

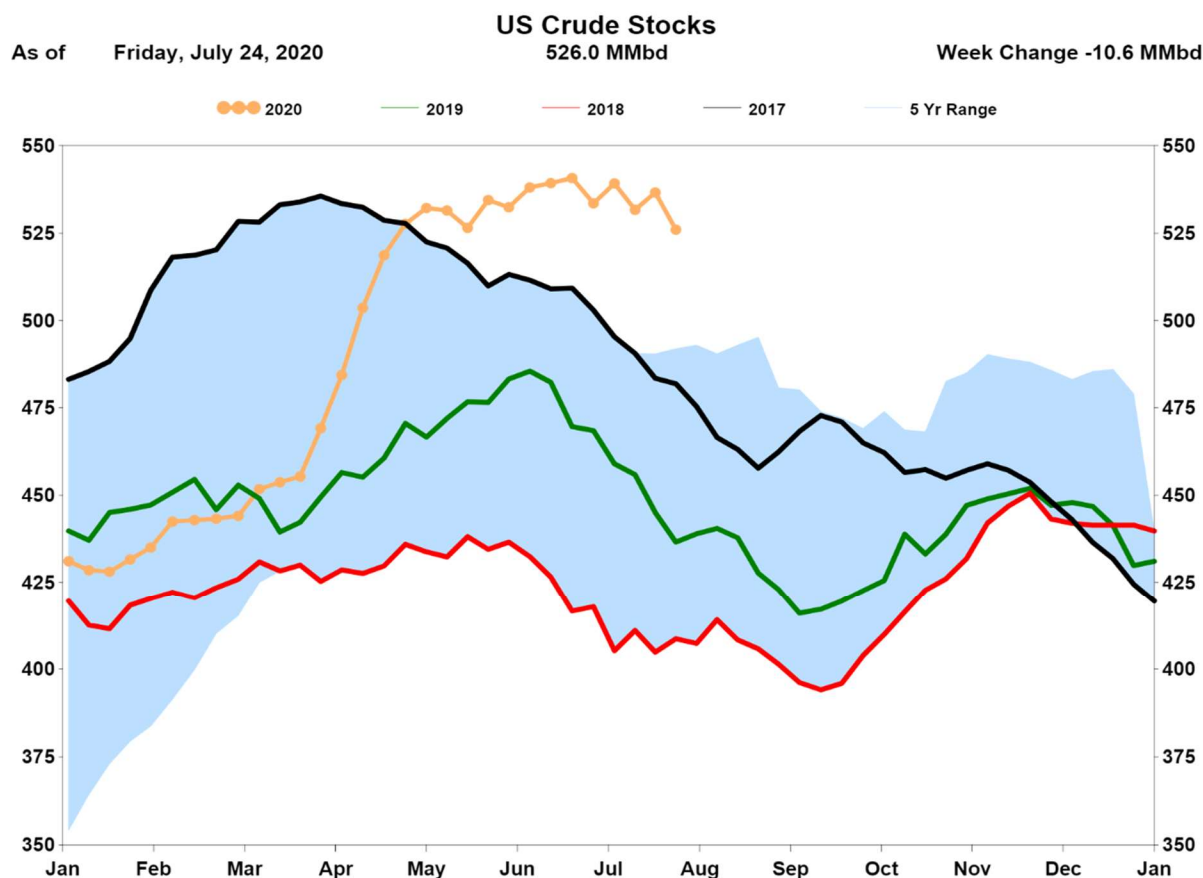


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Crude Oil Stocks sizeable withdrawal

enelyst reported prior to the number: *Our poll of 19 analysts, models and surveys came in at a small draw of .610M. Our survey number was bigger than the rest except for Platts who said -1.2M Our range WAS CRAZY WIDE AT -6.7m TO +6.17m*

The EIA broke the bounds of the Range reporting Total Crude Oil Inventories decreasing by 10.6 million barrels to 526 million barrels for the week ending July 24, 2020 [..this withdrawal after a surprising build last week..]

