

DAILY THREAT REPORT

Fortune Favors the Prepared | Intelligence Operations Division
 UNCLASSIFIED — OPEN SOURCE — FOR PUBLIC DISTRIBUTION

⚠️ PREPAREDNESS CONDITION 3 — ELEVATED ⚠️

BLOCKADE DAY 11 | Op Epic Fury Day 54 | CF Indef Ext / MSC Francesca + Epaminondas Seized 22-APR / Euphoria Attacked / CENTCOM 31 Intercepts / Lebanon R2 TODAY | Trend: RAPIDLY DEVELOPING | Full basis: SEC 10

COMMUNICATIONS CONDITION: COMCON 4 — PARTIALLY DEGRADED (CONUS)

AA26-097A Day 17 | Kp max 1.67 forecast 23-APR (QUIET) | No G-storms 22-24 APR | HF favorable for emergency comms | Full basis: SEC 11

Publication (UTC)	22 APR 2026 / 1400 UTC
Reporting Period	0000 20-APR through 1200 22-APR 2026 (72-hour sweep)
Analyst / Watch Officer	Fortune Favors the Prepared — OSINT Desk
FLASH Threshold	Risk Score ≥ 20 — NINE FLASH EVENTS THIS CYCLE
PREP-CON Baseline	PREP-CON 3 — ELEVATED (Brown) Trend: RAPIDLY DEVELOPING Op Epic Fury Day 54 Blockade Day 11 CF Indef Ext Iran Seized 2 Container Ships 22-APR Lebanon R2 Talks TODAY IRGC Aerospace Force Gulf-Oil Threat PRC Satellite ISR for Iran Confirmed (FT 14-APR)
Version	1.0 — All pre-build integrity checks passed Sweep manifest 24 areas Pre-build audit PASSED Blockade Day 11 CF Indef Ext (Trump 21-APR) First Iran Ship Seizures Since War Start 22-APR Lebanon R2 Talks Today 23-APR IRGC Aerospace Force Gulf-Oil Threat PRC Covert ISR Support for Iran Confirmed Anti-Bias Discipline Applied

FLASH ▶	GEO-001 Blockade Day 11 / CENTCOM 31 Intercepts / Iran SEIZED MSC Francesca+Epaminondas 22-APR / IRGC Gulf-Oil Threat GEO-CF-LBN Round 2 TODAY 23-APR / Toll ≥2,294 + 5 on 22-APR (journalist Khalil KIA) FIN-001 Brent \$101.55 (+\$3.53) / Goldman Q3 \$120 upside
	SC-001 UKMTO Warning 041-26 (22-APR) 2 Attacks CYB-005 AA26-097A Day 17 GEO-AXIS-001 Balikatan Day 4 / Ukraine Sevastopol \$155M AVN-001 EASA CZIB Expires 24-APR T-1
HIGH/NEW ★	GEO-AXIS-001 NEW: Russia/China Exploitation of US Attention Bandwidth CYB-011 CISA KEV 20-APR 8 CVEs + 3 Catalyst SD-WAN (due 04-MAY T-13)
HIGH/UPDATED ↻	CYB-008 SharePoint KEV T-5 CYB-010 ActiveMQ KEV T-7 CYB-002 Fortinet OVERDUE Day 7 CYB-003 Cisco SD-WAN ED 26-03 (3 new Catalyst CVEs 20-APR) CYB-009 Storm-0558 GEO-DPRK Hwasong-11 Ra Cluster Warhead
	INS-001 IRGC/MOIS + DIA TER-001 NTAS Gap Day 54 AGR-001 Fertilizer Locked GEO-UKR ZNPP 14th Outage TRV-001 State Level 4 Iran CHEM-001 TCEQ Final
CRITICAL TIME HACK	CEASEFIRE: 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."
	R2 DELEGATIONS: 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.

IRGC POSTURE: 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 23-APR \$101.55 intraday (+\$3.53 from 22-APR close \$98.02); 4th consecutive session gain. WTI \$92.46. Murban +7.09% to \$103.12 on Asian demand. Indian Basket \$103.05. Goldman Sachs 23-APR: Q2 Brent trimmed to \$90 from \$99 but MAINTAINS sharp upside scenario — extended Hormuz closure could drive Brent to \$120/bbl Q3. Lufthansa Group cancelling 20,000 short-haul flights through October (40,000t jet fuel savings); CityLine subsidiary 27 aircraft retired; 120 daily cancellations began 21-APR. IATA weekly avg jet fuel Europe \$188/bbl (+106.5% YoY); jet fuel went \$99/bbl end-Feb → \$209/bbl early April. IEA Birol: Europe "maybe six weeks or so" of jet fuel left.

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-1). R7 not yet published.

CYBER (22-APR CISA KEV ADDITION + 20-APR batch): Added 4 CVEs due TODAY 23-APR (T-0): 3 Cisco Catalyst SD-WAN Manager CVEs (CVE-2026-20122/20128/20133) compounding ED 26-03 + Zimbra CVE-2025-48700 zero-click XSS (CERT-UA: UAC-0233/UAC-0250 Ukrainian mailbox campaign since Sept 2025); 4 non-Cisco CVEs due 04-MAY (T-11): PaperCut, TeamCity, Kentico, Quest KACE. NEW 22-APR KEV addition: CVE-2026-33825 MS Defender privesc (BlueHammer) due 06-MAY (T-13). AA26-097A Day 17. SharePoint KEV T-5. ActiveMQ KEV T-7. Fortinet OVERDUE Day 7. Palo Alto Unit 42: cluster CL-STA-1128 shifted to Rockwell FactoryTalk.

TERRORISM: DHS NTAS gap Day 54.

