

## BOTTOM LINE UP FRONT — 20 APRIL 2026

**BREAKING 20-APR:** Iran state-run Tasnim News Agency reports Iranian military carried out drone strikes against US Navy vessels in the Gulf of Oman today in retaliation for the 19-APR USS Spruance seizure of Iranian-flagged M/V Touska. IRGC Khatam al-Anbiya: "Armed Forces of the Islamic Republic of Iran will soon respond and retaliate." UKMTO: Iranian gunboats fired on a tanker 18-APR; projectile struck the French-flagged CMA CGM Everglade container vessel damaging cargo.

R2 TALKS IN FLUX: Witkoff/Kushner en route Islamabad; 4 USG aircraft at Nur Khan airbase; VP Vance confirmed by White House to head US delegation. Iran MFA Baqaei 20-APR AM: "no plans for the next round." Pakistan security bubble active — Red Zone officials work-from-home, major roads closed midnight, hotels emptied. Ceasefire expires Wednesday 22-APR 0000 UTC (8 PM ET Tuesday 21-APR). Oil +7%: Brent \$96.88, WTI \$90.33. Gas \$3.976/gal AAA. Kpler: near-zero Hormuz transits 19-APR Sunday.

**Decision required today:** Retaliation is IN PROGRESS, not pledged — Tasnim claims drone strikes on US vessels, IRGC promises more. The 48-to-72-hour window to ceasefire expiration is decisive. Pre-position VHF/UHF EMCOMM (HF recovering from 18-APR G2 peak, Kp 4 today). SPC Critical Risk fire weather southern High Plains (NE NM, SE CO, SW KS, OK/TX Panhandles). CYB patch queue: SharePoint KEV T-8, ActiveMQ KEV T-10, Fortinet OVERDUE Day 4, Cisco SD-WAN ED 26-03 past deadline. NWR 21 transmitters affected (19 OOS, 2 DEG) across 15 states + Saipan.

# DAILY THREAT REPORT LITE

Fortune Favors the Prepared | Intelligence Operations Division  
 20 APRIL 2026 | PREP-CON 3 ELEVATED | BLOCKADE DAY 8 | Op Epic Fury Day 51  
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### PRIORITY ACTIONS — 20 APRIL 2026

<b>1 ENERGY MARKETS</b>	<p><b>FOR:</b> Fleet / Manufacturing / Agriculture / Generator-dependent households</p> <p>Brent \$96.88 / WTI \$90.33 (+7% post-Touska seizure 19-APR). US gas \$3.976/gal AAA (GasBuddy De Haan: -9.5c past week; diesel \$5.500/gal -11.7c). Prices will rise again within days as Touska seizure and IRGC retaliation propagate. If R2 diplomacy collapses or retaliation escalates, snap to \$105+ Brent likely. IEA baseline: Europe jet fuel timeline under renewed pressure post-Touska transit collapse. 2026 fertilizer crop year locked regardless of diplomatic outcome.</p>
<b>2 CYBER OT / ICS</b>	<p><b>FOR:</b> Any organization with internet-exposed industrial control systems, PLCs, SCADA, or OT networks</p> <p>CYB-008 SharePoint KEV CVE-2026-32201 federal due 28-APR (T-8). CYB-010 ActiveMQ KEV CVE-2026-34197 federal due 30-APR (T-10). CYB-002 Fortinet CVE-2026-21643 OVERDUE Day 4. CYB-003 Cisco SD-WAN ED 26-03 past FCEB deadlines 23-MAR. Storm-1175 weaponizing CVE-2023-21529 Exchange for Medusa ransomware. AA26-097A Day 14 OT/PLC (5,219+ exposed): CyberAv3ngers / Shahid Kaveh Group / Hydro Kitten / Storm-0784 / UNC5691. IRGC retaliation pledge elevates Iranian APT cost-benefit for CI targeting.</p>
<b>3 COMMS + FIRE WX</b>	<p><b>FOR:</b> All EMCOMM operators / served agency emergency managers / fire-weather jurisdictions</p> <p>G2 geomagnetic storm DECAYING from 18-APR peak (Kp reached 6 at 8:25 UTC per SWPC). Today Kp 4 decaying; 21-APR Kp 3. HF recovering — 40m/60m reliable primary; 20m recovering (verify before commitment). Next event window 29-30 APR (Kp 5 forecast). SPC Critical Risk fire weather southern High Plains (NE NM, SE CO, SW KS, OK/TX Panhandles). Elevated fire weather Southeast behind cold front. NWR: 21 transmitters affected across 15 states + Saipan (19 OOS, 2 DEG); verify backup alerting for served agencies in affected counties.</p>

