

# DAILY THREAT REPORT

Fortune Favors the Prepared | Intelligence Operations Division  
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## ⚠️ PREPAREDNESS CONDITION 3 — ELEVATED ⚠️

BLOCKADE DAY 8 | Op Epic Fury Day 51 | Trend: RAPIDLY DEVELOPING | Full basis: SEC 10

## COMMUNICATIONS CONDITION: COMCON 4 — PARTIALLY DEGRADED (CONUS)

AA26-097A Day 14 | G2 DECAYING post-18-APR peak | HF Recovering | Full basis: SEC 11

<b>Publication (UTC)</b>	20 APR 2026 / 1400 UTC
<b>Reporting Period</b>	0000 18-APR through 1200 20-APR 2026 (72-hour sweep)
<b>Analyst / Watch Officer</b>	Fortune Favors the Prepared — OSINT Desk
<b>FLASH Threshold</b>	Risk Score ≥ 20 — FOURTEEN FLASH EVENTS THIS CYCLE
<b>PREP-CON Baseline</b>	PREP-CON 3 — ELEVATED (Brown)   Trend: RAPIDLY DEVELOPING   Op Epic Fury Day 51   Blockade Day 8   Touska Seizure 19-APR   CF Expires TUE 22-APR
<b>Version</b>	1.0 — SOP v5.40   All \$0.8-\$0.16 checks passed   14 FLASH   13 HIGH   6 MOD   6 WATCH   Blockade Day 8   Touska Seized 19-APR   Iran Retaliation Pledged   CF expires TUE 22-APR   R2 Talks In Flux

### FLASH ▶

[GEO-001](#) Blockade Day 8 / Touska Seizure 19-APR | [GEO-CF-LBN](#) Lebanon CF Stressed / Holding | [GEO-002](#) CF Expires TUE 22-APR / R2 In Flux | [GEO-INDOPAC](#) Scarborough Barrier Removed | [GEO-DPRK](#) Hwasong-11 Launch 19-APR | [PWR-001](#) IEA Crisis Persists

[FIN-001](#) Brent +7% to \$96.88 Post-Touska | [SC-001](#) UKMTO CRITICAL Persists | [AGR-001](#) Fertilizer 2026 Locked | [CYB-005](#) AA26-097A Day 14 | [GEO-009](#) IRGC Retaliation Pledged | [INS-001](#) IRGC/MOIS + DIA | [AVN-001](#) EASA CZIB Expires 24-APR T-4 | [TER-001](#) DHS NTAS Gap Day 51

### HIGH/UPDATED ↻

[CYB-008](#) SharePoint KEV (due 28-APR T-8) | [CYB-009](#) Storm-0558 Identity Plane | [CYB-010](#) ActiveMQ KEV (due 30-APR T-10) | [CYB-002](#) Fortinet OVERDUE Day 4 | [GEO-UKR](#) ZNPP 17-APR Second Outage | [GNSS-001](#) 1,650+ Vessels Impacted

[GEO-007](#) Lebanon CF French UNIFIL+IDF KIA | [GEO-010](#) Energy/Coalition | [TRV-001](#) State Level 4 Iran | [CHEM-001](#) TCEQ Final Report | [SWX-001](#) G2 Decaying post-18-APR | [WX-001](#) SPC Critical Risk Fire Weather

### CRITICAL TIME HACK

**BREAKING 19-APR:** USS Spruance (DDG-111) fired three rounds 5-inch MK45 into engine room of Iranian-flagged M/V Touska (900 ft container ship, Treasury-sanctioned) in Gulf of Oman; Marines 31st MEU from USS Tripoli (LHA-7) boarded via MH-60S Seahawks — first blockade enforcement seizure of Iranian-flagged vessel. CENTCOM: 25 total commercial vessels turned back/seized since 13-APR. IRGC Khatam al-Anbiya joint command publicly pledged retaliation. CEASEFIRE EXPIRES TUE NIGHT 22-APR UTC (Al Jazeera/Axios T1). R2 TALKS IN FLUX: Witkoff/Kushner en route Islamabad, 4 USG aircraft at Nur Khan; Iran MFA spokesperson Baqaei 20-APR AM: "no plans for next round." VP Vance uncertain. OIL: Brent +7% to \$96.88, WTI +7% to \$90.33; gasoline \$4.05/gal (AAA). LEBANON CF: French UNIFIL peacekeeper + 2 IDF soldiers KIA weekend; IDF "Yellow Line" buffer declared south Lebanon. DPRK: 5x Hwasong-11 from Sinpo 19-APR (136km, "high precision" per KCNA, 7th launch of year, possible SLBM under ROK analysis). SWX: G2 DECAYING from 18-APR peak (Kp 4 today, AR 4419 tracked, HF recovering). WX: SPC CRITICAL RISK fire weather southern High Plains today; 17-APR outbreak 46 tornadoes confirmed. TER: DHS NTAS gap persists

Day 51. AVN: EASA CZIB 2026-03 R6 expires 24-APR T-4. GNSS: 1,650+ vessels cumulative; post-Touska spike likely. CYB: AA26-097A Day 14; SharePoint KEV T-8; ActiveMQ KEV T-10; Cisco SD-WAN ED 26-03 past deadline; Fortinet OVERDUE Day 4. OFAC: Iran designations 16-APR + Counter-Terror 17-APR NSPM-2. PRC: Scarborough barrier REMOVED weekend.

## SECTION INDEX

<a href="#"><u>SEC 2 — BLUF &amp; Market Indicators</u></a>	<a href="#">GEO-001</a> Blockade Day 8 / Touska Seizure 19-APR   <a href="#">GEO-CF-LBN</a> Lebanon CF Holding   <a href="#">GEO-002</a> CF Expires TUE 22-APR   Commodity Tracker   Geographic Impact Index   14 FLASH
<a href="#"><u>SEC 3 — FLASH Events</u></a>	<a href="#">GEO-001</a> Blockade Day 8 / Touska Seizure   <a href="#">GEO-CF-LBN</a> Lebanon CF Holding   <a href="#">GEO-002</a> R2 Talks In Flux / CF Expires 22-APR   <a href="#">GEO-INDOPAC</a> PRC Scarborough   <a href="#">GEO-DPRK</a> Hwasong-11 Launch 19-APR   <a href="#">PWR-001</a> IEA Crisis Data   <a href="#">FIN-001</a> Brent +7%   <a href="#">SC-001</a> UKMTO CRITICAL   <a href="#">AGR-001</a> Fertilizer Locked   <a href="#">CYB-005</a> AA26-097A Day 14   <a href="#">GEO-009</a> IRGC Retaliation Pledged   <a href="#">INS-001</a> DIA Confirmed   <a href="#">AVN-001</a> EASA 24-APR T-4   <a href="#">TER-001</a> DHS NTAS GAP Day 51
<a href="#"><u>SEC 4A — Cyber / Technology</u></a>	<a href="#">CYB-005</a> CISA AA26-097A Day 14   <a href="#">CYB-008</a> SharePoint KEV due 28-APR T-8   <a href="#">CYB-009</a> Storm-0558 Identity Plane   <a href="#">CYB-010</a> ActiveMQ KEV due 30-APR T-10   <a href="#">CYB-002</a> Fortinet OVERDUE   <a href="#">CYB-003</a> Cisco ED 26-03 SD-WAN   <a href="#">CYB-006</a> F5 BIG-IP   <a href="#">CYB-007</a> Pro-Russia OT
<a href="#"><u>SEC 4B — Physical / Geopolitical / IO</u></a>	<a href="#">GEO-010</a> Energy/Coalition   <a href="#">GEO-007</a> Lebanon CF Stressed   <a href="#">GEO-UKR</a> ZNPP 17-APR Outage   <a href="#">GEO-DPRK</a> Hwasong-11 Sinpo 19-APR   <a href="#">CHEM-001</a> TCEQ Final   <a href="#">TRV-001</a> GCC Level 3/4   <a href="#">AVN-002</a> Carrier Suspensions   <a href="#">TER-001</a> NTAS Gap Day 51
<a href="#"><u>SEC 4C — CI-LOG</u></a>	Q1 2026 Industrial Fire Log   All 24 §4.2 categories surveyed   <a href="#">GEO-010</a> Energy Dominance cross-ref
<a href="#"><u>SEC 5 — Energy / Infrastructure / Supply Chain</u></a>	<a href="#">PWR-001</a> IEA Crisis Framework   <a href="#">SC-001</a> UKMTO CRITICAL   <a href="#">FIN-001</a> WTI \$90.33 / Brent \$96.88   <a href="#">CHEM-001</a> TCEQ Final Valero
<a href="#"><u>SEC 6 — Aviation / Transportation</u></a>	<a href="#">AVN-001</a> EASA CZIB 2026-03 R6 expires 24-APR T-4   <a href="#">AVN-002</a> Carrier Suspensions   <a href="#">TRV-001</a> State Level 4 Iran   <a href="#">GNSS-001</a> 1,650+ vessels impacted
<a href="#"><u>SEC 7 — Meteorological Weather &amp; Severe Weather + NWR Outages</u></a>	<a href="#">WX-001</a> SPC Critical Risk fire weather S. High Plains   <a href="#">WX-002</a> NIFC   17-APR 46-tornado outbreak retrospective   NWR 21 affected transmitters
<a href="#"><u>SEC 7A — Space Weather &amp; EMCMM</u></a>	<a href="#">SWX-001</a> G2 DECAYING post-18-APR peak   Kp 4 today   AR 4419 tracked   HF recovering
<a href="#"><u>SEC 7B — Agriculture, Food &amp; Supply Chain</u></a>	<a href="#">AGR-001</a> Fertilizer Shock Locked   2026 Planting Season Impacted   IFPRI/IEA/WB Structural Damage
<a href="#"><u>SEC 8 — 72-Hour Outlook</u></a>	Blockade Day 8   Touska retaliation threat   CF expires TUE 22-APR   R2 talks in flux   G2 decaying   Fire weather today
<a href="#"><u>SEC 9 — Watch List</u></a>	<a href="#">WATCH-001</a> CF/R2/Retaliation   <a href="#">WATCH-002</a> BRICKSTORM/SD-WAN   <a href="#">WATCH-003</a> Iran Internet Day 51   <a href="#">WATCH-005</a> G2 decaying   <a href="#">WATCH-007</a> Bab el-Mandeb   <a href="#">WATCH-008</a> Missing Scientists
<a href="#"><u>SEC 10 — PREP-CON Assessment</u></a>	PREP-CON 3 ELEVATED   Blockade Day 8 / Touska Seizure Basis   fortunefavorstheprepared.com/preparedness-book-of-knowledge-2/planning/preparedness-conditions-prep-con/

<a href="#"><u>SEC 11 — Alert &amp; Readiness Conditions Panel</u></a>	DEFCON EST-3   COGCON EST-3   FPCON EST-CHARLIE   CYBERCON EST-ELEVATED   COMCON 4 CONUS DTR-ASSESSED   PREP-CON 3
<a href="#"><u>SEC 12 — Source Registry Summary</u></a>	24 Threat Areas   366 Standing Sources (v1.10)   68 Citations This Cycle   T1: 28   T2: 40   T3: 0   <a href="https://fortunefavorstheprepared.com/dtr-source-registry/">fortunefavorstheprepared.com/dtr-source-registry/</a>
<a href="#"><u>SEC 13 — Closing Block</u></a>	Fortune Favors the Prepared   Full Product Suite   IN DEVELOPMENT: FLASH Watch Desk / Incident Tracker / ASAR   <a href="https://fortunefavorstheprepared.com/dtr/">fortunefavorstheprepared.com/dtr/</a>

## GEOGRAPHIC IMPACT INDEX

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
<a href="#"><u>CONUS — Southern High Plains (NE NM / SE CO / SW KS / OK-TX Panhandles)</u></a>	<a href="#"><u>WX-001</u></a> SPC CRITICAL RISK fire weather today   Elevated fire weather Southeast behind cold front   No severe thunderstorm outlook today   17-APR tornado outbreak: 46 confirmed
<a href="#"><u>CONUS — Northeast (PA/NY/NJ/NE)</u></a>	<a href="#"><u>TER-001</u></a> NTAS Bulletin Gap Day 51   <a href="#"><u>INS-001</u></a> Iran-backed militia attacks persist   <a href="#"><u>FIN-001</u></a> fuel pass-through Brent \$96.88
<a href="#"><u>CONUS — Mid-Atlantic / Washington DC</u></a>	<a href="#"><u>TER-001</u></a> NTAS gap Day 51   <a href="#"><u>INS-001</u></a> IRGC/MOIS targeting   COGCON assessed   <a href="#"><u>CYB-005</u></a> AA26-097A Day 14
<a href="#"><u>CONUS — Nationwide (All Regions)</u></a>	<a href="#"><u>CYB-005</u></a> AA26-097A Day 14 — 5,219+ exposed PLCs   <a href="#"><u>CYB-008</u></a> SharePoint KEV due 28-APR T-8   <a href="#"><u>CYB-010</u></a> ActiveMQ KEV due 30-APR T-10   <a href="#"><u>CYB-002</u></a> Fortinet OVERDUE Day 4   <a href="#"><u>FIN-001</u></a> Brent \$96.88 +7%   <a href="#"><u>SWX-001</u></a> G2 DECAYING Kp 4 today
<a href="#"><u>CONUS — Southwest (AZ/NM/NV)</u></a>	<a href="#"><u>WX-002</u></a> NIFC elevated YTD   Dry-warm tilt through June per NIFC   SPC Critical Risk fire weather today NE NM
<a href="#"><u>CONUS — Gulf Coast (TX/LA/MS/AL)</u></a>	<a href="#"><u>PWR-001</u></a> Blockade Day 8 refinery feedstock stress   <a href="#"><u>CHEM-001</u></a> Valero Port Arthur TCEQ final report   <a href="#"><u>AGR-001</u></a> fertilizer pass-through 2026 locked
<a href="#"><u>Middle East / Persian Gulf</u></a>	<a href="#"><u>GEO-001</u></a> Blockade Day 8 / M/V Touska Seizure 19-APR   GEO-CF-LBN Lebanon CF Stressed (French UNIFIL + 2 IDF KIA)   <a href="#"><u>GEO-002</u></a> CF expires TUE night 22-APR / R2 in flux   <a href="#"><u>GEO-009</u></a> IRGC Khatam al-Anbiya retaliation pledged
<a href="#"><u>Global Maritime / Chokepoints</u></a>	<a href="#"><u>SC-001</u></a> UKMTO Hormuz CRITICAL   Post-Touska Kpler zero transits 19-APR Sunday   30+ incidents since 28-FEB   Maersk/CMA CGM/Hapag-Lloyd suspensions persist
<a href="#"><u>Iran</u></a>	<a href="#"><u>GEO-001</u></a> Op Epic Fury Day 51   Blockade Day 8   Touska seizure first Iranian-flagged vessel   <a href="#"><u>WATCH-003</u></a> Internet Day 51   IRGC retaliation pledged
<a href="#"><u>Indo-Pacific / SCS + DPRK</u></a>	GEO-INDOPAC Scarborough 352m barrier REMOVED weekend 17-18 APR   10 CCG vessels deployed   1,500-acre Antelope Reef airbase   GEO-DPRK 5x Hwasong-11 Sinpo 19-APR (possible SLBM)
<a href="#"><u>Europe / Ukraine</u></a>	GEO-UKR ZNPP 17-APR second outage 40-min restore per IAEA   6-MAR Ferosplavna-1 line repaired   Units 1-2 licenses issued, no restart during conflict
<a href="#"><u>Agricultural / Global Supply Chain</u></a>	<a href="#"><u>AGR-001</u></a> Urea Egypt FOB +78%   30% global urea disrupted   50% sulfur   25% ammonia   China export restrictions thru August 2026   2026 planting season locked

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
<a href="#">Space Environment / HF Comms</a>	<a href="#">SWX-001</a> G2 DECAYING from 18-APR peak   Kp 4 today (20-APR)   AR 4419 tracked   HF recovering   29-30 APR Kp 5 next event window
<a href="#">Cyber / Vulnerability Queue</a>	<a href="#">CYB-008</a> SharePoint 28-APR T-8   <a href="#">CYB-010</a> ActiveMQ 30-APR T-10   <a href="#">CYB-003</a> Cisco ED 26-03 SD-WAN past-deadline   <a href="#">CYB-002</a> Fortinet OVERDUE Day 4   <a href="#">CYB-009</a> Storm-0558 CSRB context