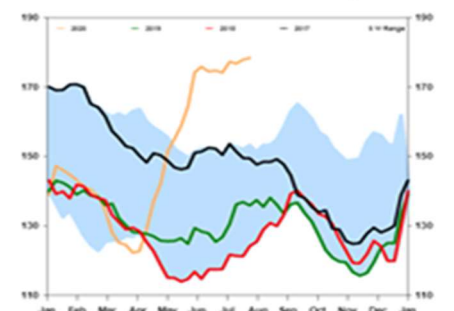
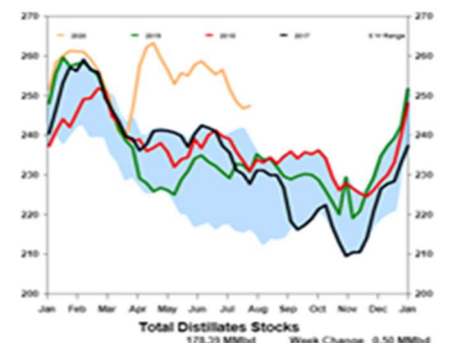
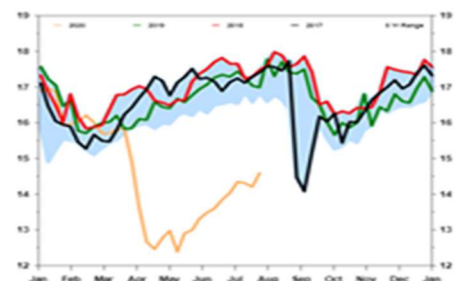
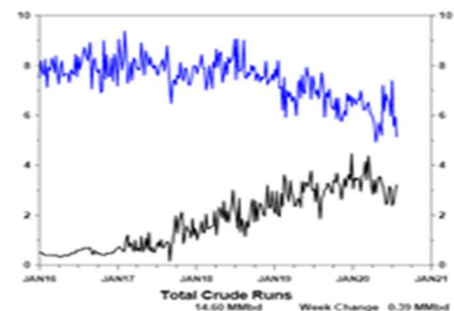


[Source: IIR Fundamental Analytics](#)

Post-EIA Petroleum Status Report Data Summary

Week Ending July 24, 2020

Stocks, Supply, Demand	Latest	Week Change
Crude Oil Exports (thou bpd)	2,993	450
Crude Oil Production (thou bpd)	11,100	100
Crude Oil Imports PADD 1 (thou bpd)	244	-110
Crude Oil Imports PADD 3 (thou bpd)	2,026	443
Crude Oil Imports PADD 5 (thou bpd)	686	-165
Crude Oil Imports (thou bpd)	5,941	374
Crude Oil Inputs into Refineries (thou bpd)	14,206	-103
Crude Oil SPR Stocks (thou b)	656,147	-2
Crude Oil Stocks (thou b)	536,580	4,892
Cushing Stocks (thou b)	50,112	138
Distillates Exports (thou bpd)	1,439	107
Distillates Product Supplied (thou bpd)	3,223	-469
Distillates Stocks (thou b)	177,883	1,074
Gasoline Exports (thou bpd)	479	-122
Gasoline Imports (thou bpd)	542	49
Gasoline Product Supplied (thou bpd)	8,550	-98
Gasoline Production (thou bpd)	9,079	-16
Gasoline Stocks (thou b)	246,733	-1,802
Petroleum Products Supplied (thou bpd)	17,654	-826
Refinery Utilization - Percent	78	-0

 US Crude Imports and Exports
Latest Imports: 5.1 MMbbl, Latest Exports: 3.2 MMbbl


EIA Stocks Summary
As of July 24, 2020

	Crude Stocks	Week Chg	5 Year Average	2019 Level	Gasoline Stocks	Week Chg	5 Year Average	2019 Level	Distillate Stocks	Week Chg	5 Year Average	2019 Level
PADD 1	12.7	-0.6	14.9	13.0	68.0	0.3	63.4	59.1	66.2	0.7	49.2	45.2
PADD 2	139.7	2.2	133.8	138.4	51.1	0.5	50.4	49.0	34.1	0.0	31.7	32.8
PADD 3	295.5	-10.5	228.0	217.2	91.0	1.3	79.3	83.8	60.3	-0.7	43.5	39.8
PADD 4	25.3	-0.1	20.6	19.9	7.5	-0.2	6.9	7.5	3.9	-0.1	3.9	4.1
PADD 5	52.8	-1.7	51.1	48.1	29.7	-1.3	28.8	31.3	13.9	0.6	13.3	14.1
Total	526.0	-10.6	448.5	436.5	247.4	0.7	228.9	230.7	178.4	0.5	141.5	135.9