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 + Yugtorsk fuel. Zelenskyy 21-APR denounced US extension of Russian-oil sanctions suspension. China: Balikpapan 2026 Day 4 (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

<u>SEC 2 — BLUF & Market Indicators</u>	GEO-001 Blockade Day 11 / 31 Vessels / CF Indef Ext / MSC Francesca + Epaminondas SEIZED 22-APR / IRGC Gulf-Oil Threat GEO-CF-LBN Round 2 Talks TODAY 23-APR Commodity Tracker 6 FLASH
<u>SEC 3 — FLASH Events</u>	GEO-001 Blockade Day 11 / 31 Vessels / MSC Francesca + Epaminondas SEIZED 22-APR / Euphoria Attacked SC-001 Three Ships Fired On 22-APR GEO-CF-LBN Round 2 TODAY / 22-APR Deadliest Day Since CF / Journalist Amal Khalil KIA FIN-001 Brent \$101.55 +\$3.53 CYB-011 4 CVEs T-0 DUE TODAY (Cisco Catalyst x3 + Zimbra) NUC-001 IAEA Blackout Day 54 / 440.9kg 60% HEU
<u>SEC 4A — Cyber / Technology</u>	CYB-005 AA26-097A Day 17 CYB-008 SharePoint KEV T-5 CYB-009 Storm-0558 Identity Plane CYB-010 ActiveMQ KEV T-7 CYB-002 Fortinet OVERDUE Day 7 CYB-003 Cisco SD-WAN / 20-APR KEV +3 Catalyst CVEs CYB-011 NEW CISA KEV 4 CVEs T-0 DUE TODAY 23-APR (3 Cisco Catalyst SD-WAN + Zimbra CVE-2025-48700); 4 others T-11 due 04-MAY; NEW 22-APR CVE-2026-33825 MS Defender BlueHammer due 06-MAY
<u>SEC 4B — Physical / Geopolitical / IO</u>	GEO-AXIS-001 Balikpapan 2026 Day 4 (17k troops / 7 nations / Japan 1st combat role since WWII) + PRC Satellite ISR for Iran (FT 14-APR Prince Sultan AB) GEO-UKR EU 20th Sanctions Agreed 22-APR / Druzhba Resumed / 1518 Day GEO-DPRK Sinpo SLBM Attribution Pending NUC-001 IAEA Blackout Day 54 / 440.9kg 60% HEU / Leavitt Demand CHEM-001 Q1 Baseline TRV-001 WW Caution / 40+ L4 AVN-002 EASA R6 T-1 / Lufthansa 20K Cancellations TER-001 NTAS Gap Day 54
<u>SEC 5 — Energy / Infrastructure / Supply Chain</u>	PWR-001 IEA Crisis Framework SC-001 UKMTO Warning 041-26 (22-APR) FIN-001 Brent \$101.55 (+\$3.53) / Goldman Q3 \$120 upside CHEM-001 TCEQ Final Valero
<u>SEC 6 — Aviation / Transportation</u>	AVN-001 EASA CZIB 2026-03 R6 expires 24-APR T-2 AVN-002 Carrier Suspensions TRV-001 State Level 4 Iran GNSS-001 1,650+ vessels impacted
<u>SEC 7 — Meteorological Weather & Severe Weather + NWR Outages</u>	WX-001 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)

<u>SEC 7A — Space Weather & EMCOMM</u>	<u>SWX-001</u> Kp max 5 observed 20-APR (G1) 21-APR Kp 4 forecast (slight G1 chance) 22-23 APR quiet Kp 2 HF recovering
<u>SEC 7B — Agriculture, Food & Supply Chain</u>	<u>AGR-001</u> Fertilizer Shock Locked (Moderate) 2026 Planting Season Impacted IFPRI/IEA/WB Structural Damage
<u>SEC 8 — 72-Hour Outlook</u>	Blockade Day 11 CF indef ext / Iran seized 2 ships 22-APR / R2 LBN talks TODAY 23-26 APR four-day tornado outbreak OK/KS/IA/MN peaking weekend <u>CYB-011</u> Cisco T-0
<u>SEC 9 — Watch List</u>	<u>WATCH-001</u> CF/R2/Retaliation <u>WATCH-002</u> BRICKSTORM/SD-WAN <u>WATCH-003</u> Iran Internet PARTIAL RESTORE 17-APR <u>WATCH-004</u> IO MOIS/SVR <u>WATCH-005</u> Kp quiet <u>WATCH-007</u> Bab el-Mandeb <u>WATCH-008</u> Scientists Narrative T-5
<u>SEC 10 — PREP-CON Assessment</u>	PREP-CON 3 ELEVATED Blockade Day 11 / CF Indef Ext / First Iran Seizures 22-APR / Patch Pressure Peak / 4-Day Tornado Outbreak fortunefavorstheprepared.com/preparedness-book-of-knowledge-2/planning/preparedness-conditions-prep-con/
<u>SEC 11 — Alert & Readiness Conditions Panel</u>	DEFCON EST-3 COGCON EST-3 FPCON EST-CHARLIE CYBERCON EST-ELEVATED COMCON 4 CONUS DTR-ASSESSED PREP-CON 3
<u>SEC 12 — Source Registry Summary</u>	24 Threat Areas 366 Standing Sources (v1.10) 68 Citations This Cycle T1: 28 T2: 40 T3: 0 fortunefavorstheprepared.com/dtr-source-registry/
<u>SEC 13 — Closing Block</u>	Fortune Favors the Prepared Full Product Suite ASAR — most of the area intelligence needed to complete your emergency plan (saves ~15 hours of research) fortunefavorstheprepared.com/dtr/

GEOGRAPHIC IMPACT INDEX

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
<u>CONUS — Southern / South-Central Texas (Hill Country)</u>	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
<u>CONUS — Northeast (PA/NY/NJ/NE)</u>	<u>TER-001</u> NTAS Bulletin Gap Day 54 <u>INS-001</u> Iran-backed militia baseline + 17-APR/21-APR Economic Fury designations <u>FIN-001</u> Brent \$101.55 +\$3.53 intraday 23-APR
<u>CONUS — Mid-Atlantic / Washington DC</u>	<u>TER-001</u> NTAS gap Day 54 <u>INS-001</u> IRGC/MOIS structural COGCON assessed <u>CYB-005</u> AA26-097A Day 17
<u>CONUS — Nationwide (All Regions)</u>	<u>CYB-005</u> AA26-097A Day 17 <u>CYB-008</u> SharePoint KEV T-5 <u>CYB-010</u> ActiveMQ KEV T-7 <u>CYB-002</u> Fortinet OVERDUE Day 7 <u>CYB-011</u> CISA KEV 4 T-0 (Cisco x3 + Zimbra DUE TODAY 23-APR) / 4 others T-11 <u>FIN-001</u> Brent \$101.55 <u>SWX-001</u> Kp quiet
<u>CONUS — Southwest (AZ/NM/NV)</u>	<u>WX-002</u> NIFC elevated YTD Dry-warm tilt through June per NIFC No SPC critical fire weather area identified 21-APR Day 1
<u>CONUS — Gulf Coast (TX/LA/MS/AL)</u>	<u>PWR-001</u> Blockade Day 11 refinery feedstock stress <u>CHEM-001</u> Valero Port Arthur TCEQ final report <u>AGR-001</u> fertilizer pass-through 2026 locked
<u>Middle East / Persian Gulf</u>	<u>GEO-001</u> Blockade Day 11 / CENTCOM 31 Interdictions / MSC Francesca + Epaminondas SEIZED 22-APR / IRGC Gulf-Oil Threat

