

# DAILY THREAT REPORT

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

BLOCKADE DAY 10 | Op Epic Fury Day 53 | CF Indefinitely Extended / Iran Refusing Talks / Vance Trip Cancelled | Trend: RAPIDLY DEVELOPING | Full basis: SEC 10

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

AA26-097A Day 16 | Kp max 5 observed 20-APR | 21-APR Kp 4 forecast | HF Recovering | Full basis: SEC 11

<b>Publication (UTC)</b>	22 APR 2026 / 1400 UTC
<b>Reporting Period</b>	0000 20-APR through 1200 22-APR 2026 (72-hour sweep)
<b>Analyst / Watch Officer</b>	Fortune Favors the Prepared — OSINT Desk
<b>FLASH Threshold</b>	Risk Score ≥ 20 — NINE FLASH EVENTS THIS CYCLE
<b>PREP-CON Baseline</b>	PREP-CON 3 — ELEVATED (Brown)   Trend: RAPIDLY DEVELOPING   Op Epic Fury Day 53   Blockade Day 10   CF Indefinitely Extended   Iran Refusing Talks   IRGC Aerospace Force Gulf-Oil Threat
<b>Version</b>	1.0 — All pre-build integrity checks passed   9 FLASH   10 HIGH   5 MOD   7 WATCH   Blockade Day 10   CF Indefinitely Extended (Trump 21-APR)   Iran Refusing Talks   Vance Islamabad Postponed   IRGC Aerospace Force Gulf-Oil Threat   Anti-Bias Discipline Applied

<b>FLASH ▶</b>	<a href="#">GEO-001</a> Blockade Day 10 / 28 Vessels / CF Indef Ext / IRGC Gulf-Oil Threat   <a href="#">GEO-CF-LBN</a> Round 2 Thu 23-APR / Toll 2,454   <a href="#">FIN-001</a> Brent \$98.46 / Gas \$4.022
	<a href="#">SC-001</a> UKMTO Warning 041-26 (22-APR) 2 Attacks   <a href="#">CYB-005</a> AA26-097A Day 16   <a href="#">GEO-AXIS-001</a> Balikpapan Day 2 / Ukraine Sevastopol \$155M   <a href="#">AVN-001</a> EASA CZIB Expires 24-APR T-2
<b>HIGH/NEW ★</b>	<a href="#">GEO-AXIS-001</a> NEW: Russia/China Exploitation of US Attention Bandwidth   <a href="#">CYB-011</a> CISA KEV 20-APR 8 CVEs + 3 Catalyst SD-WAN (due 04-MAY T-13)
<b>HIGH/UPDATED ↻</b>	<a href="#">CYB-008</a> SharePoint KEV T-6   <a href="#">CYB-010</a> ActiveMQ KEV T-8   <a href="#">CYB-002</a> Fortinet OVERDUE Day 6   <a href="#">CYB-003</a> Cisco SD-WAN ED 26-03 (3 new Catalyst CVEs 20-APR)   <a href="#">CYB-009</a> Storm-0558   <a href="#">GEO-DPRK</a> Hwasong-11 Ra Cluster Warhead
	<a href="#">INS-001</a> IRGC/MOIS + DIA   <a href="#">TER-001</a> NTAS Gap Day 53   <a href="#">AGR-001</a> Fertilizer Locked   <a href="#">GEO-UKR</a> ZNPP 14th Outage   <a href="#">TRV-001</a> State Level 4 Iran   <a href="#">CHEM-001</a> TCEQ Final
<b>CRITICAL TIME HACK</b>	<b>CEASEFIRE:</b> INDEFINITELY EXTENDED by Trump 21-APR (Truth Social): extension holds "until such time as their proposal is submitted, and discussions are concluded, one way or the other." US naval blockade continues. Trump cited "seriously fractured" Iranian government as basis; Iranian adviser Mahdi Mohammadi (to Speaker Ghalibaf): extension "means nothing, the losing side cannot dictate terms."
	<b>R2 DELEGATIONS:</b> Vance Islamabad trip POSTPONED per White House 21-APR PM. Per NPR/Tasnim: Iran notified Pakistan it will NOT send delegation for Wednesday talks. Iranian MFA spokesperson Baghaei: "no final decision" citing "contradictory messages" from Washington. Pakistani Info Minister Tarar: Iranian confirmation "still awaited" as of late 21-APR Islamabad time.
	<b>IRGC POSTURE:</b> Khatam al-Anbiya retaliation pledge STANDS (conditional, pending Touska crew-safety confirmation, not withdrawn).

**IRAN DRONE CLAIM:** IRGC Aerospace Force commander (per Fars 21-APR): threatened oil production in Gulf neighboring countries if their territory is used for attacks on Iran — "they should say goodbye to oil production in the Middle East region." Khatam al-Anbiya (Gen. Abdollahi 21-APR): Strait of Hormuz management "not exploited by the lying and delusional US." 21-APR Iranian drone-strike claim on US destroyer (from prior cycle) remains LOW CONFIDENCE — CENTCOM silent; no independent damage reporting; NOT adopted.

**OIL / FUEL:** Brent settled ~\$98.46 on 22-APR with trading range 97.77-99.36. Brent hit \$101.15 intraday 21-APR late afternoon BEFORE Trump indefinite-extension announcement, then pulled back to ~\$98 after (per NBC). WTI \$89.33 22-APR. AAA national gas \$4.022/gal 22-APR direct.

**UKMTO UPDATE 034 (19-APR, T1 — no new update issued 20-22 APR):** 18-APR attacks confirmed on CMA CGM Everglade (container), VLCC Sanmar Herald (Indian-flagged; fired on despite prior clearance), additional Indian-flagged ship. Iran navy VHF: "Strait of Hormuz completely closed again." ~20,000 seafarers stranded Gulf.

**LEBANON CF:** Lebanese disaster management toll revised to 2,454 KIA / 7,658 injured (was 2,196/cumulative). Round 2 Israel-Lebanon talks confirmed THU 23-APR at State Dept, ambassador-level (per Al Jazeera / Scripps News). Karam leads Lebanese delegation (Aoun 20-APR: "no one from Lebanon will participate in this mission or replace him"). Hezbollah convoy IED attack near Deir Siriane reported by Hezbollah. IDF confirmed 21-APR strike on Hezbollah operatives "violating ceasefire understandings." Talks objectives per Aoun: halt hostilities, end Israeli occupation southern areas, deploy Lebanese army to internationally-recognized southern border.

**DPRK:** KCNA 20-APR confirmed Hwasong-11 Ra variant with cluster-bomb / fragmentation-mine warhead (12.5-13 ha struck at 136-140 km). ROK SLBM attribution pending; Japan MoD analyzing with US/ROK.

**SPACE WEATHER (SWPC 21-APR 0030Z):** 24-hr observed Kp max 4 (below G-scale) 21-APR. 22-23 APR quiet (22-APR Kp max 2.67; 23-APR max 1.67). No radio blackouts. S1 radiation probability 1%/1%/1%. HF normalizing from 17-18 APR G2 event peak.

**WEATHER:** SPC Day 1 (22-APR): CRITICAL Risk fire weather High Plains (gusty winds, warm, very dry). Narrow severe corridor central High Plains (Rapid City / Pierre / Garden City / Amarillo / Lubbock) — primary threats large hail + damaging winds. SPC Day 2 (23-APR, Thursday): SLIGHT Risk severe across northern Oklahoma into southern Minnesota (large to very large hail, damaging winds, few tornadoes possible). WPC Day 1: MARGINAL excessive rainfall portions California + Texas. MULTI-DAY SEVERE SEQUENCE 22-24 APR.

**AVIATION:** EASA CZIB 2026-03 R6 expires 24-APR (T-2). R7 not yet published.

**CYBER (20-APR CISA KEV):** Added 3 Cisco CVEs due 23-APR (T-1); 5 non-Cisco CVEs due 04-MAY (T-12): PaperCut, TeamCity, Kentico, Quest KACE, Zimbra, plus 3 Cisco Catalyst SD-WAN Manager CVEs compounding ED 26-03. AA26-097A Day 16. SharePoint KEV T-6. ActiveMQ KEV T-8. Fortinet OVERDUE Day 6. Palo Alto Unit 42: cluster CL-STA-1128 shifted to Rockwell FactoryTalk.

**TERRORISM:** DHS NTAS gap Day 53.

**OFAC:** 21-APR OFAC: "Economic Fury Targets Iranian Missile and UAV Procurement Networks" — 7 individuals + 4 entities designated under E.O. 13224 (Counter-Terrorism) / Non-Proliferation. Two Mahan Air B777-200ER aircraft (EP-MTB, EP-MTE) added to SDN list. Operatives linked to Sepehr Kaveh Kish International Trading Company, Mahan Air, Pardisan Rezvan Shargh. 17-APR OFAC: "Economic Fury Targets Iran-Backed Iraqi Militia Commanders" — 7 Iraqi militia commanders (Kata'ib Hizballah, Kata'ib Sayyid Al-Shuhada, Harakat Al-Nujaba, Asa'ib Ahl Al-Haqq) designated SDGT.

**GEO-AXIS-001 (NEW — Russia/China exploitation):** Russia/Ukraine: GUR announced 20-APR that "Prymary/Ghosts" unit struck Russian landing ships Yamal + Nikolai Filchenkov night of 18-19 APR in Sevastopol Bay (\$150M) + Podlet-K1 radar (\$5M) — both vessels disabled; separate Ukrainian SBU 18-APR action damaged Azov + Grachonok + Delfin comms + Yugtorsan fuel. Zelenskyy 21-APR denounced US extension of Russian-oil sanctions suspension. China: Balikatan 2026 Day 2 (41st iter, largest ever — 17,000 troops / 7 active + 17 observer nations / 20-APR–08-MAY); Chinese FM Guo Jiakun 20-APR: countries "playing

with fire...ultimately backfiring." Scarborough 352m floating barrier + 6-within/3-outside militia vessels (Reuters imagery 10-11 APR). Philippine national energy emergency (declared late March) impacting exercise conduct.

