

BOTTOM LINE UP FRONT — 21 APRIL 2026

CF EXTENDED +24 HOURS: Trump (20-APR) extended the US-Iran ceasefire; it now expires **WED NIGHT 22-APR UTC**. Trump: further extension "highly unlikely." Supreme Leader cleared the Iranian delegation late 20-APR per Trump/CNBC; Vance, Kushner, Witkoff departing 21-APR per WH. Reuters / Iran state TV 21-APR AM: Iranian delegation not yet departed. **IRGC Khatam al-Anbiya retaliation pledge stands — conditional on Touska crew-safety confirmation, not withdrawn.** IRAN DRONE CLAIM — LOW CONFIDENCE, NOT ADOPTED: 21-APR Tasnim/Mehr/Press TV claim drone strike on unnamed US destroyer; CENTCOM silent, no independent wire corroboration. BLOCKADE DAY 9: CENTCOM count 25→27 vessels turned back or seized. OIL eased on CF extension: Brent \$95.42 (was \$96.88), AAA gas \$4.022/gal 21-APR direct. UKMTO Update 034 (19-APR T1): 18-APR attacks confirmed on CMA CGM Everglade, VLCC Sanmar Herald (Indian-flagged, fired on despite prior clearance), plus additional Indian-flagged vessel. Iran navy VHF: "Strait of Hormuz completely closed again." ~20,000 seafarers stranded Gulf. LEBANON: Karam named envoy 20-APR; Lebanon-Israel talks THU 23-APR. DECISIVE 48 HOURS to WED night.

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
 21 APRIL 2026 | PREP-CON 3 ELEVATED | BLOCKADE DAY 9 | Op Epic Fury Day 52
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PRIORITY ACTIONS — 21 APRIL 2026

1 ENERGY MARKETS	<p>FOR: Fleet / Manufacturing / Agriculture / Generator-dependent households</p> <p>Brent \$95.42 / WTI ~\$90.33 (eased on 20-APR CF extension). AAA national gas \$4.022/gal 21-APR direct (down from \$4.05 on 20-APR, \$4.09 on 16-APR). Pump lag behind crude is 10-14 days — post-Touska peak has not passed through fully. If R2 produces framework WED, Brent retraces toward \$85-90; if CF lapses, \$100+ snap likely. No new Iran-specific OFAC action 18-21 APR — absence reportable. 2026 fertilizer crop year locked regardless of outcome.</p>
2 CYBER OT / ICS	<p>FOR: 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>
3 COMMS + FIRE WX	<p>FOR: 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		
Blockade Day 9 27 Vessels CF Extended R2 Pending 21-APR	<p>Blockade Day 9. CENTCOM count 27 cumulative commercial vessels turned back or seized since blockade began 13-APR (was 25 on 20-APR). Iran turned back Botswana- and Angola-flagged tankers over the weekend. Trump 20-APR extended CF +24 hours to WED NIGHT 22-APR UTC; "highly unlikely" to extend further. Supreme Leader cleared Iranian delegation late 20-APR; Vance/Kushner/Witkoff departing 21-APR per WH. Reuters/Iran state TV 21-APR AM: Iran delegation not yet departed. IRGC Khatam al-Anbiya retaliation pledge stands (conditional on crew safety, not withdrawn). Ejei (21-APR): "Iran must maintain 100% readiness." Iran state-media 21-APR drone claim on US destroyer — LOW CONFIDENCE (single-source; CENTCOM silent); NOT adopted.</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</i></p>	FLASH Retaliation In Progress

