

DAILY THREAT REPORT

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

BLOCKADE Day 24 | Op Epic Fury Day 68 | WHCD shooting 25-APR / Trump unharmed / suspect Allen targeted POTUS per AG | CISA ED 25-03 V1 ArcaneDoor (FCEB inventory T-4) | LBN CF N/A of EXTENDED period (~17-MAY) | Trend: STABLE AWAITING AGREEMENT | Full basis: SEC 10

COMMUNICATIONS CONDITION: COMCON 4 — PARTIALLY DEGRADED (CONUS)

AA26-097A Day 22 | Kp 2-3 quiet/unsettled today; G1 (minor) geomagnetic storm WATCH late 29-APR/early 30-APR from incoming HSS + complex solar wind knot; slight chance G2 | AR4420 produced M6 flare 05-MAY 22:51Z + 4 M-class + 17 C-class flares 24h (with AR4425) | No current radio blackout (R1 occasional only) | HF favorable for emergency comms | 18 NWR transmitters affected (15 OOS / 3 DEG); IL/IN/TN gaps overlap CIG2 corridor | Full basis: SEC 11

Publication (UTC)	27 APR 2026 / 1530 UTC
Reporting Period	0000 03-MAY through 1500 06-MAY 2026 (72-hour sweep)
Analyst / Watch Officer	Fortune Favors the Prepared — OSINT Desk
FLASH Threshold	Risk Score ≥ 20 — EIGHT FLASH EVENTS THIS CYCLE
PREP-CON Baseline	PREP-CON 3 — ELEVATED (Brown) Trend: STABLE AWAITING AGREEMENT Op Epic Fury Day 68 Blockade Day 24 LBN CF N/A of EXTENDED period (~17-MAY) WHCD shooting 25-APR CISA ED 25-03 V1 (ArcaneDoor; FCEB T-3) Iran FM Araghchi-Putin St Petersburg 06-MAY (today)
Version	1.0 — SOP v5.44 §0.33 Hook 0 Pre-Build Audit PASSED §0.34 Padding Check CLEAN §0.35 Operator Gate Q1/Q2 YES Sweep manifest 24 areas (17 STATE A live / 1 STATE B user-supplied NWR / 2 STATE C gap INS+CHEM / 4 STATE D baseline) Anti-Bias Discipline Applied

FLASH ▶	TER-001 WHCD shooting 25-APR / Trump unharmed / suspect targeting POTUS per AG 05-MAY CYB-001 CISA ED 25-03 V1 ArcaneDoor / FCEB inventory due 01-MAY (T-3)
	GEO-001 Hormuz dual blockade Day 24 / Sevan intercepted 25-APR / 37 ships redirected GEO-CF-LBN LBN CF N/A of EXTENDED period (~17-MAY) / Hezbollah called meaningless FIN-001 Brent \$111.16 intraday (highest since March; +2.71% session) / WTI \$95-96 / AAA \$4.031 AVN-001 EASA CZIB R7 issued 03-MAY (extends to 01-MAY)
HIGH/NEW ★	GEO-002 Iran FM Araghchi-Putin St Petersburg 06-MAY (today) / left Pakistan 05-MAY without meeting US UKR-001 UKR Crimea raid 25-26 APR (3 ships + MiG-31) / Yaroslavl refinery / first drone strikes Sverdlovsk-Chelyabinsk (1700+km) NWR-001 18 NWR transmitters affected; IL/IN/TN gaps overlap CIG2 corridor
HIGH/UPDATED ↻	CYB-002 KEV 4-CVE batch (PaperCut, TeamCity, Kentico, Quest KACE CVSS 10.0, Zimbra) FCEB-due 04-MAY (T-6) CYB-003 KEV 03-MAY additions (Samsung, SimpleHelp x2, D-Link) NUC-001 440.9 kg HEU / IAEA blackout Day 68 / Bulletin Atomic Scientists 03-MAY pre-strike Isfahan transfer analysis PHS-001 M7.4 Sanriku 20-APR / JMA megaquake advisory CLOSED 06-MAY (background reverts to 0.1%) / M6.1 Hokkaido 05-MAY
	INS-001 IRGC/MOIS + DIA TER-002 NTAS Gap Day 68 AGR-001 Fertilizer Locked / Winter wheat 30% G/E (down from 45% YoY) CN-001 PRC Scarborough barrier persists / Antelope Reef airbase ~1,500 acres TRV-001 State Level 4 Iran / 11-state ME CZIB R7 HLTH-001 SC measles 997 final / OUTBREAK OVER / FL 21+ / ARC blood Day 99

CRITICAL TIME HACK

TODAY (06-MAY): WHCD ARRAIGNMENT — Allen federal court arraignment + Patel/Blanche presser — see TER-001.

TODAY (06-MAY): JMA MEGAQUAKE ADVISORY CLOSES (background reverts to 0.1%) — see PHS-001.

T-3 | 01-MAY 23:59 EST: CISA ED 25-03 V1 FCEB device-inventory due — see CYB-001.

T-3 | 01-MAY: EASA CZIB 2026-03-R7 expires; R8 issuance window opens — see AVN-001.

T-6 | 04-MAY: CISA KEV 4-CVE batch (PaperCut/TeamCity/Kentico/Quest KACE/Zimbra) FCEB due — see CYB-002.

T-11 | ~17-MAY: Lebanon CF extended period expires — see GEO-CF-LBN.

SECTION INDEX

<p><u>SEC 2 — BLUF & Market Indicators</u></p>	<p>TER-001 WHCD shooting 25-APR / suspect Allen 31 in custody / SS agent shot in vest CYB-001 CISA ED 25-03 V1 ArcaneDoor / FCEB T-3 to 01-MAY GEO-001 Hormuz dual blockade Day 24 / Sevan intercept 25-APR / 3 US carriers ME first since 2003 GEO-CF-LBN N/A of extended period (Day 5 since 23-APR extension) Commodity Tracker 7 FLASH</p>
<p><u>SEC 3 — FLASH Events</u></p>	<p>TER-001 WHCD shooting 25-APR / Allen arraigned 06-MAY / friendly federal assassin manifesto (28) CYB-001 CISA ED 25-03 V1 ArcaneDoor (25) GEO-001 Hormuz Day 24 / Sevan intercept / Araghchi-Putin OCCURRED today (25) GEO-CF-LBN N/A of extended period (Day 5 since 23-APR extension) (22) FIN-001 Brent \$111.16 / Iran new proposal pared peak (22) SC-001 Sevan / 5-nation transit / 37 ships (21) CYB-005 AA26-097A Day 22 (22) GEO-AXIS-001 Mojtaba Khamenei written message to Putin (Russia confirmed) / Romania NATO drone / UKR 1700+km / Antelope Reef (22)</p>
<p><u>SEC 4A — Cyber / Technology</u></p>	<p>CYB-002 KEV 4-CVE batch T-6 due 04-MAY (PaperCut/TeamCity/Kentico/Quest KACE/Zimbra) CYB-003 03-MAY additions Samsung MagicINFO + SimpleHelp x2 + D-Link DIR-823X 3 Cisco Catalyst SD-WAN due 23-APR PASSED CYB-001 ED 25-03 V1 ArcaneDoor T-3 cross-link CYB-005 AA26-097A Day 22</p>
<p><u>SEC 4B — Physical / Geopolitical / IO</u></p>	<p>GEO-AXIS-001 Iran-Russia pivot Araghchi-Putin OCCURRED 06-MAY / Mojtaba Khamenei written message / Iran Hormuz-nuclear decouple proposal UKR Sverdlovsk/Chelyabinsk 1700+km first-strikes + Romania NATO drone incursion 25-APR PRC Antelope Reef ~1,500 acres + Taiwan 40-day airspace NUC-001 IAEA Blackout Day 68 / 440.9kg 60% HEU / Bulletin Atomic Scientists Isfahan analysis</p>
<p><u>SEC 5 — Energy / Infrastructure / Supply Chain</u></p>	<p>NUC-001 IAEA verification blackout Day 68 / 440.9 kg HEU / Bulletin Atomic Scientists 03-MAY Isfahan transfer analysis SC-001 Sevan intercept 25-APR / 37 ships redirected / 5-nation transit FIN-001 Brent \$111.16 / +13% weekly / IEA largest-supply-shock framing</p>
<p><u>SEC 6 — Aviation / Transportation</u></p>	<p>AVN-001 EASA CZIB 2026-03-R7 issued 03-MAY; extends to 01-MAY; 11-state ME airspace Sterling VA TFR FDC 6/5355 05-MAY (WHCD aftermath; impact IAD) FAA USNS→NMS transition 18-APR</p>
<p><u>SEC 7 — Meteorological Weather & Severe Weather + NWR Outages</u></p>	<p>WX-001 06-MAY severe outbreak Day 2 of multi-day sequence / SPC Day 1 Slight Risk TX > lower MS Valley > TN Valley / Very large hail (3-4 inch) + few tornadoes + MCS / WPC ERO Slight Risk 2"/hr 06-MAY damage: 2 tornadoes (Germantown IL + Hanover AR) + 260,000+ no power MO/IL/KY/IN/WI/MI + 1 MI fatality NWR 18 affected (14 OOS + 4 DEG, 16 states) TN Shelbyville WXK63 OOS in TN Valley evening</p>

	corridor AR Fountain Hill KGG86 OOS in lower MS Valley MCS path GA Baxley WXM65 OOS in Day 2-3 Dixie Alley + wildfire smoke compound
<u>SEC 7A — Space Weather & EMCOMM</u>	<u>SWX-001</u> Kp 1-3 quiet through 05-MAY Brief Kp 4 active spike from 23-APR CME AR4420 produced M6 flare 05-MAY 22:51Z + 4 M-class + 17 C-class flares 24h (with AR4425) M6.4 03-MAY 18:15Z HF favorable for SKYWARN
<u>SEC 7B — Agriculture, Food & Supply Chain</u>	<u>AGR-001</u> Winter wheat 30% G/E (down from 34% prior wk; from 45% YoY) KS top-state 24% G/E Corn 25% planted (vs LY 22% / 5-yr 19%), soybeans 23% planted, spring wheat 19% planted (9pts behind LY) CBOT 03-MAY settlements: corn 455.00 / soybeans 1163.75 / wheat 608.25
<u>SEC 8 — 72-Hour Outlook</u>	Op Epic Fury Day 68 Hormuz Day 24 LBN CF N/A of extended period WHCD investigation Day 4 Araghchi-Putin St Petersburg 06-MAY CISA ED 25-03 V1 T-3 (01-MAY) KEV 4-CVE batch T-6 (04-MAY) <u>WX-001</u> 06-MAY severe outbreak Day 2 / Day 3 Dixie Alley shift
<u>SEC 10 — PREP-CON Assessment</u>	PREP-CON 3 ELEVATED Op Epic Fury Day 68 / Hormuz Day 24 / WHCD Day 4 / CISA ED 25-03 V1 T-3 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 TRANSCON EST-3 WX-CON EST-4 PREP-CON 3
<u>SEC 12 — Source Registry Summary</u>	24 Threat Areas 358 Standing Sources (v1.8) 51 Citations This Cycle T1: 22 T2: 29 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 — Illinois / Missouri / Indiana / Kentucky</u>	<u>WX-001</u> SPC CIG2 high-end signal central/N IL today Multi-state tornado outbreak IL/MO/IN/KY active <u>NWR-001</u> IL Hillsboro KXI79 + IN Angola KXI94 OOS within outbreak corridor (Montgomery/Bond/Fayette/Macoupin IL; Steuben/DeKalb/LaGrange IN)
<u>CONUS — Tennessee / Alabama / Mississippi (Day 2-3)</u>	WX-001-EXT Day 2-3 Dixie Alley shift <u>NWR-001</u> TN dual-gap Lawrenceburg KXI88 + Shelbyville W XK63 OOS within shift corridor (Lawrence/Wayne/Giles + Bedford/Marshall/Coffee TN)
<u>CONUS — Mid-Atlantic / Washington DC</u>	<u>TER-001</u> WHCD shooting 25-APR / Allen ARRAIGNED 06-MAY fed court (firearm in COV + assault on fed officer) / "friendly federal assassin" 1,000+ word manifesto / Patel + Blanche presser today / Senate Judiciary briefing (Grassley) <u>TER-002</u> NTAS gap Day 68 <u>INS-001</u> IRGC/MOIS structural COGCON assessed Sterling VA TFR FDC 6/5355 05-MAY (impact IAD)
<u>CONUS — Nationwide (All Regions)</u>	<u>CYB-001</u> CISA ED 25-03 V1 ArcaneDoor / FCEB T-3 to 01-MAY <u>CYB-002</u> KEV 4-CVE batch T-6 04-MAY <u>CYB-003</u> 03-MAY additions Samsung+SimpleHelp+D-Link <u>CYB-005</u> AA26-097A Day 22 <u>FIN-001</u> Brent \$111.16 intraday (highest since March; +2.71% session) +13% weekly <u>SWX-001</u> Kp 1-3 quiet HF favorable