## SECTION INDEX

<a href="#"><u>SEC 2 — BLUF &amp; Market Indicators</u></a>	<a href="#">GEO-001</a> Blockade Day 10 / 28 Vessels / CF Indef Ext + Iran Refusing / IRGC Gulf-Oil Threat   <a href="#">SC-001</a> UKMTO 041-26 22-APR 2 Attacks   GEO-CF-LBN Round 2 Thu 23-APR   Commodity Tracker   6 FLASH
<a href="#"><u>SEC 3 — FLASH Events</u></a>	<a href="#">GEO-001</a> Blockade Day 10 / 28 Vessels + CF Indef Ext + IRGC Gulf-Oil Threat   <a href="#">SC-001</a> UKMTO 041-26 22-APR 2 Attacks   GEO-CF-LBN Round 2 Thu 23-APR / Toll 2,454   <a href="#">FIN-001</a> Brent \$98.46   <a href="#">CYB-005</a> AA26-097A Day 16   GEO-AXIS-001 Balikpapan Day 2 / Ukraine Sevastopol
<a href="#"><u>SEC 4A — Cyber / Technology</u></a>	<a href="#">CYB-005</a> AA26-097A Day 16   <a href="#">CYB-008</a> SharePoint KEV T-6   <a href="#">CYB-009</a> Storm-0558 Identity Plane   <a href="#">CYB-010</a> ActiveMQ KEV T-8   <a href="#">CYB-002</a> Fortinet OVERDUE Day 6   <a href="#">CYB-003</a> Cisco SD-WAN / 20-APR KEV +3 Catalyst CVEs   <a href="#">CYB-011</a> NEW CISA KEV 20-APR Batch (3 Cisco CVEs T-1 due 23-APR; 5 others T-12 due 04-MAY)
<a href="#"><u>SEC 4B — Physical / Geopolitical / IO</u></a>	GEO-AXIS-001 NEW (Russia/China Bandwidth Exploitation)   GEO-UKR ZNPP 17-APR Outage / Russia Spring Tempo   GEO-DPRK Hwasong-11 Cluster Warhead KCNA Confirmed   <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 53   <a href="#">INS-001</a> IRGC/MOIS
<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 Warning 041-26 (22-APR)   <a href="#">FIN-001</a> Brent \$98.46 / Gas \$4.022   <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-2   <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 fire wx High Plains 22-APR + narrow severe corridor Rapid City→Lubbock   SPC Day 2 SLIGHT Risk severe OK→MN 23-APR   multi-day severe sequence 22-24 APR   NWR 20 affected / 14 states+territories (18 OOS + 2 DEG)
<a href="#"><u>SEC 7A — Space Weather &amp; EMCMM</u></a>	<a href="#">SWX-001</a> Kp max 5 observed 20-APR (G1)   21-APR Kp 4 forecast (slight G1 chance)   22-23 APR quiet Kp 2   HF recovering
<a href="#"><u>SEC 7B — Agriculture, Food &amp; Supply Chain</u></a>	<a href="#">AGR-001</a> Fertilizer Shock Locked (Moderate)   2026 Planting Season Impacted   IFPRI/IEA/WB Structural Damage
<a href="#"><u>SEC 8 — 72-Hour Outlook</u></a>	Blockade Day 10   CF indef ext / Iran refusing / Vance postponed   UKMTO 041-26 22-APR 2 attacks   22-24 APR severe WX sequence
<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 PARTIAL RESTORE 17-APR   <a href="#">WATCH-004</a> IO MOIS/SVR   <a href="#">WATCH-005</a> Kp quiet   <a href="#">WATCH-007</a> Bab el-Mandeb   <a href="#">WATCH-008</a> Scientists Narrative T-5
<a href="#"><u>SEC 10 — PREP-CON Assessment</u></a>	PREP-CON 3 ELEVATED   Blockade Day 10 / CF Extended 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 / South-Central Texas (Hill Country)</u></a>	WPC Day 1 SLIGHT Risk excessive rainfall San Antonio / New Braunfels (1.5"/hr rates)   SPC Day 1 no severe thunderstorm areas 21-APR   Day 2 MARGINAL rainfall CA + SE TX
<a href="#"><u>CONUS — Northeast (PA/NY/NJ/NE)</u></a>	<a href="#"><u>TER-001</u></a> NTAS Bulletin Gap Day 53   <a href="#"><u>INS-001</u></a> Iran-backed militia baseline + 17-APR/21-APR Economic Fury designations   <a href="#"><u>FIN-001</u></a> fuel pass-through Brent \$98.46
<a href="#"><u>CONUS — Mid-Atlantic / Washington DC</u></a>	<a href="#"><u>TER-001</u></a> NTAS gap Day 53   <a href="#"><u>INS-001</u></a> IRGC/MOIS structural   COGCON assessed   <a href="#"><u>CYB-005</u></a> AA26-097A Day 16
<a href="#"><u>CONUS — Nationwide (All Regions)</u></a>	<a href="#"><u>CYB-005</u></a> AA26-097A Day 16   <a href="#"><u>CYB-008</u></a> SharePoint KEV T-6   <a href="#"><u>CYB-010</u></a> ActiveMQ KEV T-8   <a href="#"><u>CYB-002</u></a> Fortinet OVERDUE Day 6   <a href="#"><u>CYB-011</u></a> CISA KEV 3 Cisco T-1 (DUE 23-APR) / 5 others T-12   <a href="#"><u>FIN-001</u></a> Brent \$98.46   <a href="#"><u>SWX-001</u></a> Kp quiet
<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   No SPC critical fire weather area identified 21-APR Day 1
<a href="#"><u>CONUS — Gulf Coast (TX/LA/MS/AL)</u></a>	<a href="#"><u>PWR-001</u></a> Blockade Day 10 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 10 / 28 Vessels / CF Indef Ext / Iran Refusing Talks / IRGC Aerospace Gulf-Oil Threat   GEO-CF-LBN Round 2 Thu 23-APR / Toll 2,454
<a href="#"><u>Global Maritime / Chokepoints</u></a>	<a href="#"><u>SC-001</u></a> UKMTO Warning 041-26 (22-APR T1) two Wednesday-morning attacks; 18-APR baseline stands; ~20,000 seafarers stranded; Lloyd's ~5% hull value peak
<a href="#"><u>Iran</u></a>	<a href="#"><u>GEO-001</u></a> Op Epic Fury Day 53   Blockade Day 10   27 cumulative vessels turned back/seized   <a href="#"><u>WATCH-003</u></a> Internet PARTIAL RESTORE 17-APR (Unit 42)   IRGC pledge stands
<a href="#"><u>Indo-Pacific / SCS + DPRK</u></a>	GEO-AXIS-001 Scarborough floating barrier 10-11 APR / Balikpapan 21-APR Japan joins with Type 88 first-ever firing   GEO-DPRK 5x Hwasong-11 Ra Sinpo 19-APR / KCNA cluster-bomb warhead confirmed 20-APR / SLBM pending
<a href="#"><u>Europe / Ukraine</u></a>	GEO-AXIS-001 Russia 16-APR record 659-drone barrage / 19-APR Chernihiv+Kherson / 01-APR Luhansk declaration   GEO-UKR ZNPP 17-APR 14th outage / US aid halt / Patriot drawdown concern

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
<a href="#">Agricultural / Global Supply Chain</a>	<a href="#">AGR-001</a> Urea Egypt FOB +78%   30% global urea disrupted   50% sulfur   25% ammonia   China export restrictions thru August 2026   2026 planting season locked
<a href="#">Space Environment / HF Comms</a>	<a href="#">SWX-001</a> Kp max 5 observed 20-APR (G1 from CH HSS)   21-APR Kp 4 forecast (slight G1 chance)   22-23 APR quiet Kp 2   No radio blackouts   HF recovering
<a href="#">Cyber / Vulnerability Queue</a>	<a href="#">CYB-011</a> CISA KEV 20-APR +8 CVEs (PaperCut/TeamCity/Kentico/Quest KACE/Zimbra + 3 Catalyst SD-WAN) due 04-MAY T-13   <a href="#">CYB-008</a> SharePoint T-6   <a href="#">CYB-010</a> ActiveMQ T-8   <a href="#">CYB-002</a> Fortinet OVERDUE Day 6   <a href="#">CYB-003</a> Cisco ED 26-03 past

## SECTION 2 — BLUF & MARKET INDICATORS

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

COMMODITY	PRE-WAR (28 FEB)	CURRENT (22 APR)	CHG vs PRE-WAR	48H TREND	CONSUMER / ANALYTICAL NOTE
<b>Brent Crude (Jun futures)</b>	~\$66/bbl	\$98.46/bbl	<b>+49%</b>	<b>▲ vs \$95.42 20-APR close</b> ▼ settled off 21-APR peak	22-APR settled ~\$98.46 (Investing.com) with trading range 97.77-99.36. Brent hit \$101.15 intraday 21-APR late afternoon BEFORE Trump indefinite-extension announcement, then pulled back to ~\$98 after (NBC). Market reading indefinite-CF-with-blockade-plus-Iran-refusing as structurally elevated vs. pre-blockade baseline. EIA STEO peak Q2 2026 \$115/b still live. 22-APR UKMTO Warning 041-26 two-ship attack morning of publication could reverse pullback.
<b>WTI Crude (May futures)</b>	~\$63/bbl	\$89.33/bbl	<b>+42%</b>	<b>▼ -0.38% 22-APR</b> ~\$88 post-Trump pullback	22-APR \$89.33 (TradingEconomics, down 0.38% vs prior day). 21-APR intraday hit \$95 then slid to ~\$88 after Trump indefinite-extension announcement (NBC). Pattern tracks Brent. Additional risk premium priced in for IRGC Aerospace Force 21-APR Gulf-state oil threat. 22-APR UKMTO Warning 041-26 two-ship attack could reverse pullback.
<b>Gasoline (natl avg)</b>	~\$3.10/gal	\$4.022/gal	<b>+30%</b>	<b>~flat vs 21-APR</b> pump-lag still inbound	AAA 22-APR direct from gasprices.aaa.com. Most expensive CA (~\$5.83); least OK (~\$3.38); PA (Nick baseline) ~\$4.10 range. EIA STEO peak retail projection \$4.30/gal April. Pump lag 10-14 days: 21-APR \$101 intraday Brent spike has not reached consumers yet; pressure will build over 1-2 weeks.
<b>Diesel (US No. 2)</b>	~\$3.74/gal	~\$5.42/gal	<b>+45%</b>	<b>~flat</b> ~0%	EIA. Trucking margins compressed. EIA STEO peak diesel projection \$5.80/gal Q2 2026. Refiner feedstock stress persists; fertilizer/food pass-through active.

COMMODITY	PRE-WAR (28 FEB)	CURRENT (22 APR)	CHG vs PRE-WAR	48H TREND	CONSUMER / ANALYTICAL NOTE
<b>Jet Fuel (global avg)</b>	~\$90/bbl	~\$205/bbl	<b>+128%</b>	▲ <b>+1%</b> ▲ slow	IATA. Gulf aviation restrictions via EASA CZIB 2026-03 R6 (expires 24-APR T-2, R7 not yet published) 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 lowa. +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.
<b>Ocean Freight (SCFI)</b>	~1,333 pts	~1,920 pts	<b>+44%</b>	~flat ▲ Hormuz	Blockade Day 10. UKMTO Warning 041-26 (22-APR T1) covers TWO Wednesday-morning attacks (3:55Z IRGC gunboat on container ship “heavy damage to bridge” 15nm NE Oman; 6:38Z second vessel 8nm west of Iran outbound). 18-APR named-vessel baseline (CMA CGM Everglade, VLCC Sanmar Herald, additional Indian-flagged) stands. Marine Traffic 21-APR: 12 Hormuz transits/24hrs (4 Iranian-flagged). Lloyd’s List 20-APR: 26 Iranian vessels bypassed blockade. ~20,000 seafarers stranded Gulf. Lloyd’s peak rates ~5% hull value (100x pre-crisis).

► 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

**22 APRIL 2026 | PREP-CON 3 ELEVATED | RAPIDLY DEVELOPING | OPERATION EPIC FURY DAY 53 | BLOCKADE DAY 10 | CF INDEFINITELY EXTENDED | UKMTO WARNING 041-26 22-APR TWO SHIP ATTACKS | IRAN REFUSING TALKS | VANCE POSTPONED | IRGC GULF-OIL THREAT**

**THE CYCLE IN ONE PARAGRAPH:** Trump indefinitely extended the US-Iran ceasefire 21-APR (Truth Social 4:09 PM ET) citing “seriously fractured” Iranian government; blockade continues at CENTCOM 28 vessels cumulative plus M/T Tifani boarded overnight 21-APR in INDOPACOM AOR. Lloyd’s List 20-APR: 26 Iranian vessels have successfully bypassed the blockade. CF deadline discrepancy unreconciled (Pakistan: 7:50 PM ET 21-APR; Trump: Wednesday evening). Iran via Tasnim notified Pakistan it will NOT send delegation Wednesday; Vance Islamabad trip postponed indefinitely. IRGC Aerospace Force commander 21-APR threatened Gulf-state oil production if neighboring territory is used for attacks — first explicit third-country energy-infrastructure threat during Op Epic Fury. THIS MORNING (22-APR): UKMTO Warning 041-26 — IRGC gunboat fired on container ship 15nm NE Oman at 3:55Z causing “heavy damage to bridge”; second ship fired on 8nm west of Iran at 6:38Z. Markets: Brent ~\$98.46 22-APR (intraday \$101.15 yesterday pre-Trump announcement, then pullback); WTI \$89.33; AAA gas \$4.022. Three Cisco Catalyst SD-WAN Manager CVEs in 20-APR KEV batch carry federal remediation deadline TOMORROW 23-APR. Bessent: Kharg Island storage “full in days.”

**NEW & UPDATED — THIS CYCLE ONLY**

🔗 **GEO-001: BLOCKADE DAY 10 / CF INDEFINITELY EXTENDED / IRAN REFUSING TALKS / IRGC GULF-OIL THREAT.** CENTCOM 28 vessels cumulative + M/T Tifani boarded 21-APR INDOPACOM. Trump 21-APR Truth Social extended CF indefinitely; Iran notified Pakistan no Wednesday delegation; Vance Islamabad trip postponed. IRGC Aerospace Force commander 21-APR threatened Gulf neighboring states' oil production — first explicit third-country energy-infrastructure threat during Op Epic Fury. Bessent: Kharg Island oil storage "full in days." IRGC Khatam al-Anbiya Touska retaliation pledge stands; 21-APR Iranian state-media drone-strike claim on US destroyer remains LOW — not adopted.

🔗 **SC-001: UKMTO WARNING 041-26 — TWO 22-APR MORNING ATTACKS.** Attack 1 (0355Z): IRGC gunboat fired on container ship 15nm NE Oman without VHF challenge; heavy damage to bridge; crew safe. Attack 2 (0638Z): second vessel fired on 8nm west of Iran on outbound route, no damage. Iran Nour News / Fars framed as lawful enforcement; UKMTO "no VHF challenge" fact pattern refutes. 18-APR named-vessel attack baseline (CMA CGM Everglade, VLCC Sanmar Herald, additional Indian-flagged) still holds.

🔗 **GEO-CF-LBN: LEBANON — ROUND 2 TALKS THU 23-APR; TOLL REVISED UP TO 2,454 KIA.** Lebanese Disaster Management Unit (per AJ 22-APR): toll raised to 2,454 KIA / 7,658 injured (was 2,196). Round 2 Israel-Lebanon talks confirmed THU 23-APR at State Dept, ambassador-level (per State Dept / Scripps News). Lebanon represented by Karam per Aoun 20-APR; "no one from Lebanon will participate in this mission or replace him." Talk objectives per Aoun: halt hostilities, end Israeli occupation of southern areas, deploy Lebanese army to internationally-recognized southern border. IDF 21-APR confirmed strike on Hezbollah operatives "violating ceasefire understandings." Hezbollah claimed IED attack on IDF convoy near Deir Siriane.

🔗 **FIN-001: OIL SETTLED OFF 21-APR INTRADAY PEAK.** Brent 22-APR settled ~\$98.46 with trading range 97.77-99.36 (Investing.com). Brent intraday \$101.15 on 21-APR late afternoon BEFORE Trump indefinite-extension announcement, then pulled back to ~\$98 post-announcement (NBC). WTI 22-APR \$89.33 (-0.38% vs. 21-APR). AAA national gas \$4.022/gal 22-APR direct. OFAC 21-APR "Economic Fury" Iran missile/UAV (7 indiv + 4 entities + 2 Mahan Air B777s).