SITUATION	ANALYST ASSESSMENT • ALTERNATIVE HYPOTHESIS • SOURCE	STATUS
▶ STRATEGIC — Active conflict drivers with multi-week consequences		
<b>Touska Seizure 19-APR — Iran Retaliation IN PROGRESS 20-APR</b>	<p>USS Spruance (DDG-111) fired three rounds of 5-inch MK45 into engine room of Iranian-flagged M/V Touska (900ft container ship, Treasury-sanctioned, Port Klang→Bandar Abbas at 17kt) in Gulf of Oman 19-APR. Marines from 31st MEU (USS Tripoli LHA-7) fast-roped via MH-60S Seahawks. First blockade enforcement seizure of Iranian-flagged vessel. CENTCOM: 25 commercial vessels turned back/seized since 13-APR. TODAY 20-APR: Tasnim News Agency reports Iranian military carried out drone strikes against US Navy vessels in retaliation. IRGC Khatam al-Anbiya: "Armed Forces of the Islamic Republic of Iran will soon respond and retaliate." UKMTO: Iranian gunboats fired on tanker 18-APR; projectile struck CMA CGM Everglade (French-flagged container vessel) damaging cargo.</p> <p><i>ALT: Tasnim drone-strike claim may precede visual or CENTCOM confirmation; Iran state media has historical pattern of claiming strikes that produce no confirmed damage. However, the public IRGC commitment means further action within 48-72 hours is the baseline expectation, not the exception.</i></p> <p><a href="https://fortunefavorstheprepared.com/dtr/">fortunefavorstheprepared.com/dtr/</a> — <a href="#">CENTCOM / UPI / Tasnim (20-APR)</a></p>	<b>FLASH Retaliation In Progress</b>