## SECTION 2 — BLUF & MARKET INDICATORS

### COMMODITY TRACKER — WAR IMPACT vs. PRE-WAR BASELINE (28 FEB 2026)

COMMODITY	PRE-WAR (28 FEB)	CURRENT (20 APR)	CHG vs PRE-WAR	48H TREND	CONSUMER / ANALYTICAL NOTE
<b>Brent Crude (Jun futures)</b>	~\$66/bbl	\$96.88/bbl	<b>+47%</b>	▲ +7% ▲ post-Touska	Post-Touska seizure 19-APR and re-closure of Hormuz over weekend. Friday 17-APR close settled at March-10 low on brief Araghchi "open" declaration; reversed sharply when Iran re-closed strait 18-APR. Situation highly fluid — depends on R2 talks outcome 20-22 APR and CF expiry. Goldman base case \$85 2026 avg assumes diplomatic track holds.
<b>WTI Crude (May futures)</b>	~\$63/bbl	\$90.33/bbl	<b>+43%</b>	▲ +7% ▲ post-Touska	WTI +7% on Touska seizure news. Situation in flux — Iran retaliation pledge plus US blockade reinforcement could drive above \$100 if kinetic escalation; deal track could return \$75-80 by May if negotiations hold.
<b>Gasoline (natl avg)</b>	~\$3.10/gal	~\$4.05/gal	<b>+31%</b>	~flat ~0%	AAA 20-APR. Energy Sec Wright public: "not back under \$3 until next year." Oil rally embedded. Pump prices lag crude by 10-14 days — Touska spike will land at pump by early May.
<b>Diesel (US No. 2)</b>	~\$3.74/gal	~\$5.42/gal	<b>+45%</b>	▲ +0.4% ▲ slow	EIA. Trucking margins compressed. Diesel lagging crude spike; refiner feedstock stress persists. Fertilizer/food pass-through active.
<b>Jet Fuel (global avg)</b>	~\$90/bbl	~\$205/bbl	<b>+128%</b>	▲ +2% ▲ 2%	IATA. Gulf aviation restrictions via EASA CZIB 2026-03 R6 extend supply constraint. European carriers continuing suspensions.
<b>Urea (46-0-0)</b>	~\$465/ton NOLA	\$826/ton (DTN natl)	<b>+78%</b>	~flat ~0%	DTN Week 4 March; USDA AMS \$624/ton Iowa. +35% MoM. 58-70% above long-run avg. 2026 crop year locked — no remediation window left this planting season.
<b>Anhydrous Ammonia (IL)</b>	~\$800/ton	\$1,099.50/ton avg	<b>+37%</b>	~flat ~0%	USDA AMS Illinois T1. +\$101.17 vs prior. Planting in progress. 2-4 week window to Q3 food pass-through.

COMMODITY	PRE-WAR (28 FEB)	CURRENT (20 APR)	CHG vs PRE-WAR	48H TREND	CONSUMER / ANALYTICAL NOTE
<b>Ocean Freight (SCFI)</b>	~1,333 pts	~1,920 pts	<b>+44%</b>	<b>▲ +1%</b> <b>▲ Touska</b>	Blockade Day 8. UKMTO Hormuz CRITICAL. Post-Touska 19-APR Kpler data: ~0 tanker transits 19-APR Sunday. Maersk/CMA CGM/Hapag-Lloyd suspensions persist. Lloyd's war risk rates post-Touska revision pending.

► For detailed commodity pricing and industrial analysis see the [Construction & Manufacturing Sector Report](https://fortunefavorstheprepared.com/dtr/) at fortunefavorstheprepared.com/dtr/

### BOTTOM LINE UP FRONT

**20 APRIL 2026 | PREP-CON 3 ELEVATED | RAPIDLY DEVELOPING | OPERATION EPIC FURY DAY 51 | BLOCKADE DAY 8 | M/V TOUSKA SEIZED 19-APR | CEASEFIRE EXPIRES TUE NIGHT 22-APR**

ESCALATION CYCLE. The operating environment is rapidly changing and highly fluid: what is true at publication (1400 UTC 20-APR) may not hold by the close of business. On 19-APR, USS Spruance (DDG-111) fired three rounds of 5-inch MK45 into the engine room of Iranian-flagged container ship M/V Touska in the Gulf of Oman and boarded her with Marines from the 31st MEU via MH-60S Seahawks — the first blockade enforcement seizure of an Iranian-flagged vessel since operations began 13-APR. CENTCOM reports 25 total commercial vessels turned back or seized under blockade enforcement. Iran's IRGC joint command (Khatam al-Anbiya) has condemned the action and publicly pledged retaliation. The US-Iran ceasefire expires Tuesday night 22-APR UTC (Al Jazeera/Axios T1). Round-2 (R2) diplomacy is in flux: Witkoff and Kushner are en route Islamabad with four US government aircraft landed at Nur Khan airbase, but Iran MFA spokesperson Baqaei stated on 20-APR that there are "no plans for the next round of talks." Vice President Vance's participation is uncertain. Oil has repriced sharply: Brent +7% to \$96.88, WTI +7% to \$90.33; AAA national gasoline \$4.05/gal. Lebanon ceasefire continues to hold but was stressed over the weekend by the KIA of a French UNIFIL peacekeeper and two IDF soldiers; IDF has declared a "Yellow Line" buffer in south Lebanon. Against this backdrop: DPRK launched five tactical Hwasong-11 variants from Sinpo on 19-APR (seventh launch of the year, possible submarine launch under analysis); the G2 geomagnetic storm from 18-APR is decaying (Kp 4 today, AR 4419 still tracked); SPC issued Critical Risk fire weather for the southern High Plains today; EASA CZIB 2026-03 R6 expires 24-APR (T-4 days) with no replacement yet published; and DHS NTAS has not reissued a heightened-threat advisory since the 22-JUN-2025 Iran bulletin expired 22-SEP-2025 — a gap of 51 days into Operation Epic Fury, widely criticized by CFR and HSToday. The cycle's analytical question: whether Iranian retaliation for the Touska seizure arrives before the ceasefire clock runs out 22-APR, or whether R2 talks materialize and de-escalate — the 48-to-72-hour window is the decisive one.

#### FLASH (Score 20–28)

⊖ UPDATED [GEO-001](#): US-Iran War, Op Epic Fury Day 51, Blockade Day 8. USS Spruance fires on and seizes M/V Touska 19-APR — first blockade enforcement seizure of Iranian-flagged vessel. IRGC Khatam al-Anbiya pledges retaliation. CENTCOM: 25 total vessels turned back/seized. Full scope and initial blockade framing: see DTR 13-APR-2026. Score: 28.

► CONTINUED [GEO-CF-LBN](#): Lebanon ceasefire stressed but holding. French UNIFIL peacekeeper + 2 IDF soldiers KIA over weekend. IDF declared "Yellow Line" buffer in south Lebanon. Hezbollah posture unchanged per Qassem. Score: 22.

⊖ UPDATED [GEO-002](#): US-Iran ceasefire expires Tuesday NIGHT 22-APR UTC (Al Jazeera/Axios T1). R2 talks IN FLUX: Witkoff/Kushner en route Islamabad, 4 USG aircraft at Nur Khan; Iran MFA spokesperson Baqaei 20-APR "no plans for next round." VP Vance uncertain. Situation rapidly changing. Score: 26.

⊖ UPDATED [GEO-INDOPAC](#): PRC Scarborough 352m floating barrier REMOVED weekend 17-18 APR per PCG (confirmed). 10 CCG vessels still deployed mid-April. 1,500-acre Antelope Reef airbase (FDD 16-APR). PRC opportunistic posture persists. Balikpapan exercises active Zambales. Score: 20.

- ★ NEW [GEO-DPRK](#): 19-APR 5x Hwasong-11 tactical variants from Sinpo, ~136 km to island target, "high precision" per KCNA. 7th launch of year, 4th in April. ROK analyzing for possible submarine launch (first SLBM in 4 years if confirmed). Bloomberg: US restricting intelligence sharing with Seoul. Score: 22.
  - CONTINUED [PWR-001](#): IEA April Oil Market Report framework persists: Hormuz 3.8 mb/d early-April vs 20+ mb/d pre-war. Global supply dropped 10.1 mb/d March — largest disruption in history. Alternate routes 7.2 mb/d. Post-Touska tanker transits 19-APR Sunday: approximately zero per Kpler (quietest day since war began). Score: 24.
  - ↳ UPDATED [FIN-001](#): Post-Touska spike: Brent +7% to \$96.88, WTI +7% to \$90.33. Gasoline \$4.05/gal national (AAA 20-APR). Energy Secretary Wright public: not back below \$3 "until next year." Goldman \$85 2026 avg assumes diplomatic track holds — no longer the base case. Score: 24.
  - CONTINUED [SC-001](#): UKMTO Strait of Hormuz CRITICAL persists (12-APR baseline reinforced by Touska seizure). ~20 vessels transited 18-APR Saturday; ZERO transits 19-APR Sunday per Kpler. JMIC tracks 30+ maritime incidents since 28-FEB. ITWF Warlike Operations Area designation active. Score: 22.
  - CONTINUED [AGR-001](#): Urea Egypt FOB ~\$700/MT vs \$400-490 pre-war (+78%); US NOLA +25% since end-Feb. Ammonia +20%; phosphate +30%. 30% global urea trade disrupted; 50% sulfur; 25% ammonia. China export restrictions thru August 2026. 2026 planting season irreversibly impacted. Score: 22.
  - ↳ UPDATED [CYB-005](#): CISA AA26-097A Day 14 (originated 07-APR). Iranian-affiliated APT (CyberAv3ngers / Shahid Kaveh Group / Hydro Kitten / Storm-0784 / UNC5691) exploiting internet-facing Rockwell Automation/Allen-Bradley PLCs. 5,219+ exposed assets hold. Full scope and initial CISA attribution: see DTR 07-APR-2026. Score: 22.
  - CONTINUED [GEO-009](#): IRGC restraint window closed by Touska seizure. Khatam al-Anbiya joint command condemned action and pledged retaliation. Hengaw 6,620+ IRGC KIA; HRANA 3,636+ total. Hardline political signals escalating. Score: 24.
  - CONTINUED [INS-001](#): Iran-backed militias continue kinetic attacks on US forces. OFAC 16-APR + 17-APR designations (Iran-related + Counter Terrorism) under NSPM-2 maximum pressure. 875+ persons/vessels/aircraft sanctioned in 2025; 180+ shadow fleet vessels. Score: 22.
  - ↳ UPDATED [AVN-001](#): EASA CZIB 2026-03 R6 valid through 24-APR-2026 (T-4 days). 11 FIRs affected. France NOTAM LFFF F0660-F0664 (10-APR); Germany EDWW B0189-B0190 (02-APR); Italy LIRR (13-MAR). Kuwait OKKK drone strike on fuel storage tank. Score: 22.
- ★ NEW [TER-001](#): DHS NTAS has NOT reissued heightened-threat advisory since 22-JUN-2025 Iran bulletin expired 22-SEP-2025. 51-day gap into Operation Epic Fury; widely criticized by CFR (Hoffman 02-MAR) and HSToday. NTAS site last updated 17-FEB-2026 per DHS funding lapse notice. Score: 20.

### HIGH (Score 12–19)

- CONTINUED [CYB-008](#): SharePoint CVE-2026-32201 KEV, federal due 28-APR (T-8). Score: 16.
- CONTINUED [CYB-009](#): Storm-0558 / Microsoft Identity Plane — unresolved CSRB findings; combined with SharePoint + ActiveMQ + Cisco SD-WAN = compound identity-plane risk. Score: 15.
- CONTINUED [CYB-010](#): Apache ActiveMQ CVE-2026-34197 KEV, federal due 30-APR (T-10). Enterprise messaging middleware; broad deployment financial services, logistics, manufacturing. Score: 13.
- ★ NEW [CYB-003](#): CISA Emergency Directive ED 26-03 (Cisco SD-WAN, 25-FEB): CVE-2026-20127 CVSS 10 (auth bypass) + CVE-2022-20775 (path traversal). Threat actor UAT-8616 per Talos. All FCEB deadlines past 23-MAR. Score: 18.
- ↳ UPDATED [CYB-002](#): Fortinet CVE-2026-21643 federal deadline 16-APR PASSED (Day 4 overdue). ~2,000 exposed instances internet-facing. Active exploitation >3 weeks. Score: 18.
- CONTINUED [GEO-007](#): Lebanon CF in place but stressed. French UNIFIL + 2 IDF KIA weekend. IDF Yellow Line buffer declared south of Litani. 91 healthcare personnel KIA cumulative. Score: 15.
- ↳ UPDATED [GEO-UKR](#): ZNPP second power outage 17-APR, 40-min restoration per IAEA. 6-MAR Ferosplavna-1 330 kV line repaired under local ceasefire. Units 1-2 Russian operating licenses issued; no restart during conflict per Grossi. Score: 15.
- CONTINUED [GEO-010](#): Energy/Coalition framework persists. Allied escort capability in place (non-US). Score: 14.

- ▶ CONTINUED [TRV-001](#): State Dept Iran Level 4 (Do Not Travel) baseline 31-MAR. GCC/ME Level 3/4 persists. Australian DFAT "Do Not Travel" 11 countries. Score: 15.
- ▶ CONTINUED [CHEM-001](#): TCEQ final report 06-APR: Valero Port Arthur 23-MAR released 157,146 lbs over 244 hrs. Q1 industrial fire pace within structural variance. No new fires 18-20 APR. Score: 15.
- ⊖ UPDATED [SWX-001](#): G2 geomagnetic storm from 18-APR (peak 8:25 UTC, CH HSS + CIR) DECAYING. Kp 4 today (20-APR); Kp 3 forecast 21-APR. AR 4419 still tracked. Next event window 29-30 APR (Kp 5 forecast). Aurora Timeline Viewer unavailable per SWPC. Score: 15.
- ⊖ UPDATED [WX-001](#): SPC CRITICAL RISK fire weather southern High Plains today (NE NM, SE CO, SW KS, OK/TX Panhandles). Elevated fire weather Southeast behind cold front. No severe thunderstorm outlook today. 17-APR tornado outbreak retrospective: 46 tornadoes confirmed (Cream WI EF3, Rochester MN EF2, Lena IL EF2). Score: 18.
- ★ NEW [GNSS-001](#): 1,650+ commercial vessels cumulative GNSS interference impact per Orca AI. Brief clean 6-hr window 17-APR pre-escalation; post-Touska spike likely. JMIC assessment: sporadic and localised since 15-MAR. Dryad Global: "heightened risk GPS jamming and AIS spoofing." Score: 14.

### MODERATE (6 entries)

- ▶ CONTINUED CYB-006: F5 BIG-IP carry-forward. Score: 9.
- ▶ CONTINUED CYB-007: Pro-Russia OT + PRC Volt Typhoon concurrent. Compound threat assessment. Score: 8.
- ▶ CONTINUED GEO-008: Iran internet shutdown Day 51 — longest nation-scale shutdown on record. \$35-40M/day direct cost. Score: 9.
- ▶ CONTINUED WX-002: NIFC elevated YTD wildfire activity. Score: 8.
- ▶ CONTINUED WX-003: CDC measles outbreak continues. H5N1 monitoring. Score: 8.
- ▶ CONTINUED NUC-001: IAEA ZNPP carry-forward. DPRK 19-APR launches — IAEA UN watchdog warned "very serious" days before. Score: 10.
- ▶ CONTINUED AVN-002: Carrier suspensions. Emirates/Qatar Airways ~70% reduction. 24-72h lag behind EASA decisions. Score: 10.