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
	GEO-CF-LBN Round 2 TODAY / 22-APR Deadliest Day Since CF / Journalist Khalil KIA
<u>Global Maritime / Chokepoints</u>	<u>SC-001</u> 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
<u>Iran</u>	<u>GEO-001</u> Op Epic Fury Day 54 Blockade Day 11 27 cumulative vessels turned back/seized <u>WATCH-003</u> Internet PARTIAL RESTORE 17-APR (Unit 42) IRGC pledge stands
<u>Indo-Pacific / SCS + DPRK</u>	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
<u>Europe / Ukraine</u>	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
<u>Agricultural / Global Supply Chain</u>	<u>AGR-001</u> Urea Egypt FOB +78% 30% global urea disrupted 50% sulfur 25% ammonia China export restrictions thru August 2026 2026 planting season locked
<u>Space Environment / HF Comms</u>	<u>SWX-001</u> 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
<u>Cyber / Vulnerability Queue</u>	<u>CYB-011</u> CISA KEV 20-APR +8 CVEs (PaperCut/TeamCity/Kentico/Quest KACE/Zimbra + 3 Catalyst SD-WAN) due 04-MAY T-13 <u>CYB-008</u> SharePoint T-6 <u>CYB-010</u> ActiveMQ T-8 <u>CYB-002</u> Fortinet OVERDUE Day 7 <u>CYB-003</u> 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
Brent Crude (Jun futures)	~\$66/bbl	\$101.55/bbl	+54%	▲ +\$3.53 vs 22-APR close \$98.02 ▲ 4th consecutive session gain	23-APR intraday: Brent \$101.55 (+\$3.53 from 22-APR close \$98.02); 4th consecutive session of gains; Brent closed above \$100 Wednesday for FIRST TIME in >2 weeks. WTI \$92.46; Murban surged 7.09% to \$103.12 on strong Asian demand; Indian Basket \$103.05; WTI Midland crossed \$100 at \$100.51 (+4.08%). Goldman Sachs (23-APR): Q2 Brent forecast trimmed to \$90 from \$99 on reduced immediate risk premium but MAINTAINS sharp upside scenario — extended Hormuz closure could drive Brent to \$120/bbl by Q3. EIA STEO: Brent peak 2Q26 \$115/b; retail gasoline peaks ~\$4.30/gal April; diesel peak \$5.80/gal April. Demand destruction estimated 4-5M bpd (5% of global supply), Asia bearing brunt.

COMMODITY	PRE-WAR (28 FEB)	CURRENT (22 APR)	CHG vs PRE-WAR	48H TREND	CONSUMER / ANALYTICAL NOTE
WTI Crude (May futures)	~\$63/bbl	\$89.33/bbl	+42%	▼ -0.38% 22-APR ~\$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.
Gasoline (natl avg)	~\$3.10/gal	\$4.022/gal	+30%	~flat vs 21-APR 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.
Diesel (US No. 2)	~\$3.74/gal	~\$5.42/gal	+45%	~flat ~0%	EIA. Trucking margins compressed. EIA STEO peak diesel projection \$5.80/gal Q2 2026. Refiner feedstock stress persists; fertilizer/food pass-through active.
Jet Fuel (global avg)	~\$90/bbl	~\$205/bbl	+128%	▲ +1% ▲ 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.
Urea (46-0-0)	~\$465/ton NOLA	\$826/ton (DTN natl)	+78%	~flat ~0%	DTN Week 4 March; USDA AMS \$624/ton Iowa. +35% MoM. 58-70% above long-run avg. 2026 crop year locked — no remediation window left this planting season.
Anhydrous Ammonia (IL)	~\$800/ton	\$1,099.50/ton avg	+37%	~flat ~0%	USDA AMS Illinois T1. +\$101.17 vs prior. Planting in progress. 2-4 week window to Q3 food pass-through.
Ocean Freight (SCFI)	~1,333 pts	~1,920 pts	+44%	~flat ▲ Hormuz	Blockade Day 11. IRAN SEIZED MSC Francesca (IMO 9401116, 11,312 TEU, Panama-flagged/Italian-owned) + Epaminondas (IMO 9153862, 6,690 TEU, Liberia-flagged/Greek-operated Technomar) 22-APR 0355hrs — FIRST ship seizures since war start 28-FEB. Euphoria (Panama-flagged, Dubai-based Silmar Shipping) attacked but not seized, anchored at UAE Khor Fakkan Port (Gulf of Oman). UKMTO Warning 041-26 (22-APR T1) covers THREE ships fired on Wednesday morning (3:55Z IRGC gunboat on container ship “heavy damage to bridge” 15nm NE Oman; 6:38Z second vessel 8nm west of Iran

COMMODITY	PRE-WAR (28 FEB)	CURRENT (22 APR)	CHG vs PRE-WAR	48H TREND	CONSUMER / ANALYTICAL NOTE
					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