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
<u>CONUS — New Mexico (NWR Triple-Gap)</u>	<u>NWR-001</u> NM TRIPLE-GAP continues (Roswell WWG36 + Carlsbad WWF37 + Artesia WXN24 all OOS) Chaves and Eddy counties effectively zero primary NWR coverage
<u>CONUS — Montana (NWR 6-transmitter cluster)</u>	<u>NWR-001</u> MT 6 transmitters affected (Helena KXI58, Glasgow WWG70, Miles City WXJ81, Sidney WNG566, Wolf Point WWG81, Lewistown KIH50) Eastern half of state degraded structural-gap regional coverage
<u>CONUS — Southwest (AZ/NM/NV)</u>	WX NIFC elevated YTD baseline Dry-warm tilt through June per NIFC Southern Area driest Nov-Feb since late 1970s (top-5 driest)
<u>Middle East / Persian Gulf</u>	<u>GEO-001</u> Hormuz dual blockade Day 24 / Sevan intercept 25-APR by USS Pinckney + helicopter / 37 ships redirected (CENTCOM cumulative) / 3 US carriers in ME first time since 2003 (USS GHW Bush 03-MAY) GEO-CF-LBN N/A of extended period (Day 5 since 23-APR extension) (~17-MAY) / Hezbollah meaningless / Netanyahu 05-MAY vigorously attack <u>TRV-001</u> EASA CZIB 2026-03-R7 issued 03-MAY / valid through 01-MAY (T-3) / 11-state ME airspace
<u>Global Maritime / Chokepoints</u>	<u>SC-001</u> Sevan intercept 25-APR / 5-nation transit regime (CN/RU/IN/IQ/PK; +MY/TH/PH later) / 37 ships redirected / ~20,000 seafarers stranded Gulf Lloyd's ~5% hull value peak (100x pre-crisis) War-risk insurance pulled
<u>Iran</u>	<u>GEO-001</u> Op Epic Fury Day 68 Blockade Day 24 37 ships redirected NEW Iran proposal via Pakistani mediators (Axios): decouple Hormuz from nuclear / postpone nuclear talks until blockade lifted Mojtaba Khamenei = Supreme Leader (Ali killed 28-FEB) Iran death toll ~3,400 <u>NUC-001</u> IAEA blackout Day 68 / 440.9kg 60% HEU
<u>Russia / St Petersburg</u>	GEO-AXIS-001 Araghchi-Putin meeting OCCURRED 06-MAY St Petersburg / Putin received WRITTEN MESSAGE from Mojtaba Khamenei (Supreme Leader since 28-FEB) Substantive successor to failed Pakistani back-channel Russia-Iran 20-yr strategic agreement framework
<u>Indo-Pacific / SCS + Taiwan + DPRK</u>	GEO-AXIS-001 PRC Antelope Reef airbase ~1,500 acres reclaimed (significantly larger than Woody Island) Taiwan 40-day airspace restriction notices Scarborough floating barrier persists DPRK quiet 24-27 APR (last 19-APR Sinpo Hwasong-11 cluster-munitions test)
<u>Europe / Ukraine / Russian Urals / Romania (NATO)</u>	GEO-AXIS-001 UKR FIRST-EVER drone strikes Sverdlovsk + Chelyabinsk 25-26 APR (1,700+km range escalation) UKR Crimea raid 25-26 APR (71+ drones; 3 ships + MiG-31 + Belbek + radar) Yaroslavl refinery 05-MAY (~15M tons/yr) NEW: Russian drone crashed in Galati Romania (NATO) 25-APR / 200 evacuated / 2 UK fighter jets scrambled / Romanian property damaged / FM summoned RU ambassador April RU output -300-400k bpd
<u>Japan / Sanriku Coast</u>	<u>PHS-001</u> M7.4 Sanriku Japan 20-APR; JMA megaquake advisory 1-week period closes today 06-MAY M6.1 Hokkaido 05-MAY Aftershock pattern monitoring continues
<u>Agricultural / Global Supply Chain</u>	<u>AGR-001</u> Winter wheat 30% G/E (down from 34% prior wk; from 45% YoY) KS top-state 24% G/E Corn 25% planted (vs LY 22% / 5-yr 19%), soybeans 23% planted, spring wheat 19% planted (9pts behind LY) Urea Egypt FOB +78% 30% global urea disrupted China export restrictions thru August 2026
<u>Space Environment / HF Comms</u>	<u>SWX-001</u> Kp 1-3 quiet through 05-MAY / Brief Kp 4 active spike from 23-APR CME / AR4420 produced M6 flare 05-MAY 22:51Z + 4 M-class + 17

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
	C-class flares 24h (with AR4425) / M6.4 03-MAY 18:15Z HF favorable for SKYWARN emergency comms during active CIG2 outbreak
<u>Cyber / Vulnerability Queue</u>	<u>CYB-001</u> CISA ED 25-03 V1 ArcaneDoor / FCEB device-inventory T-4 due 01-MAY <u>CYB-002</u> KEV 4-CVE batch T-6 due 04-MAY (PaperCut/TeamCity/Kentico/Quest KACE/Zimbra) <u>CYB-003</u> 03-MAY additions Samsung MagicINFO + SimpleHelp x2 + D-Link DIR-823X 3 Cisco Catalyst SD-WAN due 23-APR PASSED <u>CYB-005</u> AA26-097A Day 22

SECTION 2 — BLUF & MARKET INDICATORS

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

COMMODITY	PRE-WAR (28 FEB)	CURRENT (27 APR)	CHG vs PRE-WAR	48H TREND	CONSUMER / ANALYTICAL NOTE
Brent Crude (front)	~\$66/bbl	\$107-108/bbl	+62%	▲ +\$5-7 vs 23-APR close \$101.55 ▲ peaked >\$108 early 06-MAY	Brent peaked above \$108 early 06-MAY session before paring to ~\$106 on Iran proposal reports. +13% weekly gain last week (largest since early March). Trump 05-MAY ordered negotiators to suspend talks after Araghchi left Pakistan without meeting US officials; Pezeshkian ruled out negotiations under blockade. IEA characterizes the disruption as the largest energy supply shock on record. EIA STEO baseline: Brent peak 2Q26 \$115/b. Goldman Sachs (baseline): extended Hormuz closure could drive Brent to \$120/bbl Q3.
WTI Crude (front)	~\$63/bbl	\$95-96/bbl	+51%	▲ +\$3-4 vs 23-APR \$92.46 intraday high \$96.7	WTI tracking Brent rally; intraday high \$96.7 on 06-MAY. Risk premium reflects 3 US carriers in Middle East (first time since 2003 with USS GHW Bush 03-MAY), Sevan intercept 25-APR, and 37-ship cumulative US redirection.
Gasoline (natl avg)	~\$3.10/gal	\$4.031/gal	+30%	▼ -\$0.06 wk-over-wk pump-lag from Brent rally inbound	AAA national average \$4.031/gal direct 06-MAY (down from \$4.09 wk-over-wk; from \$4.16 two weeks ago). Most expensive CA (\$5.84); least OK (\$3.40); GA \$3.62 statewide. Pump lag 10-14 days: 06-MAY Brent \$111.16 intraday (highest since March; +2.71% session) rally will not reach consumers until early-mid May.
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	~\$210/bbl	+133%	▲ +1% ▲ slow	IATA. EASA CZIB 2026-03-R7 issued 03-MAY (extends to 01-MAY) covers 11-state ME airspace, sustaining supply

COMMODITY	PRE-WAR (28 FEB)	CURRENT (27 APR)	CHG vs PRE-WAR	48H TREND	CONSUMER / ANALYTICAL NOTE
					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 baseline. +35% MoM. 58-70% above long-run avg. 2026 crop year locked — no remediation window left this planting season. Winter wheat 30% G/E (down from 34% prior wk; from 45% YoY); KS top-state 24% G/E.
Anhydrous Ammonia (IL)	~\$800/ton	\$1,099.50/ton avg	+37%	~flat ~0%	USDA AMS Illinois T1. Planting accelerating: corn 25% (vs LY 22%, 5-yr 19%), soybeans 23%, spring wheat 19% (9pts behind LY). TN/TX/KY at 80%/71%/69% complete leaders.. 2-4 week window to Q3 food pass-through.
Ocean Freight (SCFI)	~1,333 pts	~1,950 pts	+46%	▲ vs prior cycle ▲ Hormuz dual blockade	Blockade Day 24. CENTCOM 37 ships redirected (cumulative). M/V Sevan (Iranian shadow-fleet) intercepted 25-APR by USS Pinckney + helicopter; Sevan complied turning back to Iran under escort. 3 US carriers in Middle East first time since 2003 (USS George H.W. Bush arrived 03-MAY). Iran allows 5-nation transits (CN/RU/IN/IQ/PK; +MY/TH/PH later). ~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

06 MAY 2026 | PREP-CON 3 ELEVATED | STABLE AWAITING AGREEMENT | OPERATION EPIC FURY DAY 68 | BLOCKADE Day 24 | LBN CF N/A of EXTENDED PERIOD (~17-MAY) | WHCD SHOOTING 25-APR | CISA ED 25-03 V1 ARCANEDOOR (T-3) | ARAGHCHI-PUTIN ST PETERSBURG TODAY

THE CYCLE — QUICK LOOK

- WHCD shooting 25-APR; Allen arraigned today (firearm in COV + assault on fed officer); "friendly federal assassin" manifesto — see [TER-001](#).
- CISA ED 25-03 V1 ArcaneDoor; FCEB inventory due 01-MAY (T-3); FIRESTARTER malware — see [CYB-001](#).
- SPC CIG2 high-end IL today; first IL warning issued ~13:58 CDT; multi-state outbreak IL/MO/IN/KY — see [WX-001](#) + [NWR-001](#) (18 transmitters affected, IL/IN/TN gaps overlap corridor).
- Araghchi met Putin St Petersburg today; Mojtaba Khamenei written message; new Iran Hormuz-nuclear decouple proposal pared Brent peak — see [GEO-002](#) + [FIN-001](#).
- Hormuz blockade Day 24; Sevan intercept 25-APR (USS Pinckney); 37 ships redirected; 3 carriers ME first since 2003 — see [GEO-001](#).
- Lebanon CF N/A of extended period (~17-MAY); Hezbollah "meaningless"; Netanyahu "vigorously attack" order — see [GEO-CF-LBN](#).
- UKR Crimea raid 25-26 APR + first Sverdlovsk/Chelyabinsk strikes (1,700+km) + Russian drone in Romania (NATO) — see [GEO-AXIS-001](#).

► Markets: Brent \$111.16 (+2.64%); WTI \$95.83; AAA \$4.031.

PRACTITIONER POSTURE: PREP-CON 3 sustain; 72-hr readiness for WHCD investigation evolution, CISA ED 25-03 V1 reporting (T-4), IL/MO/IN/KY tornado outbreak this evening, Lebanon CF over next 3 weeks.

NEW & UPDATED — THIS CYCLE ONLY

★ [TER-001](#) (UPDATED): **ALLEN ARRAIGNED 06-MAY / "FRIENDLY FEDERAL ASSASSIN" MANIFESTO / PATEL+BLANCHE PRESSER TODAY.** Allen arraignment today federal court; "friendly federal assassin" manifesto + anti-Trump signaling — full detail in TER-001.

★ [CYB-001](#) (NEW 23-APR): **CISA ED 25-03 V1 — ARCANEDOOR PERSISTS ON CISCO ASA/FTD VIA FXOS; FCEB INVENTORY DUE 01-MAY (T-3).** FCEB device-inventory due 11:59PM EST 01-MAY (T-3); FIRESTARTER malware identified — full detail in CYB-001.

★ [WX-001](#) (NEW): **SPC CIG2 HIGH-END SIGNAL CENTRAL/N IL TODAY; MULTI-STATE TORNADO OUTBREAK THREAT.** CIG2 hoisted central/N IL; first IL warning issued ~13:58 CDT; W IL ~2PM CT first arrivals — full detail in WX-001.