**ANALYTICAL NOTE:** Blockade Day 8. The operating environment is rapidly changing and highly fluid. The 19-APR USS Spruance seizure of Iranian-flagged M/V Touska is the dominant cycle signal — the first blockade enforcement action against an Iranian-flagged vessel, T1-confirmed via Navy/Marine Corps public statements, CENTCOM, and wire services. IRGC Khatam al-Anbiya joint command has publicly pledged retaliation. Ceasefire expires Tuesday night 22-APR UTC (Al Jazeera/Axios T1). R2 diplomacy is in flux: Witkoff/Kushner en route Islamabad with four USG aircraft at Nur Khan, Iran MFA spokesperson Baqaei stated 20-APR AM there are "no plans for next round," VP Vance participation uncertain. Oil +7% on the seizure (Brent \$96.88, WTI \$90.33). Lebanon CF stressed by French UNIFIL + 2 IDF KIA weekend; IDF "Yellow Line" buffer declared. Against this: DPRK 19-APR 5x Hwasong-11 from Sinpo (possible SLBM under analysis); G2 geomagnetic storm decaying from 18-APR peak (Kp 4 today); SPC Critical Risk fire weather southern High Plains today; EASA CZIB 2026-03 R6 expires 24-APR (T-4); DHS NTAS GAP persists Day 51. Compound cyber queue: AA26-097A Day 14 (see DTR 07-APR-2026 for initial framing), SharePoint KEV due 28-APR (T-8), ActiveMQ KEV due 30-APR (T-10), Cisco SD-WAN ED 26-03 past deadline, Fortinet Day 4 overdue. The decisive 48-to-72-hour window runs from now to ceasefire expiration 22-APR: either Iranian retaliation arrives first, or R2 materializes and de-escalates. Practitioner posture: PREP-CON 3 sustain; maintain 72-hour readiness window; monitor UKMTO, CENTCOM, State Dept, NetBlocks, and the DTR Watch Desk. Full Touska operational details: GEO-001; full post-Touska commodity picture: FIN-001; full cyber queue: CYB-005/CYB-008/CYB-010.

### WATCH-007 — Houthi / Bab el-Mandeb — Strategic Patience Posture

**Status: WATCH CONTINUED | Trigger: Houthi activation of Red Sea attacks OR ceasefire collapse 22-APR | No attacks since 28-FEB-2026**

Houthis have NOT attacked Red Sea shipping since 28-FEB-2026 despite Iran war escalation. Analysts assess "strategic patience" — holding Bab el-Mandeb in reserve. ~30 tankers near Yanbu within strike range.

Bab el-Mandeb 29km narrowest — single attack arrests ~15% global seaborne trade. LINK: Abdollahi (IRGC, 13-APR) threatened ALL Persian Gulf/Sea of Oman/Red Sea. TRIPWIRE: 22-APR ceasefire expiration and/or IRGC-pledged Touska retaliation. If ceasefire collapses and Iran signals Houthi activation, Red Sea disruption expected 24-48 hours.

**WATCH-008 — Missing / Dead Scientists Narrative — Institutional Engagement Confirmed; Causal Pattern Unestablished**

**Status: WATCH CONTINUED | POTUS + WH Press Sec On-Record 15-16 APR | Split Confidence per §0.6 Rule 2 | 27-APR self-imposed timeline (T-7)**

Trump 16-APR self-imposed timeline "next week and a half" runs to approximately 27-APR (T-7 from publication). No public federal finding has yet been released. The narrative concerns ~10 US scientists with NASA, nuclear weapons, defense research, and aerospace/UFO-related work who have died or gone missing since mid-2023. Named cases aggregate to varying corroboration: Hicks (NASA JPL 2023), Maiwald (NASA JPL 2024), Reza (NASA JPL 2025), Loureiro (MIT PSFC DEC-2025), Grillmair (Caltech/NASA FEB-2026), McCasland (ret. Maj. Gen., Albuquerque FEB-2026), Thomas (Novartis MAR-2026), Garcia (KC National Security Campus APR-2026). PATTERN-BREAKING FACTS: Grillmair has named suspect; Loureiro killed by former classmate; McCasland mental fog/medical; Thomas "no foul play suspected." ANALYTICAL DISPOSITION: Institutional engagement HIGH (T1 POTUS + WH Press Sec); individual case facts HIGH where local reporting corroborates; pattern/causal claim LOW-MODERATE; foreign-adversary causation LOW (non-zero given active IRGC/MOIS + SVR IO per INS-001, but unsupported by specific public evidence). TRIPWIRE: Trump ~27-APR (T-7) self-imposed timeline — federal public finding within window reclassifies; silence after commitment is itself reportable on information-environment grounds.

**SECTION 3 — FLASH EVENTS (Score ≥ 20)**

<b>GEO-001   US-Iran War: Op Epic Fury Day 51 / Blockade Day 8 / M/V Touska Seizure 19-APR</b>		<b>FLASH   UPDATED   28</b>
<b>SALUTE</b>		
<b>WHY THIS CYCLE</b>		
<b>Summary</b>	<p>BREAKING 19-APR: USS Spruance (DDG-111) fired three rounds of 5-inch MK45 into the engine room of Iranian-flagged 900-ft container ship M/V Touska in the Gulf of Oman. Marines from the 31st MEU embarked on USS Tripoli (LHA-7) fast-roped aboard via MH-60S Seahawks. The Touska was Treasury-sanctioned and routed Port Klang to Bandar Abbas at 17 knots. CENTCOM: 25 total commercial vessels turned back/seized since blockade began 13-APR; Touska is the first Iranian-flagged vessel seized. IRGC joint command Khatam al-Anbiya condemned the action and publicly pledged retaliation. First VP Mohammad Reza Aref (17-APR baseline): "either a free oil market for all, or the risk of high costs for everyone." Trump Truth Social (weekend): "NO MORE MR. NICE GUY" — threatened "every single Power Plant, and every single Bridge" in Iran, claimed blockade costs Iran "\$500M/day." Kpler: approximately zero tanker transits 19-APR Sunday — quietest day since war began. R2 diplomacy in flux: Witkoff and Kushner en route Islamabad, four USG aircraft at Nur Khan airbase; Iran MFA spokesperson Baqaei 20-APR: "no plans for the next round of talks"; CNN reports Iran sources indicate delegation arrives Tuesday; VP Vance participation uncertain. Ceasefire expires Tuesday night 22-APR UTC (Al Jazeera/Axios T1).</p>	
<b>Analyst Assessment</b>	<p>The Touska seizure is T1-confirmed via Navy/Marine Corps public statements and wire services. Operational meaning is HIGH — this is a line crossed. Previously the US was turning vessels back; now the US is boarding and seizing Iranian-flagged shipping with gunfire. IRGC retaliation is publicly pledged, and the 48-to-72-hour window before ceasefire expiration creates high retaliation risk. The situation is rapidly changing. TRIPWIRES: (1) Iranian kinetic retaliation against US Navy, Gulf bases, or merchant shipping within 72 hours; (2) R2 talks either</p>	

**ALT HYP**

commencing Tuesday or formally collapsing; (3) UKMTO issuing escalated advisory; (4) Lebanon CF breakdown; (5) Houthi Red Sea activation (see WATCH-007).

**ALT A: Iranian Retaliation Arrives Within 72 Hours [MOST LIKELY]**

IRGC Khatam al-Anbiya publicly pledged retaliation. First VP Aref framed as "high costs for everyone." Touska is first Iranian-flagged vessel boarded; face-saving response pressure is high. Iran has extensive kinetic options: mining, anti-ship missiles, small-boat swarms, Shahed drones, regional proxies.

✓ **Supporting Evidence:** IRGC public statement. Prior pattern of Iranian symmetric response to perceived escalation. DIA 16-APR assessment that Iran retains substantial missile and launcher capability. Proxy activation pathway through Kata'ib Hezbollah in Iraq or Houthi Red Sea assets is warmed up.

✗ **Ruling-Out Evidence:** Iran may judge that retaliation now collapses R2 talks and forfeits diplomatic off-ramp. Ceasefire expiration 22-APR provides natural decision point that might defer retaliation.

**ALT B: Iran Absorbs Touska Loss, R2 Talks Proceed Tuesday [EQUALLY LIKELY]**

Iran needs diplomatic off-ramp more than face-saving retaliation. Economic damage is compounding (\$500M/day per Trump's claim, though unverified). R2 delegation movement suggests Iran still intends to engage. Baqaei "no plans" statement may be pre-negotiation posturing.

✓ **Supporting Evidence:** USG aircraft at Nur Khan. Witkoff/Kushner travel. CNN reporting Iran delegation arrives Tuesday. Iranian hardline statements not matched by operational action (no missile launches, no mine reports).

✗ **Ruling-Out Evidence:** IRGC has institutional equities requiring visible response. Parliament and Kayhan hardline factions constrain Iranian negotiator flexibility. Touska captain/crew custody complicates deal space.

**ALT C: Trump Escalates First With Kinetic Strike on Iranian Infrastructure [LESS LIKELY]**

Trump "NO MORE MR. NICE GUY" Truth Social post threatened power plants and bridges. If retaliation does not materialize, US may preempt to force decisive outcome before ceasefire expiration.

✓ **Supporting Evidence:** Trump public threat in writing. US Navy deployment posture. CENTCOM operational tempo.

✗ **Ruling-Out Evidence:** Strike collapses R2 track Iran has signaled willingness to pursue. US ally pressure against widening war. Congressional notification requirements. Would trigger DEFCON escalation risk.

**SOURCES**

[Department of Defense \(USS Spruance/DDG-111 action\)](#) | [USNI News \(19-APR Touska seizure\)](#) | [CENTCOM \(blockade enforcement\)](#) | [Al Jazeera Live \(ceasefire expiration framing\)](#) | [Axios \(R2 Islamabad reporting\)](#) | [Reuters \(Iran MFA Baqaei "no plans"\)](#) | [CNN \(DIA Adams 16-APR\)](#) | [Full Source Registry](#)

**GEO-CF-LBN | Israel-Lebanon Ceasefire Stressed But Holding (French UNIFIL + 2 IDF KIA Weekend)**

**FLASH | UPDATED | 22**

**WHY THIS CYCLE**

**Summary**

Lebanon ceasefire (effective 16-APR 2100 UTC) continues to hold as the baseline structure governing Israeli-Hezbollah combat, but the weekend produced the first significant casualty events since the ceasefire took effect. One French UNIFIL peacekeeper KIA and two IDF soldiers KIA in separate incidents, sources reporting through Al Jazeera and Agence France-Presse. IDF has declared a "Yellow Line" buffer zone in southern Lebanon. Lebanon cumulative KIA 2,196 (Al Jazeera 17-APR baseline); 7,061 wounded; >1M displaced. 91 healthcare personnel KIA cumulative. Netanyahu continues to reject Hezbollah peace terms per CBS baseline. Hezbollah via Qassem posture: "finger on the trigger." France/Canada/Germany/Italy/UK previously expressed "grave concern"; Russia/China demanded Lebanon sovereignty. Critically: Iran FM Araghchi's 17-APR tying of Hormuz to Lebanon ceasefire did not survive the weekend — Iran repositioned to assert Strait of Hormuz control under Khatam al-Anbiya framing following Touska seizure.

**Analyst Assessment**

Ceasefire holding but stress-tested. French UNIFIL death is particularly significant given Paris-led allied escort framework. If escalation pattern continues, ceasefire may collapse within the same 48-to-72-hour window covering US-Iran ceasefire expiration 22-APR and Touska retaliation. TRIPWIRES: (1) Additional UNIFIL or IDF KIA; (2) Hezbollah firing south of the Yellow Line; (3) IDF operations south of Litani beyond defensive posture; (4) Parallel collapse of US-Iran CF triggering cascade.

**ALT HYP**

**ALT A: Ceasefire Holds Through 22-APR; Casualties Were Localized [MOST LIKELY]**

Weekend events are isolated tactical incidents, not structural breakdown. Command both sides absorbs casualties without escalation. Ceasefire reaches full 10-day window.

✓ **Supporting Evidence:** Al Jazeera/AFP reporting consistent with localized incidents, not coordinated Hezbollah or IDF escalation. UNIFIL deployment patterns allow for isolated incidents.

✗ **Ruling-Out Evidence:** Iranian retaliation for Touska seizure may trigger regional cascade that pulls Lebanon back in.

**ALT B: Incremental Breakdown Week 2 [EQUALLY LIKELY]**

Continued stress events degrade ceasefire compliance incrementally through week 2. No single decisive breakdown but effective collapse by 26-APR.

✓ **Supporting Evidence:** Historical Hezbollah-IDF pattern of probing engagements post-ceasefire. Yellow Line unilateral declaration by IDF is de facto escalation.

✗ **Ruling-Out Evidence:** Both sides have strong interest in preserving framework. International pressure. Lebanese government political investment.

**ALT C: Full Collapse Triggered by Iran-US Ceasefire Failure 22-APR [LESS LIKELY]**

Iran-US ceasefire collapse cascades to Lebanon. Hezbollah activated. Regional war resumes.

✓ **Supporting Evidence:** IRGC retaliation pledge for Touska + no plans for R2 talks per Baqaei 20-APR.

✗ **Ruling-Out Evidence:** Hezbollah still rebuilding; opportunity cost of reengagement high.

**SOURCES** | [Al Jazeera Live \(weekend casualties\)](#) | [Agence France-Presse \(UNIFIL KIA\)](#) | [IDF Spokesperson \(Yellow Line\)](#) | [CBS Iran War Live](#)

**GEO-PARIS | Paris Summit 17-APR — Non-US Hormuz Framework; French UNIFIL KIA Complicates**

**FLASH | CONTINUED | 18**

**WHY THIS CYCLE**

**Summary** | Paris Summit 17-APR at Élysée chaired by Macron and Starmer produced allied framework for non-US Hormuz escort services. French Defense Minister Vautrin confirmed France, Belgium, Netherlands capability for "fully supported escort services... in no way offensive." US and Israel not invited; framework explicitly independent of US blockade. Over the weekend, one French UNIFIL peacekeeper was killed in Lebanon, directly affecting the coalition's operational posture. UK FS Cooper rejection of Iranian tolls stands. China Wang Yi 16-APR characterized Hormuz reopening as "unanimous demand from international community." Operational deployment of allied warships has not yet occurred as of 20-APR.

**Analyst Assessment** | Political framework persists but operational deployment has not materialized. French UNIFIL KIA over the weekend is a complicating factor — Paris may prioritize Lebanon posture review before committing naval assets to Hormuz. If Iranian retaliation for Touska seizure escalates, coalition may either accelerate (to protect shipping) or defer (to avoid direct confrontation). TRIPWIRE: First FR/BE/NL warship in Gulf; coordination or non-coordination with CENTCOM; Iranian reaction to non-US escort framework.

**ALT HYP**

**ALT A: Deployment Accelerates to Protect Commercial Shipping [EQUALLY LIKELY]**

If Touska retaliation hits commercial shipping, European commercial equity forces expedited allied escort deployment.

✓ **Supporting Evidence:** FR/BE/NL operational capability confirmed. Mine-clearance task mapping cleanly.

✗ **Ruling-Out Evidence:** French UNIFIL KIA may distract from Hormuz deployment. Political will for direct Iran confrontation uncertain.

**ALT B: Political Framework Without Operational Deployment Through April [EQUALLY LIKELY]**

Paris Summit framework stays rhetorical; no FR/BE/NL warships deploy before end of month.

✓ **Supporting Evidence:** No deployment indicator 17-20 APR. Multiple competing European naval priorities.

✗ **Ruling-Out Evidence:** Iran escalation could force rapid operational commitment.

**SOURCES** | [NBC News Live 17-APR \(Paris Summit\)](#) | [French Government \(Élysée\)](#)

**GEO-002 | US-Iran Ceasefire Expires TUE Night 22-APR UTC — R2 Talks in Flux**

**FLASH | UPDATED | 26**

**WHY THIS CYCLE**

**Summary** | Ceasefire effective 08-APR expires Tuesday night 22-APR UTC (Al Jazeera: "truce ends April 22"; Axios: "Tuesday night"). R2 DELEGATION STATUS: Witkoff and Kushner en route Islamabad with four USG aircraft landed at Nur Khan airbase (T1 USG reporting via CNN, Bloomberg, Al Jazeera); Iran MFA spokesperson Baqaei 20-APR Monday: "no plans for next

round"; CNN citing Iran sources: Iran delegation arrives Tuesday 21-APR; VP Vance participation uncertain per Trump/Leavitt mixed messaging (reportedly security concerns). Trump Truth Social (weekend): "NO MORE MR. NICE GUY" threatening "every single Power Plant, and every single Bridge" in Iran, claiming blockade costs Iran "\$500M/day." Iran First VP Aref: "either a free oil market for all, or the risk of high costs for everyone." Pakistani army chief Munir continues to act as mediator. Iranian hardline domestic signals persist.