23 APRIL 2026 | PREP-CON 3 ELEVATED | RAPIDLY DEVELOPING | OPERATION EPIC FURY DAY 53 | BLOCKADE DAY 11 | 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: FIRST IRAN SHIP SEIZURES since the 28-FEB war start: IRGC took MSC Francesca + Epaminondas 22-APR, fired on a third (Euphoria, not seized) — see GEO-001. CF posture now open-ended: Trump (Fox 22-APR) “no time pressure”; WH official confirms extension is 3-5 days pending Iranian unified proposal — see GEO-001. LEBANON R2 TALKS TODAY at State Dept (Moawad/Leiter); 22-APR was the deadliest day in Lebanon since 16-APR CF — see GEO-CF-LBN. Oil extended a 4-session gain: Brent \$101.55 intraday 23-APR, +\$3.53; Goldman maintains Q3 \$120/bbl upside if Hormuz stays closed — see FIN-001. CYB-011: FOUR federal KEV CVEs due TODAY — three Cisco Catalyst SD-WAN + Zimbra zero-click XSS — heaviest simultaneous FCEB patch-pressure of the cycle. NEW disclosure: FT 14-APR reported Iran used a PRC-launched Earth Eye Co satellite to image Prince Sultan AB pre-14-MAR strike that damaged 5 US aircraft — see GEO-AXIS-001. UK-France hosting 30+ country Hormuz-reopening conference this week at RAF base (mine-clearance planning) — see SC-001. PRACTITIONER POSTURE: PREP-CON 3 sustain; 72-hr readiness for (a) CF collapse / seizure follow-on, (b) LBN R2 outcome, (c) CYB-011 T-0 compliance, (d) SPC 4-day tornado outbreak 23-26 APR peaking weekend.

NEW & UPDATED — THIS CYCLE ONLY

↳ **GEO-001: BLOCKADE DAY 11 / 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 4 — 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 EMCOMM 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: Open-ended CF with near-term inflection. Practitioner posture: PREP-CON 3 sustain; 72-hour readiness. Monitor: LBN R2 outcome (talks today), UKMTO 042+, CENTCOM blockade interdictions, State Dept briefings, OFAC new actions, SPC 23-26 APR tornado outbreak (peaks weekend), CYB-011 FCEB compliance reporting, and the DTR Watch Desk. ANTI-BIAS DISCIPLINE APPLIED: Iranian, Israeli, US, and PRC state sources flagged when cited; single-source state-media claims LOW-confidence 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 — First Iran Ship Seizures Since War Start / CENTCOM 31 Interdictions / Trump Fox "No Time Pressure" / WH Official 3-5 Day / Ghalibaf: Blockade = CF Violation

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 11. 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

CF STATUS READING: 22-APR seizures reframe the CF: Iran will kinetically enforce its blockade-is-violation position against non-US/non-Israeli flagged tonnage, and the WH response ("not US/Israeli ships") accepts that framing. Market read: structural escalation — Brent closed above \$100 for the first time in >2 weeks; 4-session gain; Goldman Q3 \$120 upside if Hormuz stays closed. Ghalibaf (Iran Parliament) directly contested the WH blockade framing.

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 Tauskha 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]

	<p>IRGC converts Aerospace Force commander 21-APR threat to kinetic action against Saudi, UAE, or Qatari energy infrastructure. Oil spikes \$110+. US escalates.</p> <p>✓ Supporting Evidence: 21-APR Aerospace Force commander public threat (Fars); standing Khatam al-Anbiya retaliation pledge; Iranian hardline faction (Ejei/Ghalibaf) in domestic signaling.</p> <p>✗ 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.</p>
SOURCES	<p>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</p>

<p>GEO-CF-LBN Lebanon R2 Talks TODAY at State Dept (Moawad/Leiter) / CF Day 8 of 10 / 22-APR Deadliest Day Since CF (5 KIA incl. Journalist Amal Khalil) / Toll ≥2,294</p>		<p>FLASH UPDATED 22</p>
SALUTE		
WHY THIS CYCLE	<p>Lebanese DMU 21-APR revised toll to 2,454 KIA / 7,658 injured; Round 2 talks confirmed THU 23-APR at State Dept.</p>	
Summary	<p>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.”</p>	
Analyst Assessment	<p>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.</p> <p>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.</p> <p>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.</p> <p>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).</p>	
ALT HYP	<p>ALT A: Round 2 Produces Framework with Follow-On Date [EQUALLY LIKELY]</p>	

	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.

FIN-001 Oil / Gas / Markets — Oil Extends 4-Session Gain on Ship Seizures (Brent \$101.55 +\$3.53 intraday 23-APR) / Goldman Q3 \$120 Upside / Lufthansa 20k Flights Cancelled		FLASH UPDATED 22
SALUTE		
WHY THIS CYCLE	Brent +\$3.53 to \$101.55 intraday 23-APR (4th consecutive session gain) on 22-APR Iran ship seizures; Goldman Q3 \$120 upside scenario; Lufthansa 20k flight cancellations through October signals demand-side response.	
Summary	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 TradingEconomics); 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-Haq 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.

Analyst Assessment

PRICING REVERSAL READING: 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.

PUMP LAG: 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.

OFAC DOUBLE-PACKAGE: 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.

MAHAN AIR AIRCRAFT DESIGNATION: 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.

TRIPWIRES: 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.

ALT HYP

ALT A: Pricing Retraces Toward \$90 on Pakistani Back-Channel Signal [EQUALLY LIKELY]

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.

✓ **Supporting Evidence:** Trump indefinite-extension language; Sharif/Munir retain mediator incentive; EIA STEO still projects Q2 peak \$115 not \$125; Goldman base case intact.

✗ **Ruling-Out Evidence:** Iran MFA refusal formal; Mohammadi "means nothing"; Kharg storage "full in days"; IRGC Aerospace Force Gulf-oil threat.

ALT B: Pricing Sustained \$98-105; OFAC Continues Pressure [EQUALLY LIKELY]

Indefinite-CF-with-blockade grinds; market holds elevated risk premium; OFAC follow-on designations continue; gas breaches \$4.10 national within 2 weeks.

✓ **Supporting Evidence:** Current 22-APR intraday \$101.15 floor; post-Touska spike still in pump pipeline; OFAC 17-APR + 21-APR "Economic Fury" package tempo.

✗ **Ruling-Out Evidence:** Pakistani mediators could accelerate; Iran diplomatic off-ramp remains; blockade pressure may force either side.

ALT C: Pricing Spikes Above \$110 on Kinetic Event [LESS LIKELY]

IRGC Aerospace Force 21-APR threat converts to kinetic action against Gulf-state oil infrastructure or US Navy asset; Brent \$115+; gas \$4.50+.

✓ **Supporting Evidence:** 21-APR IRGC Aerospace Force Gulf-oil threat; standing Khatam al-Anbiya pledge; Kharg storage filling; Iran hardline faction.

✗ **Ruling-Out Evidence:** Iran retains diplomatic off-ramp; kinetic action ends Chinese/Russian diplomatic cover; extremely high-cost.