<p><b>Ceasefire Expires WED 22-APR 0000 UTC R2 Talks In Flux</b></p>	<p>Ceasefire expires Wednesday 22-APR 0000 UTC = 8 PM ET Tuesday 21-APR per ABC News T1 ("two-week deadline means it will expire April 22"). R2 DELEGATION STATUS IN FLUX: VP Vance CONFIRMED by White House to head US delegation; Witkoff/Kushner en route Islamabad; 4 USG aircraft at Nur Khan airbase. Iran MFA Baqaei 20-APR AM: "no plans for the next round of negotiations." CNN: Iranian delegation may arrive Tuesday. Nuclear negotiation detail: US proposed 20-year enrichment pause; Iran countered 5-year; US rejected. Iran ~400kg 60% enriched uranium. Iran asked for \$20B asset unfreezing. Pezeshkian emphasizes diplomacy while IRGC vows revenge — contradictory messaging.</p> <p>ALT: Iran "no plans" posture may be negotiating leverage rather than refusal — prior pattern of late-arriving delegations. Vance confirmation signals US commitment to dialogue despite Touska and retaliation. However, multiple Iranian leader tracks (Pezeshkian vs. IRGC vs. Ghalibaf) may fragment Tehran's negotiating coherence. — <a href="#">ABC News / CNN / NBC (20-APR)</a></p>	<p><b>FLASH CF Expires ~48 hrs</b></p>
<p><b>Oil +7% Brent \$96.88 WTI \$90.33 Gas \$3.976</b></p>	<p>Brent \$96.88 (+7% on 19-APR Touska seizure); WTI \$90.33 (+7%). AAA national gas \$3.976/gal per GasBuddy Patrick De Haan (down 9.5c past week); diesel \$5.500/gal (down 11.7c). 48 of 50 states saw gas decline past week. Analysts: prices will rise again within days as Touska and IRGC retaliation propagate. Energy Secretary Wright: no return below \$3/gal "until next year." Goldman base case \$85 2026 avg no longer consensus given Touska. IEA April 2026 Oil Market Report: largest oil disruption in history. S&amp;P 500 near all-time high; 10Y Treasury ~4.29%; 6 of 10 G10 central banks expected to raise rates 2026 (was 3 pre-war).</p> <p>ALT: If R2 Tuesday produces framework extension and retaliation pauses, Brent could retrace to \$85-87 within 48-72 hours. If retaliation escalates or ceasefire lapses, Brent to \$105+ within same window. Split confidence per \$0.17.3: HIGH on current pricing (T1 exchange data); MODERATE on directional call (depends on R2 outcome). — <a href="#">CNBC / CNN / GasBuddy (20-APR)</a></p>	<p><b>FLASH +7% Post-Touska</b></p>
<p><b>Lebanon CF Stressed French UNIFIL + 2 IDF KIA</b></p>	<p>Lebanon ceasefire (effective 16-APR 2100 UTC) continues to hold as baseline structure but produced first significant casualty events over the weekend: one French UNIFIL peacekeeper KIA and two IDF soldiers KIA in separate incidents. IDF declared "Yellow Line" buffer zone south of Litani. Lebanon cumulative KIA 2,196 (Al Jazeera 17-APR baseline); 7,061 wounded; &gt;1M displaced. Netanyahu rejection of Hezbollah peace terms stands. Hezbollah via Qassem: "finger on the trigger." Iran FM Araghchi's 17-APR tying of Hormuz to Lebanon ceasefire did NOT survive the weekend — Iran repositioned to assert Strait of Hormuz control under Khatam al-Anbiya framing following Touska seizure.</p> <p>ALT: French UNIFIL KIA is the most significant weekend event and directly complicates the Paris Summit 17-APR allied escort framework (FR/BE/NL escort capability political but not yet operational). Paris may prioritize Lebanon posture review before committing warships to Hormuz. — <a href="#">Al Jazeera / AFP (weekend)</a></p>	<p><b>FLASH CF Stressed</b></p>
<p>► OPERATIONAL — Sector impacts requiring near-term action</p>		