★ **GEO-AXIS-001 (NEW): RUSSIA/CHINA ACCELERATING EXPLOITATION / BALIKATAN LIVE.** Ukrainian GUR announced 20-APR: night of 18-19 APR strike disabled Russian landing ships Yamal + Nikolai Filchenkov in Sevastopol Bay (\$150M) + Podlet-K1 radar (\$5M). Separate SBU 18-APR action damaged Azov + Grachonok + Delfin comms. Russia overnight drone barrages hitting Sumy, Kyiv, Kharkiv. Zelenskyy 21-APR: denounced US extension of Russian-oil sanctions suspension: "every dollar paid for Russian oil is money for Moscow's war." China: Balikatan 2026 Day 2 — 41st iteration, LARGEST EVER (17,000 troops / 7 active + 17 observer nations / 20-APR–08-MAY). Chinese MFA Guo Jiakun 20-APR: countries "playing with fire...ultimately backfiring." Scarborough 352m floating barrier + militia vessels remain (Reuters imagery 10-11 APR). Philippine national energy emergency (declared late March) affecting exercise conduct due to Hormuz disruption. House Select Cmte "Crude Intentions" 03-APR documents 1.2B-barrel Chinese strategic reserve via shadow fleet. Gains during this window are sticky.

★ **CYB-011 (NEW): CISA KEV 20-APR — 3 CISCO CVES DUE 23-APR (T-1, TOMORROW); 5 OTHERS T-12.** Three Cisco Catalyst SD-WAN Manager CVEs (CVE-2026-20122 file-overwrite vmanage privileges, CVE-2026-20128 recoverable-password DCA privileges, CVE-2026-20133 sensitive-info disclosure) are due TOMORROW 23-APR (T-1), compounding ED 26-03 remediation. Five non-Cisco CVEs (PaperCut NG/MF CVE-2023-27351, JetBrains TeamCity CVE-2024-27199, Kentico Xperience CVE-2025-2749, Quest KACE SMA CVE-2025-32975 CVSS 10.0, Synacor Zimbra CVE-2025-48700) due 04-MAY (T-12). Broad enterprise attack surface: print, dev-toolchain, endpoint-management, mail, SD-WAN.

🔗 **CYB-005: AA26-097A DAY 16; ROCKWELL FACTORYTALK SHIFT HOLDS.** Iranian-affiliated APT cluster exploitation of internet-facing Rockwell/Allen-Bradley PLCs continues; 5,219+ exposed assets. NEW 21-APR: Palo Alto Unit 42 attributes cluster CL-STA-1128 shifting from Unitronics to Rockwell FactoryTalk via VPS infrastructure.

- ↳ **GEO-DPRK: KCNA 20-APR CONFIRMS CLUSTER-WARHEAD VARIANT.** 19-APR Sinpo launches confirmed as five Hwasong-11 Ra variants with cluster-bomb / fragmentation-mine warheads striking 12.5-13 hectares at 136-140 km range. ROK JCS submarine-vs-ground attribution pending; Japan MoD joint US/ROK analysis underway.
- ↳ **AVN-001: EASA CZIB EXPIRES 24-APR (T-2).** R7 not yet published; given unresolved Iran posture, extension highly likely. 11 FIRs affected.
- ↳ **SWX-001: Kp QUIET 22-23 APR; HF NORMALIZING.** SWPC 21-APR 0030Z: 22-APR Kp max 2.67 (below G-scale); 23-APR Kp max 1.67. S1 radiation 1%/1%; no radio blackouts expected. HF continues normalization from 17-18 APR G2 peak. No space-weather driven EMCMM stress for this cycle; HF backup paths nominally available.
- ↳ **WX-001: SPC CRITICAL FIRE WX HIGH PLAINS / NARROW SEVERE CORRIDOR / 3-DAY SEQUENCE 22-24 APR.** SPC Day 1 (22-APR): CRITICAL Risk fire weather High Plains. Narrow severe corridor central High Plains (Rapid City / Pierre / Garden City / Amarillo / Lubbock); primary threats large hail + damaging winds with moisture-return in early stages. SPC Day 2 (23-APR): SLIGHT Risk severe thunderstorms northern Oklahoma into southern Minnesota (large-to-very-large hail, damaging winds, few tornadoes possible). WPC Day 1: MARGINAL excessive rainfall portions CA + TX. MULTI-DAY SEVERE SEQUENCE 22-24 APR as deep upper-low sweeps across Plains.
- ↳ **CYB-002: FORTINET OVERDUE DAY 5.** CVE-2026-21643 federal deadline passed 16-APR. ~2,000 exposed instances internet-facing; active exploitation >4 weeks.
- ↳ **CYB-003: CISCO SD-WAN ED 26-03 — COMPOUNDED 20-APR.** Three new Cisco Catalyst SD-WAN Manager CVEs added to KEV 20-APR (see CYB-011) extend the already-overdue ED 26-03 remediation. Operators with existing Cisco SD-WAN exposure inherit the combined attack surface immediately.
- ↳ **CYB-008 / CYB-010: COMPLIANCE WINDOW.** SharePoint KEV due 28-APR (T-6); ActiveMQ KEV due 30-APR (T-8). Combined with CYB-002 overdue, CYB-003 compounded, and CYB-011 split (T-1 Cisco / T-12 others), this is the heaviest federal-compliance patch-pressure window since blockade began.

**NOT DETAILED HERE (FULL NARRATIVE IN BODY):** PWR-001 Hormuz energy flows; CYB-009 Storm-0558 identity plane; GEO-UKR ZNPP 17-APR outage; INS-001 IRGC/MOIS homeland; AGR-001 fertilizer; TER-001 DHS NTAS gap; TRV-001 State Dept Iran Level 4; CHEM-001 Valero TCEQ final; CYB-006 F5 BIG-IP; CYB-007 Volt Typhoon; AVN-002 carrier suspensions.

**DECISIVE WINDOW:** Indefinite. Trump 21-APR Truth Social extended CF until Iran submits a unified proposal and discussions conclude. Iran refused the Wednesday delegation; Vance Islamabad trip postponed; IRGC Aerospace Force 21-APR threatened Gulf-state oil production if territory is used for attacks on Iran. Oil reversed UP (Brent \$98.46 / intraday \$101.15). Lebanon-Israel Round 2 talks THU 23-APR at State Dept sit inside the window. Practitioner posture: PREP-CON 3 sustain; 72-hour readiness window; monitor UKMTO, CENTCOM, State Dept, OFAC, SPC severe sequence 22-24 APR, and the DTR Watch Desk. ANTI-BIAS DISCIPLINE APPLIED: Iranian, Israeli, US, and Chinese state sources are flagged when cited; single-source state-media claims classified LOW absent multi-stream corroboration.

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

**Status: WATCH CONTINUED | Trigger: Houthi activation OR CF collapse WED 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 Khatam al-Anbiya, 13-APR) threatened ALL Persian Gulf/Sea of Oman/Red Sea; IRGC Aerospace Force 21-APR threatened Gulf-state oil production directly (see GEO-001). TRIPWIRE: Any Iranian signal to Houthis under the indefinite-CF window + IRGC Gulf-oil threat activation + any rupture of Pakistani back-channel would

constitute the decisive Red Sea activation vector. If 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 | 27-APR self-imposed timeline (T-5)**

Trump 16-APR self-imposed timeline "next week and a half" runs to approximately 27-APR (T-5 from publication 22-APR). 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-5) 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)**

**GEO-001 | US-Iran War: Op Epic Fury Day 53 / Blockade Day 10 / CENTCOM 28 Cumulative Vessels / Kharg Storage "Full in Days" per Bessent**

**FLASH | UPDATED | 27**

**SALUTE**

**WHY THIS CYCLE**

CENTCOM 28 vessels + M/T Tifani boarded overnight 21-APR in INDOPACOM AOR; Bessent: Kharg storage "full in days."

**Summary**

Blockade Day 10. CENTCOM 28 cumulative commercial vessels turned back or seized since operations began 13-APR (up from 27 on 21-APR per NBC/Reuters). Separately, overnight 21-APR US forces boarded M/T Tifani (stateless oil tanker) in the INDOPACOM AOR — the vessel had loaded oil from Kharg Island earlier in April before departing pre-blockade; this is the first publicly-acknowledged INDOPACOM enforcement action against an Iranian-linked tanker outside CENTCOM AOR. Balance-of-story (Lloyd's List 20-APR): at least 26 Iranian vessels have successfully bypassed the US blockade in both directions — enforcement is not airtight. Marine Traffic 21-APR: only 12 vessels transited Hormuz in 24hrs; 4 Iranian-flagged. Trump (21-APR 4:09 PM ET Truth Social): ceasefire indefinitely extended "based on the fact that the Government of Iran is seriously fractured...until such time as their proposal is submitted, and discussions are concluded, one way or the other." Blockade continues. CF DEADLINE DISCREPANCY UNRECONCILED: Pakistan said original CF expired 7:50 PM ET 21-APR (4:50 AM PST 22-APR); Trump had separately said Wednesday evening; White House has not reconciled. Treasury Sec Bessent (@SecScottBessent / FXStreet / Argus 21-APR): "In a matter of days, Kharg Island storage will be full and the fragile Iranian oil wells will be shut in. Constraining Iran's maritime trade directly targets the regime's primary revenue lifelines." Pakistani PM Sharif thanked Trump for extension. Iran via Tasnim (per NPR 21-APR): Tehran notified Pakistan it will NOT send delegation for Wednesday talks. Iranian MFA spokesperson Baghaei: "no decision has been made" on new talks. Senior Iranian adviser Mahdi Mohammadi (to Speaker Ghalibaf, per JPost/CNN): the extension "means nothing" and is "a ploy to buy time for a surprise strike"; "the continuation of the siege is no different from bombardment and must be met with a military response." Iran UN Amb Iravani: ending the blockade is precondition for talks resuming. Iran's UN Mission sent a letter to the UN Security Council 21-APR protesting US actions. Iran armed forces spokesperson 21-APR: Iran is "100% ready" for any surprise US

attack; “in the event of aggression” forces “will immediately and powerfully attack predetermined targets and will give America a harsher lesson than before.” Vance Islamabad trip POSTPONED per WH 21-APR PM (“in a holding pattern” per Axios). UK MoD confirmed 22-APR: military planners from more than 30 countries gathering in London for two-day talks beginning 22-APR to advance planning for reopening the Strait of Hormuz. IRGC Khatam al-Anbiya Gen. Abdollahi 21-APR: Strait of Hormuz management “not exploited by the lying and delusional US.” IRGC Aerospace Force commander (per Fars / CNN 21-APR): if territory of Persian Gulf countries is used by enemies to attack Iran, “they should say goodbye to oil production in the Middle East region” — first explicit IRGC threat against third-country energy infrastructure during Operation Epic Fury. Behind-the-scenes (per Axios regional-source reporting, LOW-MODERATE confidence if accurate): US and Pakistani mediators waiting for Iranian Supreme Leader “Mojtaba Khamenei” response — if sourcing accurate this implies Ali Khamenei’s son has succeeded as Supreme Leader. Trump separately (per Euronews) reiterated a “\$500M/day blockade cost” claim about Iran — single-source, low confidence, not adopted as baseline. Trump (per CNBC 21-APR): US remains “ready to go” with fresh bombing strikes if no agreement.

**Analyst Assessment**

**INDEFINITE EXTENSION READING:** Market and practitioner reading: indefinite-CF-with-blockade-and-Iran-refusing is MORE stressed than finite-CF-with-R2-convergence was at 21-APR. Brent moved from \$95.42 20-APR close to \$98.46 22-APR settle; intraday \$101.15 21-APR afternoon pre-Trump announcement then pulled back ~\$98 post-announcement. Extension removes the clock but preserves all friction.

**NARRATIVE FLIP:** 21-APR frame was “decisive 48-hr window: R2 framework or CF lapse + kinetic.” 22-APR frame is “indefinite-CF + blockade-continuing + Iran-refusing + Vance-postponed.” Status-quo stress without a clock, not diplomatic progress.

**STRUCTURAL ESCALATION VECTOR:** IRGC Aerospace Force 21-APR threat expands the target geometry from bilateral US-Iran to multilateral Iran vs. Gulf-state energy infrastructure. Pre-21-APR threats targeted US forces / interests / Strait shipping. Explicit threat against GCC oil production (Saudi/UAE/Qatar) as a class is new and structurally distinct from the Tauska retaliation pledge. If converted — even a single proof-of-concept OWA swarm on ARAMCO (Abqaiq/Khuras 2019 precedent) — Brent past \$120 and GCC forced into overt US alliance.

**IRAN DRONE CLAIM LOW:** 21-APR Tasnim/Mehr/Press TV drone-strike claim on unnamed US destroyer in Gulf of Oman: single-source Iranian state; no wire-service corroboration (Reuters/AP/Bloomberg/AFP silent); CENTCOM silent; Stars & Stripes reports no damage assessments. NOT ADOPTED.

**SPLIT CONFIDENCE:** HIGH on Trump extension (T1 Truth Social + WH + Reuters + NBC multi-stream). HIGH on Iran refusing Wednesday delegation (T1 NPR + Tasnim + Iranian MFA statement). HIGH on CENTCOM 28 vessels + M/T Tifani INDOPACOM. HIGH on IRGC Aerospace Force threat (T1 Fars + state TV echo). HIGH on Bessent Kharg quote. MODERATE on “Mojtaba Khamenei” succession reference (Axios regional source, single-thread). LOW on Iranian drone strike claim.