SOURCES

[Treasury OFAC \(21-APR Economic Fury Iranian missile/UAV\)](#) | [Treasury OFAC \(17-APR Economic Fury Iraq militia commanders\)](#) | [Trading Economics \(Brent 22-APR\)](#) | [AAA Gas Prices \(22-APR direct\)](#) | [EIA STEO April 2026](#) | [Full Source Registry](#)

SC-001 | Supply Chain — 3 Ships Fired On 22-APR / 2 Seized (MSC Francesca + Epaminondas) / UN IMO Condemns / UK-France 2-Day Hormuz Conference This Week at RAF Base

FLASH | UPDATED | 22

SALUTE

WHY THIS CYCLE

UKMTO Warning 041-26 22-APR: two vessel attacks Wednesday morning (0355Z + 0638Z) with heavy damage to container-ship bridge in Attack 1.

Summary

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&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.)

Analyst Assessment

ATTACK 1 ATTRIBUTION HIGH: 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.

ATTACK 2 ATTRIBUTION AMBIGUOUS: 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.

HEAVY DAMAGE TO BRIDGE: 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.

CROSS-CURRENT WITH DIPLOMACY: 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.

TRIPWIRES: 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.

ALT HYP

ALT A: Third Attack Within 24hrs / UKMTO 042 Issues [LESS LIKELY]

IRGC launches additional attack on commercial vessel within 24 hours; UKMTO Warning 042 issued.

	<p>✓ Supporting Evidence: Pattern: two attacks already on same day; IRGC Aerospace Force 21-APR Gulf-oil threat; indefinite CF + Iran refusing talks.</p> <p>✗ Ruling-Out Evidence: IRGC has typically clustered incidents; could escalate or pause pending Supreme Leader direction.</p>
	<p>ALT B: 22-APR Twin Attacks Become New Baseline; No Further Named Attacks 48hr [MOST LIKELY]</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>✓ Supporting Evidence: UKMTO warnings typically settle into baseline after initial burst; insurance market adjustment lag.</p> <p>✗ Ruling-Out Evidence: IRGC pattern historically unpredictable; could cluster or pause.</p>
SOURCES	<p>UKMTO Warning 041-26 (22-APR) Ship & Bunker (UKMTO Attack 1 reporting) AP / ClickOrlando (both attacks) Haaretz (both attacks + US policy context) CNN (UKMTO + Mohammadi context) ANI News (UKMTO Warning 041-26 screenshot) Marine Traffic (12 Hormuz transits 21-APR) Lloyd's List (26 Iranian vessels bypassed blockade)</p>

CYB-005 CISA AA26-097A Day 17 — OT/PLC Exploitation; Palo Alto Unit 42 Rockwell FactoryTalk Shift		FLASH UPDATED 22
SALUTE		
WHY THIS CYCLE	Palo Alto Unit 42 21-APR: cluster CL-STA-1128 target-shifted from Unitronics to Rockwell FactoryTalk.	
Summary	<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>	
Analyst Assessment	<p>QUIET PERIOD INTERPRETATION: 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>UNIT 42 SHIFT SIGNIFICANCE: 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>KINETIC ESCALATION COST-BENEFIT: Indefinite CF extension + 22-APR ship seizures + 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>TRIPWIRES: 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>	
SOURCES	<p>CISA AA26-097A CyberScoop 07-APR baseline Palo Alto Unit 42 (CL-STA-1128 tracking)</p>	

GEO-AXIS-001 | Adversary Exploitation of US Attention Bandwidth — PRC COVERT ISR FOR IRAN CONFIRMED (FT 14-APR: Earth Eye Co Satellite Imaged Prince Sultan AB Pre-14-MAR Strike) / Balikatan Day 4 / CERT-UA UAC-0233 Ukrainian Mailbox Campaign

FLASH | UPDATED | 20

SALUTE	
WHY THIS CYCLE	FT 14-APR: Iran used PRC Earth Eye Co satellite (Sept 2024 purchase) for Prince Sultan AB ISR pre-14-MAR strike damaging 5 US aircraft — FIRST public confirmation of PRC covert ISR support. CERT-UA H2 2025 report (April): UAC-0233/UAC-0250 Zimbra mailbox compromise campaign against Ukrainian entities since Sept 2025 — Russia-adjacent dev-toolchain threat.
Summary	<p>CRITICAL NEW — 23-APR CYCLE:</p> <p>(0) PRC COVERT ISR FOR IRAN — CONFIRMED. Financial Times reporting 14-APR (surfaced via this cycle’s OSINT sweep): Iran used Earth Eye Co satellite imagery — purchased Sept 2024 — to image Prince Sultan Air Base in Saudi Arabia on 13-15 MAR ahead of the 14-MAR Iranian strike that damaged five US aircraft at the base. Empostat, a PRC satellite services firm with ties to the PLA Aerospace Force (per House Select Committee on the CCP), operated ground stations enabling data downlink. This is the first OSINT-level confirmation of PRC commercial-cover ISR directly supporting Iranian kinetic operations against US assets.</p> <p>(0a) CERT-UA H2 2025 report (released April): threat clusters UAC-0233/UAC-0250 have been exploiting Zimbra CVE-2025-48700 + CVE-2025-66376 against Ukrainian mailboxes since Sept 2025 — stealing correspondence, MFA backup codes, app passwords, global address books. CISA KEV added CVE-2025-48700 on 20-APR with T-0 today.</p> <p>CYCLE-FRESH ACTIVITY — 22-APR:</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, currently Day 4): 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>STRUCTURAL BASELINE (pointer — see prior DTRs for full): 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; >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>
Analyst Assessment	SPLIT CONFIDENCE: HIGH on kinetic/tempo data (multi-stream T1/T2 wire corroboration across all 15 items). HIGH on 22-APR-specific deltas (Balikatan Day 4 ongoing; Chinese MFA statement T1 multi-stream; Ukraine strikes T1 GUR + wire). HIGH on shadow-fleet architecture (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: Balikatan Day 4 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 Balikatan; (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 Balikatan 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); Balikatan 2026 opened 20-APR (currently Day 4) as 41st iteration and 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, Balikatan Day 4; 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; Balikatan 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 Balikatan 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. Balikatan is annual (this iteration is Day 4).

✗ **Ruling-Out Evidence:** Balikatan 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.