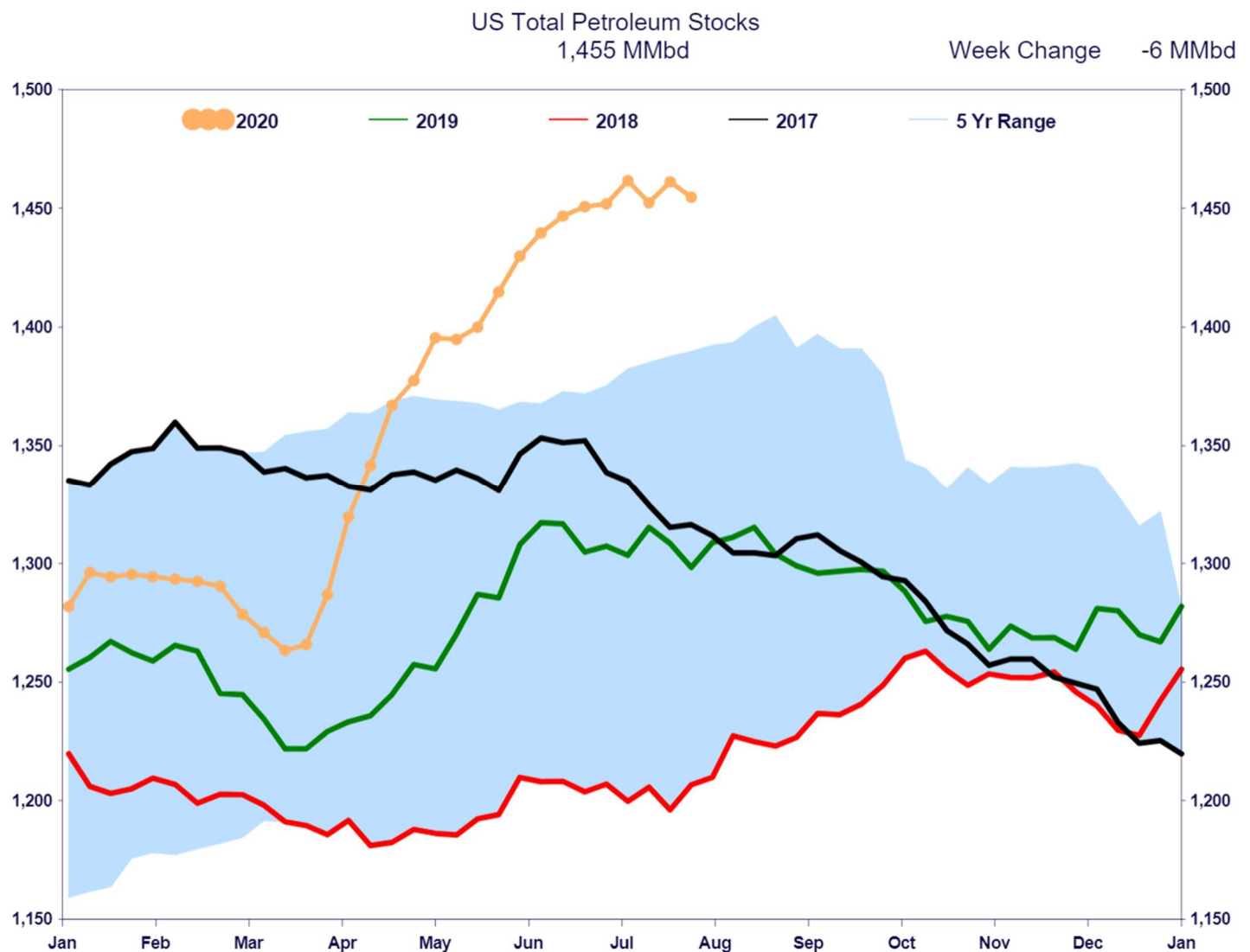
	Total Crude Stocks	Week Chg	Last Year Stocks	Last Year Delta	Five Year Avg.	Five Year Delta	Cushing Stocks	Week Chg	Last Year Stocks	Last Year Delta	Total Crude Prod.	Week Chg	Last Year Prod.	Total Crude Imports	Four Week Avg.	Last Year Avg.
19JUN20	540.7	1.4	469.6	71.1	464.9	75.8	45.8	-1.0	51.8	-6.0	11.0	0.5	12.1	6.5	6.6	7.4
26JUN20	533.5	-7.2	468.5	65.0	463.3	70.2	45.6	-0.3	52.5	-6.9	11.0	0.0	12.2	6.0	6.5	7.3
03JUL20	539.2	5.7	459.0	80.2	456.0	83.2	47.8	2.2	52.2	-4.4	11.0	0.0	12.3	7.4	6.6	7.3
10JUL20	531.7	-7.5	455.9	75.8	455.6	76.0	48.7	0.9	50.8	-2.1	11.0	0.0	12.0	5.6	6.4	7.1
17JUL20	536.6	4.9	445.0	91.5	450.3	86.3	50.1	1.4	50.4	-0.3	11.1	0.1	11.3	5.9	6.2	7.2
24JUL20	526.0	-10.6	436.5	89.4	448.5	77.5	51.4	1.3	48.9	2.6	11.1	0.0	12.2	5.1	6.0	7.0