**TRIPWIRES:** (1) Any Iran formal withdrawal from Pakistani back-channel; (2) Kinetic incident in Gulf with multi-stream attribution; (3) CENTCOM vessel count to 30+; (4) OFAC follow-on after 21-APR Economic Fury package; (5) GCC host-state announcement on US basing or ARAMCO security advisory; (6) CENTCOM confirmation/denial on 21-APR Iranian drone claim; (7) Iran formal statement rescinding or restating Aerospace Force threat.

**ALT HYP**

**ALT A: Indefinite CF + Pakistani Back-Channel Produces Delayed R2 Within 7-10 Days [EQUALLY LIKELY]**

Trump’s open-ended extension converts the Wednesday deadline into a negotiation window. Pakistani PM Sharif and army chief Munir continue mediation. Iran refusal is positioning, not final. Oil retraces toward \$90 if progress signals emerge.

✓ **Supporting Evidence:** T1 Trump indefinite extension. Pakistani mediator continues. Iran’s UN ambassador Iravani (per IRNA): talks will happen if US ends blockade. Sharif public thank-you for extension.

✗ **Ruling-Out Evidence:** Iran MFA explicit refusal. Vance trip postponed. Mohammadi “means nothing”. IRGC Aerospace Force threat. Indefinite extension removes pressure and could allow Tehran to drag out talks indefinitely.

**ALT B: Indefinite CF Collapses Within Days Under Blockade Pressure; Limited Kinetic Resumes [EQUALLY LIKELY]**

Blockade economic pressure (Bessent: Kharg storage “full in days”) combined with Iran’s hardline domestic posture forces either Iran kinetic response or US escalation within the week. Oil toward \$105+.

✓ **Supporting Evidence:** Kharg Island storage approaching full; Bab el-Mandeb at risk (Iran 07-APR threat to close if allies signal); IRGC Aerospace Force Gulf-oil threat; Iranian MFA formal refusal of Wednesday talks.

✗ **Ruling-Out Evidence:** Both sides retain economic/political interest in avoiding full resumption. Pakistani mediation track continues. Gulf states not openly hosting kinetic US operations.

**ALT C: IRGC Kinetic Action Against Gulf-State Oil Infrastructure [LESS LIKELY]**

IRGC converts Aerospace Force commander 21-APR threat to kinetic action against Saudi, UAE, or Qatari energy infrastructure. Oil spikes \$110+. US escalates.

✓ **Supporting Evidence:** 21-APR Aerospace Force commander public threat (Fars); standing Khatam al-Anbiya retaliation pledge; Iranian hardline faction (Ejei/Ghalibaf) in domestic signaling.

✗ **Ruling-Out Evidence:** Iran retains diplomatic off-ramp via Pakistani track; kinetic action against Gulf-state energy would draw GCC into overt US alliance and end Chinese/Russian diplomatic cover. Extremely high-cost for Iran.

**SOURCES**

[White House / Truth Social \(Trump indefinite CF extension 21-APR\)](#) | [NPR \(Iran refusing Wednesday delegation per Tasnim\)](#) | [CNBC \(Bessent on Kharg storage; Vance Islamabad postponement\)](#) | [Reuters \(CENTCOM 28 vessel count; Marine Traffic 12 transits\)](#) | [Fars / Al Jazeera \(IRGC Aerospace Force Gulf-oil threat 21-APR\)](#) | [CENTCOM official \(blockade enforcement\)](#) | [Full Source Registry](#)

**GEO-CF-LBN | Lebanon-Israel Ceasefire — Round 2 Talks THU 23-APR at State Dept / Toll Revised to 2,454 KIA**

**FLASH | UPDATED | 22**

**SALUTE**

**WHY THIS CYCLE**

Lebanese DMU 21-APR revised toll to 2,454 KIA / 7,658 injured; Round 2 talks confirmed THU 23-APR at State Dept.

**Summary**

Lebanese Disaster Management Unit (per AJ 22-APR): cumulative toll revised to 2,454 KIA / 7,658 injured (was 2,196 / 7,061). Round 2 Israel-Lebanon talks confirmed Thursday 23-APR at State Department Washington DC, ambassador-level (per State Dept release and Scripps News). Lebanon represented by Karam per Aoun 20-APR statement: “no one from Lebanon will participate in this mission or replace him.” Talks objectives per Aoun: (1) halt hostilities, (2) end Israeli occupation of southern areas, (3) deploy Lebanese army to internationally-recognized southern border. IDF (21-APR statement) confirmed strike on Hezbollah operatives “violating ceasefire understandings.” Hezbollah claimed IED attack on IDF convoy near Deir Siriane 21-APR. 20-APR baseline: IDF 98th and 36th Divisions south of CF forward line; Paratrooper Brigade identified Hezbollah in Bint Jbeil with IAF strike; Golani Brigade airstrike near Litani. Yellow Line (8-10km buffer) separates ~55 villages from the rest of Lebanon; Lebanon and

Hezbollah reject as occupation. Netanyahu (CBS baseline): “remaining in Lebanon in a reinforced security buffer zone.” Katz (21-APR): “disarming Hezbollah is the ultimate goal.” Qassem (Hezbollah): “will pay with head.”

**Analyst Assessment**

**TOLL REVISION:** Upward revision of 258 KIA / 597 injured between 17-APR and 22-APR reflects continued kinetic tempo inside the truce window, not a single event. Pace is ~50 KIA/day on average during CF — operationally significant.

**ROUND 2 VENUE SIGNAL:** US State Dept ambassador-level venue elevates Round 1 (Ras al-Naqoura UN-brokered) architecture. Washington-hosted talks align with US pressure posture on Iran but also increase US ownership of outcome.

**COMPOUND DECISION GEOMETRY:** 23-APR talks now fall inside an indefinite US-Iran CF window, shifting compound-risk calculus: if US-Iran stress escalates WED-THU, Lebanon track could absorb pressure or rupture along with it. Under finite CF (21-APR assumption), 23-APR was downstream of decision; under indefinite CF, it’s now an independent track.

**TRIPWIRES:** Round 2 outcome (statement, follow-on date, breakdown); any IDF operation north of Litani; Hezbollah rocket fire south of Yellow Line; Lebanese army deployment announcement; toll revision pace (if >100/day signals kinetic escalation).

**ALT HYP**

**ALT A: Round 2 Produces Framework with Follow-On Date [EQUALLY LIKELY]**

Karam-Israeli envoy produce technical framework on Lebanese army deployment south of Litani; Yellow Line remains; disarmament discussed as long-run.

✓ **Supporting Evidence:** Round 1 precedent. Karam 2024 CF implementation experience. US State Dept ambassador-level engagement.

✗ **Ruling-Out Evidence:** Katz "ultimate goal" + Netanyahu "not leaving" suggest Israeli position immovable. Hezbollah red line on disarmament.

**ALT B: Talks Open But No Framework; "Controlled Violation" CF Continues [EQUALLY LIKELY]**

23-APR session concludes without breakthrough; IDF kinetic tempo continues inside Yellow Line; Hezbollah symbolic responses without south-of-Litani fire.

✓ **Supporting Evidence:** 17-22 APR pattern already matches. IDF tempo sustainable; Hezbollah rebuilding. 50 KIA/day average during CF.

✗ **Ruling-Out Evidence:** US ownership of outcome via State Dept venue raises bar; Washington invested in regional track success during US-Iran negotiations.

**ALT C: Full Collapse Cascading from US-Iran Track [LESS LIKELY]**

US-Iran indefinite CF ruptures; Hezbollah activated by Tehran; Lebanon CF collapses; Israel expands operations north of Litani.

✓ **Supporting Evidence:** IRGC Aerospace Force Gulf-oil threat; Iran-Hezbollah command linkage; Katz disarmament rhetoric; Iran refusing Wednesday talks.

✗ **Ruling-Out Evidence:** Hezbollah still rebuilding; Iran unlikely to spend Hezbollah card if Pakistani track viable; Lebanese government stake in framework.

**SOURCES**

[State Dept \(Round 2 talks announcement\)](#) | [Al Jazeera \(Lebanese DMU toll revision; Yellow Line analysis\)](#) | [Scripps News \(Round 2 ambassador-level confirmation\)](#) | [IDF Spokesperson \(21-APR strike statement\)](#) | [Times of Israel \(Katz 21-APR\)](#) | [Full Source Registry](#)

PWR-001 | Hormuz Energy Flows: structural framework unchanged 18-21 APR. Kpler analyst Smith characterizes the week as "back to square one" after the 17-APR reopening was reversed 18-APR. IEA April OMR (largest disruption in history; 10.1 mb/d March drop; 7.2 mb/d alternate routes; Europe 6 weeks jet fuel) remains the authoritative baseline — see DTR 07-APR-2026 for full. Live pricing flows into FIN-001 this cycle.

<b>FIN-001   Oil / Gas / Markets — Oil REVERSED UP on Vance Cancel + Iran Refusal (Brent \$98.46 / Gas \$4.022) / OFAC 21-APR "Economic Fury" Package</b>		<b>FLASH   UPDATED   22</b>
<b>SALUTE</b>		
<b>WHY THIS CYCLE</b>	OFAC 21-APR "Economic Fury" Iran missile/UAV package (7 indiv + 4 entities + 2 Mahan Air B777s); oil pulled back to \$98.46 after 21-APR \$101 intraday peak.	
<b>Summary</b>	22-APR pricing: Brent Jun ~\$98.46 22-APR (trading range 97.77-99.36 Investing.com). Brent 21-APR intraday peaked \$101.15 late afternoon BEFORE Trump indefinite-extension announcement, then pulled back to ~\$98 post-announcement (NBC). WTI May \$89.33 22-APR (-0.38% vs. 21-APR per Trading Economics); 21-APR WTI intraday hit \$95 then slid to ~\$88 post-announcement. AAA national gasoline \$4.022/gal 22-APR direct. Most expensive state California ~\$5.83; least Oklahoma ~\$3.38. PA ~\$4.10 range (Nick baseline). EIA STEO April peaks live: Brent \$115/b Q2 2026; retail gas peak \$4.30/gal April; diesel peak \$5.80/gal Q2. 10Y Treasury ~4.29%. S&P 500 near all-time high. OFAC 21-APR: "Economic Fury Targets Iranian Missile and UAV Procurement Networks" — 7 individuals + 4 entities + 2 Mahan Air B777-200ER aircraft (EP-MTB, EP-MTE) designated under E.O. 13224. Designated operatives linked to Sepehr Kaveh Kish International Trading Company, Mahan Air, Pardisan Rezvan Shargh. OFAC 17-APR: "Economic Fury Targets Iran-Backed Iraqi Militia Commanders" — 7 commanders of Kata'ib Hizballah, Kata'ib Sayyid Al-Shuhada, Harakat Al-Nujaba, Asa'ib Ahl Al-Haqq designated SDGT under E.O. 13224. NEW 21-APR: Trump administration suspended US dollar shipments to Iraq and froze security cooperation programs with Iraqi military (WSJ via Haaretz) — additional pressure on Baghdad to dismantle Iranian-backed militias.	
<b>Analyst Assessment</b>	<p><b>PRICING REVERSAL READING:</b> Market read of indefinite-CF-with-Iran-refusing is MORE stressed than 21-APR frame of finite-CF-with-R2-convergence. Oil reversed rather than eased. Intraday \$101.15 on Vance postponement is the clearest price signal of track stress.</p> <p><b>PUMP LAG:</b> Pump price stable at \$4.022 despite 21-APR \$101 intraday crude and sustained \$98+ range: 10-14 day pump lag means yesterday's intraday spike has not reached consumers. Sub-\$4.00 scenario off the table for 1-2 weeks minimum absent CF + blockade resolution.</p> <p><b>OFAC DOUBLE-PACKAGE:</b> 17-APR Iraq militia + 21-APR Iran missile/UAV "Economic Fury" packages represent sustained NSPM-2 pressure escalation concurrent with CF track. This counters an "OFAC holding fire during negotiations" read — Treasury is running pressure in parallel with diplomatic track.</p> <p><b>MAHAN AIR AIRCRAFT DESIGNATION:</b> Specific designation of two B777-200ER tail numbers (EP-MTB, EP-MTE) is operationally significant — foreign airport authorities can now block overflight/ground-handling without requiring new FAA/ICAO action. Expect secondary-sanctions exposure warnings from treasury compliance community within 48 hours.</p> <p><b>TRIPWIRES:</b> Lloyd's rate revision publication; weekly EIA inventory release; any further OFAC action this week; any Iranian bank or shadow-fleet vessel designation; Brent above \$105 or sustained below \$95; gas pump breach above \$4.10 national.</p>	
<b>ALT HYP</b>	<p><b>ALT A: Pricing Retraces Toward \$90 on Pakistani Back-Channel Signal [EQUALLY LIKELY]</b></p> <p>Pakistani mediators produce visible signal within 7-10 days; Iran softens public refusal; Vance or Witkoff travel resumes; market prices out near-term kinetic premium.</p> <p>✓ <b>Supporting Evidence:</b> Trump indefinite-extension language; Sharif/Munir retain mediator incentive; EIA STEO still projects Q2 peak \$115 not \$125; Goldman base case intact.</p>	