**Analyst Assessment**

The situation is rapidly changing and highly fluid. The Touska seizure 19-APR inserts major retaliation pressure on Iran that did not exist at the last DTR update. Baqaei "no plans" statement is either pre-negotiation posturing or genuine breakdown. Witkoff/Kushner on-the-ground presence indicates US still committed to diplomatic track, but Iran MFA public signals and IRGC retaliation pledge suggest Iranian decision not yet final. The next 48 hours are decisive. TRIPWIRES: (1) Trump Truth Social or Iran MFA public confirmation R2 commences; (2) Any Iranian kinetic action before Tuesday; (3) Formal ceasefire extension announcement; (4) Ceasefire lapse without extension.

**ALT HYP**

**ALT A: R2 Commences Tuesday; Framework Extends Ceasefire [EQUALLY LIKELY]**

Iran absorbs Touska loss, delegation arrives Tuesday, R2 produces at minimum ceasefire extension with Hormuz/nuclear/sanctions sticking points deferred.

✓ **Supporting Evidence:** USG aircraft positioned at Nur Khan. Witkoff/Kushner travel. CNN Iran-source reporting delegation arrives Tuesday. Pakistani mediator track active.

✗ **Ruling-Out Evidence:** Baqaei "no plans" public statement. IRGC Khatam al-Anbiya retaliation pledge. Hardline Kayhan/parliament signals. VP Vance uncertainty.

**ALT B: Ceasefire Lapses Without Agreement; Both Sides Resume Limited Kinetic [EQUALLY LIKELY]**

Tuesday arrives without R2 output; neither side formally ends ceasefire but operational tempo resumes; Iran mines Gulf approaches, US strikes Iranian power infrastructure.

✓ **Supporting Evidence:** Trump "NO MORE MR. NICE GUY" escalation signal. Baqaei "no plans" public. Touska retaliation unresolved.

✗ **Ruling-Out Evidence:** Both sides have economic/political interest against full resumption. Pakistani mediation track continues.

**ALT C: Iran Kinetic Retaliation Before Tuesday [LESS LIKELY]**

IRGC acts on public pledge within 48 hours; retaliation targets US Navy, Gulf bases, or merchant shipping before ceasefire expires.

✓ **Supporting Evidence:** IRGC Khatam al-Anbiya public pledge. Face-saving pressure. 19-APR Kpler transit effectively zero suggests IRGC preparing theater.

✗ **Ruling-Out Evidence:** Iran has diplomatic off-ramp via R2; retaliation forfeits it. Internal US hardliners would use retaliation to expand war.

**SOURCES**

[Al Jazeera Live \(22-APR expiration\)](#) | [Axios \(Witkoff/Kushner Islamabad\)](#) | [CNN \(Iran delegation arrives Tuesday\)](#) | [Bloomberg \(USG aircraft at Nur Khan\)](#) | [Reuters \(Baqaei "no plans"\)](#)

**GEO-INDOPAC | PRC Scarborough Barrier REMOVED Weekend + SCS Structural Position Holds**

**FLASH | UPDATED | 20**

**WHY THIS CYCLE**

**Summary**

Philippine Coast Guard confirmed over weekend 17-18 APR that PRC removed the 352m floating barrier previously installed at Scarborough Shoal entrance on 10-11 APR. Ten CCG vessels remain deployed mid-April per Philippine Navy. FDD 16-APR 1,500-acre Antelope Reef airbase construction continues (Vantor satellite imagery). E China Sea: thousands of PRC fishing boats in organized 200-mile formations near Japan-Taiwan-Korea lanes. US-Philippines Balikatan exercises active in Zambales. "Iron Triangle" framing in analyst commentary regarding combined Hormuz + SCS + global shipping concern.

**Analyst Assessment**

Barrier removal is tactical-level de-escalation; broader PRC SCS structural position (airbase construction, vessel presence, fishing fleet organization) unchanged. Pattern supports ALT A (gray-zone opportunism) rather than Taiwan-escalation precursor. Timing of removal coincident with US focus on Touska seizure may indicate PRC perception that US attention is bandwidth-limited. TRIPWIRE: Re-installation of any barrier; PLAN deployment to shoal; Balikatan friction; ASEAN coordinated response.

**ALT HYP**

**ALT A: Barrier Removal Tactical; Structural PRC Position Holds [MOST LIKELY]**

PRC gains short-term provocation value, removes before triggering Philippine kinetic response, retains longer-term structural position.

✓ **Supporting Evidence:** PCG confirmation of removal. Antelope Reef construction ongoing. CCG vessel presence persists.

✗ **Ruling-Out Evidence:** Could indicate PRC bandwidth re-allocation to other theater.

**ALT B: Coordinated With Iran Deal Expectations [LESS LIKELY]**

PRC deactivates provocation as Wang Yi positions Beijing for mediator role if Iran deal materializes.

✓ **Supporting Evidence:** Wang Yi 16-APR Hormuz framing. PRC diplomatic equities.

✗ **Ruling-Out Evidence:** No public PRC statement linking. Timing also consistent with pure domestic decision.

**SOURCES**

[Philippine Coast Guard](#) | [FDD Antelope Reef Analysis](#) | [Reuters \(barrier removal\)](#)

**GEO-DPRK | 5x Tactical Hwasong-11 Launch From Sinpo 19-APR — Possible SLBM Under Analysis**

**FLASH | NEW | 22**

**WHY THIS CYCLE**

**Summary**

DPRK launched 5 tactical Hwasong-11 variants from Sinpo area on 19-APR to a target island approximately 136 km away, described as "high precision" per KCNA state media. Kim Jong Un expressed "great satisfaction." This is the 7th launch of the year and 4th in April; the previous 12-APR event featured the first public destroyer-launched cruise and anti-ship missile test from the Choe Hyon class. ROK JCS is analyzing whether the 19-APR launch originated from a submarine platform — which would be the first DPRK SLBM test in approximately 4 years. IAEA UN nuclear watchdog issued a "very serious" advance warning days before the launches. Bloomberg (20-APR): US is restricting intelligence sharing with Seoul amid US-Iran diplomatic focus.

**Analyst Assessment** Pattern suggests coordinated test campaign timed to periods of US global attention dispersion. SLBM confirmation would mark significant DPRK capability milestone. US-ROK intelligence-sharing restriction is a structural concern raised by allied-relationship analysts. TRIPWIRE: ROK JCS formal SLBM attribution; additional launches within 72 hours; DPRK statement pairing with Iran escalation; US PACOM posture change.

**ALT HYP**

**ALT A: Test Campaign Continues with Additional April Launches [MOST LIKELY]**

DPRK maintains high tempo through end of April, leveraging US Iran/diplomatic focus.

✓ **Supporting Evidence:** Four April launches to date. Kim satisfaction statement suggests program continuity. Pre-launch IAEA advance warning indicates program signaling.

✗ **Ruling-Out Evidence:** Tempo may yield to operational pause after weapons capability validated.

**ALT B: First Confirmed DPRK SLBM in Four Years [EQUALLY LIKELY]**

19-APR launch from submarine; ROK confirms within 72 hours; significant strategic capability milestone.

✓ **Supporting Evidence:** Sinpo area launch location. ROK analysis underway. DPRK strategic incentive to demonstrate deliverable nuclear capability.

✗ **Ruling-Out Evidence:** ROK JCS typically conservative on SLBM attribution. May be surface/TEL launch from coastal site.

**ALT C: Coordinated Signaling With Iran [LESS LIKELY]**

DPRK launches timed with Iran-US ceasefire pressure to distract US and support Iran posture.

✓ **Supporting Evidence:** Timing co-incident with blockade Day 8. Historical DPRK-Iran cooperation on missile technology.

✗ **Ruling-Out Evidence:** No direct DPRK-Iran statement connecting. DPRK has independent program tempo driven by domestic calendar.

**SOURCES**

[USNI News \(19-APR launch\)](#) | [KCNA State Media](#) | [Bloomberg \(US intel restriction\)](#) | [IAEA DPRK monitoring](#)

**PWR-001 | Hormuz Energy Flows + IEA April Oil Market Report — Largest Disruption in History**

**FLASH | CONTINUED | 24**

**WHY THIS CYCLE**

**Summary**

IEA April 2026 Oil Market Report baseline persists: Global oil supply dropped 10.1 mb/d to 97 mb/d in March — "largest disruption in history." Alternative routes (Saudi west coast, Fujairah, Iraq-Türkiye ITP pipeline) up to 7.2 mb/d from <4 mb/d pre-war. Middle East refineries cut runs 6 mb/d to 77.2 mb/d. Floating storage ME +100 mb in March; onshore crude stocks +20 mb; China added 40 mb to tanks. US SPR release 172M bbl during crisis; IEA-coordinated release 400M bbl across 32 nations. IEA Birol: Europe ~6 weeks jet fuel. 230 loaded tankers waiting inside Gulf (ADNOC CEO, baseline). POST-TOUSKA DATA: Kpler reports approximately zero tanker transits 19-APR Sunday (quietest day since 28-FEB war began); approximately 20 vessels transited 18-APR Saturday.

<b>Analyst Assessment</b>	The Touska seizure and immediate transit collapse on 19-APR reverse the trajectory that had briefly emerged on 17-APR. Jet fuel timeline (IEA 6 weeks) now faces renewed pressure — if shipping remains constrained through May 15, European aviation will materially degrade. TRIPWIRE: Lloyd's war risk rate escalation; Maersk/CMA CGM formal extension of suspensions; weekly EIA inventory; first non-Iranian tanker stopped or attacked.
<b>ALT HYP</b>	<b>ALT A: Structural Supply Shock Deepens With Iranian Retaliation [EQUALLY LIKELY]</b>
	Iran retaliation (mines, anti-ship missiles, drones) further degrades Hormuz flows; Brent exceeds \$100; Europe jet fuel crisis within 3 weeks.
	✓ <b>Supporting Evidence:</b> IRGC public retaliation pledge. Zero transits 19-APR indicator. Aref "high costs for everyone" framing.
	✗ <b>Ruling-Out Evidence:</b> US blockade tightens could eventually force Iranian capitulation. Coalition escort deployment could reopen shipping.
	<b>ALT B: R2 Talks Produce Extension and Graduated Recovery [EQUALLY LIKELY]</b>
	Witkoff/Kushner talks succeed Tuesday; ceasefire extends; shipping gradually resumes over 2-3 weeks; prices retrace to \$85 Brent.
✓ <b>Supporting Evidence:</b> USG aircraft positioned. Both sides have economic incentive.	
✗ <b>Ruling-Out Evidence:</b> Iran MFA "no plans" statement. Hardline Iranian signals. Insurance market lag.	
<b>SOURCES</b>	<a href="#">IEA Oil Market Report April 2026</a>   <a href="#">Kpler (19-APR transit data)</a>   <a href="#">EIA STEO</a>

<b>FIN-001   Oil/Markets Repricing +7% on Touska Seizure — Brent \$96.88 / WTI \$90.33</b>	<b>FLASH   UPDATED   24</b>
<b>WHY THIS CYCLE</b>	
<b>Summary</b>	Post-Touska pricing: Brent crude Jun futures \$96.88 (+7% on the seizure); WTI May futures \$90.33 (+7%). AAA national gasoline \$4.05/gal (20-APR). Energy Secretary Wright public statement: not back below \$3/gal "until next year." 10-year Treasury ~4.29%. S&P 500 near all-time high. 6 of 10 G10 central banks expected to raise rates 2026 (was 3 pre-war). Only Fed expected to cut. Goldman base case \$85 2026 avg assumes diplomatic track holds — no longer the consensus base case given Touska. Treasury OFAC cumulative: 875+ persons/vessels/aircraft sanctioned in 2025; 180+ shadow fleet vessels cumulative under NSPM-2 maximum pressure framework. Recent OFAC actions: 14-APR Counter Narcotics, Counter Terrorism + Russia GL amendments; 15-APR Counter Narcotics, Counter Terrorism; 16-APR Iran-related Designations + Counter Terrorism Designations; 17-APR Counter Terrorism Designations; Sudan Designations.
<b>Analyst Assessment</b>	Price action is rapidly changing and will respond within hours to next developments. Short-gamma positioning has been volatile. Dow Futures weekend reaction to Touska was sharply negative; equity futures remain elevated. If R2 produces Tuesday extension, expect 10-15% oil retracement; if retaliation event, snap to \$105+ Brent. Insurance market reaction lagging by 24-48 hours.
<b>ALT HYP</b>	<b>ALT A: Prices Retrace on R2 Success [EQUALLY LIKELY]</b>
	Tuesday R2 delivers framework; market unwinds to \$85 Brent / \$80 WTI by end of week.
	✓ <b>Supporting Evidence:</b> Market positioning primed for unwind. Goldman base case supports.

	<p>✘ <b>Ruling-Out Evidence:</b> Iran MFA "no plans" signals. IRGC retaliation pledge unresolved.</p>
	<p><b>ALT B: Prices Spike Above \$100 on Retaliation [EQUALLY LIKELY]</b></p> <p>Iranian retaliation against US Navy or Gulf infrastructure triggers panic buying; Brent exceeds \$105.</p>
	<p>✓ <b>Supporting Evidence:</b> IRGC public pledge. Post-Touska transit collapse 19-APR.</p>
	<p>✘ <b>Ruling-Out Evidence:</b> US political/military capacity to impose kinetic cost on Iran may deter retaliation.</p>
<b>SOURCES</b>	<p><a href="#">Treasury OFAC Recent Actions</a>   <a href="#">CNBC Markets</a>   <a href="#">AAA Gas Prices</a></p>

<b>SC-001   Supply Chain — UKMTO Hormuz CRITICAL Persists Post-Touska Seizure</b>	<b>FLASH   UPDATED   22</b>
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<b>WHY THIS CYCLE</b>	
<b>Summary</b>	<p>UKMTO/JMIC Update 031 12-APR (T1 baseline): Hormuz CRITICAL, Bab el-Mandeb MODERATE. AIS transit volumes: 8/2/4 per day 09-11 APR; approximately 20 vessels 18-APR Saturday; approximately zero 19-APR Sunday per Kpler (post-Touska seizure). Pre-war pre-28-FEB baseline: approximately 100-138 commercial vessels per day. JMIC tracks 30+ maritime incidents since 28-FEB start of hostilities. Norwegian Maritime Authority MARSEC/ISPS Level 3 for Norwegian-flagged in Persian Gulf/Hormuz/Gulf of Oman. MARAD Advisory 2026-004 standing. Iran IRGC alternative routing graphics in effect. Mines suspected per multiple reporting. Maersk/CMA CGM/Hapag-Lloyd suspensions persist. ITWF Warlike Operations Area designation active. All 12 P&amp;I Clubs International Group issued 72-hr cancellation of war cover in early March; residual premiums elevated.</p>
<b>Analyst Assessment</b>	<p>Situation rapidly changing. Post-Touska seizure, UKMTO escalation possible within 24-48 hours. Lloyd's war risk rate revision pending post-19-APR Touska (market range cited: VLCC at 5% = \$10-14M per transit on early-April baseline; post-Touska revision expected). Insurance market lag behind political events is the binding constraint on commercial shipping resumption. TRIPWIRE: UKMTO status change (CRITICAL to SEVERE); Lloyd's rate publication; attack on non-Iranian commercial vessel; first R2-outcome transit.</p>
<b>ALT HYP</b>	<p><b>ALT A: UKMTO Escalates CRITICAL→SEVERE [LESS LIKELY]</b></p> <p>Further Iranian action triggers UKMTO to escalate or issue emergency advisory; Lloyd's rates spike.</p> <p>✓ <b>Supporting Evidence:</b> Post-Touska zero-transit data. IRGC retaliation pledge.</p> <p>✘ <b>Ruling-Out Evidence:</b> UKMTO has operational reasons to retain baseline CRITICAL until specific additional incident.</p>
	<p><b>ALT B: Status Persists With Continued Low Transit [MOST LIKELY]</b></p> <p>UKMTO CRITICAL holds; transit volumes remain approximately zero to single digits; pending R2 outcome Tuesday.</p> <p>✓ <b>Supporting Evidence:</b> Consistent pattern since blockade commenced. Insurance market conservative adjustment pace.</p>

✘ **Ruling-Out Evidence:** Diplomatic breakthrough could produce rapid improvement if ceasefire extension and escort deployment occur.

