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WEEKLY NATURAL GAS MARKET UPDATE

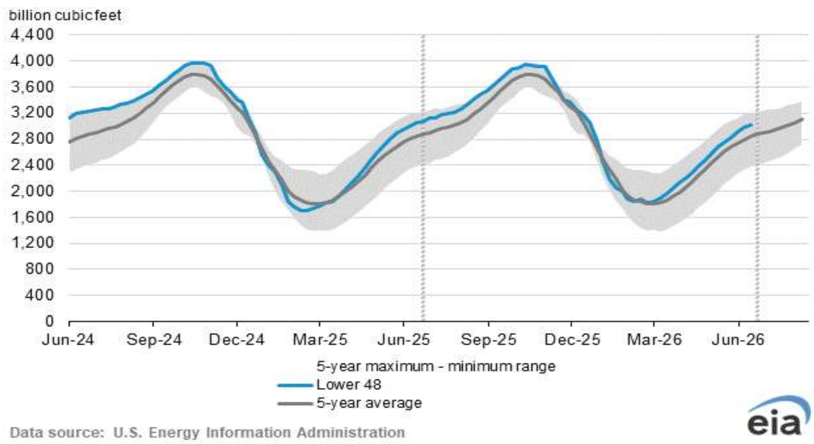
JULY 20, 2026

The August-2026 NYMEX natural gas contract closed Friday at $2.911, down $0.029 for the week. The 12-month strip average price of natural gas fell by $0.027 over the same period. The August-2026 NYMEX crude oil contract closed Friday at $82.49, up $11.08 for the week. Updated long term weather forecasts released last week by the NOAA suggest that normal/above normal temperatures are likely to prevail over the entire US for the balance of summer. Per the NHC, TD Two is expected to become TS Bertha later today as it tracks across the northern Gulf of America. Baker Hughes reported on Friday that the US natural gas rig count was unchanged at 126 while total rigs (gas/oil combined) were up 7 to 588. In its most recent natural gas storage data, the EIA reported an injection of 41 Bcf into national inventories, a number in line with consensus market expectations. Early estimates for this week's report indicate an expected injection in the range of 20 to 40 Bcf vs. an injection of 47 Bcf for the same week last year and a 5-yr avg. injection of 45 Bcf.

EIA NATURAL GAS STORAGE REPORT
Week Ending July 10, 2026

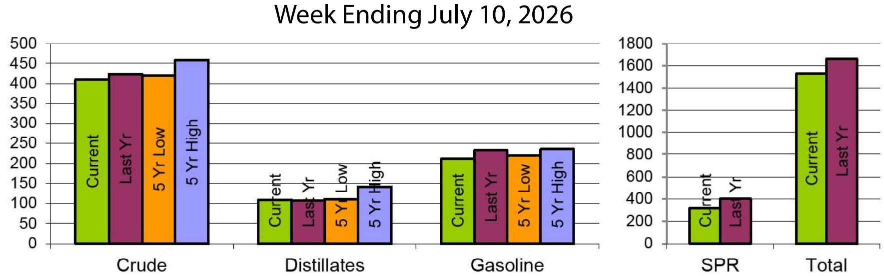
Region	Inv. Level	Week Δ	Year Ago	5yr Avg.
East	614	+14	626	604
Midwest	749	+20	727	705
Mountain	240	+4	234	198
Pacific	319	-0-	294	262
S. Central	1103	+3	1163	1074
Total	3024	+41	3045	2843

WORKING GAS IN UNDERGROUND STORAGE COMPARED WITH 5-YEAR RANGE



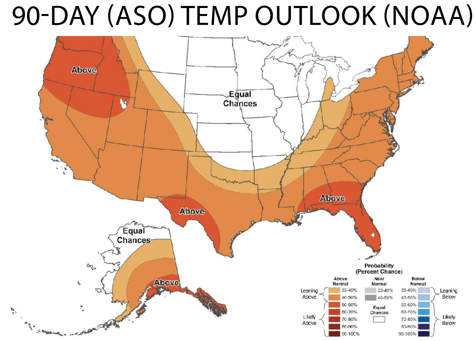
Storage Highlights: Working gas in storage was 3,024 Bcf as of Friday, July 10, 2026, according to EIA estimates. This represents a net increase of 41 Bcf from the previous week. Stocks were 21 Bcf less than last year at this time and 181 Bcf above the five-year average of 2,843 Bcf. At 3,024 Bcf, total working gas is within the five-year historical range. (Totals may not equal sum of components due to independent rounding)

EIA PETROLEUM INVENTORY (BARRELS X 1000)
Week Ending July 10, 2026

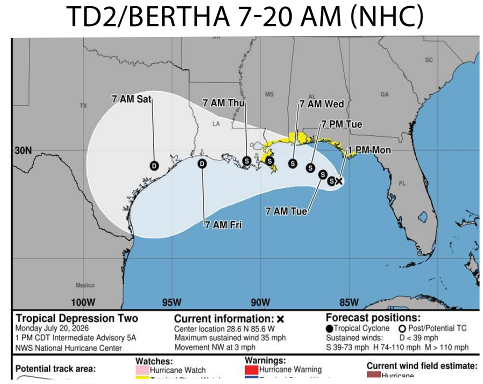


U.S. commercial crude oil inventories (excluding those in the Strategic Petroleum Reserve) decreased by 1.7 million barrels from the previous week. At 409.7 million barrels, U.S. crude oil inventories are about 6% below the five-year average for this time of year. Total motor gasoline inventories decreased by 1.5 million barrels from last week and are 8% below the five-year average for this time of year. Both finished gasoline and blending component inventories decreased last week. Distillate fuel inventories increased by 4.6 million barrels last week and are about 11% below the five-year average for this time of year. Propane/propylene inventories increased by 3.0 million barrels from last week and are 28% above the five-year average for this time of year. Total commercial petroleum inventories increased by 13.3 million barrels last week.

90-DAY (ASO) TEMP OUTLOOK (NOAA)



TD2/BERTHA 7-20 AM (NHC)



BAKER HUGHES US NATURAL GAS RIG COUNT, 7/17/2026

	This Week	+/-	Last Week	+/-	Year Ago
Gas Rigs	126	-0-	126	+9	117