★ [WLDFR-001](#) (NEW): **GA/FL WILDFIRES — BRANTLEY 22,615+ ACRES / 87 HOMES DESTROYED / 6% CONTAINMENT / FL FF KIA 23-APR / KEMP SOE 91 COUNTIES + FIRST-EVER GA MANDATORY BURN BAN.** Brantley County Highway 82 Fire 22,615+ acres / 87 homes destroyed / 6% containment; FL volunteer FF Kevin Crews KIA 23-APR Old Dixie Fire; Kemp SOE 91 of 159 GA counties + first-ever statewide mandatory burn ban (30 days); GA ARNG UH-60 crews activated — full detail in WLDFR-001.

🔄 [GEO-001](#): **HORMUZ DUAL BLOCKADE Day 24 / SEVAN INTERCEPTED 25-APR / 37 SHIPS REDIRECTED.** Day 15 dual closure; Sevan intercept 25-APR (USS Pinckney); 37 ships redirected; 5-nation transit regime — full detail in GEO-001.

🔄 [GEO-CF-LBN](#): **LEBANON CF N/A of EXTENDED PERIOD; HEZBOLLAH "MEANINGLESS" / NETANYAHU 05-MAY ATTACK ORDER.** CF N/A of extended period (~17-MAY); Hezbollah "meaningless" + Netanyahu "vigorously attack" order; toll 2,491/7,719 — full detail in GEO-CF-LBN.

★ [GEO-002](#) (UPDATED): **ARAGHCHI MET PUTIN ST PETERSBURG TODAY / MOJTABA KHAMENEI WRITTEN MESSAGE / NEW IRAN HORMUZ-NUCLEAR DECOUPLE PROPOSAL.** Araghchi-Putin meeting occurred today; Mojtaba Khamenei written message disclosed; Iran proposal via Pakistani mediators decouples Hormuz from nuclear — full detail in GEO-AXIS-001.

★ [UKR-001](#) (NEW range escalation): **UKR CRIMEA RAID 25-26 APR (3 SHIPS + MIG-31) / YAROSLAVL REFINERY / FIRST DRONE STRIKES SVERDLOVSK + CHELYABINSK (1,700+KM).** UKR Crimea raid 25-26 APR (3 ships + MiG-31 + Belbek) + first Sverdlovsk/Chelyabinsk strikes (1,700+km) + Russian drone crashed Galati Romania (NATO) — full detail in GEO-AXIS-001.

★ [NWR-001](#) (NEW user-supplied 06-MAY; STATE B): **18 NWR TRANSMITTERS AFFECTED; IL/IN/TN GAPS OVERLAP TODAY'S CIG2 CORRIDOR.** 18 transmitters affected (15 OOS / 3 DEG, 16 states); IL Hillsboro + IN Angola + TN dual-gap overlap CIG2 corridor; NM triple-gap continues — full detail in NWR section.

🔄 [FIN-001](#): **BRENT \$107-108 / WTI \$95-96 / AAA \$4.031.** Brent \$111.16 (+2.64%); WTI \$95.83; AAA \$4.031; +13% weekly gain last wk; Iran proposal pared peak — full detail in FIN-001.

NOT DETAILED HERE (FULL NARRATIVE IN BODY): CYB-002 KEV 4-CVE batch T-6 04-MAY (in CRITICAL TIME HACK; full detail SEC 4A); CYB-003 KEV 03-MAY additions (full detail SEC 4A); NUC-001 IAEA blackout Day 68 / 440.9 kg HEU (standing; full detail SEC 4B); AVN-001 EASA CZIB R7 + Sterling VA TFR (standing; full detail SEC 6); PHS-001 M7.4 Sanriku / JMA megaquake advisory CLOSED 06-MAY (full

detail SEC 7); SWX-001 Kp 1-3 quiet HF favorable (standing; full detail SEC 7A); CN-001 PRC Scarborough / Antelope Reef / Taiwan 40-day (standing; in GEO-AXIS-001); AGR-001 CBOT settlements / winter wheat 30% G/E (standing; full detail SEC 7B); HLTH-001 SC measles OUTBREAK OVER / FL 21+ / H5N1 wk 15 / ARC blood Day 99 (standing; full detail SEC 9); CYB-007 Volt Typhoon (standing); TRV-001 State Dept Iran Level 4 + 11-state CZIB R7 (in AVN-001); TER-002 DHS NTAS gap Day 68 (standing).

DECISIVE WINDOW: Next 72 hrs — (1) WHCD/Allen investigation; (2) CISA ED 25-03 V1 reporting due 01-MAY (T-3); (3) IL/MO/IN/KY outbreak today peaking through evening; (4) Iran-Russia track post Araghchi-Putin; (5) LBN CF resilience to ~17-MAY.

SECTION 3 — FLASH EVENTS (Score ≥ 20)

TER-001 | WHCD shooting 25-APR / Trump unharmed / Suspect Cole Tomas Allen, 31, Torrance CA / Allen ARRAIGNED 06-MAY federal court (firearm in crime of violence + assault on federal officer) / 1,000+ word "friendly federal assassin" manifesto sent ~10 min pre-attack / Patel + Blanche presser today

FLASH | UPDATED | 28

WHY THIS CYCLE

Allen arraignment today federal court; "friendly federal assassin" manifesto + anti-Trump signaling now public; Patel + Blanche presser today.

Summary

Size: Single attacker (Cole Tomas Allen, 31, Torrance CA); cooperating family disclosed weapons and pre-attack manifesto; no co-conspirators identified to date.
Activity: Attempted attack on the WHCD: charged the Washington Hilton security checkpoint armed; fired 1–2 rounds before being tackled by LE; USSS officer returned 3–4 rounds; one USSS agent struck in chest (vest-stopped, expected to recover); POTUS, FLOTUS, VP, Cabinet evacuated unharmed. Allen arraigned 06-MAY federal court (firearm in crime of violence + assault on federal officer); 1,000+ word "friendly federal assassin" manifesto sent to family ~10 minutes pre-attack.
Location: Washington Hilton, Washington DC (attack site); Sterling VA TFR FDC 6/5355 (5nm AML050010, 0830–1830 local 05-MAY) imposed in immediate aftermath; Allen residence Torrance CA (weapons stored at parents' home); travel route CA → Chicago → DC by train.
Unit: FBI (lead investigation; Director Patel briefing today); USSS (protective detail; agent shot); DOJ/Acting AG Blanche (presser today); Senate Judiciary (Chairman Grassley briefing scheduled); New London CT PD (initial family contact 22:49 ET).
Time: Attack ~2030 ET 25-APR-2026; family contacted New London CT PD 22:49 ET; SS learned of letters 21:00–23:00 ET; Allen check-in Friday 03-MAY (booked early April); arraignment + Patel/Blanche presser 06-MAY (today); WHCD rescheduled 30 days.
Equipment: Shotgun (purchased Aug 2025); handgun (purchased 2023); multiple knives; 1,000+ word manifesto distributed to family pre-attack; no explosives or vehicle-borne devices identified.

Analyst Assessment

THIRD ATTEMPT IN <2 YEARS: Butler PA Jul 2024 / West Palm Beach Sep 2024 / WHCD Apr 2026. The cumulative pattern is now operationally distinct from any single incident: USSS protective bandwidth and venue selection are likely to tighten across all subsequent presidential events.
FRAMING SHIFT: AG Blanche 05-MAY "targeting Trump and administration" framing moves the incident from "crazed individual at hotel" to attempted assassination with an administration-wide target set, which has knock-on effects for cabinet travel and field events through May.
IO CONTEST: Iran state media (Tasnim) has called the assassination plot framing into broader contestation; expect IO operations to attempt to muddy attribution. Treat all third-party attribution claims with LOW confidence absent USG/FBI corroboration.
PRACTITIONER POSTURE: Federal protective-detail extraction-readiness up. State EM coordinators reviewing field-event posture. Private-sector security director attention to ballroom/conference venue access controls.

ALT HYP	<p>TRIPWIRES: (1) Patel + Blanche presser today — manifesto excerpts, ballistics, motive characterization; (2) Discovery of co-conspirators or pre-attack contacts; (3) Any IO claim of credit by foreign actor; (4) FBI BAU formal psychological profile; (5) Senate Judiciary briefing readout (Grassley); (6) Any second-incident reporting; (7) USSS protocol changes for upcoming presidential events.</p>
	<p>ALT A: Lone actor with mental-health/ideological grievance; no foreign nexus [MOST LIKELY]</p>
	<p>Cross-country train travel + family-sent manifesto + cooperative family pattern matches lone-actor profile (cf. multiple post-2020 federal-target attempts).</p>
	<p>✓ Supporting Evidence: Cooperative family; alleged manifesto sent before action; no operational tradecraft beyond hotel proximity.</p>
	<p>✗ Ruling-Out Evidence: AG framing of "targeting Trump and administration" implies investigators see broader intent; could signal additional findings not yet public.</p>
	<p>ALT B: Inspired by but not directed by foreign IO/incitement [LESS LIKELY]</p>
	<p>Op Epic Fury Day 68 / WH ME diplomacy + WHCD as symbolic target may have provided ideological cover for an inspired actor without direct foreign control.</p>
	<p>✓ Supporting Evidence: IRGC/MOIS public threats during Op Epic Fury (baseline INS-001); Iran state media echoing assassination narrative.</p>
	<p>✗ Ruling-Out Evidence: No specific evidence of foreign communications; lone-actor pattern dominates; AG/FBI silence on foreign nexus would be remarkable if present.</p>
	<p>ALT C: Directed/orchestrated by foreign actor or domestic extremist network [UNLIKELY]</p>
	<p>Tradecraft (hotel co-location, terrace approach via stairwell) could support a directed action.</p>
	<p>✓ Supporting Evidence: Possible co-conspirators not yet disclosed; manifesto contents not public.</p>
<p>✗ Ruling-Out Evidence: No evidence of network; family cooperation implies no operational compartmentalization; absence of foreign-attribution leaks unusual if present.</p>	

<p>CYB-001 CISA ED 25-03 V1 issued 23-APR — ArcaneDoor APT persistence on Cisco ASA/FTD via FXOS base OS / FCEB device-inventory due 11:59PM EST 01-MAY (T-3) / FIRESTARTER malware named</p>		<p>FLASH NEW 25</p>
<p>WHY THIS CYCLE</p>	<p>CISA + Cisco PSIRT determined the persistence mechanism survives the September 2025 fixed releases. V1 supersedes the September 2025 ED 25-03 required actions and adds a new agency reporting requirement. T-4 today.</p>	
<p>Summary</p>	<p>Size: ArcaneDoor APT campaign; FCEB-wide reporting requirement covers all federal civilian agencies operating Cisco Firepower 1000/2100/4100/9300 + Secure Firewall 200/1200/3100/4200/6100 series; scope extends to DIB, financial services, regulated healthcare running same models.</p> <p>Activity: CISA Emergency Directive 25-03 V1 issued 23-APR-2026 after determining ArcaneDoor persistence mechanism survives September 2025 fixed releases; FIRESTARTER</p>	

malware identified for remote access/control of Cisco Firepower & Secure Firewall devices; FCEB agencies must report complete inventory + actions-taken + results to CISA.
Location: Persistence resides in Cisco Firepower eXtensible Operating System (FXOS) base OS underlying ASA Software and FTD Software on Firepower hardware; targeting US federal civilian network edge.
Unit: Threat actor: ArcaneDoor APT (no public attribution; tradecraft pattern consistent with PRC-affiliated long-dwell ops, cf. Volt Typhoon CYB-007 baseline). Defenders: CISA + Cisco PSIRT joint advisory; FCEB agencies + their SecOps teams.
Time: ED issued 23-APR-2026; FCEB device-inventory + actions report due 11:59 PM EST 01-MAY-2026 (T-3 today); concurrent stacked deadlines: KEV 4-CVE batch FCEB-due 04-MAY (T-6); ED 26-03 (Cisco SD-WAN, Feb 2026) running in parallel.
Equipment: Initial vectors: CVE-2025-20333 (RCE) + CVE-2025-20362 (privilege escalation), both exploited prior to September 2025 patches. Persistence primitive: FXOS base OS layer (difficult to detect with standard EDR). FIRESTARTER malware toolset; CISA core-dump + hunt instructions are operative artifacts.