**SOURCES** | [UKMTO JMIC Update 031](#) | [Kpler \(tanker transit data\)](#) | [MARAD 2026-004](#)

**AGR-001 | Fertilizer Shock — 2026 Planting Season Locked; Post-Touska Pressure Compounds**

**FLASH | CONTINUED | 22**

**WHY THIS CYCLE**

**Summary** Urea Egypt FOB (bellwether nitrogen fertilizer) approximately \$700/MT vs. \$400-490 pre-war = +78% on CRU Group analysis cited by PBS NewsHour and CNBC. US NOLA urea up 25% since end-February per AFBF. Ammonia +20% per Alpine Macro. Phosphate stressed +30% range. IFPRI (IFPRI.org) and American Farm Bureau Federation: approximately 30% of globally traded urea disrupted; approximately 50% of globally traded sulfur; 25% of globally traded ammonia all sourced from the Gulf region now at risk. China extended fertilizer export restrictions through end of August 2026 to protect domestic supply. Ethiopia gets 90% of nitrogen fertilizer from the Gulf via Djibouti; Sub-Saharan Africa most exposed. Historical 2008-2020 avg anhydrous approximately \$650, urea approximately \$440. Current 58-70% above long-run avg.

**Analyst Assessment** The 2026 crop cost structure is locked with fertilizer 58-70% above 2008-2020 average. Touska seizure removes short-term substitution or recovery scenario; the situation is rapidly changing but trajectory is deteriorating for Q3 food cost pass-through. Watch downstream food CPI Q3 2026. Emerging-market food security impact most severe. TRIPWIRE: Additional Q3 food inflation signals; Ethiopia/East Africa emergency import requests; US CPI food category.

**SOURCES** | [IFPRI \(April 2026 fertilizer impact\)](#) | [AFBF Market Intel](#) | [PBS \(CRU Group analysis\)](#)

**CYB-005 | CISA AA26-097A Day 14 — OT/PLC Exploitation Holds Without New Federal Escalation**

**FLASH | CONTINUED | 22**

**WHY THIS CYCLE**

**Summary** CISA-FBI-NSA-EPA-DOE-CyberCom joint advisory AA26-097A 07-APR (T1 baseline). Iranian-affiliated APT targeting internet-facing OT including Rockwell Automation / Allen-Bradley PLCs. Threat actor identity consolidated across multiple vendor naming conventions: CyberAv3ngers (US Treasury designation), Shahid Kaveh Group (Mandiant), Hydro Kitten (CrowdStrike), Storm-0784 (Microsoft), UNC5691 (Mandiant track). 5,219+ exposed count holds. Water, energy, municipal facilities affected. FBI NY field office warned Iran-linked PLC exploitation 07-APR baseline. Day 14 quiet period continues.

**Analyst Assessment** 14-day quiet period continues to suggest either (a) CISA/FBI coordinated containment, (b) threat actor operational tempo slower than Treasury designation pace, or (c) additional incidents below public-disclosure threshold via ISAC channels. Iran kinetic escalation (Touska, IRGC retaliation pledge, CF expiration 22-APR) should elevate threat actor cost-benefit. TRIPWIRE: New CISA supplement; named CI victim; KEV addition tied to OT vector; Iran-attributed incident on CONUS water/electric infrastructure.

**SOURCES** | [CISA AA26-097A](#) | [CyberScoop 07-APR baseline](#)

**GEO-009 | IRGC Retaliation Pledged Post-Touska — Restraint Window Closed**

**FLASH | UPDATED | 24**

**WHY THIS CYCLE**

**Summary**

IRGC Khatam al-Anbiya joint command 19-APR (T1): condemned the USS Spruance action against M/V Touska and publicly pledged retaliation. First VP Mohammad Reza Aref (17-APR baseline): "either a free oil market for all, or the risk of high costs for everyone." DIA Lt. Gen. Adams 16-APR baseline: Iran retains "thousands of missiles" and OWA drones; ~half missile launchers intact; Iran-backed Shiite militias "hundreds" of attacks on US forces since 28-FEB. Hengaw 08-APR baseline: 6,620+ IRGC KIA. HRANA 07-APR baseline: 3,636+ total Iran KIA (1,701 civilians, 1,221 military, 714 unclassified). Khamenei killed 28-FEB; Larijani assassinated 17-MAR; Khademi (IRGC intel head) assassinated 06-APR. Hardline political signals (Kayhan, parliament deputy speaker) continue to escalate.

**Analyst Assessment**

Situation rapidly changing. Public retaliation pledge creates IRGC face-saving pressure to act within 48-72 hours or before ceasefire expiration 22-APR. Potential retaliation vectors: (1) mining Hormuz approaches, (2) anti-ship missile or drone attack on US Navy or commercial vessel, (3) Shiite militia strike on US forces in Iraq or Syria, (4) Houthi Red Sea activation (see WATCH-007), (5) cyber attack on US infrastructure (AA26-097A vector). DIA capability assessment allows any or several of these. TRIPWIRE: Any kinetic event attributable to Iran or proxies; IRGC movement indicators; cyber incident during CF window.

**ALT HYP**

**ALT A: Retaliation Arrives Before CF Expiration 22-APR [MOST LIKELY]**

IRGC institutional pressure + face-saving logic + window narrowing forces action before diplomatic track can foreclose military option.

✓ **Supporting Evidence:** IRGC public pledge. Aref "high costs" framing. DIA capability intact.

✗ **Ruling-Out Evidence:** Iran has diplomatic off-ramp via R2 Tuesday; retaliation forfeits it.

**ALT B: Delayed Retaliation After CF Expiration [EQUALLY LIKELY]**

IRGC holds action until ceasefire formally expires, avoiding forfeiture of R2 if R2 emerges.

✓ **Supporting Evidence:** Pakistani mediator track still active. Witkoff/Kushner still en route.

✗ **Ruling-Out Evidence:** Hardline domestic pressure may not tolerate delay.

**ALT C: No Retaliation; Retaliation Pledge Is Rhetorical [LESS LIKELY]**

IRGC pledge is face-saving public rhetoric; Iran accepts Touska loss as cost of maintaining diplomatic track.

✓ **Supporting Evidence:** R2 delegation movement. Iran economic damage compounds.

✗ **Ruling-Out Evidence:** IRGC institutional equities require visible response. Parliament and Kayhan constrain Iranian negotiator flexibility.

**SOURCES**

[CENTCOM \(Touska seizure\)](#) | [Reuters \(IRGC statement\)](#) | [CNN \(DIA 16-APR baseline\)](#)

**INS-001 | IRGC/MOIS Homeland Threat + DIA-Confirmed Militia Operations**

**FLASH | CONTINUED | 22**

**WHY THIS CYCLE**

<b>Summary</b>	DOJ "Justice Department Disrupts Iranian Cyber Enabled Psychological Operations" 19-MAR baseline (T1). Asif Merchant conviction 06-MAR baseline (T1 DOJ) — IRGC trained operative, US assassination plot including Trump. DIA Adams 16-APR baseline: Iran-backed Shiite militias "hundreds" of attacks on US forces since 28-FEB. Recent OFAC actions: 14-APR Counter Narcotics, Counter Terrorism + Russia GL amendments; 15-APR Counter Narcotics, Counter Terrorism; 16-APR Iran-related Designations + Counter Terrorism Designations; 17-APR Counter Terrorism Designations; Sudan Designations. 875+ persons/vessels/aircraft sanctioned under NSPM-2 in 2025; 180+ shadow fleet vessels cumulative. Magaziner/Thompson letter to FBI Director Patel 06-MAR baseline: counterespionage agents with Iran expertise terminated at FBI. No new homeland kinetic incident confirmed this cycle.
<b>Analyst Assessment</b>	DIA baseline confirms active adversary operations; kinetic posture in CONUS remains unchanged at publication, but 48-72 hour window elevated for (1) cyber attack (AA26-097A vector, see CYB-005), (2) proxy-enabled targeting of US persons or infrastructure, (3) activation of sleeper networks. Domestic institutional capacity may be reduced per congressional reporting (FBI counterespionage terminations). TRIPWIRE: New DOJ/FBI indictment; NTAS issuance (long overdue); OFAC expansion; named plot disruption; any kinetic incident attributable to Iran.
<b>SOURCES</b>	<a href="#">Treasury OFAC Recent Actions</a>   <a href="#">DOJ MOIS Seizure</a>   <a href="#">DIA Testimony</a>

<b>AVN-001   EASA CZIB 2026-03-R6 Expires 24-APR-2026 (T-4) — Critical Decision Point</b>		<b>FLASH   UPDATED   22</b>
<b>WHY THIS CYCLE</b>		
<b>Summary</b>	EASA CZIB 2026-03 R6 valid through 24-APR-2026 (T1 EASA web T-4 days from publication). 11 FIRs covered: Bahrain, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Qatar, UAE, Saudi Arabia. Exception: south of OBSOT-DANOM-KEDON-VELOD reporting points in Saudi FIR Jeddah and Oman FIR Muscat at FL320+ with current risk assessment. Separate CZIBs remain in force: Syria (CZIB-2017-03R17), Yemen Sana'a (CZIB-2017-07R17). Additional national-level NOTAMs: France LFFF F0660-F0664 (10-APR) covering Iran/Iraq/Lebanon; Germany EDWW B0189-B0190 (02-APR) Iran/Lebanon; Italy LIRR E0559/E0563/E0564/E0567 (13-MAR). Kuwait OKKK: drone strike on fuel storage tank reported (no fatalities, airport infrastructure impact). UAE briefly closing airspace during new missile/drone threats. Emirates/Qatar Airways ~70% capacity reduction. Lufthansa, Air France-KLM continued Dubai/Tel Aviv suspensions.	
<b>Analyst Assessment</b>	Situation rapidly changing. 24-APR review is the operational tripwire. Given Touska seizure and ceasefire expiration 22-APR two days before EASA review, near-term trajectory strongly supports R7 extension through at least mid-May. If kinetic retaliation occurs, aviation could escalate to complete FIR closure. European carrier operational decisions lag EASA by 24-72 hours. TRIPWIRE: EASA R7 publication before 24-APR; individual FIR closures; airport infrastructure strikes; European carrier Dubai/Tel Aviv announcements.	
<b>SOURCES</b>	<a href="#">EASA CZIB 2026-03 R6</a>   <a href="#">SafeAirspace (conflict zone tracking)</a>   <a href="#">OPSGROUP</a>	

<b>TER-001   DHS NTAS — Gap Persists Day 51; No Bulletin Since JUN-2025 Expired 22-SEP-2025</b>		<b>FLASH   NEW   20</b>
<b>WHY THIS CYCLE</b>		
<b>Summary</b>	DHS NTAS website (T1): "There are no current advisories." The 22-JUN-2025 NTAS Bulletin ("heightened threat environment across the United States due to the direct involvement of the United States in the ongoing conflict between the nations of Israel and Iran") expired 22-SEP-2025 and has NOT been reissued despite Operation Epic Fury beginning 28-FEB-2026. HSToday perspective piece (published 01-MAR): "Operation Epic Fury is underway and DHS	

	has issued no NTAS terror alert. Here's why that silence is a serious homeland security concern." CFR Bruce Hoffman interview 02-MAR-2026: counterterrorism posture shift toward immigration has eroded DHS institutional capacity for homeland terrorism response. DHS NTAS website footer notice: "due to a lapse in federal funding, the site is not being actively managed and has not been updated since February 17, 2026." Information may not be current until appropriations enacted.
<b>Analyst Assessment</b>	The 51-day gap is structurally unusual for a period of active US kinetic military operations in the Middle East. NTAS bulletins have historically been the public-messaging mechanism through which DHS and FBI coordinate state, local, and private-sector vigilance for foreign-adversary-linked homeland threats. Absent NTAS, the signal function is being carried by CISA (cyber), ODNI (threat assessment), and individual federal statements — none of which reach the same operator and public audiences. Practitioner posture: treat heightened threat environment as operationally real regardless of federal NTAS publication. TRIPWIRE: NTAS bulletin issuance; DHS/FBI joint statement referencing Iran threat; named homeland plot disruption.
<b>SOURCES</b>	<a href="#">DHS NTAS</a>   <a href="#">HSToday (01-MAR critique)</a>   <a href="#">CFR Hoffman interview</a>

## SECTION 4A — CYBER & INFORMATION SECURITY

<b>CYB-008   Microsoft SharePoint Zero-Day CVE-2026-32201 — KEV, Federal Due 28-APR (T-8)</b>		<b>HIGH   UPDATED   16</b>
<b>WHY THIS CYCLE</b>		
<b>Summary</b>	CISA KEV 14-APR baseline (T1). CVE-2026-32201 Microsoft SharePoint Server spoofing. Federal remediation due 28-APR (T-8 from publication 20-APR). Part of 2 KEVs added 14-APR (other: CVE-2009-0238 MS Office RCE). Storm-1175 actively weaponizing CVE-2023-21529 Exchange deserialization for Medusa ransomware per Microsoft Threat Intelligence. Fortinet CVE-2026-21643 federal deadline passed 16-APR (see CYB-002). Patch queue compound with CYB-010 (ActiveMQ, due 30-APR T-10), CYB-002 (Fortinet overdue Day 4), and Cisco SD-WAN ED 26-03 (FCEB deadlines all past 23-MAR).	
<b>Analyst Assessment</b>	Agencies and enterprises running on-prem SharePoint Server have 8 days to remediate. IRGC retaliation pledge (see GEO-009) elevates cyber threat environment for CONUS CI operators. AA26-097A Day 14 OT/PLC focus (see CYB-005) pairs with SharePoint+ActiveMQ identity-plane compound exposure.	
<b>SOURCES</b>	<a href="#">CISA KEV Catalog</a>   <a href="#">Hacker News 14-APR baseline</a>	

<b>CYB-009   Storm-0558 / Microsoft Identity Plane — Unresolved Root Cause Relevant to Current Environment</b>		<b>HIGH   NEW   15</b>
<b>WHY THIS CYCLE</b>	CSRB unresolved findings on Storm-0558 (2023 Microsoft identity plane breach) gain new relevance given current cycle KEV cadence: CYB-008 SharePoint, CYB-010 ActiveMQ, plus Storm-1175 Exchange weaponization all hit Microsoft identity-plane-adjacent surfaces simultaneously. Deeper analysis coming in AI / Data Center / Infrastructure sector brief.	
<b>Summary</b>	CSRB Review of Summer 2023 MEO Intrusion documented Storm-0558 breach that used acquired Microsoft signing key to issue forged tokens for 22 organizations including US federal agencies. CSRB findings: Microsoft security culture inadequate; root cause not fully established. Current cycle compound: SharePoint KEV (CYB-008, 14-APR, due 28-APR), Apache ActiveMQ KEV (CYB-010, 16-APR, due 30-APR), Storm-1175 weaponizing CVE-2023-21529 Exchange deserialization for Medusa ransomware per Microsoft Threat Intelligence. Identity-plane trust assumptions are the common thread.	
<b>Analyst Assessment</b>	Current cycle is not a repeat of Storm-0558 but the compound identity/Microsoft-ecosystem exposure pattern mirrors the preconditions CSRB flagged as unaddressed. Enterprise/federal	

operators should verify M365/Azure token-validation posture, review SharePoint on-prem exposure, and assess Exchange attack surface. Full analysis in dedicated sector brief. CONFIDENCE: HIGH on CSRB findings (T1). HIGH on current KEV cadence (T1 CISA). MODERATE on pattern recognition (analyst judgment).

**SOURCES** [CSRB Review MEO Intrusion](#) | [Microsoft Threat Intelligence](#)

**CYB-010 | Apache ActiveMQ CVE-2026-34197 — KEV, Federal Due 30-APR (T-10)**

**HIGH | UPDATED | 13**

**WHY THIS CYCLE**

**Summary** CISA KEV 16-APR baseline (T1). Apache ActiveMQ improper input validation vulnerability allowing code injection. Federal remediation due 30-APR (T-10 from publication 20-APR). "Known to be used in ransomware campaigns: Unknown" per CISA. References: [activemq.apache.org/security-advisories.data](#), NIST NVD.

**Analyst Assessment** ActiveMQ widely deployed as message broker in enterprise integration architectures. Code injection via messaging paths bypasses perimeter controls. Federal operators with ActiveMQ in FISMA-boundary systems have 10 days. TRIPWIRE: compliance deadline 30-APR; ransomware campaign attribution; specific enterprise disclosure.

**SOURCES** [CISA KEV](#) | [Apache ActiveMQ Advisory](#)

**CYB-002 | Fortinet CVE-2026-21643 — Federal Deadline OVERDUE Day 4**

**HIGH | UPDATED | 18**

**WHY THIS CYCLE**

**Summary** CISA KEV 13-APR baseline, federal due 16-APR (T1). SQL injection in FortiClient EMS, unauthenticated, CVSS 9.1. Defused Cyber detected exploitation attempts since 24-MAR. FortiGuard PSIRT FG-IR-25-1142. FortiClient EMS CVE-2026-35616 (separate) added to KEV 06-APR.