<p><b>AA26-097A Day 14 OT/PLC CyberAv3ngers + 4 APT Aliases</b></p>	<p>CISA-FBI-NSA-EPA-DOE-CyberCom joint advisory AA26-097A baseline 07-APR Day 14. Iranian-affiliated APT targeting internet-facing OT / Rockwell Automation / Allen-Bradley PLCs. Threat actor identity consolidated across vendor naming: CyberAv3ngers (Treasury) / Shahid Kaveh Group (Mandiant) / Hydro Kitten (CrowdStrike) / Storm-0784 (Microsoft) / UNC5691 (Mandiant). 5,219+ exposed PLCs baseline; water, energy, municipal facilities affected. Day 14 quiet period continues for public-disclosure victims — but IRGC Touska retaliation pledge elevates threat actor cost-benefit. Wartime cyber elevated; patch queue heavy: SharePoint KEV T-8, ActiveMQ KEV T-10, Fortinet OVERDUE Day 4, Cisco SD-WAN ED 26-03 past deadline.</p> <p>ALT: Day 14 quiet period may reflect (a) coordinated CISA/FBI containment, (b) threat actor operational tempo lagging Treasury designation pace, or (c) additional incidents below public-disclosure threshold via ISAC channels. Kinetic escalation (Touska, retaliation pledge) should elevate threat actor cost-benefit for CONUS CI strikes in the 22-APR ceasefire window. — <a href="#">CISA AA26-097A</a></p>	<p><b>FLASH Day 14</b></p>
<p><b>Fertilizer Shock Locked Urea Egypt \$700/MT (+78%)</b></p>	<p>Urea Egypt FOB approximately \$700/MT vs \$400-490 pre-war per CRU Group (+78%). US NOLA urea +25% since end-Feb per AFBF. Ammonia +20% per Alpine Macro. IFPRI: approximately 30% of globally traded urea disrupted; approximately 50% of globally traded sulfur; 25% of globally traded ammonia all sourced from the Gulf region. China extended fertilizer export restrictions through August 2026. Ethiopia gets 90% of nitrogen fertilizer from Gulf via Djibouti; sub-Saharan Africa most exposed. US spring planting LOCKED — application decisions made; cost pass-through to Q3 food prices closes in 4-6 weeks. Touska seizure 19-APR removes short-term substitution or recovery scenario.</p> <p>ALT: Pre-contracted fertilizer operators (~40-60% Corn Belt volume) are insulated. Spot-market and fall application buyers fully exposed. Retail food impact delayed but certain. — <a href="#">IFPRI / PBS (CRU Group) / AFBF</a></p>	<p><b>FLASH 2026 Crop Locked</b></p>
<p><b>EASA CZIB R6 Expires 24-APR (T-4) Kuwait OKKK</b></p>	<p>EASA CZIB 2026-03 R6 expires 24-APR-2026 (T-4 from publication). 11 FIRs covered: Bahrain, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Oman, Qatar, UAE, Saudi Arabia. Exception: south of OBSOT-DANOM-KEDON-VELOD in Saudi/Oman FIRs at FL320+ with current risk assessment. National NOTAMs stacking: France LFFF F0660-F0664 (10-APR); Germany EDWW B0189-B0190 (02-APR); Italy LIRR (13-MAR). Separate CZIBs: Syria (CZIB-2017-03R17), Yemen Sana'a (CZIB-2017-07R17). Kuwait OKKK: drone strike on fuel storage tank at airport; fire, no casualties. Emirates/Qatar Airways ~70% capacity reduction. Lufthansa Group, Air France-KLM continued Dubai/Tel Aviv suspensions.</p> <p>ALT: EASA review 24-APR is the operational tripwire. Given Touska seizure and 22-APR ceasefire expiration two days before EASA review, near-term trajectory strongly supports R7 extension through at least mid-May. If kinetic retaliation escalates, aviation could escalate to complete FIR closures. — <a href="#">EASA / OPSGROUP / Safe Airspace</a></p>	<p><b>FLASH T-4 Review</b></p>
<p><b>DHS NTAS Gap Day 51 No Bulletin Since JUN-2025</b></p>	<p>DHS NTAS website (T1): "There are no current advisories." 22-JUN-2025 Iran bulletin expired 22-SEP-2025 and has NOT been reissued despite Operation Epic Fury beginning 28-FEB-2026. Gap runs to Day 51. HSToday (01-MAR): "Operation Epic Fury is underway and DHS has issued no NTAS terror alert... Institutional silence is not a strategy." CFR Hoffman 02-MAR: counterterrorism posture shift toward immigration has eroded DHS institutional capacity. DHS NTAS website footer: "due to a lapse in federal funding, the site is not being actively managed and has not been updated since February 17,</p>	<p><b>FLASH Day 51</b></p>