	<p>✓ Supporting Evidence: MAR-2026 UN 1737 obstruction jointly executed. “No limits” partnership framing since 2022. Xi-Putin alignment on Iran policy.</p>
	<p>✗ 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.</p>
SOURCES	<p>House Select Committee on the CCP — Crude Intentions (03-APR, T1 Congressional) Philstar (Balikatan 2026 Day 4; 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)</p>

SECTION 4A — CYBER & INFORMATION SECURITY

<p>CYB-011 CISA KEV — 4 CVEs T-0 DUE TODAY 23-APR (3 Cisco Catalyst SD-WAN + Zimbra CVE-2025-48700 Zero-Click XSS) / NEW 22-APR KEV CVE-2026-33825 MS Defender BlueHammer (T-13 Due 06-MAY) / CERT-UA Active Exploitation</p>	<p>HIGH UPDATED 16</p>
SALUTE	
WHY THIS CYCLE	<p>Four CVEs hit FCEB deadline TODAY 23-APR — three Cisco Catalyst SD-WAN + Zimbra zero-click XSS actively exploited by UAC-0233/UAC-0250 against Ukrainian entities since Sept 2025 per CERT-UA. NEW 22-APR KEV addition: MS Defender BlueHammer (privesc).</p>
Summary	<p>CISA KEV 20-APR batch carries SPLIT FCEB DEADLINES. Due TODAY 23-APR (T-0): three Cisco Catalyst SD-WAN Manager CVEs (CVE-2026-20122 / -20128 / -20133) compounding standing ED 26-03 + Zimbra CVE-2025-48700 zero-click XSS. The Zimbra flaw has documented active exploitation by CERT-UA-tracked UAC-0233/UAC-0250 against Ukrainian mailboxes since Sept 2025 — attackers compromised mailbox contents, MFA backup codes, app passwords, and global address books without user interaction. Due 04-MAY (T-11): PaperCut NG/MF, JetBrains TeamCity, Kentico Xperience, Quest KACE SMA CVSS 10.0. NEW 22-APR KEV addition: CVE-2026-33825 MS Defender BlueHammer privilege escalation, T-13 due 06-MAY.</p>
Analyst Assessment	<p>T-0 URGENCY: FCEB agencies with Catalyst SD-WAN Manager or Zimbra deployments are at deadline TODAY. Non-federal operators should treat 23-APR as the effective patch-by date given contractor/supply-chain exposure correlation. Zimbra CVE-2025-48700 is zero-click — no user interaction required for compromise.</p> <p>COMPOUND FCEB POSTURE: Other active KEV deadlines (prior-cycle entries, countdown-only): Fortinet CVE-2026-21643 OVERDUE Day 7; SharePoint CVE-2026-32201 T-5 due 28-APR; ActiveMQ CVE-2026-34197 T-7 due 30-APR; ED 26-03 Cisco SD-WAN compounded into today's CYB-011. Combined with TODAY posture, heaviest simultaneous KEV-deadline pressure since blockade began.</p> <p>TRIPWIRES: (1) CISA supplemental directive or extension guidance; (2) Named-victim disclosure on any of the 9 CVEs; (3) Cisco PSIRT or Microsoft MSRC scope expansion; (4) 23-APR FCEB compliance reporting; (5) CERT-UA attribution expansion beyond UAC-0233/UAC-0250.</p>
SOURCES	<p>CISA KEV Catalog (20-APR additions) Cisco PSIRT (Catalyst SD-WAN Manager CVEs) Palo Alto Unit 42 (CL-STA-1128 tracking)</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 resumptions 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

<p>WX-001 SPC Day 1 SLIGHT Risk OK→MN 23-APR / 4-DAY TORNADO OUTBREAK 23-26 APR Peaking Weekend (OK/KS) / NWR 18 Transmitter Outages (Nashville WFO Double-Gap Ahead of Dixie-Alley Shift)</p>	<p>HIGH UPDATED 18</p>
<p>SALUTE</p>	
<p>WHY THIS CYCLE</p>	<p>SPC CRITICAL fire weather High Plains 22-APR plus narrow severe corridor Rapid City→Lubbock; multi-day severe sequence 22-24 APR.</p>
<p>Summary</p>	<p>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</p>

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.

Analyst Assessment

SEQUENCE STRUCTURE: Three-day severe sequence 22-24 APR with day-by-day geographic migration — not a single event. Planning horizon is 72 hours not 24.

NWR COMPOUND: 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.

