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WEEKLY NATURAL GAS MARKET UPDATE

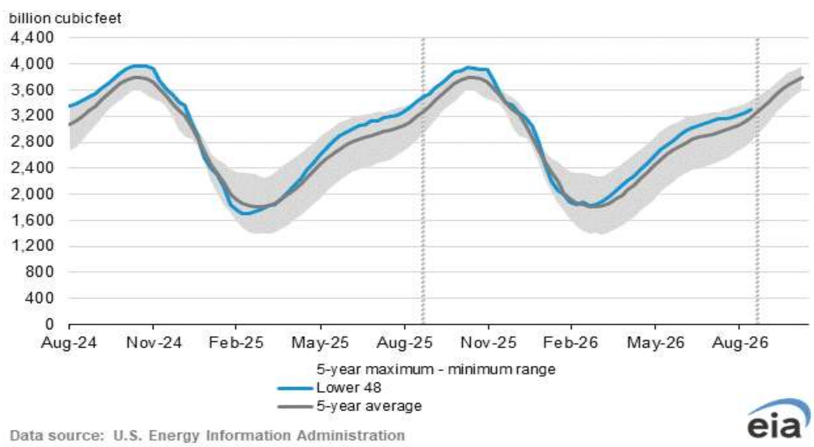
SEPTEMBER 21, 2026

The Oct-2026 NYMEX natural gas contract closed Friday at $2.912, up $0.081 for the week. The 12-month strip average price of natural gas fell by $0.034 over the same period. The Oct-2026 NYMEX crude oil contract closed Friday at $100.30 up $0.25 for the week. Updated long term weather forecasts released by the NOAA last week suggest that a mild fall and winter may be in store for a significant portion of the US this year. Per the NHC, there is no threat of storm activity in the Gulf of America this week. We are now past the historical peak of the Atlantic season and have yet to see our first hurricane develop. Baker Hughes reported on Friday that the US natural gas rig count was up 2 to 134 while total rigs (gas/oil combined) were up 4 to 595. In its most recent natural gas storage data, the EIA reported an injection of 44 Bcf into national inventories, a number at the low end of consensus market expectations. Early estimates for this week's report indicate an expected injection in the range of 50 to 60 Bcf vs. an injection of 77 Bcf for the same week last year and a 5-yr avg. injection of 76 Bcf.

EIA NATURAL GAS STORAGE REPORT
Week Ending September 11, 2026

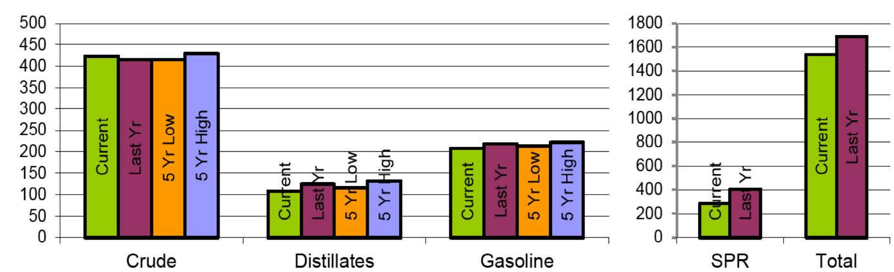
Region	Inv. Level	Week Δ	Year Ago	5yr Avg.
East	795	+22	778	752
Midwest	934	+26	916	899
Mountain	241	+2	260	224
Pacific	289	-1	296	263
S. Central	1039	-5	1170	1041
Total	3298	+44	3420	3180

WORKING GAS IN UNDERGROUND STORAGE COMPARED WITH 5-YEAR RANGE



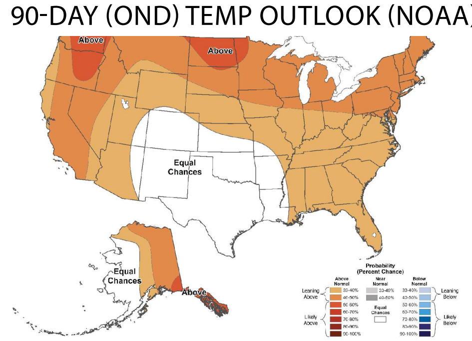
Storage Highlights: Working gas in storage was 3,298 Bcf as of Friday, September 11, 2026, according to EIA estimates. This represents a net increase of 44 Bcf from the previous week. Stocks were 122 Bcf less than last year at this time and 118 Bcf above the five-year average of 3,180 Bcf. At 3,298 Bcf, 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 September 11, 2026

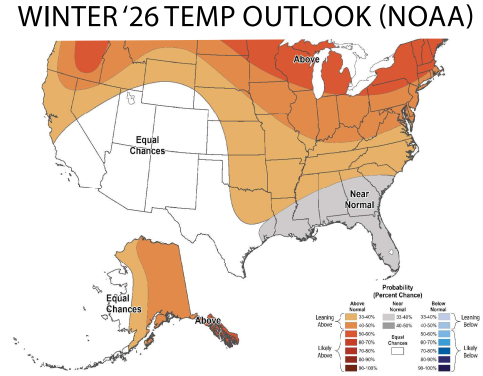


Commercial crude oil inventories (excluding the Strategic Petroleum Reserve) decreased 0.6 million barrels to 423.4 million barrels, 1% above the five-year average. Gasoline inventories increased 0.8 million barrels, 5% below the five-year average. Distillate inventories increased 1.6 million barrels, 13% below the five-year average. Propane/propylene inventories decreased 1.4 million barrels, 22% above the five-year average. Total commercial petroleum inventories increased by 2.6 million barrels for the week.

90-DAY (OND) TEMP OUTLOOK (NOAA)



WINTER '26 TEMP OUTLOOK (NOAA)



BAKER HUGHES US NATURAL GAS RIG COUNT, 9/18/2026

	This Week	+/-	Last Week	+/-	Year Ago
Gas Rigs	134	+2	132	+16	118