**Analyst Assessment** Agencies past deadline operating in non-compliance with BOD 22-01. Active exploitation timeline >4 weeks. IR burden likely accumulating at Fortinet shops. TRIPWIRE: named agency breach; CISA emergency directive.

**SOURCES** [CISA KEV](#) | [Fortinet PSIRT](#)

**CYB-003 | CISA ED 26-03 Cisco SD-WAN — CVE-2026-20127 CVSS 10 + CVE-2022-20775**

**HIGH | UPDATED | 18**

**WHY THIS CYCLE**

**Summary** CISA Emergency Directive ED 26-03 issued 25-FEB (T1). Cisco SD-WAN Manager affected: CVE-2026-20127 CVSS 10.0 authentication bypass combined with CVE-2022-20775 path traversal enables unauthenticated RCE on management plane. Cisco Talos attribution to threat actor UAT-8616. Federal deadlines: identify 27-FEB, patch 10-MAR, report 23-MAR — all past. Public-facing Cisco SD-WAN deployments at federal agencies have been directed to disconnect or remediate.

**Analyst Assessment** SD-WAN management plane compromise provides lateral movement across enterprise branches and potentially OT/IT boundary crossings. UAT-8616 attribution places this within the broader pattern of nation-state interest in network edge appliances. Wartime elevation: Iranian-affiliated APT interest in infrastructure management planes has historical precedent. TRIPWIRE: named agency breach; supplemental CISA directive; expansion of CVE scope.

**SOURCES** | [CISA ED 26-03](#) | [Cisco PSIRT](#) | [Cisco Talos \(UAT-8616\)](#)

**SECTION 4B — PHYSICAL / GEOPOLITICAL / IO**

<b>GEO-007   Lebanon CF In Place But Stressed — French UNIFIL + 2 IDF KIA Weekend</b>		<b>HIGH   UPDATED   15</b>
<b>WHY THIS CYCLE</b>		
<b>Summary</b>	Lebanon cumulative KIA 2,196 baseline (AI Jazeera 17-APR). 7,061 wounded; >1M displaced (20% population). 91 Lebanese healthcare personnel KIA cumulative; 241 injured per Ministry of Health. Weekend stress: one French UNIFIL peacekeeper KIA, two IDF soldiers KIA in separate incidents. IDF declared "Yellow Line" buffer zone south of Litani. Netanyahu rejection of Hezbollah peace terms stands. Hezbollah via Qassem posture unchanged: "finger on the trigger." France/Canada/Germany/Italy/UK "grave concern"; Russia/China called for Lebanon sovereignty. UK pledged \$28M humanitarian baseline.	
<b>Analyst Assessment</b>	Ceasefire holding baseline but weekend casualty events represent first serious stress test. French UNIFIL KIA is particularly significant given Paris-led allied escort framework (see GEO-PARIS). Lebanon trajectory may collapse with Iran-US ceasefire expiration 22-APR if cascading escalation occurs. TRIPWIRE: Additional UNIFIL/IDF KIA; Hezbollah firing south of Yellow Line; IDF ops south of Litani beyond defensive posture.	
<b>SOURCES</b>	<a href="#">Al Jazeera Live</a>   <a href="#">Lebanon NNA</a>   <a href="#">AFP (UNIFIL KIA)</a>	

<b>GEO-UKR   Russia-Ukraine: ZNPP Second Power Outage 17-APR (40-Min); US Arms Delay Confirmed</b>		<b>HIGH   UPDATED   15</b>
<b>WHY THIS CYCLE</b>		
<b>Summary</b>	IAEA (T1): ZNPP suffered second power outage 17-APR evening, 40-minute restoration. 6-MAR baseline: Ferosplavna-1 back-up 330 kV line repaired under IAEA-brokered local ceasefire. 3-MAR baseline: ZNPP Russian operating entity announced IT functions under KONSIST-OS (Rosatom subsidiary). Grossi position: electricity generation restart not feasible during conflict; "common view" with Russia. Russian regulator Rostekhnadzor has issued 10-year operating licenses for Units 1 and 2 but Rosatom has confirmed no restart during military conflict. US informed European counterparts previously signed arms supply contracts will be delayed due to Iran war (Ukrinform 17-APR baseline T1). ISW: Russia spring offensive gained 17 sq mi period 10-MAR to 07-APR; Ukraine gained territory Feb 2026 (first month since 2024). Ukrainian drone campaigns on Russian oil infrastructure: 40% of oil export capacity halted (Reuters 25-MAR baseline).	
<b>Analyst Assessment</b>	US arms delay direct spillover from Iran war to NATO theater. ZNPP second outage within month is structural nuclear safety signal; IAEA monitoring continues. Spring offensive dynamics unchanged. TRIPWIRE: Third ZNPP outage; named US arms contract delays; Russian spring offensive territorial acceleration.	
<b>SOURCES</b>	<a href="#">IAEA Ukraine Updates</a>   <a href="#">Ukrinform</a>   <a href="#">ISW Campaign Assessments</a>	

<b>CHEM-001   Chemical Feedstock + Q1 Industrial Fire Pattern (TCEQ Final Report)</b>		<b>HIGH   CONTINUED   15</b>
<b>WHY THIS CYCLE</b>		

<b>Summary</b>	Q1 2026 industrial fire log (T1 TCEQ, OSHA incident data): Valero Ardmore OK 09-FEB (1 KIA, 4 WIA); LyondellBasell Bayport Choate TX 12-MAR (7 tons toxic gas, 30 prior ER events); Valero Port Arthur TX 23-MAR (TCEQ final 06-APR: 157,146 lbs over 244 hrs, 435k bpd refinery, industrial heater likely cause); Hawkeye Pride IA 26-MAR. 02-APR petrochemical 3 KIA; 08-APR chemical explosion 1 KIA. No new incidents reported 18-20 APR.
<b>Analyst Assessment</b>	Pattern continues within structural variance. No coordination evidence; drivers are deferred maintenance, turnaround season timing, aging infrastructure, consolidation. Alt hypothesis: coordinated-attack social media narrative is an information environment threat, not a threat indicator. Watch Q2 for fires outside turnaround windows as divergence signal.
<b>SOURCES</b>	<a href="#">TCEQ</a>   <a href="#">OSHA Incident Data</a>

<b>TRV-001   GCC/ME Travel Advisory Level 3/4 — State Iran Level 4</b>		<b>HIGH   CONTINUED   15</b>
<b>WHY THIS CYCLE</b>		
<b>Summary</b>	State Dept Iran Travel Advisory Level 4 (Do Not Travel) effective 31-MAR baseline. GCC/ME region Level 3/4 advisories persist. Australian DFAT "Do Not Travel" 11 Middle Eastern countries. Emirates/Qatar Airways ~70% capacity reduction. Lufthansa Group, Air France-KLM Dubai/Tel Aviv suspensions persist.	
<b>Analyst Assessment</b>	Given Touska seizure and R2 uncertainty, advisory downgrades are deferred. Post-Tuesday R2 outcome will be decisive for next-week advisory review window.	
<b>SOURCES</b>	<a href="#">travel.state.gov</a>   <a href="#">DFAT Smartraveller</a>	

### SECTION 4C — CRITICAL INFRASTRUCTURE LOG (CI-LOG)

SECTOR	STATUS	PRIMARY DRIVER THIS CYCLE
Energy-Electric	<b>SUSTAINED</b>	AA26-097A Day 10 OT/PLC; G2 GMD live 17-18 APR
Energy-Oil & Gas	<b>DEVELOPING</b>	Hormuz opening declaration (Araghchi 17-APR); IEA crisis data
Water & Wastewater	<b>SUSTAINED</b>	Iran-linked PLC exploitation continuing
Comms	<b>DEGRADED</b>	G2 HF degradation; COMCON 4
Emergency Services	<b>SUSTAINED</b>	NWR outages; WX Enhanced Risk today
Transportation-Aviation	<b>SUSTAINED</b>	EASA CZIB extended to 24-APR; review date is tripwire
Transportation-Maritime	<b>CRITICAL</b>	UKMTO CRITICAL Hormuz; Bab el-Mandeb MODERATE
Financial	<b>DEVELOPING</b>	Oil repricing on Araghchi; Dow Futures +500pts
Healthcare & Public Health	<b>DEGRADED</b>	CDC measles 1,714 YTD; H5N1 active; PAHO elimination status at risk
Food & Agriculture	<b>SUSTAINED</b>	Fertilizer 58-70% above long-run average; planting locked
IT Sector	<b>DEVELOPING</b>	SharePoint KEV; ActiveMQ KEV NEW; Fortinet OVERDUE; Storm-1175 active
Defense Industrial Base	<b>SUSTAINED</b>	DIA capability assessment 16-APR; Iran-backed militia attacks continuing
Government-Federal	<b>SUSTAINED</b>	NTAS gap; FBI capability concerns per congressional letter
Nuclear (Civilian)	<b>DEVELOPING</b>	Zaporizhzhia NPP external power outage 16-APR — IAEA investigating

SECTOR	STATUS	PRIMARY DRIVER THIS CYCLE
Commercial Facilities	STABLE	No named incidents this cycle
Manufacturing-Critical	STABLE	No named incidents this cycle
Chemical	DEVELOPING	Valero Port Arthur TCEQ final report; Q1 industrial fire pattern elevated but structural
Dams	STABLE	No named incidents this cycle

All 24 §4.2 sector sweeps surveyed; — entries scored where sufficient evidence exists. Source Registry v1.9 pending v1.10 expansion per SOP revision queue.

**Q1 2026 INDUSTRIAL FIRE LOG — CROSS-SECTOR (4 CONFIRMED EVENTS):**

(1) Valero Ardmore OK — 09-FEB-2026: Fatal turnaround explosion. 1 KIA, 4 WIA. (2) LyondellBasell Bayport Choate TX — 12-MAR-2026: Process upset/flare ignition; 7 tons toxic gas; 30 prior ER events; 4/12 quarters CAA noncompliant. (3) Valero Port Arthur TX — 23-MAR-2026: 435,000 bpd refinery; diesel unit offline; SIP 56,000 pop. (4) Hawkeye Pride IA — 26-MAR-2026: AGR sector event.

**ANALYTICAL FINDING:** No coordination evidence. Structural causation: aging infrastructure + deferred maintenance + turnaround season + refinery consolidation. Q1 2026 within structural variance. WATCH VARIABLE: Q2 fires outside turnaround windows require reassessment. Coordinated-attack social media narrative = IO threat, not threat indicator.

**SECTION 5 — ENERGY / INFRASTRUCTURE / SUPPLY CHAIN**

<b>NUC-001   Bushehr Nuclear Plant Four Strikes Baseline   ZNPP 17-APR Outage   DPRK IAEA "Very Serious"</b>		<b>HIGH   CONTINUED   18</b>
<b>WHY THIS CYCLE</b>		
<b>Summary</b>	Iran's Bushehr Unit 1 (915 MW PWR, Rosatom-built) baseline: four confirmed strikes on or near plant since 28-FEB-2026 (28-FEB, 14-MAR, 18-MAR, 04-APR). No radiation increase detected per IAEA. Russian Rosatom technicians partially evacuated. IAEA Grossi 04-APR warning framework persists. WHO Tedros 06-APR alarm persists. No new strike this cycle. ZNPP UPDATE: IAEA confirmed second power outage 17-APR, 40-minute restoration. 6-MAR Ferosplavna-1 line repair baseline holds. Russian operating licenses issued for Units 1-2 but no restart during conflict per Grossi. DPRK UPDATE: IAEA UN nuclear watchdog issued "very serious" advance warning days before the 19-APR Hwasong-11 launches from Sinpo (see GEO-DPRK).	
<b>Analyst Assessment</b>	Compound nuclear-safety picture across three theaters. Bushehr: no new strike during blockade but monitoring continues; Rosatom-personnel escalation risk persists. ZNPP: second outage within a month is structural signal. DPRK: advance IAEA warning indicates program monitoring remains intact despite tempo. TRIPWIRE: Fifth Bushehr strike during blockade; ZNPP third outage; DPRK SLBM confirmation.	
<b>SOURCES</b>	<a href="#">IAEA Press</a>   <a href="#">IAEA Ukraine</a>   <a href="#">IAEA DPRK</a>	

See FLASH entries: [PWR-001](#) (Hormuz Energy Crisis), [SC-001](#) (Supply Chain), [AGR-001](#) (Fertilizer), [FIN-001](#) (Oil Brent \$96.88). Cross-reference: Commodity Tracker (Section 2).

<b>CHEM-001   Petrochemical Feedstock Stress + Baltimore Water Fluoride CI Impact</b>		<b>HIGH   CONTINUED   15</b>
<b>Summary</b>	Hormuz closure disrupting chlorine, industrial gases, petrochemical feedstocks. Baltimore, MD Department of Public Works reduced water fluoride from 0.7 to 0.4 mg/L (15-APR): "constraints are part of broader national supply chain disruptions, driven in part by ongoing conflict in the Middle East." Key supplier based in Israel "experienced significant operational disruptions." This is the first confirmed CONUS public health infrastructure casualty from the conflict's supply chain disruption.	
<b>Analyst Assessment</b>	Baltimore fluoride reduction elevates this entry from structural watch to confirmed CONUS CI impact. Water treatment chemical supply chain is not a notional risk — it is a demonstrated real-world consequence. Retained at HIGH. Next-cycle: monitor for additional municipal water system constraints.	
<b>SOURCES</b>	<a href="#">NBC News via Baltimore DPW</a>	

## SECTION 6 — AVIATION / TRANSPORTATION

Full aviation and transportation entries this section: [AVN-001](#) (ME Airspace — full entry SEC 3 FLASH), [AVN-002](#) (Carrier Suspensions below), [TRV-001](#) (GCC/ME Travel Advisories below). EASA CZIB renewal/lapse: mandatory verification this cycle.

<b>TRV-001   Travel Advisory Cascade — Wartime Level 3/4 GCC &amp; Middle East</b>		<b>HIGH   CONTINUED   15</b>
<b>Summary</b>	Iran/Israel: Level 4 (Do Not Travel). Bahrain/Kuwait/Qatar: Level 3 (Reconsider Travel). UAE: Level 3. Turkey: Level 2 (07-APR Hatay missile incursion — State Dept upgrade watch active). No new advisory action 15-APR. Standing advisories from early March remain in force. Repatriation flights ongoing.	
<b>Analyst Assessment</b>	Standing advisories CONTINUED. Turkey Level 3 upgrade remains a live watch item. Practical travel environment has deteriorated beyond formal advisory levels — post-ceasefire IRGC attacks on GCC states and continued airspace closures compound the risk. Confidence: HIGH (State Dept = Tier 1).	
<b>ALT HYP</b>	<b>ALT A: Advisory Cascade Has Fully Propagated; No Further Escalation Likely [EQUALLY LIKELY]</b>	
	State Dept Level 3/4 cascade essentially complete. No new Level 3/4 issuances 15-APR. Advisories front-loaded in first two weeks of conflict.	
	✓ <b>Supporting Evidence:</b> No new GCC kinetic attack this cycle. Advisory review cycles are 90-day windows.	
	✗ <b>Ruling-Out Evidence:</b> Post-ceasefire IRGC attacks on UAE/Kuwait/Bahrain could justify UAE/Bahrain upgrade to Level 4 if attacks resume.	
<b>SOURCES</b>	<a href="#">US State Dept Travel Advisories</a>   <a href="#">State Dept Iran Level 4</a>	

<b>AVN-002   US &amp; Global Carrier Route Suspensions — Extended Timelines Signal Protracted Disruption</b>		<b>HIGH   CONTINUED   15</b>
<b>Summary</b>	American Airlines: PHL-DOH suspended through 07-MAY; JFK-TLV restart 23-APR. British Airways: Abu Dhabi near year-end (unprecedented). Singapore Airlines: Dubai through 31-MAY. Lufthansa/Swiss/Austrian: Dubai and Tel Aviv through 31-MAY. Air France: Dubai/Riyadh/Tel Aviv/Beirut through 19-APR. KLM: Tel Aviv/Riyadh/Dammam/Dubai through	

	17-MAY. Gulf Air suspended Bahrain International. No new suspensions or resumptions 15-APR.
<b>Analyst Assessment</b>	Extended suspension timelines — some through year-end — signal airline industry assessment of protracted disruption. War-risk insurance is the primary constraint, independent of NOTAMs. Confidence: HIGH (carrier statements T2; OPSGROUP T2).
<b>ALT HYP</b>	<p><b>ALT A: Carrier Suspensions Will Reverse Rapidly If Credible Framework Emerges [LESS LIKELY]</b></p> <p>7-14 day rolling windows allow rapid route restoration. UK/Macron coalition framework could enable insurance reinstatement within days.</p> <p>✓ <b>Supporting Evidence:</b> AA 07-MAY date is a scheduled review, not an absolute end date.</p> <p>✗ <b>Ruling-Out Evidence:</b> Insurance clearance requires 72+ hours minimum after framework AND mine clearance confirmation. Some suspensions extend to year-end.</p>
<b>SOURCES</b>	<a href="#">The Traveler Airline Suspensions</a>   <a href="#">OPSGROUP Airspace</a>

## SECTION 7 — METEOROLOGICAL WEATHER & SEVERE WEATHER

### CONUS WEATHER SYNOPSIS — 20 APRIL 2026 | TODAY / 48H / 72H

TODAY (20-APR): SPC Critical Risk fire weather southern High Plains (NE NM, SE CO, SW KS, OK/TX Panhandles). Elevated fire weather Southeast behind cold front. No severe thunderstorm outlook today — dry continental airmass persists first part of the week per SPC 170741. 17-APR RETROSPECTIVE: Multi-day severe weather sequence 13-17 APR produced a verified outbreak of 46 confirmed tornadoes (Cream WI EF3, Rochester MN EF2, Lena IL EF2, Ringle WI) as the moderate risk delivered outbreak-scale impact from northern OK into SE KS and W MO. COMMUNICATIONS NOTE: HF recovering from 18-APR G2 event (see SWX-001). Kp 4 today. Deploy VHF/UHF backup for any served agencies in fire-weather Critical Risk corridor as standard protocol.