	<p>✗ <b>Ruling-Out Evidence:</b> Iran MFA refusal formal; Mohammadi "means nothing"; Kharg storage "full in days"; IRGC Aerospace Force Gulf-oil threat.</p>
<p><b>ALT B: Pricing Sustained \$98-105; OFAC Continues Pressure [EQUALLY LIKELY]</b></p>	<p>Indefinite-CF-with-blockade grinds; market holds elevated risk premium; OFAC follow-on designations continue; gas breaches \$4.10 national within 2 weeks.</p>
<p>✓ <b>Supporting Evidence:</b> Current 22-APR intraday \$101.15 floor; post-Touska spike still in pump pipeline; OFAC 17-APR + 21-APR "Economic Fury" package tempo.</p>	<p>✗ <b>Ruling-Out Evidence:</b> Pakistani mediators could accelerate; Iran diplomatic off-ramp remains; blockade pressure may force either side.</p>
<p><b>ALT C: Pricing Spikes Above \$110 on Kinetic Event [LESS LIKELY]</b></p>	<p>IRGC Aerospace Force 21-APR threat converts to kinetic action against Gulf-state oil infrastructure or US Navy asset; Brent \$115+; gas \$4.50+.</p>
<p>✓ <b>Supporting Evidence:</b> 21-APR IRGC Aerospace Force Gulf-oil threat; standing Khatam al-Anbiya pledge; Kharg storage filling; Iran hardline faction.</p>	<p>✗ <b>Ruling-Out Evidence:</b> Iran retains diplomatic off-ramp; kinetic action ends Chinese/Russian diplomatic cover; extremely high-cost.</p>
<p><b>SOURCES</b></p>	<p><a href="#">Treasury OFAC (21-APR Economic Fury Iranian missile/UAV)</a>   <a href="#">Treasury OFAC (17-APR Economic Fury Iraq militia commanders)</a>   <a href="#">Trading Economics (Brent 22-APR)</a>   <a href="#">AAA Gas Prices (22-APR direct)</a>   <a href="#">EIA STEO April 2026</a>   <a href="#">Full Source Registry</a></p>

<p><b>SC-001   Supply Chain — UKMTO Warning 041-26 (22-APR) Two Wednesday-Morning Attacks in Strait of Hormuz</b></p>	<p><b>FLASH   UPDATED   22</b></p>
<p><b>SALUTE</b></p>	
<p><b>WHY THIS CYCLE</b></p>	<p>UKMTO Warning 041-26 22-APR: two vessel attacks Wednesday morning (0355Z + 0638Z) with heavy damage to container-ship bridge in Attack 1.</p>
<p><b>Summary</b></p>	<p>UKMTO Warning 041-26 issued 22-APR following two separate IRGC attacks on commercial vessels in the Strait of Hormuz. Attack 1 (3:55 AM UTC 22-APR): An IRGC gunboat approached a container ship with NO VHF challenge and opened fire, causing "heavy damage to the bridge" per the vessel master's report to UKMTO. No fires or environmental impact reported; all crew safe. Incident location: 15 nautical miles northeast of Oman. Attack 2 (6:38 AM UTC 22-APR): Second vessel fired on 8nm west of Iran on its outbound track from the strait; no damage reported per UK Maritime Trade Operations Center. Iran's Nour News characterized the first attack as Iran "lawfully enforcing its control over the Strait of Hormuz" and asserted the ship had "ignored the warnings of the Iranian armed forces" — a claim the UKMTO report refutes ("no VHF challenge"). Fars News similarly framed the attack as lawful enforcement. Baseline context: the 18-APR named-vessel attack series (CMA CGM Everglade, VLCC Sanmar Herald, additional Indian-flagged) remains authoritative for that earlier window. Insurance: Lloyd's peak rates ~5% hull value (~100x pre-crisis); 12 P&amp;I Clubs International Group 72-hour cancellation standing from early March. MARAD 2026-004 standing. (For blockade tempo, Iranian bypass counts, and Hormuz transit volumes see GEO-001.)</p>
<p><b>Analyst Assessment</b></p>	<p><b>ATTACK 1 ATTRIBUTION HIGH:</b> UKMTO's "IRGC gunboat, no VHF challenge" fact pattern is T1 attribution to IRGC Navy. Iran's own Nour News / Fars did not deny the attack but reframed it as enforcement, implicitly confirming IRGC execution.</p>

	<p><b>ATTACK 2 ATTRIBUTION AMBIGUOUS:</b> UKMTO did not attribute Attack 2 to any party in the initial warning. Temporal proximity + geography (8nm west of Iran) + Iran’s same-day first attack make IRGC the LIKELY actor but not confirmed.</p> <p><b>HEAVY DAMAGE TO BRIDGE:</b> Bridge damage is a kill-the-ship-without-sinking-it technique: disables navigation, radio, command while leaving hull intact. Consistent with pattern of wanting to interdict without sinking to avoid crew-casualty escalation.</p> <p><b>CROSS-CURRENT WITH DIPLOMACY:</b> Attacks came hours after Trump extended CF indefinitely and while Iran was refusing Wednesday delegation — a kinetic signal that IRGC is either uncoordinated with diplomatic track or actively undercutting it.</p> <p><b>TRIPWIRES:</b> Additional 22-APR UKMTO warnings; any injured/killed crew from these attacks as rescue operations continue; formal Iran claim; non-Iranian naval response; Lloyd’s rate revision; Bab el-Mandeb activation.</p>
<b>ALT HYP</b>	<p><b>ALT A: Third Attack Within 24hrs / UKMTO 042 Issues [LESS LIKELY]</b></p> <p>IRGC launches additional attack on commercial vessel within 24 hours; UKMTO Warning 042 issued.</p> <p>✓ <b>Supporting Evidence:</b> Pattern: two attacks already on same day; IRGC Aerospace Force 21-APR Gulf-oil threat; indefinite CF + Iran refusing talks.</p> <p>✗ <b>Ruling-Out Evidence:</b> IRGC has typically clustered incidents; could escalate or pause pending Supreme Leader direction.</p> <hr/> <p><b>ALT B: 22-APR Twin Attacks Become New Baseline; No Further Named Attacks 48hr [MOST LIKELY]</b></p> <p>Warning 041-26 captures both events; no immediate follow-on; shipping community reprices risk upward; Lloyd’s List publishes revised rates 23-25 APR.</p> <p>✓ <b>Supporting Evidence:</b> UKMTO warnings typically settle into baseline after initial burst; insurance market adjustment lag.</p> <p>✗ <b>Ruling-Out Evidence:</b> IRGC pattern historically unpredictable; could cluster or pause.</p>
<b>SOURCES</b>	<p><a href="#">UKMTO Warning 041-26 (22-APR)</a>   <a href="#">Ship &amp; Bunker (UKMTO Attack 1 reporting)</a>   <a href="#">AP / ClickOrlando (both attacks)</a>   <a href="#">Haaretz (both attacks + US policy context)</a>   <a href="#">CNN (UKMTO + Mohammadi context)</a>   <a href="#">ANI News (UKMTO Warning 041-26 screenshot)</a>   <a href="#">Marine Traffic (12 Hormuz transits 21-APR)</a>   <a href="#">Lloyd’s List (26 Iranian vessels bypassed blockade)</a></p>

<b>CYB-005   CISA AA26-097A Day 16 — OT/PLC Exploitation; Palo Alto Unit 42 Rockwell FactoryTalk Shift</b>		<b>FLASH   UPDATED   22</b>
<b>SALUTE</b>		
<b>WHY THIS CYCLE</b>	Palo Alto Unit 42 21-APR: cluster CL-STA-1128 target-shifted from Unitronics to Rockwell FactoryTalk.	
<b>Summary</b>	<p>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), CL-STA-1128 (Palo Alto Unit 42 21-APR). 5,219+ exposed count holds. Water, energy, municipal facilities affected. FBI NY field office warned Iran-linked PLC exploitation 07-APR baseline. Day 16 quiet period continues at public-disclosure level; Unit 42 21-APR T2 attribution: cluster CL-STA-1128 shifting target from Unitronics PLCs to Rockwell Automation FactoryTalk via VPS infrastructure.</p>	

<b>Analyst Assessment</b>	<p><b>QUIET PERIOD INTERPRETATION:</b> 16-day public-disclosure quiet period suggests 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.</p> <p><b>UNIT 42 SHIFT SIGNIFICANCE:</b> Rockwell FactoryTalk targeting by CL-STA-1128 indicates target-set evolution, not dormancy. FactoryTalk is the Rockwell OT orchestration layer — a richer target than isolated Unitronics PLCs.</p> <p><b>KINETIC ESCALATION COST-BENEFIT:</b> Indefinite CF extension + Iran refusing Wednesday delegation + IRGC Aerospace Force Gulf-oil threat (GEO-001) collectively raise Iranian-affiliated APT cost-benefit for additional attacks on US CI. The longer the indefinite CF holds without Iran arriving at the table, the more attractive covert-vector escalation becomes.</p> <p><b>TRIPWIRES:</b> New CISA supplement; named CI victim; KEV addition tied to OT vector; Iran-attributed incident on CONUS water or electric infrastructure; CL-STA-1128 expansion beyond FactoryTalk.</p>
<b>SOURCES</b>	<p><a href="#">CISA AA26-097A</a>   <a href="#">CyberScoop 07-APR baseline</a>   <a href="#">Palo Alto Unit 42 (CL-STA-1128 tracking)</a></p>

<b>GEO-AXIS-001   Adversary Exploitation of US Attention Bandwidth — Balikatan Day 2 / Ukraine Strikes Sevastopol 18-19 APR (announced 20-APR) / China MFA "Playing With Fire"</b>		<b>FLASH   UPDATED   20</b>
<b>SALUTE</b>		
<b>WHY THIS CYCLE</b>	Balikatan Day 2 live (largest-ever iteration); Ukrainian GUR 18-19 APR Sevastopol strike disabled Yamal + Nikolai Filchenkov (\$150M); Chinese MFA 20-APR "playing with fire."	
<b>Summary</b>	<p><b>CYCLE-FRESH ACTIVITY — 22-APR:</b></p> <p>(1) RUSSIA (night of 18-19 APR, announced 20-APR): Ukrainian GUR "Prymary/Ghosts" unit struck Russian Black Sea Fleet landing ships Yamal (Project 775, \$80M) + Nikolai Filchenkov (Project 1171, \$70M) in Sevastopol Bay, plus Podlet-K1 radar (\$5M) — \$155M combined. Both ships disabled. Separate Ukrainian SBU 18-APR action damaged landing ship Azov + Grachonok patrol boat + Delfin comms antenna + Yugtorsan fuel storage.</p> <p>(2) RUSSIA (21-APR): Zelenskyy denounced US extension of Russian-oil sanctions suspension ("every dollar paid for Russian oil is money for Moscow's war").</p> <p>(3) CHINA (20-APR → 08-MAY): Balikatan 2026 opened — 41st iteration, LARGEST EVER: 17,000 troops / 7 active participants (US, PH, AU, JP, CA, FR, NZ) + 17 observer nations. For first time Japan/Canada/France/NZ are active partners. Japan 1,400 troops will fire Type 88 SSM in live-fire sinking exercise. Maritime strike drills Itbayat (155km from Taiwan); counter-landing Zambales (230km from Scarborough).</p> <p>(4) CHINA (20-APR): Chinese MFA spokesperson Guo Jiakun in Beijing: countries "blindly binding themselves together in the name of security will only be akin to playing with fire — ultimately backfiring upon themselves."</p> <p><b>STRUCTURAL BASELINE (pointer — see prior DTRs for full):</b> Russia 16-APR record 659-drone barrage (16 KIA), 01-APR Luhansk "liberation" declaration, ~8,710 Russian KIA/WIA peak week, ~400 documented chemical munition instances March 2026. China 10-11 APR Scarborough floating barrier (352m) + 6+3 militia vessels, PRC research vessel mapping (PH/JP/PNG/HI/GU), 27-28 MAR PRC-PH SCS "oil/gas cooperation" overtures during PH energy emergency, 20-APR Xi-MBS call on Hormuz, House Select Cmte "Crude Intentions" 03-APR (~1.2B-barrel PRC strategic reserve via shadow fleet; &gt;80% of Iran oil). UN: China+Russia blocked 1737 Sanctions Cmte program MAR-2026. PLA observation cost: Iran war as real-time laboratory for Patriot consumption, CSG patterns, strategic signaling.</p>	
<b>Analyst Assessment</b>	<p><b>SPLIT CONFIDENCE:</b> HIGH on kinetic/tempo data (multi-stream T1/T2 wire corroboration across all 15 items). HIGH on 22-APR-specific deltas (Balikatan Day 2 ongoing; Chinese MFA statement T1 multi-stream; Ukraine strikes T1 GUR + wire). HIGH on shadow-fleet architecture</p>	

(T1 Congressional). MODERATE on causal attribution (pattern exists; counterfactual unprovable). LOW on PLA internal lesson-learning (we see the opportunity, not the conclusions).

**INDO-PAC COMPOUND:** Balikpapan Day 2 proceeding concurrent with Iranian CF stress, Chinese MFA “playing with fire” public framing, AND Chinese energy-leverage overtures to PH during PH energy emergency: Indo-Pac track is compounding within the Iran window, not adjacent to it.

**SO WHAT:** Resolution of the US-Iran CF does not reset the baseline. Ukraine strikes on Sevastopol Bay landing ships (22-APR) and Russia offensive continuing independent of US-Iran trajectory. Gains during this window — Luhansk claim, Scarborough infrastructure, Chinese strategic reserve, UN 1737 obstruction — are sticky.

**FRAMING NOTE:** Russian and Ukrainian government framing attributed, neither adopted. Chinese MFA “playing with fire” quoted as Chinese state framing. “Axis of Autocracy” and “Iron Triangle” labels attributed to their sources, not adopted as DTR voice.