	Total Crude Runs	Week Chg	Last Year Runs	Five Year Avg.	Total Refinery Inputs	Week Chg	Last Year Inputs	Five Year Avg.	Total Crude Exports	Week Chg	Last Year Exports	PADD 1 Stocks	Week Chg	Last Year Stocks	Five Year Avg.
19JUN20	13.84	0.24	17.34	17.05	14.2	0.2	17.7	17.4	3.2	0.7	3.8	12.5	0.2	14.0	16.0
26JUN20	14.03	0.19	17.29	17.07	14.3	0.2	17.7	17.4	3.1	-0.1	3.0	12.5	-0.0	16.3	16.0
03JUL20	14.35	0.31	17.44	17.14	14.7	0.4	17.8	17.5	2.4	-0.7	3.0	12.1	-0.4	15.9	15.0
10JUL20	14.31	-0.04	17.27	17.07	14.8	0.1	17.7	17.4	2.5	0.2	2.5	13.1	1.0	15.7	15.4
17JUL20	14.21	-0.10	17.03	16.99	14.8	-0.0	17.5	17.3	3.0	0.4	3.3	13.2	0.2	13.5	14.9
24JUL20	14.60	0.39	16.99	17.16	15.1	0.3	17.5	17.5	3.2	0.2	2.6	12.7	-0.6	13.0	14.9

	PADD 2 Stocks	Week Chg	Last Year Stocks	Five Year Avg.	PADD 3 Stocks	Week Chg	Last Year Stocks	Five Year Avg.	PADD 4 Stocks	Week Chg	Last Year Stocks	Five Year Avg.	PADD 5 Stocks	Week Chg	Last Year Stocks	Five Year Avg.
19JUN20	137.9	-0.0	144.2	137.4	308.0	0.5	235.0	234.6	25.5	-0.1	22.6	21.2	56.8	0.9	53.8	55.7
26JUN20	136.8	-1.1	143.8	136.5	304.0	-4.0	234.7	235.2	25.6	0.1	22.0	20.8	54.6	-2.1	51.7	54.9
03JUL20	136.3	-0.6	141.8	135.7	309.0	5.0	228.0	230.4	25.6	0.0	22.2	21.0	56.2	1.6	51.2	54.0
10JUL20	137.2	0.9	140.3	134.6	301.1	-7.9	228.5	231.0	25.6	-0.0	21.7	20.8	54.8	-1.5	49.7	53.9
17JUL20	137.5	0.3	139.3	134.1	306.0	4.8	220.6	228.2	25.4	-0.2	20.5	20.5	54.5	-0.3	51.1	52.6
24JUL20	139.7	2.2	138.4	133.8	295.5	-10.5	217.2	228.0	25.3	-0.1	19.9	20.6	52.8	-1.7	48.1	51.1



[eia Weekly Petroleum Status Report:](#) “Total commercial petroleum inventories decreased last week by 6.5 million barrels last week”





11

US Crude Oil Supply and Demand (million barrels per day) Data Smoothed and Net Balance Lagged 4 Weeks

July 24, 2020

Supply 16.2 = Production 11.1 + Imports 5.1 Demand 17.8 = Runs 14.6 + Exports 3.2

Net Balance -0.1 = Supply 16.2 - Demand 17.8