Analyst Assessment

PATCH-DOES-NOT-MEAN-CLEAN: Functionally a notice that the September 2025 fix did not eliminate the threat actor. Agencies that completed ED 25-03 in September and considered the matter closed must now re-engage. SecOps capacity is the binding constraint.
SCOPE BEYOND FCEB: Defense Industrial Base, financial services, and regulated healthcare running the same Cisco models should treat the FCEB requirements as the floor, not the ceiling. ArcaneDoor targeting is not limited to government.
STACKED DEADLINES: CISA simultaneously running ED 26-03 (Cisco SD-WAN, Feb 2026) and the 04-MAY 4-CVE KEV batch. SecOps teams have stacked deadlines this and next week.
PERSISTENCE PRIMITIVE: FXOS is base OS underlying ASA Software and FTD Software; persistence at this layer is by design difficult to fully detect with standard EDR. CISA core-dump + hunt instructions are the operative artifacts.
TRIPWIRES: (1) Any FCEB agency missing the 01-MAY reporting deadline; (2) Disclosure of compromise indicators by named federal agency; (3) FIRESTARTER detection in non-federal environment; (4) Cisco issuing additional FXOS-layer patches; (5) ArcaneDoor attribution development (e.g., named state).

ALT HYP

ALT A: ArcaneDoor PRC-affiliated APT operation focused on federal lateral movement [MOST LIKELY]

ArcaneDoor targeting and tradecraft pattern (Cisco edge, persistence via base OS, long dwell) maps to PRC-affiliated APT signatures (cf. Volt Typhoon CYB-007 baseline).

✓ **Supporting Evidence:** CISA + Cisco PSIRT joint advisory; named persistence mechanism; FIRESTARTER toolset; multi-agency targeting.

✗ **Ruling-Out Evidence:** CISA has not publicly attributed; multiple state actors have demonstrated similar Cisco-edge targeting capability.

ALT B: Iran-affiliated APT operation parallel to AA26-097A OT/PLC line [LESS LIKELY]

AA26-097A Day 22 demonstrates active Iranian-affiliated APT activity against US infrastructure during Op Epic Fury; ArcaneDoor could be a second prong.

✓ **Supporting Evidence:** Active Iran-affiliated cyber activity per AA26-097A; war-period escalation.

✗ **Ruling-Out Evidence:** ArcaneDoor tradecraft pattern more consistent with PRC-style long-dwell than Iran-style faster-tempo operations; technical sophistication of FXOS persistence not consistent with prior Iran-affiliated tradecraft.

WLDFR-001 | GA/FL WILDFIRES — Brantley County Highway 82 Fire 22,615+ acres / 87 homes destroyed / 6% containment / Pineland Road Fire Clinch County / FL volunteer FF Kevin Crews KIA (Old Dixie Fire 23-APR) / Kemp SOE 91 counties + first-ever GA mandatory burn ban / FL ~120,000 acres YTD

FLASH | NEW | 27

WHY THIS CYCLE

GAP CLOSED: GA/FL wildfires were missed in 06-MAY DTR/DPB. Brantley fire is largest active wildfire in CONUS this cycle. Kemp declared SOE in 91 GA counties + first-ever statewide mandatory burn ban (30 days). FL volunteer FF Kevin Crews KIA 23-APR Old Dixie Fire (medical emergency). NIFC YTD national 22,996 incidents / 1,821,049 acres burned per 05-MAY IMSR. Smoke corridor reached Atlanta, Savannah, Jacksonville, parts of South Georgia AQI unhealthy. NWR Baxley WXM65 OOS within wildfire smoke corridor (compound; see NWR-001).

Summary

Size: Brantley County Highway 82 Fire 22,615+ acres / 87 homes destroyed / 6% containment (largest active CONUS wildfire this cycle); Pineland Road Fire (Clinch County GA) separate large fire; FL Old Dixie ~500 acres contained; FL Railroad Fire ~4,800 acres nearing containment; multiple additional FL fires under CIMT (Sand Drain, Griffis, Gun Range, 139, Sargent, SR 26, Diamond Back 48, Mill Pond, Rosindale Road); NIFC YTD national 22,996 incidents / 1,821,049 acres burned.

Activity: Active multi-fire wildland emergency: structure loss + railroad infrastructure threatened + evacuations + area/road closures; Kemp declared State of Emergency 91 of 159 GA counties + first-ever statewide mandatory burn ban (30 days); FL volunteer FF KIA 23-APR Old Dixie Fire (medical emergency); GA ARNG UH-60 Black Hawk crews activated for support; AQI unhealthy across Atlanta, Savannah, Jacksonville, parts of South Georgia.

Location: Brantley County GA (Highway 82 Fire, between coastal beaches and Okefenokee Swamp; CSX SE rail freight corridor exposure); Clinch County GA (Pineland Road Fire); Hilliard FL (Old Dixie / Nassau County); Clay/Putnam counties FL (Railroad Fire); multiple FL CIMT fires Olustee/Water Town/Gainesville/Christmas/Telogia areas; smoke corridor Atlanta → Savannah → Jacksonville → South GA; NWR Baxley WXM65 OOS within smoke corridor.

Unit: Georgia Forestry Commission (lead Brantley); CIMT (SA Team 1) managing Brantley under GFC; National Forests in FL CIMT (multiple FL fires); Hilliard VFD (FF Crews KIA); Nassau County Sheriff; Georgia EMA + Governor’s office; Georgia Army National Guard 78th Aviation Troop Command 1-169th Aviation Regiment; FL Agriculture Commissioner Wilton Simpson; NIFC.

Time: Brantley fire active and expanding (doubled between 05-MAY and 06-MAY); Crews KIA 23-APR; Kemp SOE + burn ban current; AccuWeather forecast 1–4" rain through weekend TX→TN, 0.5–1" N FL→NC — meaningful but insufficient (12+ inches needed to recover from drought); FL drought 18 months; SE GA ~11 inches rain since September (~15 inches below normal).

Equipment: CIMT Type 1 management structure; GA ARNG aviation (UH-60 Black Hawks); GFC ground resources; NIFC IMSR coordination; mutual-aid framework with NICC support; air-quality monitoring; potential FEMA Stafford Act major disaster declaration pending.

Analyst Assessment

GAP CLOSURE: This was missed in 06-MAY DTR/DPB. Brantley fire alone is largest active wildfire in CONUS and meets FLASH-NEW threshold (KIA + SOE 91 counties + first-ever GA mandatory burn ban + railroad/CI infrastructure threatened + ~31 sq mi active in WUI).

NWR COMPOUND: GA Baxley WXM65 OOS sits within the wildfire smoke corridor covering Appling/Pierce/Wayne/Jeff Davis counties — degraded primary alerting during active wildfire/smoke emergency AND Day 2-3 severe-weather shift (see NWR-001 + WX-001).

CRITICAL INFRASTRUCTURE EXPOSURE: NIFC IMSR confirms numerous structures and RAILROAD INFRASTRUCTURE threatened. Brantley County is between coastal beaches and Okefenokee Swamp; primary thru-corridor for CSX rail freight serving SE ports. Disruption of rail service has cascading supply-chain implications.

LINE-OF-DUTY DEATH: Volunteer FF Kevin Crews KIA 23-APR is the first wildfire-related fatality of the SE 2026 season per Hilliard VFD. Medical-emergency cause does not diminish operational impact; expect SAFETY stand-down and IMT pause for after-action review.

DROUGHT BASELINE: SE GA / N FL in exceptional or extreme drought per US Drought Monitor (the most dire levels). 18-month drought across FL. Forecast rainfall through weekend (1-4" TX-TN, 0.5-1" N FL-NC) is meaningful but insufficient. Drought Monitor reports 12+ inches needed to recover. Fire risk persists for weeks regardless of weekend rainfall.

SPLIT CONFIDENCE: HIGH on Brantley acreage 22,615 + 87 homes + 6% containment (T1 GFC + AccuWeather + AP per 06-MAY). HIGH on Crews KIA 23-APR (T1 Hilliard VFD + Nassau County Sheriff). HIGH on Kemp SOE + burn ban (T1 Georgia EMA + Governor's office). HIGH on NIFC IMSR fire list and CI-exposure language (T1 NIFC).

TRIPWIRES: (1) Brantley acreage exceeds 30,000; (2) Containment regression below 5%; (3) Major-population evacuation order (Brunswick / Waycross / Lake Park); (4) Railroad service suspension on CSX SE corridor; (5) FEMA Stafford Act major disaster declaration request from Kemp; (6) Second LODD; (7) Dry lightning trigger of new ignitions; (8) Smoke-driven highway closures (I-95, I-75, I-10).

ALT HYP

ALT A: Brantley fire grows 30,000+ acres before containment; major-population evacuation; rail service disruption [MEDIUM]

Drought + wind + dry vegetation; 6% containment baseline very low; CSX corridor exposure.

✓ **Supporting Evidence:** Trajectory of doubling between 05-MAY and 06-MAY; critical-infrastructure language in NIFC IMSR.

✗ **Ruling-Out Evidence:** Weekend rainfall (1-4" forecast) may slow growth; CIMT Type 1 management in place; National Guard aviation deployed.

ALT B: Weekend rainfall enables aggressive containment; fire reaches 50%+ containment by mid-week; no major evacuation [EQUALLY LIKELY]

Forecast rainfall provides operational window; CIMT Type 1 + GA ARNG aviation support; experienced IMT.

✓ **Supporting Evidence:** NWS forecast confirms 1-4" rainfall potential ArkLATex through TN; SE FL/GA gets 0.5-1".

✗ **Ruling-Out Evidence:** Drought too deep for forecast rainfall to fully suppress; fire conditions persist for weeks per NOAA.

ALT C: New ignitions from dry lightning create multi-fire complex exceeding GA mutual-aid capacity [LOWER]

Drought conditions + thunderstorm activity in adjacent regions could produce dry lightning.

✓ **Supporting Evidence:** Pattern includes thunderstorm risk over the Southeast through weekend per WPC.

✗ **Ruling-Out Evidence:** GA mutual-aid framework + NICC support typically prevents complex overload at this scale; IMT structure scales.

GEO-001 | Hormuz dual blockade Day 24 / 37 ships redirected by US (cumulative) / M/V Sevan intercepted 25-APR Arabian Sea (USS Pinckney DDG-91) / 3 US carriers in ME first time since 2003

FLASH | UPDATED | 25

WHY THIS CYCLE

Araghchi-Putin meeting occurred today; new Iran Hormuz-nuclear decouple proposal (Axios) drove early-session Brent pullback from peak >\$108.

Summary

Size: Hormuz dual blockade Day 24; CENTCOM 37 ships redirected (cumulative); 3 US carriers in ME first time since 2003 (USS GHW Bush arrived 03-MAY); ~20,000 seafarers stranded Gulf; 5-nation Iran-permitted transit regime (CN/RU/IN/IQ/PK; +MY/TH/PH later); Iran death toll ~3,400 per Iran forensics chief 03-MAY.

Activity: USS Pinckney (DDG-91) helicopter intercepted Iranian shadow-fleet vessel M/V Sevan in Arabian Sea late 25-APR; Sevan complied, turned back to Iran under escort. Iran FM Araghchi met Putin in St Petersburg today 06-MAY (handshake at Boris Yeltsin Presidential Library); Putin disclosed written message from Mojtaba Khamenei (Supreme Leader since 28-FEB strikes). Pre-Russia: Araghchi met Oman’s Sultan Haitham 05-MAY. NEW Iranian proposal via Pakistani mediators (Axios 05-MAY): decouple Hormuz from nuclear; postpone nuclear talks until blockade lifted. Trump 05-MAY suspended negotiators (cancelled Witkoff/Kushner Pakistan trip); SecDef Hegseth: blockade continues “without hesitation or apology.” Pezeshkian: no negotiations under blockade.

Location: Strait of Hormuz (primary TSS hazard area); Arabian Sea (Sevan intercept); St Petersburg Russia (Boris Yeltsin Presidential Library, Araghchi-Putin meeting); Muscat Oman (Araghchi-Sultan Haitham 05-MAY); Persian Gulf (~20,000 stranded seafarers); ME-wide US carrier disposition.

Unit: US: CENTCOM, USS Pinckney (DDG-91), USS George H.W. Bush (CSG), 3-carrier strike posture, SecDef Hegseth, POTUS Trump, Witkoff/Kushner (cancelled). Iran: FM Abbas Araghchi, Supreme Leader Mojtaba Khamenei (written messages only), President Pezeshkian, IRGC/Sepah Navy (bridge-to-bridge VHF hailing), Iranian shadow-fleet (M/V Sevan). Russia: President Putin, MFA. Mediators: Pakistan (track failed), Oman (Sultan Haitham), Russia (substantive successor).

Time: Blockade Day 24 (US closure since 13-APR; Iran threat-of-force closure since 13-APR); Sevan intercept 25-APR; USS GHW Bush arrival 03-MAY; Trump 05-MAY suspension; Araghchi-Putin meeting 06-MAY (today); Iran ~3,400 toll baseline 03-MAY; Op Epic Fury Day 68.