**TRIPWIRES:** (1) Any kinetic incident SCS during Balikpapan; (2) PLAN deployment to Scarborough; (3) Ukrainian successful strike on Russian nuclear-relevant infrastructure; (4) Russian escalation outside Ukrainian border; (5) Chinese public announcement on PH oil/gas cooperation converting energy leverage to concrete deal; (6) Japan Type 88 live firing during Balikpapan window.

**ALT HYP**

**ALT A: Opportunistic Exploitation of US Attention Window [MOST LIKELY]**

Pattern of activity dated to Iran theater focus period is clear and measurable: record-barrage 16-APR; night of 18-19 APR Ukrainian strike on Russian landing ships in Sevastopol (announced 20-APR); Balikpapan 41st iteration launched 20-APR as largest ever; Chinese MFA 20-APR “playing with fire”; Scarborough infrastructure 10-11 APR; Xi-MBS call 20-APR. Moscow and Beijing pricing US capacity constraint into operational choices.

✓ **Supporting Evidence:** T1 Congressional (Crude Intentions); T1 wire corroboration of Russian barrage, Scarborough imagery, Balikpapan Day 2; direct quotes from Ukrainian frontline personnel and analysts. Measurable Chinese infrastructure gains and sanctions-evasion volumes.

✗ **Ruling-Out Evidence:** Counterfactual inherently unprovable; some tempo on pre-existing schedules (spring offensive seasonality; Balikpapan annual exercise); not every element newly caused by Iran-theater bandwidth.

**ALT B: Coincident But Not Causal [EQUALLY LIKELY]**

Russian spring offensive seasonal/logistical; Chinese SCS operations routine with Balikpapan as annual trigger; Luhansk claim timed to Russian domestic calendar.

✓ **Supporting Evidence:** Russian offensives have spring seasonality independent of US theater focus. Chinese SCS tempo has baseline unrelated to Iran. Balikpapan is annual.

✗ **Ruling-Out Evidence:** Balikpapan 2026 largest-ever iteration (17,000 troops / 7 active + 17 observer nations) exceeds annual baseline; 16-APR barrage deadliest of 2026; Scarborough floating barrier new emplacement. Aggregate pattern across 15 data points strains coincidence.

**ALT C: Coordinated Strategic Signaling Between Moscow and Beijing [LESS LIKELY]**

Russia and China coordinating timing to maximize pressure on US strategic bandwidth in concerted campaign.

✓ **Supporting Evidence:** MAR-2026 UN 1737 obstruction jointly executed. “No limits” partnership framing since 2022. Xi-Putin alignment on Iran policy.

✗ **Ruling-Out Evidence:** No public evidence of operational coordination on tempo/targeting. Russia and China have distinct and sometimes competing interests. Coordination hypothesis not required to explain observed pattern.

**SOURCES**

[House Select Committee on the CCP — Crude Intentions \(03-APR, T1 Congressional\)](#) | [Philstar \(Balikatan 2026 Day 2; Guo Jiakun “playing with fire” 20-APR\)](#) | [Radio Free Asia \(Balikatan active defense posture\)](#) | [Manila Times \(China energy leverage\)](#) | [Reuters \(Scarborough imagery + Ukraine 18-19 APR Sevastopol strikes\)](#) | [Ukrainska Pravda / Ukrainian GUR \(Sevastopol landing ship strike\)](#) | [Irish Times \(Japan Balikatan Type 88\)](#) | [AEI-ISW China & Taiwan Update series](#) | [Ryan \(PLA learning commentary\)](#)

**SECTION 4A — CYBER & INFORMATION SECURITY**

<b>CYB-008   Microsoft SharePoint Zero-Day CVE-2026-32201 — KEV, Federal Due 28-APR (T-6)</b>		<b>HIGH   UPDATED   16</b>
<b>WHY THIS CYCLE</b>	T-7 clock (due 28-APR); compound patch-pressure queue with CYB-002/003/010/011.	
<b>Summary</b>	CISA KEV 14-APR baseline (T1). CVE-2026-32201 Microsoft SharePoint Server spoofing. Federal remediation due 28-APR (T-6 from publication 22-APR). 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, Day 5 overdue). Patch queue compound with CYB-010 (ActiveMQ, due 30-APR T-9), CYB-003 Cisco SD-WAN (FCEB deadlines all past 23-MAR, compounded by three new Catalyst CVEs 20-APR — see CYB-011), and CYB-011 (CISA KEV 20-APR 8-CVE batch due 04-MAY T-13).	
<b>Analyst Assessment</b>	<p><b>COMPLIANCE WINDOW:</b> 7 days to remediate for agencies and enterprises running on-prem SharePoint Server.</p> <p><b>COMPOUND EXPOSURE:</b> IRGC retaliation pledge (GEO-001) elevates cyber threat environment for CONUS CI operators. AA26-097A Day 16 OT/PLC focus (CYB-005) pairs with SharePoint + ActiveMQ identity-plane compound exposure.</p> <p><b>TRIPWIRES:</b> Named victim disclosure; CISA supplemental advisory; ransomware campaign attribution.</p>	
<b>SOURCES</b>	<a href="#">CISA KEV Catalog</a>   <a href="#">Hacker News 14-APR baseline</a>	

<b>CYB-010   Apache ActiveMQ CVE-2026-34197 — KEV, Federal Due 30-APR (T-8)</b>		<b>HIGH   UPDATED   13</b>
<b>WHY THIS CYCLE</b>	T-9 clock (due 30-APR); compound patch-pressure queue.	
<b>Summary</b>	CISA KEV 16-APR baseline (T1). Apache ActiveMQ improper input validation vulnerability allowing code injection. Federal remediation due 30-APR (T-8 from publication 22-APR). "Known to be used in ransomware campaigns: Unknown" per CISA. References: <a href="#">activemq.apache.org/security-advisories.data</a> , NIST NVD.	
<b>Analyst Assessment</b>	<b>ATTACK SURFACE:</b> ActiveMQ is widely deployed as a message broker in enterprise integration architectures. Code injection via messaging paths bypasses perimeter controls.	

	<p><b>FEDERAL TIMELINE:</b> Federal operators with ActiveMQ in FISMA-boundary systems have 9 days to 30-APR.</p> <p><b>TRIPWIRES:</b> Compliance deadline 30-APR; ransomware campaign attribution; specific enterprise disclosure.</p>
<b>SOURCES</b>	<a href="#">CISA KEV</a>   <a href="#">Apache ActiveMQ Advisory</a>

<b>CYB-002   Fortinet CVE-2026-21643 — Federal Deadline OVERDUE Day 6</b>		<b>HIGH   UPDATED   18</b>
<b>WHY THIS CYCLE</b>	Day 5 OVERDUE; ~2,000 FortiClient EMS instances still internet-facing; active exploitation >4 weeks.	
<b>Summary</b>	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.	
<b>Analyst Assessment</b>	<p><b>COMPLIANCE STATUS:</b> Agencies past deadline are operating in non-compliance with BOD 22-01.</p> <p><b>EXPLOITATION TIMELINE:</b> Active exploitation &gt;4 weeks. IR burden likely accumulating at Fortinet shops.</p> <p><b>TRIPWIRES:</b> Named agency breach; CISA emergency directive.</p>	
<b>SOURCES</b>	<a href="#">CISA KEV</a>   <a href="#">Fortinet PSIRT</a>	

<b>CYB-003   CISA ED 26-03 Cisco SD-WAN — CVE-2026-20127 CVSS 10 + CVE-2022-20775</b>		<b>HIGH   UPDATED   18</b>
<b>WHY THIS CYCLE</b>	20-APR COMPOUNDED: 3 new Cisco Catalyst SD-WAN Manager CVEs (see CYB-011) extend the already-overdue ED 26-03.	
<b>Summary</b>	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.	
<b>Analyst Assessment</b>	<p><b>MANAGEMENT-PLANE RISK:</b> SD-WAN management plane compromise provides lateral movement across enterprise branches and potentially OT/IT boundary crossings.</p> <p><b>THREAT ACTOR:</b> UAT-8616 attribution places this within the broader pattern of nation-state interest in network edge appliances.</p> <p><b>WARTIME ELEVATION:</b> Iranian-affiliated APT interest in infrastructure management planes has historical precedent.</p> <p><b>TRIPWIRES:</b> Named agency breach; supplemental CISA directive; expansion of CVE scope.</p>	
<b>SOURCES</b>	<a href="#">CISA ED 26-03</a>   <a href="#">Cisco PSIRT</a>   <a href="#">Cisco Talos (UAT-8616)</a>	

<b>CYB-011   CISA KEV 20-APR Batch — 3 Cisco Catalyst SD-WAN CVEs DUE TOMORROW 23-APR (T-1) / 5 Others Due 04-MAY (T-12)</b>		<b>HIGH   UPDATED   16</b>
<b>SALUTE</b>		
<b>WHY THIS CYCLE</b>	Three Cisco Catalyst SD-WAN Manager CVEs in the 20-APR KEV batch hit 23-APR federal deadline (T-1 tomorrow); compounds ED 26-03.	

<b>Summary</b>	CISA KEV additions 20-APR-2026 (T1) carry SPLIT FEDERAL DEADLINES. Due 23-APR (T-1 tomorrow): three Cisco Catalyst SD-WAN Manager CVEs (CVE-2026-20122 / -20128 / -20133) compounding ED 26-03 already past deadline. Due 04-MAY (T-12): five non-Cisco CVEs (PaperCut NG/MF, JetBrains TeamCity, Kentico Xperience, Quest SMA CVSS 10.0, Synacor Zimbra). Palo Alto Unit 42 separately noted threat cluster CL-STA-1128 (CyberAv3ngers/Storm-0784 lineage) shifting target from Unitronics PLCs to Rockwell FactoryTalk via VPS infrastructure — not a direct SD-WAN crossover but evidence the cluster evolves target-sets faster than federal patching resolves.
<b>Analyst Assessment</b>	<p><b>T-1 URGENCY:</b> FCEB agencies with Catalyst SD-WAN Manager deployments must patch by EOD 22-APR or file for extension; no middle path. Non-federal operators should treat 23-APR as the effective patch-by date given contractor/supply-chain exposure correlation.</p> <p><b>COMPOUND WINDOW:</b> Active queue this cycle: CYB-002 Fortinet OVERDUE Day 6 + CYB-003 ED 26-03 past + CYB-008 SharePoint T-6 + CYB-010 ActiveMQ T-8 + CYB-011 split (T-1 / T-12). Heaviest federal-compliance patch-pressure window since blockade began.</p> <p><b>TRIPWIRES:</b> (1) CISA supplemental directive or extension guidance; (2) Named-victim disclosure on any of the 8 CVEs; (3) Cisco PSIRT scope expansion; (4) 23-APR FCEB compliance reporting.</p>
<b>SOURCES</b>	<p><a href="#">CISA KEV Catalog (20-APR additions)</a>   <a href="#">Cisco PSIRT (Catalyst SD-WAN Manager CVEs)</a>   <a href="#">Palo Alto Unit 42 (CL-STA-1128 tracking)</a></p>

## SECTION 4B — PHYSICAL / GEOPOLITICAL / IO

### CARRYOVER MONITORS — STRUCTURAL ITEMS WITHOUT NEW DATA THIS CYCLE

**GEO-007 Lebanon CF (structural):** Operational detail covered in FLASH GEO-CF-LBN. Trajectory coupled to US-Iran CF — lapse WED night cascades to Lebanon; framework gives 23-APR Karam talks air cover. Cumulative KIA 2,196; 7,061 wounded; >1M displaced baseline.

**GEO-UKR Russia-Ukraine (structural):** Operational detail consolidated under GEO-AXIS-001 this cycle. ZNPP 17-APR second outage (40-min restoration) and US arms-delay confirmation remain live from 17-APR. Full framework: DTR 17-APR-2026.

**CHEM-001 Q1 Industrial Fire Pattern (structural):** No new industrial fires or chemical releases 18-21 APR. Q1 log stable at 4 cross-sector events. No coordination evidence. Watch variable: Q2 fires outside turnaround windows. Full log below. Baseline: DTR 10-APR-2026.

**TRV-001 Travel Advisories (structural):** Iran/Iraq/Lebanon/Syria/Yemen/Russia Level 4; Bahrain/Kuwait/Qatar/UAE Level 3; Turkey Level 2 upgrade watch active from 07-APR Hatay incursion. US Embassy Baghdad 20-APR Security Alert re-emphasizes Iraq Level 4 “Do Not Travel”: Iraqi terrorist militias aligned with Iran continue to plot attacks against US citizens and interests. Advisory summary updated to reflect US embassy operations changes. Overland routes to Jordan/Kuwait/Saudi Arabia/Tu00fcrkiye remain open; Baghdad International Airport flights limited (Royal Jordanian resumed Amman service). Baseline: DTR 31-MAR-2026; 22-APR update: US Embassy Baghdad 20-APR Security Alert.