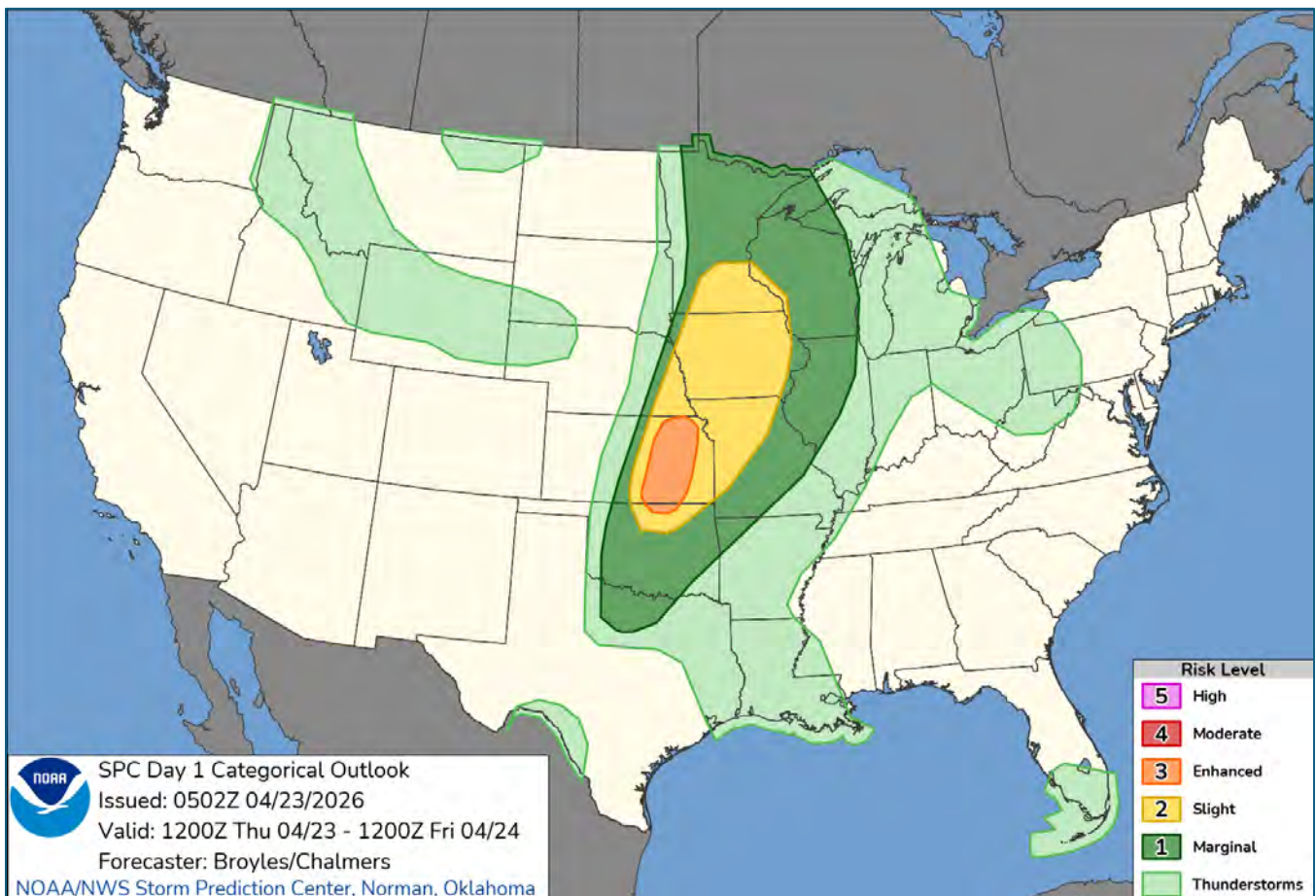
FIRE WEATHER / SEVERE JUXTAPOSITION: The High Plains corridor has CRITICAL fire weather upwind of the severe corridor on 22-APR — dry-line dynamics could drive both simultaneously with different concerns (pre-frontal fire vs. post-frontal hail/wind).

CONFIDENCE: HIGH — SPC T1; NWS offices T1.

TRIPWIRES: 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.

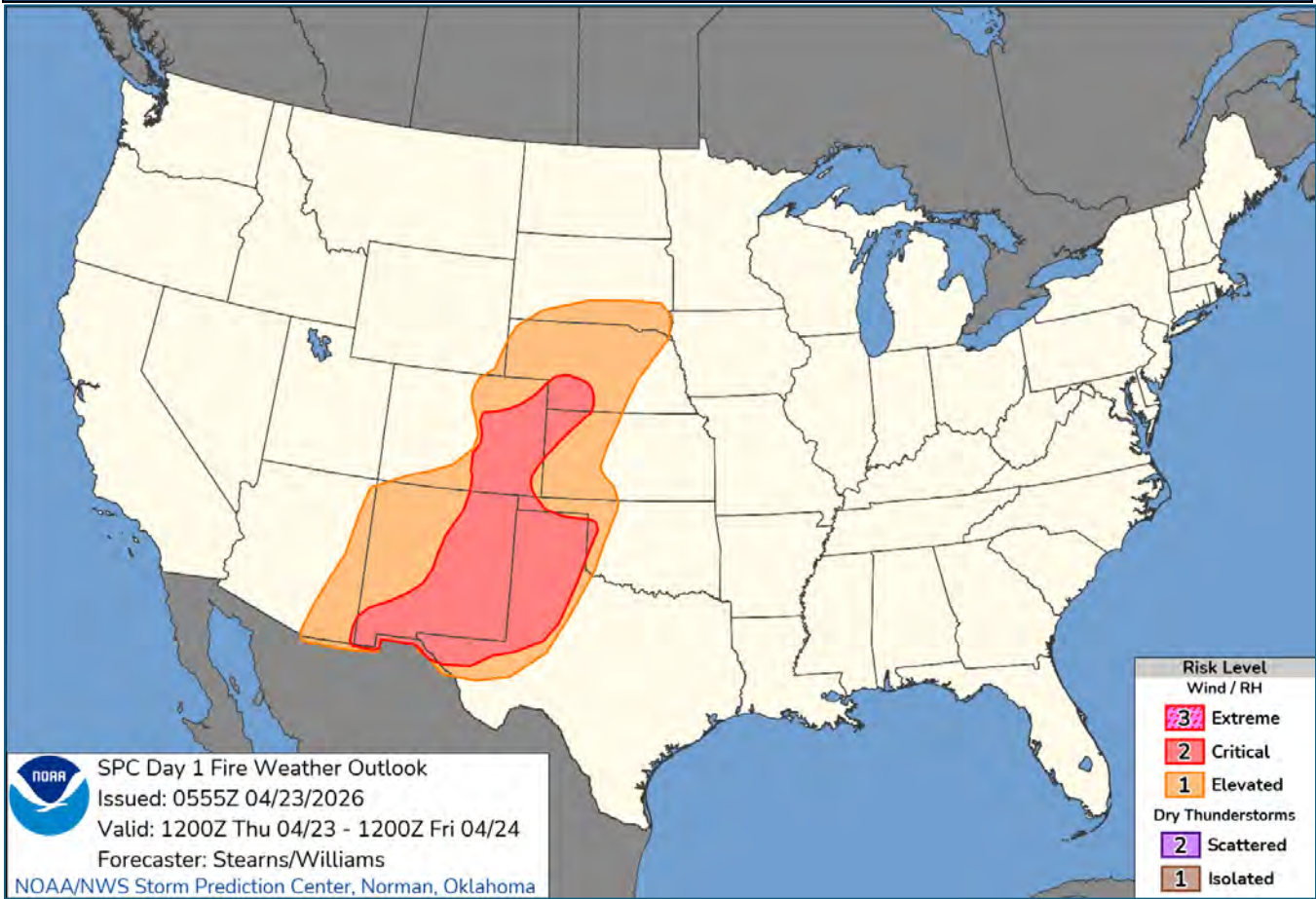
SOURCES

[NOAA SPC Day 1 Outlook](#) | [NOAA SPC Day 2 Outlook](#) | [NWS WPC](#) | [NWS Local Storm Surveys](#) | [NWS NWR Outages](#)