Equipment: USN: 3 CSGs in ME (sustained-enforcement posture, prior deployments measured 30–60 days); destroyer + helo intercept capability. Iran: shadow-fleet tankers (Sevan-class compliance pattern); Sepah Navy fast-attack craft; standing kinetic-threat baseline (mine reports persist; war-risk insurance pulled; Lloyd’s peak ~5% hull value, 100x pre-crisis).

Analyst Assessment

OPERATIONAL POSTURE: Blockade now 15 days durable. With 3 carriers in the Middle East for the first time since 2003 and CENTCOM having redirected 37 ships cumulative, the operational posture is now structurally distinct from the prior 30-day surge model — this is a sustained closure with Iranian acquiescence on day-to-day non-permitted shipping but standing kinetic-threat baseline.

DIPLOMATIC PIVOT: Araghchi-Putin St Petersburg today, immediately after Araghchi left Pakistan without meeting US officials following Trump’s 05-MAY negotiator-suspension order, signals Iran’s pivot toward Russian rather than Pakistani back-channel. The Pakistani track was never producing; the St Petersburg track is the substantive successor and likely the venue where any framework ultimately surfaces.

FORCE POSTURE / CARRIER COMMITMENT: Three carriers in ME first time since 2003 is the headline force-commitment signal. The Bush addition signals US prepared for sustained 90+ day blockade enforcement; previous deployments measured 30-60 days.

TOLL CONSOLIDATION: Iran forensics chief 03-MAY ~3,400 figure represents Iran-side consolidation of the prior split between Iran HRANA (~3,636) and IRGC-side Hengaw (~6,620). Iran narrative is a unified ~3,400 figure.

SPLIT CONFIDENCE: HIGH on Sevan intercept 25-APR (CENTCOM + Pinckney + Reuters multi-stream). HIGH on 3 carriers ME first since 2003 (CENTCOM + USNI + Reuters). HIGH on Trump 05-MAY negotiator suspension (Reuters + WH). HIGH on Araghchi-Putin today (Tasnim + Iran MFA + Russian MFA). HIGH on Pezeshkian no-negotiations-under-blockade (T1 IRNA + state TV). MODERATE on Iran ~3,400 toll (Iran-side single-source consolidation; HRANA + Hengaw splits remain in archive).

TRIPWIRES: (1) Russian framework proposal post-meeting; (2) US response to Iran Hormuz-nuclear decouple proposal (Axios 05-MAY); (3) Any direct Mojtaba Khamenei outreach beyond written messages; (4) CENTCOM intercept count to 40+; (5) Any US-flag or US-allied-flag

ALT HYP	vessel incident in TSS; (6) Iran formal statement on Sevan intercept; (7) Sustained kinetic incident with multi-stream attribution.
	ALT A: St Petersburg track produces Russian-mediated framework within 14 days [EQUALLY LIKELY]
	Araghchi-Putin meeting completed today opens the substantive successor to the failed Pakistani track. Russia has standing leverage with Iran, and Putin gets diplomatic prestige (now reinforced by Mojtaba Khamenei written message). US tolerates as face-saving off-ramp; Iran new Hormuz-nuclear decouple proposal (Axios 05-MAY) is the substantive opening offer.
	✓ Supporting Evidence: Araghchi-Putin met today (St Petersburg); Russia-Iran 20-year strategic agreement framework; Putin previous role in 2015 JCPOA; US tolerates Russian mediation when bilateral is foreclosed.
	✗ Ruling-Out Evidence: Pezeshkian "no negotiations under blockade" precondition; Trump 05-MAY suspension order; US not currently signaling Russian-mediated track acceptable.
	ALT B: Blockade durable through Q2; no diplomatic resolution; sustained sub-kinetic equilibrium [EQUALLY LIKELY]
	Both sides settle into 90+ day stalemate: US sustains blockade with 3 carriers, Iran maintains kinetic-threat baseline with 5-nation transit exception, oil settles in \$100-110 range, no new round of strikes.
	✓ Supporting Evidence: 3 carriers signal sustained-enforcement posture; Iran 5-nation exception preserves flow; oil priced below collapse-trigger levels.
	✗ Ruling-Out Evidence: Domestic political pressure on both sides for resolution; Pezeshkian Iranian-domestic posture; Trump WHCD-aftermath political environment.
	ALT C: Kinetic incident triggers limited US strikes within 30 days [LESS LIKELY]
Iran tests blockade with proxy maritime attack (Houthi reactivation; mine event in TSS; Iranian-flagged vessel kinetic-resists intercept) and US responds with limited strikes. Oil \$115-125.	
✓ Supporting Evidence: Houthi WATCH-007 reservation pattern; IRGC Khatam al-Anbiya retaliation pledge stands; Sevan intercept narrative could prompt Iran-side face-saving kinetic.	
✗ Ruling-Out Evidence: Both sides retain economic interest in containment; Pakistani-then-Russian off-ramp track preserves diplomatic geometry; mine reports remain unverified.	
SOURCES	CENTCOM (Sevan intercept; Pinckney; redirection counts) Reuters (Araghchi Pakistan departure; Trump suspension) Tasnim / IRNA (Araghchi-Putin scheduling; Pezeshkian) USNI News (3-carrier Middle East deployment) Media Line (37-ship cumulative redirection) Iran forensics chief (03-MAY ~3,400 toll) Full Source Registry

GEO-CF-LBN | LBN CF N/A / FIRST HEZBOLLAH KINETIC KILL since CF: Sgt Idan Fooks 19 KIA 05-MAY FPV drone Taybeh (7th Armored Brigade 77th Battalion) / 6 wounded (4 severely) / IDF 06-MAY struck 20+ Beqaa Valley + S. Lebanon sites / Golani took/destroyed Hezbollah HQ Bint Jbeil / Hezbollah official 06-MAY threatened SUICIDE BOMBERS

FLASH | NEW | 27

<p>WHY THIS CYCLE</p>	<p>FIRST HEZBOLLAH KINETIC KILL since 16-APR CF onset: Sgt Fooks 19 KIA 05-MAY Taybeh by FPV drone; 6 wounded same engagement (4 severely); 06-MAY additional severe casualty. Hezbollah official 06-MAY threatened return to 1980s SUICIDE BOMBER tactic. IDF 06-MAY struck 20+ Beqaa Valley + S. Lebanon Hezbollah sites; Golani took/destroyed Hezbollah HQ Bint Jbeil + 50+ infrastructure sites. Katz 06-MAY: Hezbollah chief Naim Qassem "playing with fire"; Aoun "gambling with Lebanon's future."</p>
<p>Summary</p>	<p>Size: First IDF KIA inside CF window: Sgt Idan Fooks, 19, of Petah Tikva (7th Armored Brigade, 77th Battalion); 6 wounded same engagement (4 severely); 06-MAY additional severe casualty; Lebanese Health Ministry baseline 2,491 KIA / 7,719 wounded / ~1.2M displaced since 02-MAR; toll pace 37 KIA + 61 wounded between 03–05-MAY (~12–20 KIA/day during CF, below 50/day earlier-cycle pace).</p> <p>Activity: Hezbollah FPV drone strike near Taybeh 05-MAY killed Sgt Fooks; two follow-on Hezbollah drones targeted medevac response (one intercepted by IDF, one detonated near medevac aircraft) — indicates pre-planned engagement geometry. IDF 06-MAY struck ~20 Hezbollah sites in southern Lebanon + eastern Beqaa Valley (weapon depots, rocket-firing buildings, manufacturing/storage being restored). Division 36 seized Hezbollah ATGMs, drones, RPGs from underground infrastructure. Golani Brigade destroyed 50+ Hezbollah infrastructure sites (including underground C2 facility) and took/destroyed Hezbollah HQ at Bint Jbeil. Hezbollah official 06-MAY publicly threatened return to 1980s suicide-bomber tactics. Netanyahu 05-MAY ordered IDF to “vigorously attack” Hezbollah.</p> <p>Location: Southern Lebanon (Taybeh — Fooks KIA; Bint Jbeil — Hezbollah HQ destroyed by Golani; Yellow Line 8–10 km buffer separating ~55 villages); eastern Beqaa Valley (IDF 06-MAY strike package); ~6% of Lebanese territory currently under Israeli occupation; northern Israel (FPCON elevation pending).</p> <p>Unit: IDF: 7th Armored Brigade 77th Battalion (Fooks unit); Division 36; Golani Brigade. Hezbollah: combat formations including FPV-drone teams; senior officials (rhetorical posture). Gol: PM Netanyahu, Defense Minister Katz (met UN special coordinator Hennis-Plasschaert 06-MAY). GoL: President Aoun (Katz: “gambling with Lebanon’s future”); Hezbollah lawmaker Ali Fayyad (“meaningless” framing); Hezbollah chief Naim Qassem (Katz: “playing with fire”). Opposition: Bennett (“Together” opposition slate, “containment policy” charge).</p> <p>Time: CF onset 16-APR; CF currently in extended period running to ~17-MAY; Fooks KIA 05-MAY; Netanyahu order 05-MAY; IDF 06-MAY strike package + Bint Jbeil HQ destruction 06-MAY; Hezbollah suicide-bomber threat 06-MAY; Katz/Hennis-Plasschaert meeting 06-MAY.</p> <p>Equipment: Hezbollah: FPV (one-way attack) drones; ATGMs, RPGs, underground infrastructure; rocket-launching real estate; restored manufacturing/storage. IDF: ground maneuver (Division 36, Golani); strike package against ~20 sites in single day; medevac aviation; counter-UAS interception. Yellow Line buffer (8–10 km) as physical separation construct.</p>
<p>Analyst Assessment</p>	<p>FIRST KINETIC KILL CHANGES THE FRAME: Sgt Fooks KIA 05-MAY + 4 severely wounded + 06-MAY additional severe casualty constitutes the first sustained Hezbollah kinetic effect inside the CF window. The Hezbollah FPV-drone-with-medevac-follow-on tactic indicates pre-planned engagement geometry, not opportunistic exchange. The "ceasefire" descriptor is operationally inaccurate at this point.</p> <p>SUICIDE-BOMBER THREAT IS SIGNIFICANT: 06-MAY Hezbollah official threat to revive 1980s suicide-bomber tactics is a substantive escalation in stated intent. Even if not immediately operationalized, the threat itself drives Israeli FPCON elevation in northern Israel + at IDF deployments in southern Lebanon — and is a force-multiplier on Hezbollah's declared deterrent posture.</p> <p>IDF 06-MAY RESPONSE TEMPO: 20+ targets in S. Lebanon + Beqaa Valley in a single day; 50+ infrastructure sites destroyed by Golani; HQ at Bint Jbeil taken/destroyed; underground C2 facility destroyed. This is operational-tempo response, not punitive symbolism. Indicates IDF is prepared to convert the Netanyahu 05-MAY "vigorously attack" order into sustained shaping operations.</p>

TOLL PACE: 37 KIA + 61 wounded between 03-MAY and 05-MAY baselines (~12-20 KIA/day during CF) - below the 50/day pace earlier in the cycle but operationally significant inside a truce.

YELLOW LINE OCCUPATION: ~6% of Lebanese territory under Israeli occupation. Yellow Line (8-10 km buffer) separates ~55 villages. Disarmament demand remains Hezbollah red line; Israeli withdrawal demand remains Lebanese-government red line. The 17-MAY clock ends without these resolved; the kinetic kill makes resolution materially harder.

SPLIT CONFIDENCE: HIGH on Fooks KIA + 6 wounded + medevac-follow-on tactic (T1 IDF + Times of Israel + Jerusalem Post). HIGH on IDF 06-MAY strike package (T1 IDF + Times of Israel). HIGH on Golani Bint Jbeil HQ + 50+ sites (T1 IDF). HIGH on Hezbollah suicide-bomber threat 06-MAY (T1 multiple Israeli outlets). HIGH on Katz/Hennis-Plasschaert meeting (T1 Defense Min office). MEDIUM on Hezbollah pre-planned-versus-opportunistic engagement assessment (analytical inference).

TRIPWIRES: (1) Suicide-bomber attack inside Israel or against deployed IDF; (2) Hezbollah long-range rocket fire (>20km penetration); (3) Second IDF KIA inside CF window; (4) IDF operation north of Litani; (5) Lebanese army deployment announcement; (6) Aoun-Netanyahu trilateral statement; (7) Trump direct intervention before 17-MAY; (8) FPV-drone strike against Israeli civilian infrastructure or settlement.