<p>Ceasefire Expires WED 22-APR 0000 UTC R2 Talks In Flux</p>	<p>furture action within 48-72 hours is the baseline expectation, not the exception. fortunefavorstheprepared.com/dtr/ — CENTCOM / WH / CNBC / Reuters (21-APR)</p> <p>CF EXTENDED +24hr per Trump 20-APR — now expires WED NIGHT 22-APR UTC (0000 GMT 23-APR). Trump: "highly unlikely" to extend further ("lots of bombs will start going off"). Supreme Leader cleared Iranian delegation late 20-APR per Trump/CNBC. Vance, Kushner, Witkoff departing 21-APR per WH. Reuters/Iran state TV 21-APR AM: Iran delegation not yet departed; FM Araghchi told Pakistani counterpart Iran "taking all aspects into consideration." Ejei (21-APR): 100% readiness + will respond. Ghalibaf: "new cards on the battlefield" (defending diplomatic track from hardliners). Pakistani army chief Munir continues mediator role.</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. — WH / CNBC / Reuters (21-APR)</p>	<p>FLASH CF Expires ~48 hrs</p>
<p>Oil +7% Brent \$96.88 WTI \$90.33 Gas \$3.976</p>	<p>Brent \$95.42 settled 20-APR (down ~1.5% from \$96.88 on CF extension); sub-\$95 intraday 21-APR. AAA national gas \$4.022/gal 21-APR direct read (trend: \$4.09 → \$4.05 → \$4.022). CA most expensive \$5.89; OK least \$3.27. EIA STEO April peaks: Brent \$115/b Q2 2026; retail gas peak \$4.30/gal; diesel \$5.80/gal. IEA April OMR baseline: largest oil disruption in history (10.1 mb/d March drop; Europe 6 weeks jet fuel). S&P 500 near all-time high; 10Y Treasury ~4.29%; 6 of 10 G10 expected to raise 2026 (was 3 pre-war). No Iran-specific OFAC action 18-21 APR — absence reportable.</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). — Trading Economics / AAA / EIA (21-APR)</p>	<p>FLASH Eased on CF Extension</p>
<p>Lebanon CF Stressed French UNIFIL + 2 IDF KIA</p>	<p>Lebanon CF sustaining active IDF kinetic 20-APR: 98th/36th Divisions + Paratrooper Brigade + IAF killed "several" Hezbollah operatives Bint Jbeil; Golani Brigade airstrike near Litani. Lebanon named Simon Karam (Maronite, Hezbollah critic, ex-US ambassador) as envoy 20-APR. Lebanon-Israel talks scheduled THU 23-APR — inside US-Iran CF 72-hour window. Katz (21-APR): "disarming Hezbollah is the ultimate goal." Hezbollah publicly denies French UNIFIL KIA at Deir Kifa. Netanyahu: "we are not leaving" 10km buffer. Lebanon cumulative KIA 2,196 baseline; 7,061 wounded; >1M displaced.</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. — Al Jazeera / AFP (weekend)</p>	<p>FLASH CF Stressed</p>
<p>► OPERATIONAL — Sector impacts requiring near-term action</p>		
<p>AA26-097A Day 14 OT/PLC CyberAv3ngers + 4 APT Aliases</p>	<p>AA26-097A Day 15 (baseline 07-APR). Iranian-affiliated APT targeting internet-facing Rockwell/Allen-Bradley PLCs. NEW 21-APR: Palo Alto Unit 42 attributes cluster CL-STA-1128 shifting from Unitronics to Rockwell FactoryTalk via VPS infrastructure — target-set evolution, not dormancy. Threat actor identity: CyberAv3ngers / Shahid Kaveh / Hydro Kitten / Storm-0784 / UNC5691 / CL-STA-1128. 5,219+ exposed PLCs baseline. COMPOUND PATCH QUEUE: CISA KEV 20-APR added 8 CVEs due 04-MAY T-13 (PaperCut, TeamCity, Kentico, Quest KACE, Zimbra + 3 Cisco Catalyst SD-WAN compounding ED 26-03). SharePoint KEV T-7; ActiveMQ KEV T-9; Fortinet OVERDUE Day 5. Heaviest federal-compliance window since blockade began.</p> <p>ALT: 15-day public-disclosure quiet period may reflect (a) coordinated CISA/FBI containment, (b) threat actor tempo lagging Treasury designation pace, or (c) incidents below public-disclosure threshold via ISAC channels. Unit 42 FactoryTalk shift indicates target-set evolution. CF lapse WED night should elevate threat actor cost-benefit for CONUS CI attacks. — CISA AA26-097A</p>	<p>FLASH Day 14</p>
<p>Fertilizer Shock Locked Urea Egypt \$700/MT (+78%)</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% Com Belt volume) are insulated. Spot-market and fall application buyers fully exposed. Retail food impact delayed but certain. — IFPRI / PBS (CRU Group) / AFBF</p>	<p>FLASH 2026 Crop Locked</p>
<p>EASA CZIB R6 Expires 24-APR (T-4) Kuwait OKKK</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. — EASA / OPSGROUP / Safe Airspace</p>	<p>FLASH T-4 Review</p>
<p>DHS NTAS Gap Day 52 No Bulletin Since JUN-2025</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 52. 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, 2026."</p>	<p>FLASH Day 52</p>

	<p>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). — DHS NTAS / CFR / HSToday</i></p>	
▶ WATCH — Developing situations requiring monitoring		
<p>G2 DECAYING From 18-APR Peak Kp 4 Today AR 4419 Tracked</p>	<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. — NOAA SWPC / Geophysical Institute (UAF)</i></p>	HIGH Decay
<p>Iran Internet Day 52 Record Nation-Scale Shutdown</p>	<p>Day 52 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. — NetBlocks / Iran Int!</i></p>	MOD Day 52
<p>Houthi Bab el-Mandeb Strategic Patience</p>	<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. — Defense News: Houthi/Bab el-Mandeb</i></p>	WATCH 22-APR Tripwire
<p>Scientists Narrative T-7 to Trump Self-Imposed</p>	<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. — Fox News / White House (15-16 APR baseline)</i></p>	WATCH T-7

INDICATOR	CURRENT — 20 APR 2026	CONTEXT
Brent / WTI	\$96.88 / \$90.33	+7% / +7% post-Touska seizure 19-APR. Kpler: near-zero Hormuz transits 19-APR Sunday
Gas / Diesel	\$3.976 / \$5.500/gal (AAA)	Down 9.5c / 11.7c past week per GasBuddy; analysts: prices rise again within days
Urea Egypt FOB	~\$700/MT (+78% vs pre-war)	US NOLA +25% since end-Feb (AFBF). Ammonia +20%. China restrictions through AUG-2026
Lebanon KIA	2,196 cumulative (baseline)	+1 French UNIFIL KIA, +2 IDF KIA weekend. CF stressed; IDF "Yellow Line" buffer
Iran Internet	Day 52 / ~1,220+ hrs	Record nation-scale shutdown; \$35-40M/day direct, \$70-80M/day total losses

<p>PREP-CON 3 ELEVATED Rapidly developing. 48-72h window to CF expiration.</p>	<p>COMCON 4 PARTIALLY DEGRADED G2 decaying; HF recovering. NWR 21 OOS/DEG.</p>	<p>CYBER ELEVATED SharePoint T-8, ActiveMQ T-10, Fortinet overdue, Cisco SD-WAN past due.</p>	<p>NTAS GAP DAY 51 No bulletin since JUN-2025 expired 22-SEP-2025. Anomalous.</p>	<p>SWX G2 DECAYING 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

WATCH 1 RETALIATION PROGRESSION	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.
WATCH 2 R2 TALKS + CF EXPIRES WED 22-APR	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.
WATCH 3 EASA R7 + FIRE WX + NWR GAPS	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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