SECTION 7.1 — WILDFIRE & FIRE WEATHER

REGION	STATUS	ACTIVE FIRES / EVAC STATUS	CI / INFRASTRUCTURE EXPOSURE	FIRE WEATHER / SOURCES
Southwest (AZ/NM)	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.
Southern California	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.
Pacific Northwest	MONITOR	No significant fires. Snowpack above normal.	Columbia River Gorge transmission. Forest products.	Wet pattern continuing mid-April. Sources: NIFC, USFS PNW.
Northern Rockies	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.
S. Plains (TX/OK Panhandle)	WATCH	Post-severe-wx dryline development watch 16-APR. No current active orders.	Oil/gas wellhead. Electric co-op transmission. Rural propane.	Post-system dry/wind pattern developing 15-16 APR. Sources: SPC Fire Wx, NIFC.
CONUS Outlook (April)	NSTR	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.
<p>Sources: NIFC USFS NICC SPC Fire Weather CAL FIRE InciWeb Scored entry trigger: pre-evacuation order, confirmed CI exposure, or 1,000+ acres active in WUI.</p>				



NWR TRANSMITTER OUTAGE STATUS — 23 APRIL 2026 / 1400 UTC

Source: weather.gov/nwr/outages | Live data provided 23-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-Lubbock; SPC Day 2 SLIGHT Risk severe thunderstorms 23-APR OK-MN) 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	KGG86	Fountain Hill	162.475	Jackson MS	OUT OF SVC	Ashley, Union, Chicot cos. AR; Morehouse Parish, LA
CO	WXM56	Colorado Springs	162.475	Pueblo CO	OUT OF SVC	El Paso, Teller counties, CO

ST	Callsign	Location	Freq	WFO	Status	Counties / Areas Affected
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
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 & EMCMM

SWX-001 | Space Weather — Kp Max 1.67 QUIET 23-APR / No G-Storms 22-24 APR / HF Favorable for Emergency Comms Ahead of 4-Day Tornado Outbreak

MODERATE | UPDATED | 10

WHY THIS CYCLE

Kp max 5 (G1) observed 20-APR from CH HSS arrival; HF continuing recovery from 18-APR G2 peak.

Summary

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.

Analyst Assessment	<p>HF EMCOMM STATUS: 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>21-APR OUTLOOK: Active-level forecast may produce intermittent polar-path degradation; regional NVIS and 40m/60m EMCOMM should remain reliable.</p> <p>22-23 APR QUIET WINDOW: Supports any deferred HF tests or readiness drills. Power-grid operators have cleared the GIC watch window.</p> <p>EMCOMM PROTOCOL: 40m/60m primary; 20m usable with propagation check; 15m-10m DX bands degraded.</p> <p>CONFIDENCE: HIGH — SWPC T1 observations + 3-day forecast T1; Geophysical Institute 27-day T1.</p> <p>TRIPWIRES: M- or X-class flare from AR 4419; CME arrival narrative; Kp escalation above forecast; 29-30 APR next event window.</p>
SOURCES	<p>NOAA SWPC 3-Day Forecast SWPC Planetary K-index Geophysical Institute (UAF) Aurora Forecast SpaceWeatherLive</p>

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.
<p>POLAR / TRANS-POLAR: GOOD — Kp 1-2 quiet. No active polar absorption. Trans-polar paths available. Monitor for CH HSS arrival 15-APR.</p>		

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.

23-APR (TODAY / BLOCKADE DAY 11 / Op Epic Fury Day 54): TOP-LINE: Iran seized 2 ships 22-APR (first since war start) — see GEO-001 / SC-001. CF now in open-ended 3-5 day extension. LBN R2 ambassadorial talks ACTIVE TODAY at State Dept. CYB-011 FCEB deadline T-0 TODAY on 4 CVEs (Cisco Catalyst x3 + Zimbra zero-click). 4-day tornado outbreak 23-26 APR peaks this weekend. Oil \$101.55 (+\$3.53 / 4-session gain).

23-24 APR (POST-CF WINDOW): EASA CZIB 2026-03 R6 expires 24-APR (T-1); 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 17 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 54 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 10 — PREPAREDNESS CONDITION ASSESSMENT

PREP-CON 3 — ELEVATED | Assessed: 23 April 2026 | Blockade Day 11 | First Iran Ship Seizures 22-APR / CF Open-Ended

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

OPERATIONAL BASIS: PREP-CON 3 ELEVATED basis: (1) US-Iran blockade with first kinetic ship seizures 22-APR and CF in open-ended 3-5 day state; (2) structural oil-market escalation (Brent 4-session gain, Goldman Q3 \$120 upside if Hormuz stays closed); (3) simultaneous FCEB cyber patch-peak with 4 KEV

CVEs due TODAY plus 4-day tornado outbreak 23-26 APR peaking weekend OK/KS. Trend: RAPIDLY DEVELOPING.

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

SECTION 11 — ALERT & READINESS CONDITIONS PANEL

CONDITION	LEVEL	BASIS
DEFCON	EST-3	Active wartime posture; US-Iran ceasefire expiring TUE night 22-APR UTC; Touska seizure 19-APR; IRGC retaliation pledged
COGCON	EST-3	Elevated continuity posture during active kinetic operations; IRGC/MOIS homeland threat; DHS NTAS gap Day 54 (see TER-001)
FPCON	EST-CHARLIE	US forces actively targeted by Iran-backed Shiite militias per DIA 16-APR baseline ("hundreds" of attacks since 28-FEB)
CYBERCON	EST-ELEVATED	AA26-097A Day 17 (CYB-005); SharePoint KEV T-5 (CYB-008); ActiveMQ KEV T-7 (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-11) (CYB-011)
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.

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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 <small>v1.10 20-APR-2026</small>	68	28	40	0
<small>24 Threat Areas 366 Standing Sources (v1.10) 68 Citations This Cycle v1.10 adds 8 T1 USG domains (whitehouse.gov, state.gov, defense.gov, cia.gov, odni.gov, dhs.gov, justice.gov, treasury.gov) Registry: fortunefavorstheprepared.com/dtr-source-registry/</small>					

SECTION 13 — CLOSING

END OF REPORT

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- ▶ **COMMS Watch** — Weekly communications intelligence
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