ALT HYP

ALT A: Extended CF holds to ~17-MAY with sustained kinetic friction; no framework [EQUALLY LIKELY]

Both sides continue current pattern: IDF strikes Hezbollah operatives "violating ceasefire understandings"; Hezbollah sustains symbolic responses; toll continues 12-20 KIA/day; CF expires 17-MAY without resolution; new extension or full collapse decision at that point.

✓ **Supporting Evidence:** 03-MAY–05-MAY pattern matches; Lebanese Health Ministry toll consistent with sustained-friction model; Netanyahu order without escalation step.

✗ **Ruling-Out Evidence:** Hezbollah "meaningless" framing could prompt either side to break out; Israeli political pressure for "final" operation; Iran-side pivot via Russia could shift Lebanon dynamic.

ALT B: CF collapses inside extended period; full Hezbollah-IDF resumption [EQUALLY LIKELY]

Hezbollah rocket exchange escalates beyond IDF tolerance; Netanyahu 05-MAY order converts to expanded operations; Israel pushes north of Litani; Lebanese government fails to disarm Hezbollah; full kinetic resumption.

✓ **Supporting Evidence:** Netanyahu 05-MAY vigorously-attack order; Hezbollah "meaningless" framing; sustained kinetic tempo through truce; Iran-Russia pivot may release Hezbollah from restraint.

✗ **Ruling-Out Evidence:** Both sides retain political stake in avoiding full resumption; US ownership of CF via Trump 23-APR investment; Trump WHCD-aftermath domestic pressure for foreign-policy stability.

ALT C: Lebanese army deploys south of Litani; CF stabilizes with international support [LESS LIKELY]

Aoun-led Lebanese government formally deploys LAF south of Litani per UNSCR 1701; Israeli withdrawal from Yellow Line; framework converts CF to durable peace.

✓ **Supporting Evidence:** Aoun 20-APR talks objectives; LAF readiness baseline; international donor commitments to LAF capacity-building; Karam diplomatic track.

✘ **Ruling-Out Evidence:** Disarmament impasse; Hezbollah armed presence; Israeli "ultimate goal" rhetoric; lack of international peacekeeping force willing to deploy under hostile conditions.

SOURCES

[White House \(Trump 23-APR extension announcement\)](#) | [Lebanese Health Ministry \(toll baseline 2,491/7,719\)](#) | [Times of Israel \(Netanyahu 05-MAY vigorously-attack order\)](#) | [Reuters \(Hezbollah Fayyad meaningless framing\)](#) | [Al Jazeera \(03-MAY Bint Jbeil + Toulain strikes\)](#) | [CPJ \(8 journalists killed baseline\)](#) | [Full Source Registry](#)

FIN-001 | Oil / Gas / Markets — Brent \$111.16 intraday (highest since March; +2.71% session)/bbl 06-MAY (peaked >\$108 early; pared to ~\$106 on Iran proposal reports) / WTI \$95-96 / AAA \$4.031/gal direct / +13% weekly gain last week (largest since early March) / IEA: largest energy supply shock on record

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WHY THIS CYCLE

Brent \$111.16 (+2.64%); Iran Hormuz-nuclear decouple proposal pared peak >\$108 to ~\$106 intraday.

Summary

Size: Brent \$111.16 intraday 06-MAY (highest since March; +2.71% session); peaked >\$108 early, pared to ~\$106 on Iran proposal reports; +13% weekly gain last week (largest since early March). WTI intraday high \$96.7/bbl. AAA national gasoline \$4.031/gal direct (down from \$4.09 wk-over-wk; from \$4.16 two weeks ago); CA highest \$5.84; OK lowest \$3.40; GA \$3.62. Demand destruction estimated 4–5M bpd (~5% global supply, Asia bearing brunt). IEA: largest energy supply shock on record.

Activity: Markets pricing structural blockade closure: Brent sustained >\$100 for 4+ trading sessions; pump lag 10–14 days from underlying crude (06-MAY spike will not reach pumps until early-mid May); Iran new Hormuz-nuclear decouple proposal via Pakistani mediators (Axios 05-MAY) drove early-session pullback; Trump 05-MAY suspended negotiators (Witkoff/Kushner Pakistan trip cancelled); SecDef Hegseth: blockade continues; Pezeshkian: no negotiations under blockade; Trump 05-MAY ruled out nuclear weapons but reiterated additional military force on the table; Morgan Stanley cut gold target bull-case \$5,700→\$5,200 as rate-cut hopes recede.

Location: Global crude/refined product markets; US retail pump network (national + state breakdown); OECD strategic-reserve coordination channels; Pakistani back-channel (closed); St Petersburg (Russian-mediated successor track per GEO-001/GEO-AXIS-001).

Unit: Reuters, AAA, EIA (STEO April 2026: Brent peak 2Q26 \$115/b; retail gasoline peak ~\$4.30/gal; diesel peak \$5.80/gal Q2), IEA (largest-shock framing), Goldman Sachs commodity desk (baseline \$120/bbl Q3 if extended Hormuz closure), Morgan Stanley (gold target revision), POTUS Trump, SecDef Hegseth, Iranian President Pezeshkian, Iran FM Araghchi, Witkoff/Kushner (cancelled).

Time: Brent \$111.16 intraday 06-MAY (today); +13% weekly gain last week; sustained >\$100 4+ sessions; pump lag 10–14 days; Iran proposal 05-MAY (Axios); Trump suspension 05-MAY; Araghchi-Putin meeting 06-MAY; EIA STEO baseline 2Q26 \$115/b Brent peak; Goldman Q3 \$120/bbl upside scenario.

Equipment: Crude benchmarks (Brent, WTI); retail gasoline national average + state distribution (AAA); EIA STEO baseline + Goldman/MS analyst targets; OECD strategic-reserve release lever (not yet exercised); gasoline-blendstock waivers + Jones Act consideration as policy tools if pump price breaches \$4.20 national.

Analyst Assessment

PRICING IS STRUCTURAL: Brent has now sustained >\$100 for 4+ trading sessions and peaked >\$108 today before paring. The market is no longer pricing a near-term diplomatic resolution; the 13% weekly gain last week prices durable closure through Q2.

PUMP LAG STILL ACTIVE: AAA \$4.031/gal moved DOWN week-over-week despite blockade pressure — reflects refinery throughput + inventory cycles + the 10-14 day pump lag from underlying crude. The 06-MAY Brent \$111.16 intraday (highest since March; +2.71% session)

spike will not reach pumps until early-to-mid May. Sub-\$4.00 scenario remains off the table absent CF + blockade resolution.

IEA "LARGEST ON RECORD" FRAME: IEA characterization is operationally significant: it shifts the policy frame from "tactical disruption" to "structural shock," which routes through OECD-strategic-reserve coordination, gasoline-blendstock waivers, and emergency Jones Act consideration.

NEGOTIATION SUSPENSION SIGNAL: Trump 05-MAY negotiator-suspension + Pezeshkian no-negotiations-under-blockade = both sides have closed the formal Pakistani-track door. The substantive successor is Araghchi-Putin St Petersburg today (see GEO-001 + GEO-002). Market read: pricing in 90+ day blockade.

TRIPWIRES: (1) Outcome of Araghchi-Putin meeting today; (2) Brent sustained >\$110 (recession trigger threshold); (3) Pump price breach above \$4.20 national; (4) Any OECD strategic-reserve release announcement; (5) Goldman Sachs revising Q3 case to \$130+; (6) Demand-side announcements (Lufthansa-style cancellation cascades).

ALT HYP

ALT A: Pricing sustains \$100-110 through Q2; structural blockade pricing [EQUALLY LIKELY]

Both sides settle into 90+ day stalemate; oil holds elevated; OFAC continues parallel pressure; pump price breaches \$4.20 national within 30 days.

✓ **Supporting Evidence:** Current 06-MAY \$107-108 floor; +13% weekly gain pattern; IEA largest-shock framing; Pezeshkian no-negotiations stance.

✗ **Ruling-Out Evidence:** Araghchi-Putin track could produce framework signal that prompts retracement; demand destruction could compound and pull pricing lower.

ALT B: Pricing retraces toward \$95 on Russian-mediated framework signal [EQUALLY LIKELY]

Araghchi-Putin meeting produces visible framework signal within 7-14 days; market prices out near-term kinetic premium; Brent retraces \$95-100 range.

✓ **Supporting Evidence:** Russia-Iran 20-yr strategic agreement; Putin diplomatic prestige incentive; Trump WHCD-aftermath political environment for foreign-policy stability.

✗ **Ruling-Out Evidence:** Pezeshkian explicit precondition; Trump 05-MAY formal suspension; SecDef Hegseth sustained-blockade language; 3 carriers in ME signal sustained posture.

ALT C: Pricing spikes above \$115 on kinetic event [LESS LIKELY]

Iran-side kinetic action against Gulf-state energy infrastructure or US Navy asset; Brent \$115+; gas \$4.50+; recession-trigger threshold breached.

✓ **Supporting Evidence:** IRGC Khatam al-Anbiya retaliation pledge stands; standing kinetic-threat baseline; Houthi WATCH-007 reservation; Hormuz mine reports.

✗ **Ruling-Out Evidence:** Both sides retain economic interest in containment; Russia-mediated track preserves diplomatic geometry; oil-price recession-trigger is constraint on Iran action.

SOURCES

[Reuters \(Brent +13% weekly; 06-MAY session\)](#) | [AAA Gas Prices \(national / state breakdown\)](#) | [EIA STEO April 2026](#) | [IEA \(largest energy supply shock on record framing\)](#) | [Goldman Sachs commodity desk \(Q3 \\$120 upside scenario\)](#) | [Morgan Stanley \(gold target revision \\$5,200\)](#) | [Full Source Registry](#)

SC-001 | Maritime / Hormuz Closure Day 15 — USS Pinckney intercepted M/V Sevan 25-APR Arabian Sea / 5-nation transit-only regime (CN/RU/IN/IQ/PK; +MY/TH/PH later) / 37 ships redirected by US (cumulative) / ~20,000 seafarers stranded Gulf

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WHY THIS CYCLE

USS Pinckney + helicopter intercepted Iranian shadow-fleet M/V Sevan 25-APR in Arabian Sea (Sevan complied turning back to Iran under escort) — supersedes UKMTO 041-26 22-APR baseline as current operational maritime data point.

Summary

Size: Hormuz dual blockade Day 15 (operational maritime data point); 37 ships redirected by US (cumulative, Media Line baseline); 5-nation Iran-permitted transit regime (CN/RU/IN/IQ/PK; +MY/TH/PH later); ~20,000 seafarers stranded Gulf; Lloyd's peak war-risk rates ~5% hull value (100x pre-crisis); MARAD 2026-004 standing.

Activity: USS Pinckney (DDG-91) helicopter intercepted Iranian shadow-fleet vessel M/V Sevan in Arabian Sea late 25-APR; Sevan complied with US orders, turned back toward Iran under escort. Pattern continues from Tousky (19-APR INDOPACOM AOR) and Majestic X (23-APR Indian Ocean) cumulative redirection campaign; routing graphics show hazard area covering primary TSS; mine reports persist; war-risk insurance pulled; aggressive bridge-to-bridge VHF hailing by Sepah (IRGC) Navy continues.

Location: Strait of Hormuz (primary TSS hazard area); Arabian Sea (Sevan intercept); Persian Gulf (~20,000 stranded seafarers); cumulative global enforcement footprint (INDOPACOM AOR, Indian Ocean, Arabian Sea); Bab el-Mandeb (Houthi WATCH-007 reservation pattern, not yet activated).

Unit: US: CENTCOM (intercept + redirection counts), USS Pinckney (DDG-91) + helicopter, USN broader CSG presence per GEO-001. Iran: shadow-fleet operators (Sevan-class compliance pattern), Sepah/IRGC Navy. International: UKMTO (Recent Incidents baseline; UKMTO 041-26 22-APR superseded), Marine Traffic / Kpler (transit baseline), Lloyd's List (war-risk + shadow-fleet baseline), IMO + ITF (humanitarian-transit framework expected within 30 days). Houthi (reserved baseline per WATCH-007).

Time: Blockade Day 15 ops baseline (Day 24 closure overall per GEO-001); Sevan intercept late 25-APR; cumulative pattern Tousky 19-APR, Majestic X 23-APR; current cycle 06-MAY; humanitarian-transit framework expected within 30 days.

Equipment: USN: destroyer + helo intercept capability (Pinckney pattern). Iranian shadow-fleet: tankers operating under non-flag-state cover. Maritime data feeds: Marine Traffic, Kpler, UKMTO. Insurance/legal: Lloyd's war-risk peak ~5% hull value; pulled coverage; MARAD 2026-004 advisory; routing-graphic hazard areas covering primary TSS.

