
BLS	73.2	73.14	68.65
LLS	295.52	290.17	276.01
Mid	89.71	93.47	92.83
WTI	89.44	92.87	91.48

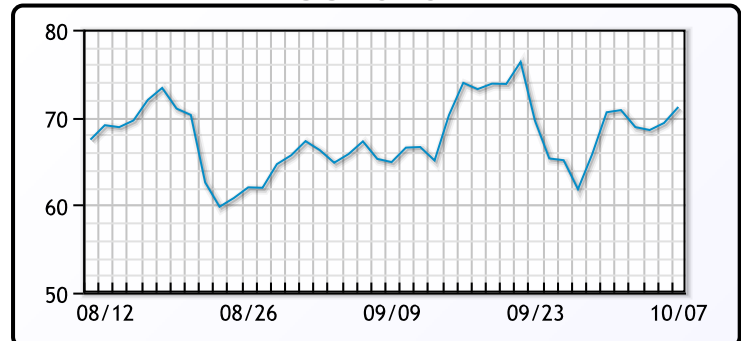
PRODUCTS

	Last	Week Ago	Month Ago
GC Gas 87	214.12	211.515	194.13
Gulf ULSD	-0.095	-0.0913	-0.0925
NYH RBOB	3.3832	3.5826	3.6696
NYH ULSD	4.6044	4.687	4.6252
USGC 3%	80.43	79.84	74.4

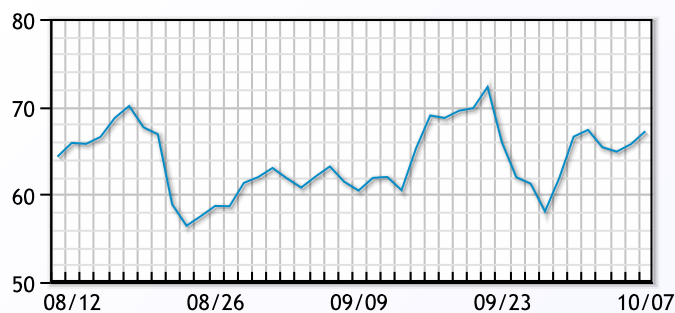
WTI Diffs



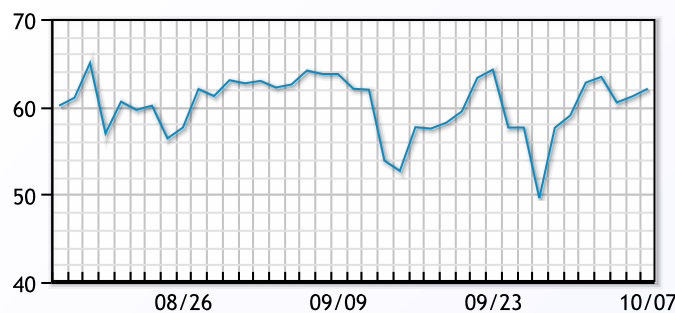
5-3-2 CRACK



3-2-1 Crack



Gulf 3-2-1 Crack



NGLs

MB

	Last	Week Ago	Month Ago
Butane	145	130.4	117.8
IsoButane	148	133.4	120.8
Natural Gasoline	208.5	198.5	198.5
Propane	91.8	89.2	80

MB NON

	Last	Week Ago	Month Ago
Butane	148	133.4	120.7
IsoButane	168	142.4	142.8
Natural Gasoline	208.5	198.5	198.5
Propane	89.4	86.2	77.2

CONWAY

	Last	Week Ago	Month Ago
Butane	154	143	122
IsoButane	188	150	148
Natural Gasoline	210.5	201	201.3
Propane	85.8	79.4	69.8

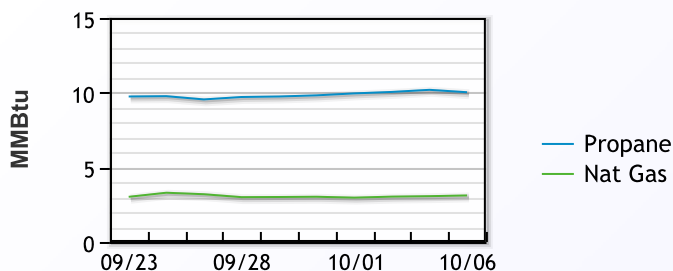
EDMONTON

	Last	Week Ago	Month Ago
Propane	62.8	56.4	46.8

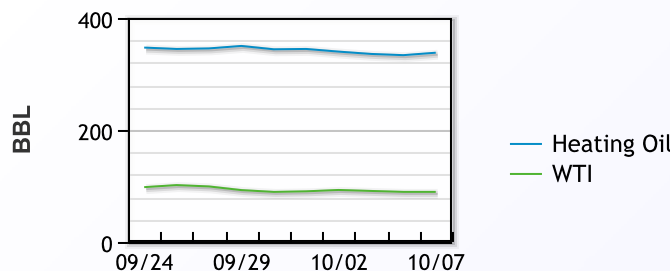
SARNIA

	Last	Week Ago	Month Ago
Propane	104.8	100.4	88.3

Propane MT.B Tet vs Nat Gas



WTI vs Heating Oil



FX

	Last	Change
CAD	1.4262	0.0054
DXY	102.286	0.453
Gold	4104.16	-60.02

RATES

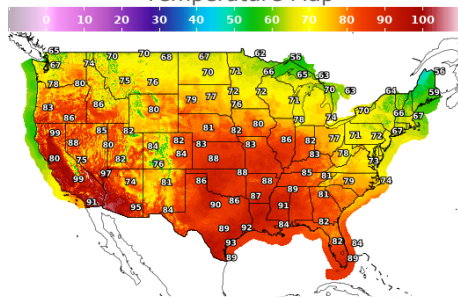
	Last	Change
US 2yr	4.7724	-0.0251
US 10yr	5.2837	0.0044
CAN 10yr	3.948	0.02

EQUITIES

	Last	Change
Nasdaq	27538.69	-61.2
TSX	2064.75	-34.31
S&P 500	7799.75	-19.18

Weather Data

Temperature Map



City	HIGH °F	LOW °F
Calgary	59	38
Conway	66	47
Cushing	89	58
Denver	78	55
Houston	90	70
Mont Belvieu	91	71
Sarnia	74	54
Williston	68	40

Precipitation Map