	<p>2026." Practitioner posture: treat heightened threat environment as operationally real regardless of federal NTAS publication.</p> <p><i>ALT: No evidence supports concluding absence of NTAS equals absence of threat. Conversely, no evidence supports concluding NTAS issuance is imminent. Split confidence per §0.17.3: HIGH on gap duration (T1 dhs.gov); LOW on cause (institutional capacity vs policy posture unresolved). — <a href="#">DHS NTAS / CFR / HSToday</a></i></p>	
<b>▶ WATCH — Developing situations requiring monitoring</b>		
<b>G2 DECAYING From 18-APR Peak Kp 4 Today AR 4419 Tracked</b>	<p>NOAA SWPC: Kp climbed from 4 through G1 (Kp 5) and reached G2 (Moderate, Kp 6) at approximately 8:25 UTC on 18-APR. Primary driver was CH HSS + CIR arrival. 19-APR Kp ~4 decaying. Today 20-APR Kp 4 per Geophysical Institute 27-day forecast. Forecast: 21-APR Kp 3; 22-24 APR Kp 2-3; 25-APR Kp 4; 26-28 APR Kp 2-3 quiet; 29-30 APR Kp 5 (next event window). AR 4419 still named and tracked in SWPC daily products. HF recovering — 40m/60m reliable primary; 20m recovering. Aurora Timeline Viewer product remains unavailable per SWPC. Power grid GIC watch window cleared.</p> <p><i>ALT: Next event window 29-30 APR warrants standing readiness. Unexpected M/X-class flare from AR 4419 would reset the propagation picture. — <a href="#">NOAA SWPC / Geophysical Institute (UAF)</a></i></p>	<b>HIGH Decay</b>
<b>Iran Internet Day 51 Record Nation-Scale Shutdown</b>	<p>Day 51 at approximately 1,220+ hours. Longest nation-scale internet shutdown on record. \$35-40M/day direct losses, \$70-80M/day total per NetBlocks baseline. 50M Iranians on Telegram despite ban. MOIS Handala operating via Starlink through blackout — cyber threat not neutralized by shutdown. Monitoring for: (a) partial reopening signal; (b) regime stability indicators; (c) Iran economic collapse driving diplomatic flexibility. Touska seizure and retaliation pledge may correlate with deeper shutdown posture rather than restoration.</p> <p><i>ALT: Partial whitelist expansion would be an early signal of regime stability pressure. Conversely, further tightening during retaliation window reads as regime prioritizing control over economic cost. — <a href="#">NetBlocks / Iran Int'l</a></i></p>	<b>MOD Day 51</b>
<b>Houthi Bab el-Mandeb Strategic Patience</b>	<p>Houthis have NOT attacked Red Sea shipping since 28-FEB-2026 despite Iran war escalation. Analysts (CSIS, ICG) assess "strategic patience" — Bab el-Mandeb held in reserve. ~30 tankers near Yanbu within strike range. Bab el-Mandeb 29km narrowest — single attack arrests approximately 15% global seaborne trade. LINK: Abdollahi (IRGC, 13-APR) threatened ALL Persian Gulf/Sea of Oman/Red Sea. TRIPWIRE: 22-APR ceasefire expiration and IRGC-pledged Touska retaliation. If ceasefire lapses and Iran signals Houthi activation, Red Sea disruption expected 24-48 hours.</p> <p><i>ALT: Prior back-channel understandings with Riyadh/Washington may durably prevent Houthi activation. Domestic Yemeni pressures may be diverting focus from Red Sea operations. — <a href="#">Defense News: Houthi/Bab el-Mandeb</a></i></p>	<b>WATCH 22-APR Tripwire</b>
<b>Scientists Narrative T-7 to Trump Self-Imposed</b>	<p>Trump 16-APR self-imposed "next week and a half" runs to approximately 27-APR (T-7 from publication 20-APR). No public federal finding released to date. Narrative concerns approximately 10 US scientists with NASA, nuclear weapons, defense research, aerospace/UFO-related work who have died or gone missing since mid-2023. SPLIT CONFIDENCE per §0.17.3: Institutional engagement HIGH (T1 POTUS + WH Press Sec on-record); individual case facts HIGH where local reporting corroborates; pattern/causal claim LOW-MODERATE (rests on congressional statements + media amplification, not federal finding); foreign-adversary causation LOW (non-zero given active IRGC/MOIS + SVR IO, but unsupported by specific public evidence).</p> <p><i>ALT: Trump ~27-APR self-imposed timeline is the tripwire — federal finding within window reclassifies; silence after commitment is itself reportable on information-environment grounds. — <a href="#">Fox News / White House (15-16 APR baseline)</a></i></p>	<b>WATCH T-7</b>