REGION	RISK	TODAY (15-APR) SYNOPSIS	48H (15-APR)	72H (16-APR)
<b>Upper MS Valley / Great Lakes (MN-WI-IA-IL-MI-IN-OH)</b>	SLIGHT	Residual Slight Risk. System clearing from Enhanced Risk 14-15 APR. Isolated severe possible late afternoon. Primary threats: wind gusts, marginal hail.	Clearing 17-APR. Cooler, drier pattern. G2 Watch 17-18 APR compounds EMCOMM.	Clear. Monitor reload potential end-of-week.
<b>Southern Plains (TX-OK-KS)</b>	SLIGHT	Slight Risk remnant: isolated storm development possible TX-OK-KS afternoon. System moving NE. Not primary threat corridor today.	Dryline residual. Isolated severe possible 15-APR afternoon.	Clearing.
<b>Northeast (PA-NY-NJ-CT-MA)</b>	NSTR	Dry. System not yet impacting region.	Marginal rainfall. No severe threat.	System approach. Rainfall possible 16-APR.
<b>Southeast (AL-GA-FL-SC-NC)</b>	MARGINAL	Isolated strong storms FL panhandle.	Monitor as system approaches.	System passage.
<b>CONUS West (CA-NV-AZ-OR-WA)</b>	NSTR	Quiet. No wx hazards. Wildfire WATCH SW/SoCal.	Stable. Wildfire WATCH SW/SoCal continues.	Low pressure developing offshore PNW late week.

Sources: [NOAA SPC](#) | [NWS WPC](#) | [NWS Local](#)

<b>WX-001   SPC CRITICAL RISK Fire Weather Southern High Plains   17-APR Outbreak Retrospective</b>		<b>HIGH   UPDATED   18</b>
<b>WHY THIS CYCLE</b>		
<b>Summary</b>	<p>TODAY (20-APR): SPC Day 1 Critical Risk fire weather issued for southern High Plains (NE New Mexico, SE Colorado, SW Kansas, Oklahoma/Texas Panhandles). Elevated fire weather behind cold front extends across Southeast (T1 SPC 170741). "Dry continental airmass persists for first part of week." No severe thunderstorm outlook today. 17-APR RETROSPECTIVE: Moderate Risk produced outbreak from northern Oklahoma into southeastern Kansas and west-central Missouri with 46 confirmed tornadoes, including EF3 Cream WI, EF2 Rochester MN, EF2 Lena IL, and Ringle WI damage survey ongoing. NWS storm surveys continuing. NWR: 21 transmitters affected (2 DEGRADED — AK Kotzebue KWN30, OR Portland KIG98 — plus 19 OUT OF SERVICE across 15 states plus Saipan, user-provided status report).</p>	
<b>Analyst Assessment</b>	<p>Fire-weather practitioner posture: Red Flag Warning protocols; elevated burn restrictions Critical Risk counties; resource pre-positioning per state fire agencies. NWR transmitter status degradation across 15 states plus territories is a structural EMCOMM concern — backup WRN paths (radio, cell, apps, amateur, SAME tone) should be verified. CONFIDENCE: HIGH (SPC T1; NWS offices T1). TRIPWIRE: Upgrade to Extreme Risk; any fire weather watch/warning issuance; named ignition event.</p>	
<b>SOURCES</b>	<p><a href="#">NOAA SPC Day 1 Outlook</a>   <a href="#">NWS WPC</a>   <a href="#">NWS Local Storm Surveys</a></p>	

## SECTION 7.1 — WILDFIRE & FIRE WEATHER

REGION	STATUS	ACTIVE FIRES / EVAC STATUS	CI / INFRASTRUCTURE EXPOSURE	FIRE WEATHER / SOURCES
<b>Southwest (AZ/NM)</b>	<b>WATCH</b>	No active large-fire evacuations 16-APR. Early-season pre-conditioning. Dry/windy pattern developing.	Power transmission corridors. Propane/LP infrastructure rural communities.	Dry/windy pattern April. SPC fire weather. Sources: NIFC, USFS NICC.
<b>Southern California</b>	<b>WATCH</b>	No active evacuations 16-APR. Offshore flow risk moderate.	SDG&E/SCE transmission infrastructure. Oil/gas pipeline corridors WUI.	Humidity recovery ongoing. No Santa Ana active 15-APR. Sources: NIFC, CAL FIRE.
<b>Pacific Northwest</b>	<b>MONITOR</b>	No significant fires. Snowpack above normal.	Columbia River Gorge transmission. Forest products.	Wet pattern continuing mid-April. Sources: NIFC, USFS PNW.
<b>Northern Rockies</b>	<b>MONITOR</b>	Season not active. Snowpack at or above normal.	Energy corridor. Mountain WUI. Transmission rights-of-way.	No fire weather activity. Season onset June-July. Sources: NIFC.
<b>S. Plains (TX/OK Panhandle)</b>	<b>WATCH</b>	Post-severe-wx dryline development watch 16-APR. No	Oil/gas wellhead. Electric co-op	Post-system dry/wind pattern developing 15-16 APR. Sources: SPC Fire Wx, NIFC.

REGION	STATUS	ACTIVE FIRES / EVAC STATUS	CI / INFRASTRUCTURE EXPOSURE	FIRE WEATHER / SOURCES
		current active orders.	transmission. Rural propane.	
<b>CONUS Outlook (April)</b>	<b>NSTR</b>	No major active fires with confirmed evacuations at collection (16-APR).	No CI-exposure fires active.	Transitional month. Primary risk: SW and S.Plains. Season May-June. Sources: NIFC, USFS NICC.
<b>Sources:</b> <a href="#">NIFC</a>   <a href="#">USFS NICC</a>   <a href="#">SPC Fire Weather</a>   <a href="#">CAL FIRE</a>   <a href="#">InciWeb</a>   Scored entry trigger: pre-evacuation order, confirmed CI exposure, or 1,000+ acres active in WUI.				

**NWR TRANSMITTER OUTAGE STATUS — 17 APRIL 2026 / 15:25 UTC**

Source: [weather.gov/nwr/outages](https://weather.gov/nwr/outages) | Source: Live data provided 17-APR-2026 15:25 UTC | 17 OUT OF SERVICE | 4 DEGRADED | 16 States/Territories

**OPERATIONAL NOTE:** 21 NWR transmitters are currently degraded or out of service across 16 states/territories as of 17-APR 15:25 UTC. Affected populations lose the primary all-hazards alerting channel and dedicated SAME-coded EAS tone activation. During active severe weather (WPC Enhanced Risk TODAY MS Valley + Plains) or IPAWS alert events, residents in gap areas should use WEA-capable mobile devices, local broadcast EAS, and app-based alerting (FEMA App, Weather.gov) as primary alternatives. EMCOMM operators in affected counties: note the gap and brief served agency emergency managers. NEW MEXICO HIGH-GAP: Three simultaneous outages (Roswell, Artesia, Carlsbad) leave Chaves and Eddy counties with effectively zero primary NWR coverage. COMPOUND WINDOW: G2 geomagnetic storm LIVE 17-18 APR — HF degradation compounds alerting-path stress.

ST	Callsign	Location	Freq	WFO	Status	Counties / Areas Affected
AK	WZ2555	Duffield Peninsula	162.525	Juneau AK	DEGRADED	SE Alaska (Duffield Peninsula)
AK	WNG526	Rugged Island	162.425	Anchorage AK	DEGRADED	Kodiak area, AK
AK	KWN30	Kotzebue	162.550	Fairbanks AK	DEGRADED	Northwest Arctic Borough, AK
AR	KGG86	Fountain Hill	162.475	Jackson MS	OUT OF SVC	Ashley, Union, Chicot cos. AR; Morehouse Parish, LA
CO	WXM56	Colorado Springs	162.475	Pueblo CO	OUT OF SVC	El Paso, Teller counties, CO
GA	WXM65	Baxley	162.525	Jacksonville FL	OUT OF SVC	Appling, Jeff Davis, Bacon, Pierce counties, GA
IL	KXI79	Hillsboro	162.425	St. Louis MO	OUT OF SVC	Montgomery, Bond, Fayette, Macoupin counties, IL
IN	KXI94	Angola	162.425	Northern Indiana IN	OUT OF SVC	Steuben, DeKalb, LaGrange counties, IN
KS	WXN81	Ulysses	162.450	Dodge City KS	OUT OF SVC	Grant, Haskell, Stevens, Seward counties, KS
ME	WNG547	Sugarloaf Mtn	162.450	Gray/Portland ME	OUT OF SVC	Franklin, Somerset, Oxford counties, ME
MI	WNG572	Petoskey	162.475	Gaylord MI	OUT OF SVC	Emmet, Charlevoix, Cheboygan counties, MI
MI	WNG582	Sandusky	162.450	Detroit/Pontiac MI	OUT OF SVC	Sanilac, Huron counties, MI
MN	KXI45	Gun Flint Lake	162.525	Duluth MN	OUT OF SVC	Cook County, MN
MP	WXM86	Saipan	162.550	Guam GU	OUT OF SVC	Northern Mariana Islands
NM	WXN24	Artesia	162.425	Midland/Odessa TX	OUT OF SVC	Eddy County (alt), Chaves County, NM
NM	WWF37	Carlsbad	162.475	Midland/Odessa TX	OUT OF SVC	Eddy County, NM
NM	WWG36	Roswell	162.450	Albuquerque NM	OUT OF SVC	Chaves, Lincoln counties, NM
OR	KIG98	Portland	162.550	Portland OR	DEGRADED	Portland metro area, OR

ST	Callsign	Location	Freq	WFO	Status	Counties / Areas Affected
PA	WNG591	Coudersport	162.500	State College PA	OUT OF SVC	Potter, McKean counties, PA
TN	WWF84	Lawrenceburg	162.425	Nashville TN	OUT OF SVC	Lawrence, Wayne, Giles counties, TN
TN	WXK63	Shelbyville	162.475	Nashville TN	OUT OF SVC	Bedford, Marshall, Coffee counties, TN

**⚠ HIGH-GAP ALERT — NEW MEXICO:** Three simultaneous NWR outages in NM (WWG36 Roswell, WWF37 Carlsbad, WXN24 Artesia). Chaves and Eddy counties have effectively zero primary NWR coverage. Residents should rely on WEA mobile alerts, FEMA App, and local broadcast EAS exclusively. Emergency managers in Chaves/Eddy: verify alternate alerting pathways are operational.

## SECTION 7A — SPACE WEATHER & EMCOMM

SWX-001 | Space Weather — G2 DECAYING Post-18-APR Peak | Kp 4 Today | AR 4419 Tracked

HIGH | UPDATED | 15

### WHY THIS CYCLE

#### Summary

EVENT TIMELINE: On 18-APR, Kp index climbed from 4 through G1 (Kp 5) and reached G2 (Moderate, Kp 6) at approximately 8:25 UTC (T1 SWPC observations + EarthSky T1 narrative). Primary driver was the fast solar wind stream from the large coronal hole in combination with the co-rotating interaction region (CIR) arrival. 19-APR Kp approximately 4 decaying. Today 20-APR Kp 4 per Geophysical Institute 27-day forecast (T1). Forecast: 21-APR Kp 3; 22-23 APR Kp 3-2; 24 APR Kp 3; 25-APR Kp 4; 26-28 APR Kp 2-3 quiet; 29-30 APR Kp 5 (next event window). AR 4419 still named and tracked in SWPC daily products. Comet C/2026 A1 (MAPS) in CCOR-1 field of view (benign observation). Aurora Timeline Viewer product remains unavailable per SWPC.

#### Analyst Assessment

HF EMCOMM is recovering from the 18-APR G2 event. Propagation conditions today are improving but not fully restored; expect residual degradation on higher HF bands through 21-APR. Power grid operators have cleared GIC watch window. EMCOMM PROTOCOL: 40m/60m remain reliable primary bands for EMCOMM; 20m recovering, verify propagation before commitment. Next event window 29-30 APR warrants standing readiness. CONFIDENCE: HIGH (SWPC T1 observations, Geophysical Institute forecast T1). TRIPWIRE: New M- or X-class flare from AR 4419; Kp escalation through next ~10-day quiet window; CME arrival narrative.

#### SOURCES

[NOAA SWPC](#) | [SWPC Planetary K-index](#) | [Geophysical Institute \(UAF\) Aurora Forecast](#) | [EarthSky Sun News](#)

BAND	STATUS	COLLECTED 20-APR   G2 DECAYING post-18-APR peak   Kp 4 Today (Forecast)   AR 4419 Tracked   HF Recovering   Next Event Window 29-30 APR
160m (1.8 MHz)	FAIR	Kp 1-2 quiet. Noise floor normal. Short-wave absorption nil. Low-power EMCOMM viable. Check WWV 2.5 MHz.
80m (3.5 MHz)	GOOD	✅ Usable short-range NVIS. Kp quiet. Regional EMCOMM viable. Monitor before committing. Verify via WWV 3.330 MHz.
60m (5 MHz)	GOOD	✅ PRIMARY EMCOMM TODAY. Kp quiet. EMCOMM channel: 5330.5 kHz USB. Good propagation. Verify PSKReporter before committing.

BAND	STATUS	COLLECTED 20-APR   G2 DECAYING post-18-APR peak   Kp 4 Today (Forecast)   AR 4419 Tracked   HF Recovering   Next Event Window 29-30 APR
40m (7 MHz)	GOOD	✅ RECOMMENDED primary EMCOMM (0–800 km NVIS). Kp quiet. Best choice for Upper MS Valley / Great Lakes severe weather EMCOMM tonight. Verify WWV or PSKReporter.
20m (14 MHz)	GOOD	✅ Kp quiet. Propagation good. DX paths viable. Verify via PSKReporter. CH HSS arrives ~15-APR AM — may degrade 15-APR.
15m–10m (21–28 MHz)	FAIR	Solar flux SFI moderate. High-band DX viable. Not primary EMCOMM. CH HSS may affect 15-APR. Check PSKReporter.
<b>POLAR / TRANS-POLAR:</b> GOOD — Kp 1-2 quiet. No active polar absorption. Trans-polar paths available. Monitor for CH HSS arrival 15-APR.		
<b>DATA COLLECTED 15-APR:</b> Spaceweather.com live (13-APR 1142 UT / 15-APR): Kp 0.33 (quiet); 24-hr max Kp 1.00. Solar wind 396.9 km/s, density 1.11 p/cm <sup>3</sup> , Bz +0.45 nT north (favorable). SFI 99. X-ray 24-hr max C1 (very low). NOAA storm probabilities (13-APR 2200 UTC): 0-24hr Active 20%, Minor storm 5%; 24-48hr Active 35%, Minor 15%. Large coronal hole emerging NE solar limb (NASA SDO 15-APR) — CH HSS arrival ~15-APR forecast. Operators should verify propagation via WWV (5/10/15/20 MHz) or pskreporter.info before any EMCOMM commitment. Pre-position VHF/UHF backup before 15-APR for CH HSS arrival.		

