

WEEKLY MARKET UPDATE



September 3, 2026

SUMMARY

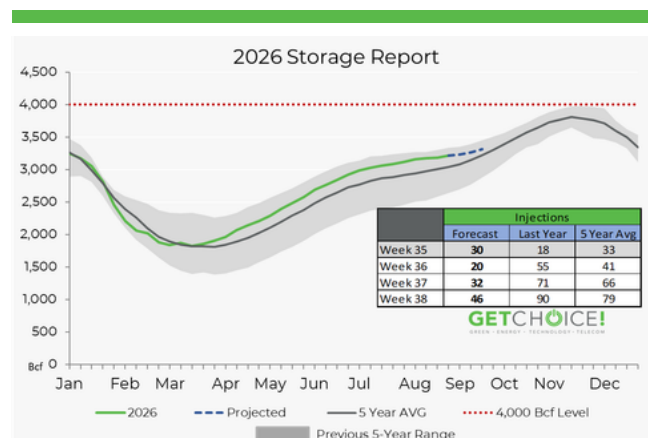
Today's EIA storage report showed a 30 Bcf injection for the week ended August 28, lifting total working gas to 3,214 Bcf and widening the year-on-year deficit to 50 Bcf. Regional builds were concentrated in the East and Midwest, while South Central, Pacific, and Mountain all posted net withdrawals – a pattern consistent with continued strong Gulf Coast demand. Lower 48 production notched another record, averaging about 111.5 Bcf/d in August, up from July's revised 110.7 Bcf/d, with further supply growth on the way now that Energy Transfer's Hugh Brinson Pipeline began service September 1 (up to 2.2 Bcf/d of eventual Permian-to-East-Texas capacity). LNG feedgas demand has also strengthened now that Freeport LNG has completed maintenance and returned to service, reaching its highest level since late June – a reversal from the maintenance-capped levels of recent weeks.

Market Indicator	Current		Last Week			Last Year		
	Date	Units	Date	Units	% Change	Date	Units	% Change
NYMEX, Prompt (\$/MMBtu)	9/2/2026	\$2.96	8/27/2026	\$2.84	4.0%	9/12/2025	\$2.94	0.5%
NYMEX, Rolling 12 (\$/MMBtu)	9/2/2026	\$3.17	8/27/2026	\$3.17	-0.1%	9/12/2025	\$3.70	-14.4%
Storage (Bcf)	9/3/2026	3214	8/27/2026	3184	0.9%	9/3/2025	3264	-1.5%
Total Rig Count (Oil & Gas)	8/28/2026	588	8/21/2026	588	0.0%	8/28/2025	536	9.7%

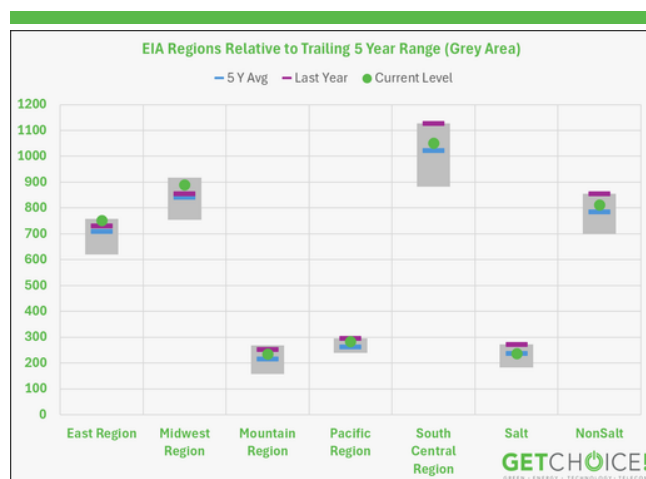
NYMEX PRICING MOVEMENT



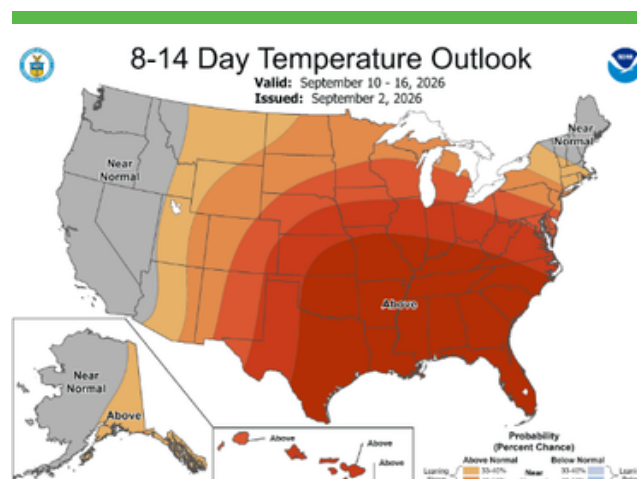
2026 STORAGE REPORT



STORAGE BY REGION



TEMPERATURE FORECAST



ARTICLE OF THE WEEK: "U.S. LNG FEEDGAS JUMPS BACK

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