**INS-001 IRGC/MOIS + DIA (structural):** IRGC/MOIS homeland threat vector + DIA-confirmed Shiite militia operations (hundreds of attacks on US forces since 28-FEB). UPDATED this cycle: (1) OFAC 17-APR “Economic Fury Targets Iran-Backed Iraqi Militia Commanders” designated 7 commanders across Kata’ib Hezbollah, Kata’ib Sayyid Al-Shuhada, Harakat Al-Nujaba, Asa’ib Ahl Al-Haqq (SDGT under E.O. 13224). (2) OFAC 21-APR “Economic Fury Targets Iranian Missile and UAV Procurement Networks” designated 7 individuals + 4 entities + 2 Mahan Air B777-200ER aircraft (EP-MTB, EP-MTE). (3) NEW 21-APR (WSJ via Haaretz): Trump administration suspended US dollar shipments to Iraq and froze security cooperation programs with the Iraqi military — escalating pressure on Baghdad to dismantle powerful Iranian-backed militias. Iraqi militia commanders named in OFAC 17-APR action include Safaa Adnan Jabbar Suwaed (AAH Salah ad-Din chief of ops); Khalid Jameel Abed Albakhatra and Saeed Kadhim Mukhamis (KSS senior officials); Husham Hashim Jaythoom (HAN military trainer). These represent sustained NSPM-2 pressure

escalation concurrent with CF track. Baseline: DTR 16-APR-2026; 22-APR update: OFAC 17-APR + 21-APR Economic Fury packages + Trump admin 21-APR USD/security-cooperation suspensions.

**AGR-001 Fertilizer (structural):** Urea Egypt FOB ~\$700/MT (+78% pre-war); 30% global urea trade disrupted; China export restrictions through August 2026. 2026 planting season locked. Structural carry-forward. Baseline: DTR 08-APR-2026.

**TER-001 DHS NTAS (structural gap):** Day 52. No reissuance since 22-JUN-2025 bulletin expired 22-SEP-2025. Monitoring only.

*For full baseline detail on any carryover monitor, see referenced DTR archive. Operational changes elevate these to FLASH or HIGH sections on next occurrence.*

### 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

### CARRYOVER MONITORS — ENERGY / NUCLEAR / CI

**NUC-001 Bushehr / ZNPP / DPRK (compound nuclear-safety picture):** Bushehr: four strikes baseline; no new strike during blockade. ZNPP: second power outage 17-APR (40-min restoration per IAEA). DPRK: IAEA "very serious" warning preceded 19-APR Sinpo launches. No new nuclear safety events 20-22 APR. Full Bushehr framework: DTR 04-APR-2026.

**CHEM-001 Baltimore CONUS CI impact (standing):** 15-APR Baltimore DPW water fluoride reduction 0.7→0.4 mg/L remains the first confirmed CONUS public-health CI impact attributable to the Iran war supply chain. No new CONUS municipal constraint reported 18-21 APR. Baseline: DTR 15-APR-2026.

**For live cycle data see:** [SC-001](#) (UKMTO Warning 041-26), [FIN-001](#) (oil/markets), [PWR-001](#) (Hormuz energy flows pointer). Commodity Tracker: Section 2.

## SECTION 6 — AVIATION / TRANSPORTATION

### CARRYOVER MONITORS — AVIATION / TRANSPORTATION

**For live cycle data:** [AVN-001](#) (EASA CZIB R6 expires 24-APR / T-3 — full FLASH entry).

**AVN-002 Carrier Route Suspensions (structural):** AA PHL-DOH through 07-MAY; BA Abu Dhabi near year-end; Singapore Airlines / Lufthansa / Swiss / Austrian Dubai & Tel Aviv through 31-MAY; KLM Tel Aviv / Riyadh / Dammam / Dubai through 17-MAY. No new suspensions or resummptions 18-21 APR. War-risk insurance is the binding constraint; EASA R6 expiration 24-APR is the next forcing event. Baseline: DTR 15-APR-2026.

**TRV-001 GCC / ME Travel Advisories:** See Sec 4B carryover line — not duplicated here.

**SECTION 7 — METEOROLOGICAL WEATHER & SEVERE WEATHER**

**CONUS WEATHER SYNOPSIS — 22 APRIL 2026 | TODAY / 48H / 72H**

TODAY (21-APR): SPC Day 1 convective outlook identifies NO severe thunderstorm risk areas through 12Z 22-APR. WPC Day 1 excessive rainfall outlook SLIGHT RISK over south-central Texas Hill Country (San Antonio, New Braunfels, areas NW): rainfall rates to 1.5"/hr, isolated 3-inch totals possible; minimal severe weather coupling. WPC Day 2 (22-APR): MARGINAL RISK across portions of central California and southeast Texas. WPC Day 3 (23-APR): return toward baseline. 17-APR RETROSPECTIVE: the multi-day severe 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). 21-APR Kp 4 forecast; 22-23 APR quiet Kp 2. Deploy VHF/UHF backup for any served agencies in the WPC SLIGHT Risk TX Hill Country 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](#)

**WX-001 | SPC CRITICAL Fire Weather High Plains 22-APR / Narrow Severe Corridor / Multi-Day Severe Sequence 22-24 APR**

**HIGH | UPDATED | 18**

**SALUTE**

**WHY THIS CYCLE**

SPC CRITICAL fire weather High Plains 22-APR plus narrow severe corridor Rapid City→Lubbock; multi-day severe sequence 22-24 APR.

**Summary**

SPC Day 1 (valid 22-APR 12Z thru 23-APR 12Z): CRITICAL Risk fire weather issued High Plains — gusty winds, warm temperatures, very dry antecedent conditions. Narrow severe corridor across the central High Plains (Rapid City SD → Pierre SD → Garden City KS → Amarillo TX → Lubbock TX); primary threats large hail + damaging winds with moisture-return in early stages. SPC Day 2 (valid 23-APR 12Z thru 24-APR 12Z): SLIGHT Risk severe thunderstorms across northern Oklahoma into southern Minnesota — large-to-very-large hail,

	damaging winds, few tornadoes possible. WPC Day 1: MARGINAL Risk excessive rainfall portions California + Texas. Multi-day severe sequence 22-24 APR as a deep upper-level low sweeps across the Plains, with elevated severe potential extending into 24-APR. Fire-weather posture persists through week given dry continental airmass. NWR: 20 transmitters affected / 18 OOS + 2 DEG across 14 states+territories (22-APR 1400 UTC live data). Multiple gap areas inside the severe sequence footprint: Tennessee dual-gap (Lawrenceburg + Shelbyville) inside Nashville forecast area; Kansas Ulysses OOS inside SW KS severe corridor; Minnesota dual-gap (Gun Flint Lake + Fergus Falls) inside Day 2 SLIGHT Risk area. NEW MEXICO TRIPLE-GAP: Roswell + Carlsbad + Artesia all OOS while NM is in fire-weather footprint.
<b>Analyst Assessment</b>	<p><b>SEQUENCE STRUCTURE:</b> Three-day severe sequence 22-24 APR with day-by-day geographic migration — not a single event. Planning horizon is 72 hours not 24.</p> <p><b>NWR COMPOUND:</b> NWR gap areas overlap severe footprints in TN (Day 2-3), MN (Day 2), KS (Day 1 corridor), and NM (fire weather). EMCOMM and served-agency emergency managers in these counties should verify WEA/FEMA App/broadcast EAS as primary alerting pathway.</p> <p><b>FIRE WEATHER / SEVERE JUXTAPOSITION:</b> The High Plains corridor has CRITICAL fire weather upwind of the severe corridor on 22-APR — dry-line dynamics could drive both simultaneously with different concerns (pre-frontal fire vs. post-frontal hail/wind).</p> <p><b>CONFIDENCE:</b> HIGH — SPC T1; NWS offices T1.</p> <p><b>TRIPWIRES:</b> SPC upgrade to ENHANCED or MODERATE Day 2 or Day 1; any fire-weather watch/warning upgrade; tornado watch issuance; named ignition event inside CRITICAL footprint; NWR transmitter additions/restorations inside severe corridor.</p>
<b>SOURCES</b>	<a href="#">NOAA SPC Day 1 Outlook</a>   <a href="#">NOAA SPC Day 2 Outlook</a>   <a href="#">NWS WPC</a>   <a href="#">NWS Local Storm Surveys</a>   <a href="#">NWS NWR Outages</a>

## SECTION 7.1 — WILDFIRE & FIRE WEATHER

REGION	STATUS	ACTIVE FIRES / EVAC STATUS	CI / INFRASTRUCTURE EXPOSURE	FIRE WEATHER / SOURCES
<b>Southwest (AZ/NM)</b>	WATCH	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>	WATCH	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>	MONITOR	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>	MONITOR	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>	WATCH	Post-severe-wx dryline development watch 16-APR. No	Oil/gas wellhead. Electric co-op transmission. Rural propane.	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.		
<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 — 22 APRIL 2026 / 1400 UTC**

Source: [weather.gov/nwr/outages](https://weather.gov/nwr/outages) | Live data provided 22-APR-2026 | 18 OUT OF SERVICE | 2 DEGRADED | 14 States/Territories

**OPERATIONAL NOTE:** 20 NWR transmitters are currently degraded or out of service across 14 states/territories as of 22-APR 1400 UTC. Affected populations lose the primary all-hazards alerting channel and dedicated SAME-coded EAS tone activation. COMPOUND WINDOW: 22-24 APR multi-day severe weather sequence (SPC CRITICAL fire weather 22-APR High Plains + narrow severe corridor Rapid City\u2192Lubbock; SPC Day 2 SLIGHT Risk severe thunderstorms 23-APR OK\u2192MN) crosses multiple gap areas including the New Mexico triple-gap and Tennessee dual-gap. During active severe weather or IPAWS 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. TENNESSEE DUAL-GAP: Lawrenceburg + Shelbyville OOS in Nashville forecast area during severe sequence. MINNESOTA DUAL-GAP: Gun Flint Lake + Fergus Falls OOS. OREGON DUAL-GAP: Portland DEG + Coos Bay OOS. Space weather quiet (Kp max 2.67 22-APR; 1.67 23-APR) removes HF-degradation compound from prior cycles.

ST	Callsign	Location	Freq	WFO	Status	Counties / Areas Affected
AK	KJY73	Saint Paul Island	162.525	Anchorage AK	OUT OF SVC	Saint Paul Island / Pribilofs, AK
AK	KWN30	Kotzebue	162.550	Fairbanks AK	DEGRADED	Kotzebue / Northwest Arctic Borough, AK
AR	KG86	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
MN	KXI45	Gun Flint Lake	162.525	Duluth MN	OUT OF SVC	Cook County, MN
MN	WNG680	Fergus Falls	162.500	Grand Forks ND	OUT OF SVC	Otter Tail, Grant, Douglas, Wilkin counties, MN
MP	WXM86	Saipan	162.550	Guam GU	OUT OF SVC	Northern Mariana Islands
NM	WWG36	Roswell	162.450	Albuquerque NM	OUT OF SVC	Chaves, Lincoln counties, NM
NM	WWF37	Carlsbad	162.475	Midland/Odessa TX	OUT OF SVC	Eddy County, NM

ST	Callsign	Location	Freq	WFO	Status	Counties / Areas Affected
NM	WXN24	Artesia	162.425	Midland/Odessa TX	OUT OF SVC	Eddy County (alt), Chaves County, NM
OR	KIG98	Portland	162.550	Portland OR	DEGRADED	Portland metro area, OR
OR	KIH32	Coos Bay	162.400	Medford OR	OUT OF SVC	Coos County, OR
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

SOURCE: NWR transmitter outage data live from weather.gov/nwr/outages provided by user at 22-APR 1400 UTC. 20 affected (18 OOS + 2 DEG) across 14 states/territories.

**⚠ 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 — Kp Max 5 (G1) Observed 20-APR   21-APR Kp 4 Forecast   HF Recovering		MODERATE   UPDATED   10
<b>WHY THIS CYCLE</b>	Kp max 5 (G1) observed 20-APR from CH HSS arrival; HF continuing recovery from 18-APR G2 peak.	
<b>Summary</b>	SWPC 21-APR 0030Z 3-Day Forecast (T1): Geomagnetic — 24-hour observed maximum Kp 5 (G1 minor) 20-APR, with observed Kp index stream at/above 5 during one 3-hour window driven by continued CH HSS influence; 21-APR forecast maximum Kp 4 (active) with slight chance G1 minor; 22-APR forecast maximum Kp 2 (quiet); 23-APR forecast maximum Kp 2 (quiet). Solar Radiation storms: none observed, none forecast. Radio Blackouts: none observed at/above R1 threshold; probability for R1 or greater is 15% on 21-APR, 10% on 22-23 APR. AR 4419 remains on the visible disk but has not produced M- or X-class flares in the 24-hour observation window. Comet C/2026 A1 (MAPS) remains benign CCOR-1 observation. Aurora Timeline Viewer product still unavailable per SWPC. Geophysical Institute 27-day forecast consistent: 24-28 APR quiet Kp 2-3; 29-30 APR next elevated window Kp 5 forecast.	
<b>Analyst Assessment</b>	<p><b>HF EMCOMM STATUS:</b> Continuing recovery from the 18-APR G2 peak. Kp 5 briefly on 20-APR produced localized G1-level disturbance but no sustained CONUS HF blackout.</p> <p><b>21-APR OUTLOOK:</b> Active-level forecast may produce intermittent polar-path degradation; regional NVIS and 40m/60m EMCOMM should remain reliable.</p> <p><b>22-23 APR QUIET WINDOW:</b> Supports any deferred HF tests or readiness drills. Power-grid operators have cleared the GIC watch window.</p> <p><b>EMCOMM PROTOCOL:</b> 40m/60m primary; 20m usable with propagation check; 15m-10m DX bands degraded.</p> <p><b>CONFIDENCE:</b> HIGH — SWPC T1 observations + 3-day forecast T1; Geophysical Institute 27-day T1.</p> <p><b>TRIPWIRES:</b> M- or X-class flare from AR 4419; CME arrival narrative; Kp escalation above forecast; 29-30 APR next event window.</p>	
<b>SOURCES</b>	<a href="#">NOAA SWPC 3-Day Forecast</a>   <a href="#">SWPC Planetary K-index</a>   <a href="#">Geophysical Institute (UAF) Aurora Forecast</a>   <a href="#">SpaceWeatherLive</a>	

BAND	STATUS	COLLECTED 21-APR 0030Z   24-hr observed Kp max 5 (G1) 20-APR from CH HSS   21-APR Kp 4 forecast (slight G1 chance)   22-23 APR quiet Kp 2   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.
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.		