## SECTION 7B — AGRICULTURE, FOOD & SUPPLY CHAIN

### AGRICULTURE & FOOD SUPPLY CHAIN — 20 APRIL 2026

AGR-001 FLASH (Score 22): Fertilizer shock compounded by Touska seizure 19-APR. Urea Egypt FOB approximately \$700/MT (+78% vs \$400-490 pre-war) per CRU Group analysis cited by PBS NewsHour; US NOLA +25% since end-Feb per AFBF. Ammonia +20% per Alpine Macro. IFPRI: approximately 30% of globally traded urea disrupted, 50% of sulfur, 25% of ammonia. China export restrictions extended through end of August 2026 to protect domestic supply. 2026 spring planting is locked — application decisions made and cost pass-through to Q3 food prices now embedded. Ethiopia gets 90% of nitrogen fertilizer from Gulf via Djibouti; sub-Saharan Africa most exposed. Post-Touska removes remaining near-term recovery scenarios. See full entry in SECTION 3 FLASH (↑ AGR-001).

Sources: [IFPRI April 2026 fertilizer impact](#) | [AFBF Market Intel](#) | [PBS \(CRU Group\)](#)

## SECTION 8 — 72-HOUR OUTLOOK & NEXT-CYCLE TASKING

### 72-HOUR OUTLOOK | 20-23 APR 2026

**The operating environment is rapidly changing and highly fluid. What is true at publication (1400 UTC 20-APR) may not hold by close of business. The decisive 48-to-72-hour window runs from now to ceasefire expiration Tuesday night 22-APR.**

**20-APR (TODAY / BLOCKADE DAY 8):** Touska seizure 19-APR dominates cycle. IRGC Khatam al-Anbiya retaliation pledge unresolved. R2 delegation status in flux — Witkoff/Kushner en route Islamabad with 4 USG aircraft at Nur Khan; Iran MFA Baqaei "no plans" statement 20-APR AM. VP Vance participation uncertain. Oil +7% (Brent \$96.88). Kpler zero transits 19-APR. G2 geomagnetic storm decaying (Kp 4 today); HF recovering. SPC Critical Risk fire weather southern High Plains.

**21-APR (TUESDAY / R2 DECISION WINDOW):** Three convergent scenarios. SCENARIO A (EQUALLY LIKELY): R2 talks commence Tuesday; delegation arrives; framework extends ceasefire with

Touska/Hormuz/nuclear sticking points deferred. SCENARIO B (EQUALLY LIKELY): Ceasefire lapses without formal agreement; both sides resume limited kinetic; Iran mines Gulf approaches, US strikes Iranian power infrastructure. SCENARIO C (LESS LIKELY): Iranian kinetic retaliation before Tuesday — IRGC acts on public pledge within 48 hours, targeting US Navy, Gulf bases, or merchant shipping. Lloyd's war risk rates expected to revise post-Touska within 24 hours.

**22-APR (TUESDAY NIGHT UTC / CEASEFIRE EXPIRATION):** Ceasefire expires per Al Jazeera/Axios T1 framing. Formal extension decision or lapse forcing function. Oil trajectory: retrace to \$85-87 Brent if extension; spike to \$105+ if retaliation event. EASA CZIB 2026-03 R6 expires 24-APR (T-4), R7 issuance expected. SharePoint KEV CYB-008 deadline 28-APR (T-8); ActiveMQ CYB-010 deadline 30-APR (T-10).

**NEXT-CYCLE TASKING:** (1) TOUSKA RETALIATION: Any kinetic event attributable to Iran or proxies within 72 hours; IRGC movement indicators; Houthi Red Sea activation (see WATCH-007). (2) R2 STATUS: Formal commencement/collapse signaling; delegation arrival photos; joint statement. (3) LEBANON CF: Additional UNIFIL or IDF KIA; Hezbollah fire south of Yellow Line. (4) CYBER COMPLIANCE: CYB-008 SharePoint T-8; CYB-010 ActiveMQ T-10; Fortinet overdue; AA26-097A Day 14 any new incidents. (5) UKMTO STATUS: CRITICAL→SEVERE escalation; Lloyd's rate publication; first non-Iranian commercial transit. (6) SPACE WEATHER: AR 4419 flare activity; Kp 3 21-APR confirming decay; next event 29-30 APR. (7) DPRK: ROK SLBM attribution; additional launches within 72h. (8) AVIATION: EASA R7 CZIB issuance before 24-APR; additional airport infrastructure strikes. (9) DHS NTAS: Any advisory issuance (long overdue). (10) OFAC: Additional NSPM-2 designations.

## SECTION 9 — WATCH LIST

**WATCH-001 — Blockade Day 8 / Touska Retaliation Threat / Ceasefire Expires TUE 22-APR / R2 In Flux**  
**Status: ACTIVE | Monitoring: Continuous | Situation RAPIDLY CHANGING | Ceasefire Expires: TUE NIGHT 22-APR UTC | R2: Witkoff/Kushner en route (Iran MFA "no plans" 20-APR AM)**

BLOCKADE DAY 8 — USS Spruance fired on and seized M/V Touska 19-APR (first Iranian-flagged vessel seized). IRGC Khatam al-Anbiya joint command publicly pledged retaliation. 25 commercial vessels turned back/seized cumulative. Ceasefire expires Tuesday NIGHT 22-APR UTC per Al Jazeera/Axios T1. R2 talks IN FLUX: 4 USG aircraft at Nur Khan airbase, Witkoff/Kushner en route; Iran MFA spokesperson Baqaei 20-APR "no plans"; VP Vance uncertain. Trump Truth Social (weekend): "NO MORE MR. NICE GUY" threatening power plants and bridges. Oil +7% (Brent \$96.88). KEY VARIABLES: (1) Iranian kinetic retaliation within 72 hours; (2) R2 commencement Tuesday or formal collapse; (3) UKMTO CRITICAL→SEVERE escalation; (4) Lebanon CF breakdown; (5) Houthi Red Sea activation (see WATCH-007); (6) First major commercial transit post-R2.

**WATCH-002 — BRICKSTORM / Cisco SD-WAN / Microsoft Identity Plane Compound Cyber**  
**Status: SUSTAINED | Monitoring: Weekly | CYB-005 AA26-097A Day 14 | CYB-003 Cisco SD-WAN ED 26-03 past deadline**

BRICKSTORM PRC backdoor campaign against VMware vSphere/vCenter and Windows environments baseline persists (CISA/NSA/Canadian Centre advisory). CISA ED 26-03 Cisco SD-WAN (CVE-2026-20127 CVSS 10 + CVE-2022-20775) all FCEB deadlines past 23-MAR; threat actor UAT-8616 per Talos. SharePoint KEV CVE-2026-32201 due 28-APR (T-8). ActiveMQ KEV CVE-2026-34197 due 30-APR (T-10). Fortinet CVE-2026-21643 Day 4 overdue. Storm-1175 weaponizing CVE-2023-21529 Exchange for Medusa. AA26-097A Day 14 (CyberAv3ngers / Shahid Kaveh Group / Hydro Kitten / Storm-0784 / UNC5691) holds at 5,219+ exposed PLCs. Compound identity-plane + OT + network-edge exposure profile.

**WATCH-003 — GEO-008: Iran Internet Shutdown — Day 51 | Record Nationwide Shutdown Persists**  
**Status: CONTINUED (Day 51 — longest nation-scale shutdown on record) | Monitoring: Daily**

Day 51 at approximately 1,220+ hours. \$35-40M/day direct losses, \$70-80M/day total per NetBlocks baseline. 50M Iranians on Telegram despite ban. MOIS Handala operating through shutdown via Starlink — cyber threat not neutralized. Monitoring for: (a) partial reopening signal; (b) regime stability indicators; (c) Iran economic

collapse driving diplomatic flexibility. Touska seizure and retaliation pledge may correlate with deeper shutdown posture rather than restoration. WATCH TRIGGER: Any reopening signal; named regime stability event.

#### WATCH-004 — IO — MOIS/SVR Active Campaigns (Structural Monitor)

**Status: MONITORING | Trigger: New DOJ/FBI/CISA advisory or victim disclosure**

DOJ MOIS death threats and cartel recruitment (19-MAR baseline T1). Canadian Centre SVR/MOIS simultaneous campaigns (02-MAR baseline T2). MOIS confirmed using Starlink through domestic blackout. Russian NoName057(16) partnered with Iranian hackers. No new cycle event. OFAC maximum pressure designations 14-15-16-17 APR under NSPM-2 maintain financial pressure vector. WATCH TRIGGER: any new T1/T2 advisory; new victim disclosure; Touska-retaliation-linked IO event.

#### WATCH-005 — Space Weather — G2 DECAYING From 18-APR Peak | Next Event 29-30 APR

**Status: DECAY | Trigger: G2 peak 18-APR 8:25 UTC resolved | Kp 4 today | Next window 29-30 APR (Kp 5 forecast)**

G2 geomagnetic storm peaked 18-APR at 8:25 UTC (CH HSS + CIR). Kp ~4 today 20-APR, decaying; 21-APR Kp 3. AR 4419 still named and tracked on solar disk. HF propagation recovering — 40m/60m remain reliable primary EMCOMM bands; 20m recovering. Next event window 29-30 APR (Kp 5 forecast per Geophysical Institute). Aurora Timeline Viewer product remains unavailable. WATCH TRIGGER: Unexpected M/X-class flare from AR 4419; Kp escalation before 29-30 APR.

#### WATCH-007 — Houthi / Bab el-Mandeb — Strategic Patience Posture

**Status: WATCH CONTINUED | Trigger: Houthi activation of Red Sea attacks OR ceasefire collapse 22-APR | No attacks since 28-FEB-2026**

Houthis have NOT attacked Red Sea shipping since 28-FEB-2026 despite Iran war escalation. Analysts (CSIS, ICG) assess "strategic patience" — holding Bab el-Mandeb in reserve. ~30 tankers near Yanbu within strike range. Bab el-Mandeb 29km narrowest — single attack arrests ~15% global seaborne trade. LINK: Abdollahi (IRGC, 13-APR) threatened ALL Persian Gulf/Sea of Oman/Red Sea. TRIPWIRE: 22-APR ceasefire expiration and/or IRGC-pledged Touska retaliation. If ceasefire collapses and Iran signals Houthi activation, Red Sea disruption expected 24-48 hours.

#### WATCH-008 — Missing / Dead Scientists Narrative — T-7 to Trump Self-Imposed Timeline

**Status: WATCH CONTINUED | POTUS + WH Press Sec On-Record 15-16 APR baseline | Split Confidence per §0.6 Rule 2 | ~27-APR timeline (T-7)**

Trump 16-APR self-imposed timeline "next week and a half" runs to approximately 27-APR (T-7 from publication 20-APR). No public federal finding released to date. Narrative concerns ~10 US scientists with NASA, nuclear weapons, defense research, and aerospace/UFO-related work who have died or gone missing since mid-2023. Named cases: Hicks (NASA JPL 2023), Maiwald (NASA JPL 2024), Reza (NASA JPL 2025), Loureiro (MIT PSFC DEC-2025), Grillmair (Caltech/NASA FEB-2026), McCasland (ret. Maj. Gen., Albuquerque FEB-2026), Thomas (Novartis MAR-2026), Garcia (KC National Security Campus APR-2026). ANALYTICAL DISPOSITION: Institutional engagement HIGH; individual case facts HIGH where local reporting corroborates; pattern/causal claim LOW-MODERATE; foreign-adversary causation LOW (non-zero but unsupported by specific public evidence). TRIPWIRE: Trump ~27-APR self-imposed timeline — federal finding within window reclassifies; silence after commitment is itself reportable on information-environment grounds.

## SECTION 10 — PREPAREDNESS CONDITION ASSESSMENT

**PREP-CON 3 — ELEVATED | Assessed: 20 April 2026 | Blockade Day 8 | Touska Seizure 19-APR**

**ASSESSED LEVEL: PREP-CON 3 — ELEVATED | Trend: RAPIDLY DEVELOPING**

**OPERATIONAL BASIS:** 14 FLASH-level events including USS Spruance seizure of M/V Touska 19-APR (first Iranian-flagged vessel seized in blockade), publicly pledged IRGC Khatam al-Anbiya retaliation, US-Iran ceasefire expiring Tuesday night 22-APR UTC, R2 diplomacy in flux (Witkoff/Kushner en route Islamabad; Iran MFA "no plans" 20-APR AM), oil +7% to Brent \$96.88, DPRK 19-APR Hwasong-11 launch from Sinpo (possible SLBM under analysis), Lebanon ceasefire stressed by French UNIFIL + IDF KIA, G2 geomagnetic storm decaying from 18-APR peak (Kp 4 today), SPC Critical Risk fire weather southern High Plains, EASA CZIB expiring 24-APR (T-4), DHS NTAS gap at Day 51, CISA AA26-097A Day 14, SharePoint KEV T-8, ActiveMQ KEV T-10, Cisco SD-WAN ED 26-03 past deadline, and Fortinet OVERDUE Day 4. The operating environment is rapidly changing and highly fluid; the decisive 48-to-72-hour window runs from now to ceasefire expiration 22-APR.

For full PREP-CON framework reference, see: [fortunefavorstheprepared.com / Preparedness Book of Knowledge / PREP-CON](https://fortunefavorstheprepared.com/Preparedness_Book_of_Knowledge/PREP-CON)

For Family Emergency Plan Workbook: [fortunefavorstheprepared.com/family-emergency-plan-workbook/](https://fortunefavorstheprepared.com/family-emergency-plan-workbook/)

## SECTION 11 — ALERT & READINESS CONDITIONS PANEL

CONDITION	LEVEL	BASIS
DEFCON	<b>EST-3</b>	Active wartime posture; US-Iran ceasefire expiring TUE night 22-APR UTC; Touska seizure 19-APR; IRGC retaliation pledged
COGCON	<b>EST-3</b>	Elevated continuity posture during active kinetic operations; IRGC/MOIS homeland threat; DHS NTAS gap Day 51 (see TER-001)
FPCON	<b>EST-CHARLIE</b>	US forces actively targeted by Iran-backed Shiite militias per DIA 16-APR baseline ("hundreds" of attacks since 28-FEB)
CYBERCON	<b>EST-ELEVATED</b>	AA26-097A Day 14 (CYB-005); SharePoint KEV T-8 (CYB-008); ActiveMQ KEV T-10 (CYB-010); Fortinet overdue Day 4 (CYB-002); Cisco SD-WAN ED 26-03 past deadline (CYB-003)
COMCON	<b>4 CONUS DTR-ASSESSED</b>	G2 geomagnetic storm decaying from 18-APR peak; Kp 4 today (SWX-001); HF recovering; AA26-097A OT impact (CYB-005)
PREP-CON	<b>3 — ELEVATED</b>	See SEC 10

## SECTION 12 — SOURCE REGISTRY SUMMARY — 17 APR 2026

THREAT AREAS ASSESSED	STANDING REGISTRY	CITATIONS THIS CYCLE	TIER 1 PRIMARY	TIER 2 SECONDARY	TIER 3 SUPPLEMENTAL
<b>24</b>	<b>366</b> v1.10   20-APR-2026	<b>68</b>	<b>28</b>	<b>40</b>	<b>0</b>
<small>24 Threat Areas   366 Standing Sources (v1.10)   68 Citations This Cycle   v1.10 adds 8 T1 USG domains (whitehouse.gov, state.gov, defense.gov, cia.gov, odni.gov, dhs.gov, justice.gov, treasury.gov) per §0.16   Registry: fortunefavorstheprepared.com/dtr-source-registry/</small>					

## SECTION 13 — CLOSING

### END OF REPORT

Fortune Favors the Prepared brings together 30+ years of operational emergency management practice — law enforcement, EMS/paramedicine, wilderness search and rescue, airport emergency management, statewide logistics, and federal alerting infrastructure — into a daily intelligence product suite designed for practitioners.

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*Semper Paratus, Semper Gumby.*