

Back-to-Back Catalysts Line Up for U.S. Oil and Gas Producers as Domestic Output Tightens

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Issued on behalf of Prairie Operating Co.

USA News Group News Commentary - U.S. crude inventories continue to shrink despite efforts by the current administration to rebuild domestic stockpiles, with the latest EIA data showing a 3.9 million barrel decline. Earlier this year, the EIA projected strong domestic crude and gas production through 2030, even as OPEC now expects global oil demand to grow well beyond 2050, fueled in part by surging power needs from AI-focused data centers in the Middle East. In the U.S., President Trump's AI Action Plan is expected to accelerate investment into domestic energy sources-positioning select non-OPEC producers to benefit from the trend, including Prairie Operating Co. (NASDAQ: PROP), [Ring Energy Inc.](#) (NYSE-American: REI), Amplify Energy Corp. (NYSE: AMPY), Matador Resources Company (NYSE: MTDR), and [Obsidian Energy Ltd.](#) (NYSE-American: OBE) (TSX: OBE).

Meanwhile, the Strategic Petroleum Reserve remains depleted, and Energy Secretary Chris Wright warns that refilling it to prior levels could cost US\$20 billion and take years. That prolonged timeline, coupled with accelerating AI-driven energy demand, is drawing fresh attention to the importance of stable, domestically sourced oil and gas supplies.

Prairie Operating Co. (NASDAQ: PROP) has remained a stealth operator in the energy space, steadily growing its position in the Denver-Julesburg Basin without drawing much attention. Over the past four months, the Houston-based driller has methodically built scale while maintaining a disciplined capital approach that continues to resonate with cost-conscious investors.

In its latest strategic addition, Prairie acquired a portion of Edge Energy's assets for US\$12.5 million, securing roughly 11,000 net acres, 190 boe/d of current production, and 40 locations ready for drilling.

"This strategic and highly accretive bolt-on acquisition enhances our existing footprint in the DJ Basin," said Edward Kovalik, Chairman and CEO of Prairie. "With a high working interest, established cash flow, and development-ready drilling locations, this transaction aligns with our capital allocation strategy and adds near-term value and long-term inventory."

Prairie financed the Edge Energy acquisition through its reserve-based lending facility, avoiding any equity dilution. The flexibility comes thanks to a June update, when Prairie confirmed a US\$1 billion RBL led by Citibank. On June 9, the lending syndicate-which now includes Bank of America and West Texas National-reaffirmed a US\$475 million borrowing base following a review of Prairie's expanded reserve profile.

Operational momentum continues to build. In late April, Prairie began completions on nine drilled-but-uncompleted wells at its Opal Coalbank location, with first oil expected this summer. Those follow the 11-well Rusch Pad, which was spudded on April 1 and features alternating 2-mile laterals targeting the Niobrara and Codell formations. Initial production from Rusch is expected in early August, setting up back-to-back volume catalysts.

Prairie's broader expansion is anchored by its US\$602.8 million acquisition of Bayswater Exploration assets, which closed in late March. That deal boosted daily production by approximately 25,700 boe, added 77.9 MMboe in proved reserves, and delivered more than 600 future drilling locations across 24,000 net acres. At a purchase price of less than 0.7x proved PV-10, the assets offer firm value support under the stock.

"The addition of the Bayswater Assets further establishes Prairie as a leading operator in the DJ Basin," said Gary Hanna, President of Prairie. "These assets are a strong complement to our existing portfolio, and we remain focused on maximizing operational efficiencies, optimizing production, and delivering sustainable

growth for shareholders."

Prairie now holds approximately 60,000 net acres in the DJ Basin, with a runway of over 550 economic locations and leverage holding steady near 1x EBITDA. Production remains weighted about 70% to liquids-a favorable profile as rising AI-related power demand lifts both crude and associated gas fundamentals. With new wells at Opal Coalbank and Rusch nearing first production, Prairie's execution timeline is about to be put to the test.