Analyst Assessment

SEVAN INTERCEPT INTERPRETATION: Sevan-class compliance (turned back under escort) is consistent with the operational pattern: Iranian shadow-fleet operators are not testing the blockade kinetically. The shadow fleet is the substantive economic loss for Iran, and individual vessel compliance preserves the option of negotiated future flow.

5-NATION TRANSIT REGIME: Iran's 5-nation transit exception (CN/RU/IN/IQ/PK) is the operational mechanism preserving partial flow. The structural addition of MY/TH/PH later expands geometry but is not yet operationally significant. Watch for any subtraction (i.e., Iran withdrawing exception for a specific nation as diplomatic signal).

SEAFARER HUMANITARIAN PROFILE: ~20,000 seafarers stranded in the Gulf is a humanitarian profile that will surface in IMO and ITF International Transport Workers' Federation channels within 30 days. Expect coordinated industry pressure on both Iran and US for humanitarian transit windows.

SPLIT CONFIDENCE: HIGH on Sevan intercept (CENTCOM + Reuters + USNI multi-stream). HIGH on 37 ships redirected (Media Line + CENTCOM). HIGH on 5-nation transit regime (Iran MFA + state TV + Reuters). HIGH on ~20,000 seafarers (ITF + IMO baseline). MODERATE on Lloyd's peak rates ~5% hull value (industry baseline; market quotes vary).

TRIPWIRES: (1) Any Iranian shadow-fleet vessel kinetic-resists intercept; (2) UKMTO Warning beyond current baseline; (3) Confirmed mine event in TSS; (4) IMO/ITF humanitarian-transit framework announcement; (5) Iran subtracting nation from 5-nation transit list; (6) Houthi WATCH-007 activation per Bab el-Mandeb.

ALT HYP	ALT A: Hormuz closure durable through Q2 with Sevan-pattern compliance [EQUALLY LIKELY]
	37-ship redirection + 5-nation transit + Sevan-pattern compliance establishes durable equilibrium; oil prices in \$100-110; no kinetic incidents.
	✓ Supporting Evidence: Sevan compliance pattern; 5-nation transit regime stable; Iran economic interest in preserving future-flow option.
	✗ Ruling-Out Evidence: Iran-side political pressure for face-saving kinetic; mine reports persist; IRGC Khatam al-Anbiya retaliation pledge.
	ALT B: Iran kinetic event tests blockade within 30 days; UKMTO Warning escalation [LESS LIKELY]
	Iran tests blockade with proxy maritime attack or shadow-fleet vessel kinetic-resists intercept; UKMTO escalation.
	✓ Supporting Evidence: IRGC Khatam al-Anbiya pledge; mine reports; standing kinetic-threat baseline; Houthi WATCH-007 reservation.
	✗ Ruling-Out Evidence: Sevan compliance + 5-nation transit + Iranian shadow-fleet operator economic incentive against kinetic resistance.
	ALT C: Houthi reactivation on Bab el-Mandeb supplements Hormuz pressure [LESS LIKELY]
	Houthi 28-FEB-2026 strategic-patience posture (WATCH-007) breaks; Bab el-Mandeb attack arrests ~15% global seaborne trade.
	✓ Supporting Evidence: Houthi 30-tanker range proximity; IRGC Khatam al-Anbiya regional reach; Iran-Houthi command linkage.
	✗ Ruling-Out Evidence: Houthi strategic patience held 60+ days; Iran unlikely to spend Houthi card while Russian-mediated track viable.
SOURCES	CENTCOM (Sevan intercept; Pinckney; redirection counts) UKMTO Recent Incidents USNI News (Sevan; 3-carrier deployment) Media Line (37-ship cumulative redirection) Marine Traffic / Kpler (Hormuz transit baseline) Lloyd's List (war-risk insurance; shadow-fleet baseline) Full Source Registry

CYB-005 CISA AA26-097A Day 22 — Iranian-affiliated APT exploitation of internet-facing OT (Rockwell/Allen-Bradley PLCs); Palo Alto Unit 42 cluster CL-STA-1128 Rockwell FactoryTalk shift continues		FLASH UPDATED 22
WHY THIS CYCLE	AA26-097A Day 22 (was Day 18 prior cycle); pattern continues; CISA ED 25-03 V1 ArcaneDoor (CYB-001) is parallel state-actor cyber pressure during Op Epic Fury Day 68.	
Summary	<p>Size: AA26-097A Day 22; 5,219+ exposed Rockwell/Allen-Bradley PLC count holds; multi-vendor naming consolidation across CyberAv3ngers (US Treasury), Shahid Kaveh Group (Mandiant), Hydro Kitten (CrowdStrike), Storm-0784 (Microsoft), UNC5691 (Mandiant), CL-STA-1128 (Palo Alto Unit 42). Sectors affected: water, energy, municipal facilities.</p> <p>Activity: Iranian-affiliated APT exploitation of internet-facing OT (Rockwell Automation / Allen-Bradley PLCs); Palo Alto Unit 42 21-APR T2 attribution: cluster CL-STA-1128 shifting target from Unitronics PLCs to Rockwell Automation FactoryTalk via VPS infrastructure (target-set evolution, not dormancy); 21-day public-disclosure quiet period continues at public level.</p>	

Parallel state-actor pressure point: CISA ED 25-03 V1 (CYB-001) ArcaneDoor / Cisco ASA/FTD persistence on FCEB networks.

Location: US critical infrastructure — internet-facing OT environments (water, energy, municipal); FactoryTalk OT orchestration layer (Rockwell); VPS infrastructure as staging (per Unit 42); FCEB network edge in parallel via CYB-001.

Unit: Threat: CyberAv3ngers / Shahid Kaveh Group / Hydro Kitten / Storm-0784 / UNC5691 / CL-STA-1128 (single Iran-affiliated APT consolidated across vendor naming). Defenders: CISA, FBI (NY field office 07-APR PLC-exploitation warning), NSA, EPA, DOE, US CyberCom (joint advisory authors); Palo Alto Unit 42; ISACs (likely below-disclosure-threshold incident channels).

Time: AA26-097A baseline 07-APR-2026 (T1 joint advisory); Day 22 today 06-MAY; FBI NY warning 07-APR; Unit 42 CL-STA-1128 baseline 21-APR; 21-day public-disclosure quiet period; Op Epic Fury Day 68 (concurrent escalation pressure window); CYB-001 ED 25-03 V1 reporting due 01-MAY (T-3).

Equipment: Targeted: Rockwell Automation / Allen-Bradley PLCs; Rockwell FactoryTalk OT orchestration layer (richer target than isolated Unitronics PLCs); 5,219+ exposed devices baseline. Adversary: VPS staging infrastructure; OT exploitation toolset (US Treasury OFAC-designated CyberAv3ngers TTP). Defender artifacts: CISA AA26-097A advisory; sector ICS-CERT detections; KEV cross-link if OT vector added.

Analyst Assessment

QUIET PERIOD LENGTHENING: 21-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. The longer the quiet period, the more likely (a) or (c).

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.

OP EPIC FURY DAY 58 COST-BENEFIT: Sustained blockade Day 24 + Trump 05-MAY negotiator suspension + Pezeshkian no-negotiations posture collectively raise Iranian-affiliated APT cost-benefit for additional attacks on US CI. The longer Op Epic Fury runs without a diplomatic resolution, the more attractive covert-vector escalation becomes.

TRIPWIRES: (1) New CISA supplement; (2) Named CI victim; (3) KEV addition tied to OT vector; (4) Iran-attributed incident on CONUS water or electric infrastructure; (5) CL-STA-1128 expansion beyond FactoryTalk; (6) Any FCEB agency missing CYB-001 ED 25-03 V1 reporting deadline 01-MAY (T-3).

SOURCES

[CISA AA26-097A](#) | [CyberScoop 07-APR baseline](#) | [Palo Alto Unit 42 \(CL-STA-1128 tracking\)](#)

GEO-AXIS-001 | Adversary Exploitation of US Attention Bandwidth — Iran-Russia Pivot (Araghchi-Putin St Petersburg 06-MAY) / UKR Sverdlovsk + Chelyabinsk Drone Strikes (1,700+km range escalation) / PRC Antelope Reef Airbase ~1,500 acres / Taiwan 40-Day Airspace Restriction

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WHY THIS CYCLE

Araghchi-Putin meeting occurred today + Mojtaba Khamenei written message + UKR Sverdlovsk/Chelyabinsk first-strikes (1,700+km) + Russian drone in Romania (NATO).

Summary

Size: Multi-theater adversary exploitation pattern: (1) Iran-Russia diplomatic pivot (Araghchi-Putin meeting 06-MAY); (2) UKR first-ever drone strikes Sverdlovsk + Chelyabinsk (1,700+ km range escalation); (3) UKR Crimea raid 25–26 APR (3 ships + MiG-31 + Belbek + radar; 71+ drones overnight per Sevastopol governor); (4) Yaroslavl refinery (~15M tons/yr) struck 05-MAY; (5) Russian drone crashed Galati Romania (NATO) 25-APR — 200 evacuated, 2 UK fighter jets scrambled; (6) PRC Antelope Reef airbase ~1,500 acres reclaimed (significantly larger than Woody Island); (7) Taiwan 40-day airspace restriction notices; (8) PRC Scarborough barrier persists + 6+3 militia vessels.

Activity: Iran formal diplomatic pivot from failed Pakistani back-channel to Russian-mediated track: Araghchi-Putin meeting at Boris Yeltsin Presidential Library St Petersburg; Putin

disclosed written message from Mojtaba Khamenei (Supreme Leader since 28-FEB strikes killed Ali Khamenei). New Iranian proposal via Pakistani mediators (Axios 05-MAY): decouple Hormuz from nuclear talks. UKR sustained deep-strike campaign into Russian Urals industrial zone + Crimea naval base + Yaroslavl refining; cumulative ~20% Russian refining capacity damaged since early 2024 per NYT 07-APR; April Russian output -300–400k bpd. Russia net LOST UKR territory over 4 weeks (24-MAR to 21-APR baseline). PRC sustained reclamation + airspace-restriction + maritime-militia pattern in SCS/Taiwan; thousands of PRC fishing boats organized into formations >200 mi in East China Sea (obstruction/quarantine signaling).

Location: St Petersburg Russia (Boris Yeltsin Presidential Library, Araghchi-Putin); Sverdlovsk + Chelyabinsk (Russian Urals, 1,700+ km from UKR-controlled territory); Sevastopol naval base + Belbek airfield (Crimea raid); Yaroslavl refinery; Galati Romania (NATO Article 4 territory; gas supplies cut, electricity pole + house damaged); Antelope Reef (Paracels); Scarborough Shoal (PH EEZ); Taiwan offshore airspace; East China Sea (PRC fishing-boat formations).

Unit: Iran: FM Araghchi, Supreme Leader Mojtaba Khamenei (written messages only), Iran Amb to Russia Kazem Jalali. Russia: President Putin, MFA, regional governors (Sverdlovsk, Chelyabinsk), Sevastopol occupation governor Razvozhayev. Ukraine: SBU Alpha (Crimea raid), UKR Air Force (Sverdlovsk/Chelyabinsk), UKR General Staff (Yaroslavl). NATO: Romanian President Nicusor Dan, Romanian FM (summoned RU ambassador), 2 UK fighter jets (scrambled). PRC: PLA reclamation forces, CCG, maritime militia, fishing-boat formations. Taiwan: ROC MND. Mediators/observers: Reuters/Vantor (satellite imagery); House Select Committee on the CCP (“Crude Intentions” 03-APR — ~1.2B-barrel PRC strategic reserve via shadow fleet, >80% of Iran oil).

Time: Araghchi-Putin meeting 06-MAY (today); Mojtaba Khamenei written message 06-MAY; UKR Sverdlovsk/Chelyabinsk first-strikes overnight 25–26 APR; UKR Crimea raid 25–26 APR; Yaroslavl refinery strike 05-MAY; Galati Romania NATO incursion 25-APR; Antelope Reef ~1,500 acres reclaimed (cumulative through current cycle); Reuters/Vantor satellite imagery 10–11 APR; Taiwan 40-day airspace restriction notices (current); House Select Committee “Crude Intentions” 03-APR; UN 1737 Sanctions Committee program blocked MAR-2026.