INDICATOR	CURRENT — 20 APR 2026	CONTEXT
<b>Brent / WTI</b>	<b>\$96.88 / \$90.33</b>	+7% / +7% post-Touska seizure 19-APR. Kpler: near-zero Hormuz transits 19-APR Sunday
<b>Gas / Diesel</b>	<b>\$3.976 / \$5.500/gal (AAA)</b>	Down 9.5c / 11.7c past week per GasBuddy; analysts: prices rise again within days
<b>Urea Egypt FOB</b>	<b>~\$700/MT (+78% vs pre-war)</b>	US NOLA +25% since end-Feb (AFBF). Ammonia +20%. China restrictions through AUG-2026
<b>Lebanon KIA</b>	<b>2,196 cumulative (baseline)</b>	+1 French UNIFIL KIA, +2 IDF KIA weekend. CF stressed; IDF "Yellow Line" buffer
<b>Iran Internet</b>	<b>Day 51 / ~1,220+ hrs</b>	Record nation-scale shutdown; \$35-40M/day direct, \$70-80M/day total losses

<p><b>PREP-CON 3 ELEVATED</b> Rapidly developing. 48-72h window to CF expiration.</p>	<p><b>COMCON 4 PARTIALLY DEGRADED</b> G2 decaying; HF recovering. NWR 21 OOS/DEG.</p>	<p><b>CYBER ELEVATED</b> SharePoint T-8, ActiveMQ T-10, Fortinet overdue, Cisco SD-WAN past due.</p>	<p><b>NTAS GAP DAY 51</b> No bulletin since JUN-2025 expired 22-SEP-2025. Anomalous.</p>	<p><b>SWX G2 DECAYING</b> 18-APR Kp 6 peak resolved. Kp 4 today. Next event 29-30 APR.</p>
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**24-HOUR WATCH — What changes the picture by 21 April 0600**

<b>WATCH 1 RETALIATION PROGRESSION</b>	Tasnim 20-APR claims Iranian drone strikes on US Navy vessels in Gulf of Oman in retaliation for Touska seizure. IRGC Khatam al-Anbiya: "Armed Forces of the Islamic Republic of Iran will soon respond and retaliate." Watch: (1) CENTCOM visual or damage confirmation / denial; (2) Additional IRGC kinetic activity in Gulf, Iraq, Syria, or Red Sea (Houthi activation per WATCH-007); (3) Iranian proxy activity against US forces in Iraq/Syria; (4) Cyber attack on US infrastructure (AA26-097A vector). The 48-to-72-hour window to 22-APR ceasefire expiration is decisive.
<b>WATCH 2 R2 TALKS + CF EXPIRES WED 22-APR</b>	VP Vance CONFIRMED by WH to head US delegation; Witkoff/Kushner en route; 4 USG aircraft at Nur Khan airbase. Iran MFA Baqaei 20-APR AM: "no plans." Ceasefire expires Wednesday 22-APR 0000 UTC (8 PM ET Tuesday 21-APR). Watch: (1) Formal R2 commencement Monday evening or Tuesday; (2) Iran delegation arrival photos; (3) Joint statement post-session; (4) Nuclear framework signaling — US proposed 20-yr pause rejected by Iran (5-yr counter rejected by US); Iran asked for \$20B asset unfreezing. If R2 collapses, retaliation escalation likely immediate.
<b>WATCH 3 EASA R7 + FIRE WX + NWR GAPS</b>	EASA CZIB 2026-03 R6 expires 24-APR (T-4). R7 issuance expected given Touska + retaliation pledge. SPC Critical Risk fire weather today covering southern High Plains (NE NM, SE CO, SW KS, OK/TX Panhandles); elevated fire weather Southeast behind cold front. NWR: 21 transmitters affected across 15 states + Saipan (19 OOS, 2 DEG). Watch: (1) EASA R7 publication; (2) Any airport infrastructure strikes; (3) European carrier announcements; (4) NM triple-gap Chaves/Eddy counties and any severe-weather cross-reference; (5) Fire-weather Red Flag progression.

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