CONTINUED… Read this and more news for Prairie Operating Co. at:

<https://usnewsgroup.com/2025/07/14/ai-power-demand-set-to-jump-165-meet-the-sub-5-oil-stock-racing-to-help-keep>

In other recent industry developments and happenings in the market include:

Ring Energy, Inc. (NYSE-American: REI) has selected Veriforce as its exclusive contractor management partner to enhance safety, compliance, and operational efficiency across its expanding network.

"Our goal was to free up time with our field and office personnel, improving how we verify contractor insurance and MSAs," said Chris Gafford, HSE Manager for Ring Energy. "More importantly, we needed a better way to understand how our contractors are handling safety. Veriforce provides that insight."

The move centralizes contractor oversight and integrates training programs like SafeLand and H2S awareness to streamline field readiness. The initiative reflects Ring's continued growth in the Permian and its commitment to risk reduction and workforce scalability

Amplify Energy Corp. (NYSE: AMPY) has sold its non-operated Eagle Ford assets to Murphy Exploration & Production for US\$23 million, aiming to strengthen its balance sheet and reduce debt.

"Reducing debt and accelerating Beta development are core tenets of our go-forward strategy," said Martyn Willsher, President and CEO of Amplify. "This deal is consistent with both of these objectives, and we believe we are receiving fair value for the divested assets. We will continue to look for other opportunities that align with our strategic intent."

The proceeds may also fund the return of previously deferred Beta field development wells. The divestiture supports Amplify's pivot toward a more focused operational strategy centered on higher-return assets.

Matador Resources Company (NYSE: MTDR) has successfully completed a major expansion of its Marlan cryogenic gas processing plant in New Mexico, boosting capacity from 60 MMcf/d to 260 MMcf/d.

"We are pleased to announce the start up of the expansion of the Marlan Plant," said Joseph Wm. Foran, Chairman and CEO of Matador. "The increased processing capacity at the Marlan Plant should allow San Mateo to continue to provide Matador with reliable flow assurance in our Ranger and Antelope Ridge asset areas in Lea County, New Mexico. The Board and I congratulate and thank the members of our midstream and operational asset teams - especially the teams in the field - for the significant value they have created through their extra efforts to complete the Marlan Plant expansion on time and on budget."

The project supports both Matador's operations in the Delaware Basin and third-party volumes through its midstream affiliate, San Mateo. Alongside the infrastructure upgrade, Matador received a corporate credit rating bump from Fitch to BB and saw its US\$3.25 billion borrowing base reaffirmed by all 19 participating lenders.

Obsidian Energy Ltd. (NYSE-American: OBE) (TSX: OBE) has unveiled a US\$110-120 million second-half capital program, focused on drilling 28 operated wells across its Peace River and Willesden Green assets.

"With the disposition of our Pembina asset during the second quarter, coupled with the recent tariff and

OPEC+ induced commodity price volatility, we have adapted our approach to 2025 accordingly," said Stephen Loukas, Obsidian Energy's President and CEO. "Post-disposition, due to our enhanced liquidity position as well as the continued discount that our shares trade to intrinsic-value, we have opted to moderate our near-term production growth via the reduction in capital expenditures and have chosen to drive growth in per-share metrics via incremental share buybacks. Moreover, during the second half we are extending infrastructure to our Open Creek field which will, upon completion, allow us to aggressively grow our Cardium and Belly River production volumes as market conditions improve. Furthermore, we plan on building an all-season road to our Nampa field that will bring ~200 barrels per day of currently shut-in oil back on production and enable pursuit of a full field development plan."

The company aims to exit 2025 at approximately 29,000 boe/d, supported by infrastructure upgrades and moderate production growth. Obsidian also plans a Canadian share exchange offer involving its stake in [InPlay Oil Corp.](#) as part of its capital return strategy.

Source:

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