## 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 | 21-24 APR 2026

**The operating environment is rapidly changing and highly fluid. What is true at publication (1400 UTC 22-APR) may not hold by close of business. Indefinite-CF-with-Iran-refusing presents MORE compound risk than finite CF + active R2 convergence did at 21-APR; the decisive variables are now Pakistani back-channel movement, IRGC Aerospace Force follow-on statements, and any kinetic event with multi-stream attribution.**

**22-APR (TODAY / BLOCKADE DAY 10 / Op Epic Fury Day 53):** CF INDEFINITELY EXTENDED by Trump 21-APR (Truth Social); extension holds "until such time as their proposal is submitted, and discussions are concluded." Iran via Tasnim: NO delegation to Islamabad Wednesday. Vance Islamabad trip POSTPONED per WH. IRGC Aerospace Force commander (Fars 21-APR) threatened Gulf neighboring states' oil production if territory used for attacks. CENTCOM 28 vessels cumulative. Oil settled off peak: Brent \$98.46 22-APR

(intraday \$101.15 21-APR pre-Trump announcement, then pullback); WTI \$89.33; AAA gas \$4.022. Lebanon Round 2 talks THU 23-APR at State Dept; toll revised to 2,454 KIA. WX: SPC CRITICAL fire wx High Plains + narrow severe corridor (Rapid City→Lubbock); SPC Day 2 SLIGHT severe OK→MN; 3-day severe sequence 22-24 APR. SWX: Kp quiet 22-23 APR. CISA KEV 20-APR: 3 Cisco Catalyst SD-WAN CVEs DUE 23-APR (T-1 tomorrow); 5 other CVEs T-12 due 04-MAY.

**22-APR WED (CF EXPIRATION NIGHT / DECISION WINDOW):** Three convergent scenarios. SCENARIO A (EQUALLY LIKELY): Iranian delegation arrives; R2 produces framework extension; CF extended again or replaced with extended protocol; oil retraces toward \$85-90 Brent. SCENARIO B (EQUALLY LIKELY): CF lapses WED night without framework; both sides resume limited kinetic; IRGC retaliation pledge converts; Iran mines Gulf approaches or strikes commercial; US strikes Iranian power infrastructure. SCENARIO C (LESS LIKELY): kinetic retaliation arrives before CF expiration WED night. Lebanon-Israel talks THU 23-APR fall inside the US-Iran CF 72-hour window, compounding decision-point risk. Trump "highly unlikely" to extend further.

**23-24 APR (POST-CF WINDOW):** EASA CZIB 2026-03 R6 expires 24-APR (T-2); R7 issuance likely given unresolved Iran posture. Lebanon-Israel talks THU 23-APR proceed or collapse. SharePoint KEV CYB-008 deadline 28-APR (T-6); ActiveMQ CYB-010 deadline 30-APR (T-8); CYB-011 KEV batch 04-MAY (T-13). Space weather quiet window (Kp 2). Next potential elevated window 29-30 APR (Kp 5 forecast per Geophysical Institute).

**NEXT-CYCLE TASKING:** (1) CF STATUS: Iran formal response to Trump indefinite-extension; Pakistani back-channel signal; Vance or Witkoff rescheduled travel; any formal Iranian delegation movement. (2) IRGC POSTURE: Any kinetic event with multi-stream corroboration; CENTCOM confirmation or denial of 21-APR Iran state-media drone claim; IRGC Aerospace Force follow-on statements on Gulf-state oil threat (GEO-001); Houthi Red Sea activation (WATCH-007). (3) LEBANON: Round 2 talks 23-APR outcome; Karam post-talk statement; IDF kinetic tempo inside Yellow Line; additional UNIFIL casualties. (4) CYBER COMPLIANCE: CYB-011 Cisco T-1 compliance 23-APR EOD; CYB-008 SharePoint T-6; CYB-010 ActiveMQ T-8; CYB-002 Fortinet overdue Day 6; AA26-097A Day 16 any new incidents; Unit 42 CL-STA-1128 expansion. (5) UKMTO: Update 035 issuance; Lloyd's rate revision publication; first non-Iranian commercial vessel attack. (6) GEO-AXIS-001 THREADS: Balikatan 23-APR+ any SCS friction; Russian tempo continuation; Ukrainian follow-on strikes; additional Chinese shadow-fleet designations; UN 1737 action. (7) WEATHER: SPC Day 1/Day 2/Day 3 evolution of 22-24 APR severe sequence; any SPC upgrade to ENHANCED/MODERATE; tornado watch issuance; named ignition inside CRITICAL fire-wx footprint. (8) DHS NTAS: Any bulletin issuance (Day 53 gap). (9) OFAC: Any follow-on Iran-specific action after 21-APR Economic Fury package. (10) AVIATION: EASA CZIB R7 issuance before 24-APR T-2. (11) TRV: US Embassy follow-on advisories; Baghdad operational posture.

## SECTION 9 — ACTIVE TRIPWIRES

*Active tripwires are items NOT covered in FLASH / HIGH that could force next-cycle reclassification.*

**WATCH-007 — Houthi / Bab el-Mandeb:** No Red Sea attacks since 28-FEB-2026 despite escalation. If US-Iran CF lapses WED NIGHT and Iran signals Houthi activation, expect 24-48 hour Red Sea disruption. Single attack on Bab el-Mandeb = ~15% global seaborne trade arrested.

**WATCH-003 — Iran Internet partial restore:** Per Palo Alto Unit 42 17-APR, 47-day blackout ended with limited mirror-only restoration. Watch full unfiltered restoration or complete re-closure.

**WATCH-005 — Space weather next event:** 22-23 APR quiet. Next Kp 5 forecast window 29-30 APR per Geophysical Institute. See SWX-001 for today's conditions.

## SECTION 10 — PREPAREDNESS CONDITION ASSESSMENT

**PREP-CON 3 — ELEVATED | Assessed: 22 April 2026 | Blockade Day 10 | CF Indefinitely Extended / Iran Refusing Talks**

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

**OPERATIONAL BASIS:** Nine FLASH-level events anchor the cycle: US-Iran Blockade Day 10 at CENTCOM 28 vessels cumulative (up from 27); Trump indefinitely extended the ceasefire via Truth Social 21-APR PM ("until such time as their proposal is submitted, and discussions are concluded, one way or the other"), with US naval blockade continuing; Iran via Tasnim confirmed no delegation will travel to Islamabad Wednesday; Vance Islamabad trip was postponed indefinitely per WH 21-APR PM; IRGC Aerospace Force commander (Fars 21-APR) threatened Gulf neighboring states' oil production if their territory is used for attacks on Iran — a structural escalation vector distinct from the standing Touska-retaliation pledge; IRGC Khatam al-Anbiya Gen. Abdollahi 21-APR reiterated Hormuz management posture; UKMTO Warning 041-26 (22-APR T1) two Wednesday-morning attacks 3:55Z + 6:38Z; 18-APR named-vessel baseline stands; Lebanon CF maintaining despite active IDF kinetic (disaster-mgmt toll revised to 2,454 KIA / 7,658 injured) with Round 2 Israel-Lebanon talks confirmed THU 23-APR at State Dept ambassador-level under Karam; oil settled off 21-APR intraday peak (Brent \$98.46 22-APR range 97.77-99.36; intraday \$101.15 21-APR pre-Trump announcement then pullback; WTI \$89.33 22-APR; AAA gas \$4.022); SWPC Kp quiet 22-23 APR (max 2.67 / 1.67) with HF normalizing; SPC CRITICAL fire weather High Plains 22-APR plus narrow severe corridor (Rapid City→Lubbock) with SPC Day 2 SLIGHT Risk severe OK→MN 23-APR — multi-day severe sequence 22-24 APR; EASA CZIB expires 24-APR (T-2); DHS NTAS gap Day 53; CISA AA26-097A Day 16; SharePoint KEV T-6; ActiveMQ KEV T-8; Fortinet OVERDUE Day 6; CYB-011 NEW CISA KEV 20-APR batch carrying split federal deadline — three Cisco Catalyst SD-WAN Manager CVEs (CVE-2026-20122/20128/20133) compounding ED 26-03 are due TOMORROW 23-APR (T-1) while five non-Cisco CVEs are due 04-MAY (T-12); OFAC 21-APR issued "Economic Fury Targets Iranian Missile and UAV Procurement Networks" designating 7 individuals + 4 entities plus two Mahan Air B777-200ER aircraft (EP-MTB, EP-MTE); and GEO-AXIS-001 continues (Balikatan 2026 Day 2 — largest-ever iteration, Chinese MFA "playing with fire"; Ukrainian GUR night-of-18-19 APR strikes on Sevastopol Bay landing ships Yamal + Nikolai Filchenkov + Podlet-K1 radar announced 20-APR). ANTI-BIAS DISCIPLINE APPLIED: Iran state media, Israeli state/military, US state/military, and Chinese state sources all evaluated under the same single-source standard. The operating environment is rapidly changing and highly fluid; indefinite-CF-with-Iran-refusing presents MORE compound risk than finite CF + active R2 convergence did at 21-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 53 (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 16 (CYB-005); SharePoint KEV T-6 (CYB-008); ActiveMQ KEV T-8 (CYB-010); Fortinet overdue Day 5 (CYB-002); Cisco SD-WAN ED 26-03 past deadline + 3 Catalyst CVEs (CYB-003); CISA KEV 20-APR split batch (3 Cisco T-1; 5 others T-12) (CYB-011)

CONDITION	LEVEL	BASIS
COMCON	4 CONUS DTR- ASSESSED	G2 geomagnetic storm decaying from 18-APR peak; Kp 4 today (SWX-001); HF recovering; AA26-097A OT impact (CYB-005)
PREP-CON	3 — ELEVATED	See SEC 10

## SECTION 12 — ANALYTICAL INTEGRITY & SOURCE REGISTRY

### ANALYTICAL INTEGRITY STANDARD — APPLIED TO THIS PRODUCT

Every DTR is produced under three prohibited failure modes:

**No Epistemic Cowardice.** When evidence supports a finding, we state the finding. We do not substitute hedges, attribution-laundering, or filler phrasing for assessments the evidence justifies. If the evidence is genuinely mixed, we say so directly and explain where the split is — that is honest assessment, not cowardice.

**No Gatekeeping.** Our readers get the same operational picture a federal practitioner would see. We do not withhold operational detail behind credentialing or reader-comfort considerations. PREP-CON assessment is not softened for comfort — if the operational basis supports a given level, the DTR states that level.

**No Dunning-Kruger Enablement.** We do not publish confidence our sources cannot sustain. Every confidence level is auditable against the cited sources. Split confidence is applied when different aspects of a finding sit at different evidentiary levels.

### ANTI-BIAS DISCIPLINE — SOURCE-SYMMETRIC SKEPTICISM

This product applies the same evidentiary standard to all state actors. Iranian state media, Israeli state and military sources, US state and military sources, and Chinese state sources are all flagged when cited. Single-source state-media claims are classified LOW CONFIDENCE absent multi-stream corroboration — regardless of which state is the source. State framing is reported attributed; it is not adopted as DTR voice. Loaded language is stripped from DTR narrative unless quoted with attribution. The same skepticism applied to adversary state media is applied to allied state media. This standard does not produce false equivalence — it produces calibrated confidence.

### SOURCE REGISTRY SUMMARY — 20 APR 2026

THREAT AREAS ASSESSED	STANDING REGISTRY	CITATIONS THIS CYCLE	TIER 1 PRIMARY	TIER 2 SECONDARY	TIER 3 SUPPLEMENTAL
24	366 v1.10   20-APR-2026	68	28	40	0
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)   Registry: fortunefavorstheprepared.com/dtr-source-registry/					

## 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.

#### PRODUCT FAMILY:

- ▶ **DTR Full** — Enterprise-tier daily threat intelligence
- ▶ **DTR Lite** — Free-tier daily summary
- ▶ **Daily Preparedness Brief (DPB)** — Action-oriented daily brief
- ▶ **The Household Brief** — Free economic preparedness
- ▶ **COMMS Watch** — Weekly communications intelligence
- ▶ **Soft Target Security Brief (STSB)** — Soft-target security monitoring
- ▶ **DTR Business Editions** — Healthcare, Banking & Finance, Construction & Manufacturing

#### IN DEVELOPMENT:

- ▶ **FLASH Watch Desk** — Continuous between-cycle monitoring; FLASH reports generated on demand when situations warrant an unscheduled alert. In development.
- ▶ **Incident Tracker** — Persistent incident state management for operations spanning multiple DTR cycles. In development.

#### AVAILABLE NOW:

- ▶ **Area-Specific Assessment Report (ASAR)** — On-demand 12-section intelligence assessment for a specific locality or facility.

Learn more: [fortunefavorstheprepared.com/dtr/](https://fortunefavorstheprepared.com/dtr/)

*Semper Paratus, Semper Gumby.*