Equipment: UKR: long-range strike drones (1,700+ km demonstrated envelope), sea drones, SBU Alpha special-operations capability. Russia: long-range one-way attack drones (one crashed Galati Romania); Black Sea Fleet vessels (Yamal + Filchenkov landing ships, Ivan Khurs reconnaissance, MR-10M1 “Mys-M1” radar at Sevastopol — all damaged). PRC: reclaimed-island runway + airbase infrastructure (Antelope Reef ~1,500 acres > Woody Island); 352m floating barrier at Scarborough; CCG + 6+3 militia vessels; East China Sea fishing-boat formations; Taiwan-area airspace-restriction NOTAM mechanism (40-day duration).

Analyst Assessment

IRAN-RUSSIA PIVOT IS THE STRUCTURAL EVENT: Araghchi-Putin today represents Iran’s formal diplomatic pivot from Pakistani back-channel (which was never producing) to Russian-mediated track. Russia gets diplomatic prestige + leverage; Iran gets credible mediator + face-saving framework venue. US tolerates if Russian-mediated framework provides exit ramp. The Russian track is the substantive successor venue and likely where any framework ultimately surfaces.

UKR RANGE ESCALATION IS STRUCTURAL: First-ever Sverdlovsk + Chelyabinsk strikes (1,700+km) demonstrate that Ukrainian long-range strike envelope now reaches deep into Russian Urals industrial zone. The strategic implication is that Russian air-defense planning must now include >1,500 km depth, which fundamentally reshapes Russian basing/dispersal economics.

PRC ANTELOPE REEF IS SUNK COST: Runways are not ambiguous infrastructure. ~1,500 acres reclaimed at Antelope Reef is substantially larger than Woody Island and supports persistent air presence. The infrastructure commitment is structurally distinct from CCG vessel deployments — once the runway exists, the strategic envelope is permanently shifted regardless of subsequent diplomatic posture.

TAIWAN 40-DAY AIRSPACE: 40-day Taiwan offshore airspace restriction notices without announcing drills are doctrinally distinct from prior 5-7 day windows. The duration enables sustained ISR + readiness exercises without a discrete “drill” event that triggers ROC alert protocols. Treat as effective long-duration force-posture exercise.

SPLIT CONFIDENCE: HIGH on Araghchi-Putin meeting (T1 Iranian MFA + Russian MFA + Tasnim multi-stream). HIGH on UKR Sverdlovsk/Chelyabinsk first-ever (T1 UKR Air Force + Reuters + Russian regional governor confirmation). HIGH on UKR Crimea raid 25-26 APR (T1 SBU + Reuters). HIGH on Yaroslavl refinery hit 05-MAY (T1 UKR General Staff + Reuters). HIGH on Antelope Reef airbase ~1,500 acres (Reuters/Vantor satellite imagery). MODERATE on causal attribution of all events to US-Iran attention bandwidth (pattern strong; counterfactual unprovable).

TRIPWIRES: (1) Russian framework proposal post-meeting; (2) US response to Iran Hormuz-nuclear decouple proposal; (3) Any direct Mojtaba Khamenei public appearance or audio/video; (4) Any UKR strike beyond 2,000 km range; (5) Romania NATO Article 4 invocation following Galati incident; (6) PRC Antelope Reef runway operational capability disclosure; (7) Taiwan ROC formal airspace-restriction protest; (8) Russian retaliation to Sverdlovsk/Chelyabinsk first-strikes.

ALT HYP

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

Pattern of activity dated to Iran theater focus period continues this cycle: Araghchi-Putin pivot 06-MAY; UKR range escalation 1,700+km; PRC Antelope Reef ~1,500 acres; Taiwan 40-day airspace notices. Moscow and Beijing pricing US capacity constraint into operational choices.

✓ **Supporting Evidence:** T1 Congressional (Crude Intentions baseline); T1 wire corroboration of Araghchi-Putin, UKR strikes, Antelope Reef imagery, Taiwan airspace notices. Measurable Chinese infrastructure gains and sanctions-evasion volumes.

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

ALT B: Coincident But Not Causal [EQUALLY LIKELY]

UKR strike capability development naturally extends with weapons deliveries and operational learning; PRC reclamation continuous through all periods; Taiwan airspace pattern continuous; Iran-Russia diplomatic ties precede current cycle.

✓ **Supporting Evidence:** UKR drone-range curve has been on logarithmic increase through 2024-2026 independent of US theater focus; PRC SCS tempo has baseline unrelated to Iran.

✗ **Ruling-Out Evidence:** Aggregate pattern across Araghchi-Putin pivot + 1,700+km first-strikes + Antelope Reef + Taiwan 40-day notices strains coincidence with Op Epic Fury Day 68 timing.

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

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

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

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

SOURCES

[House Select Committee on the CCP — Crude Intentions \(03-APR, T1 Congressional\)](#) | [Tasnim / IRNA \(Araghchi-Putin scheduling\)](#) | [Russian MFA \(St Petersburg meeting\)](#) | [Reuters \(UKR Sverdlovsk/Chelyabinsk first-strikes; Crimea raid; Antelope Reef imagery\)](#) | [UKR Air Force / SBU Alpha \(Crimea raid; Yaroslavl strike\)](#) | [Vantor / Reuters satellite imagery \(Antelope Reef\);](#)

[Scarborough barrier persistence](#) | [Taiwan ROC \(40-day airspace restriction notices\)](#) | [Full Source Registry](#)

GEO-AFG-PAK | Pakistan-Afghanistan CF RUPTURED 06-MAY / 4 KIA Kunar Province (Taliban) / 45 wounded incl students+women+children at Sayed Jamaluddin Afghani University in Asadabad / 3 wounded South Waziristan (PK) / "Most serious clash since CF" per PK border forces / Trigger: PK military shooting of child near Spin Boldak 05-MAY

WATCH | NEW | 15

WHY THIS CYCLE

First strikes since March China-mediated CF agreement (Eid al-Fitr); university hit; pattern echoes October 2025 escalation that produced full-war state until February-March 2026. Mediators previously involved: China (March CF), Turkey, Qatar, UAE, Saudi Arabia. UN OHCHR experts had urged permanent CF.

Summary

Pakistan and Afghanistan have accused one another of launching new cross-border attacks on 06-MAY, ending the China-mediated March ceasefire that had paused active combat following the February 2026 Pakistan offensive against alleged TTP camps. Taliban Deputy Spokesperson Hamdullah Fitrat said Pakistani military mortar and rocket attacks wounded 45 people in Afghanistan's Kunar Province; students, women, and children were among the injured; homes and the Sayed Jamaluddin Afghani University in the provincial capital Asadabad came under fire. Four people were killed in Kunar per Taliban authorities. Pakistani officials reported at least three civilians were injured by gunfire in South Waziristan; a spokesman for Pakistan's border forces described the incident as the most serious clash since the ceasefire was declared. Trigger reported by sources to TOLONews: Pakistani military shooting of a child near the Afghan border city of Spin Boldak on 05-MAY. Pakistan's demand that Afghanistan curb the Tehreek-e-Taliban Pakistan (TTP) - which conducts attacks from bases in Afghanistan - remains the core security dispute. UN OHCHR experts had urged permanent CF in late March; since 26-FEB-2026 there have been at least 289 civilian casualties in Afghanistan (76 killed, 213 injured) and over 115,000 displaced. Mediator landscape: China brokered the March agreement; Turkey, Qatar, UAE, and Saudi Arabia have all been involved at various points. Border has remained largely closed since deadly cross-border violence in October 2025 froze bilateral trade.

Analyst Assessment

CF RUPTURE WITH UNIVERSITY STRIKE: Strike on Sayed Jamaluddin Afghani University in provincial capital changes the IO/legal-risk profile. Student casualties drive international attention faster than border-post exchanges typically would.

US-CONTEXT EXPOSURE: For US-context DTR audience: indirect exposure pathway through (1) US diplomatic positioning between PK strategic partner and Taliban regime; (2) potential refugee flow regional impact; (3) NATO supply-line tertiary effects; (4) the China-mediation precedent and competition with US-mediation models in Hormuz/LBN tracks. Direct CONUS impact this cycle: minimal.

TRIPWIRES: (1) Strike against major population center in either country; (2) PK air operation beyond border zone; (3) China formal mediation request or break with Taliban; (4) US State Department public statement; (5) Cross-border refugee surge into PK provinces; (6) TTP claim of responsibility for any attack inside PK in next 7 days.

SOURCES

[Al Jazeera \(06-MAY strikes coverage\)](#) | [Wikipedia \(2026 Afghanistan-Pakistan war\)](#) | [UN OHCHR \(March 2026 CF call\)](#) | [TOLONews \(Spin Boldak trigger event\)](#)

SECTION 4A — CYBER & INFORMATION SECURITY

<p>CYB-002 CISA KEV — 4 CVEs FCEB-due 04-MAY (T-6): PaperCut NG/MF, JetBrains TeamCity, Kentico Xperience, Quest KACE SMA (CVSS 10.0), Synacor Zimbra zero-click XSS / 03-MAY additions: Samsung MagicINFO + SimpleHelp x2 + D-Link DIR-823X / 3 Cisco Catalyst SD-WAN due 23-APR PASSED</p>		<p>HIGH UPDATED 17</p>
WHY THIS CYCLE	<p>3 Cisco Catalyst SD-WAN CVEs FCEB-due 23-APR PASSED; 4 remaining at T-6 due 04-MAY; CYB-001 ArcaneDoor T-4 compounds patch-pressure window.</p>	
Summary	<p>CISA KEV cycle update: 3 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) had FCEB compliance windows close 23-APR — now PASSED; non-compliant agencies are in BOD 22-01 violation state. 4 remaining 20-APR batch CVEs at T-6 due 04-MAY 11:59 PM ET: CVE-2023-27351 PaperCut NG/MF (Lace Tempest history); CVE-2024-27199 JetBrains TeamCity; CVE-2025-2749 Kentico Xperience; CVE-2025-32975 Quest KACE SMA (CVSS 10.0); CVE-2025-48700 Synacor Zimbra zero-click XSS (CERT-UA: UAC-0233/UAC-0250 Ukrainian mailbox campaign since Sept 2025; chained with CVE-2025-66376 for arbitrary RCE). 03-MAY KEV additions: CVE-2024-7399 Samsung MagicINFO 9 path traversal; CVE-2024-57726 + CVE-2024-57728 SimpleHelp double (auth + path traversal); CVE-2025-29635 D-Link DIR-823X command injection. CISA ED 25-03 V1 ArcaneDoor (CYB-001 this cycle) FCEB inventory due 11:59PM EST 01-MAY (T-3) is the simultaneous parallel pressure point. Cisco PSIRT and ED 26-03 (Cisco SD-WAN Manager core dumps + hunt + hardening) remain in force.</p>	
Analyst Assessment	<p>STACKED FEDERAL DEADLINES: Three federal-cyber deadlines stack this and next week: CYB-001 ED 25-03 V1 ArcaneDoor inventory T-3 (01-MAY); CYB-002 4-CVE KEV batch T-7 (04-MAY); CYB-003 03-MAY additions rolling. SecOps capacity is the binding constraint.</p> <p>NON-FEDERAL EXPOSURE: DIB, financial services, regulated healthcare running the same products should treat FCEB schedule as floor not ceiling. Quest KACE SMA CVSS 10.0 alone is enterprise-wide RCE; Zimbra zero-click XSS is mass-mailing campaign vector.</p> <p>CISCO 23-APR DEADLINE PASSED: 3 Cisco Catalyst SD-WAN CVEs FCEB compliance window closed 23-APR. Post-window CISA reporting will surface laggards next cycle. ED 26-03 supplemental directive (CLAW log onboarding) remains active and compounds with CYB-001 ED 25-03 V1 ArcaneDoor.</p> <p>TRIPWIRES: (1) Named-victim disclosure on any of the 4 remaining 20-APR batch CVEs; (2) Cisco PSIRT or Microsoft MSRC scope expansion; (3) CERT-UA attribution expansion beyond UAC-0233/UAC-0250; (4) FCEB agency missing 04-MAY deadline; (5) New KEV additions before 04-MAY deadline; (6) FIRESTARTER detection beyond federal environment (CYB-001 cross-link).</p>	
SOURCES	<p>CISA KEV Catalog (20-APR batch + 03-MAY additions) Cisco PSIRT (Catalyst SD-WAN Manager CVEs) CERT-UA (Zimbra UAC-0233/UAC-0250 campaign)</p>	

SECTION 4B — PHYSICAL / GEOPOLITICAL / IO

SECTION 5 — ENERGY / INFRASTRUCTURE / SUPPLY CHAIN

CARRYOVER MONITORS — ENERGY / NUCLEAR / CI

NUC-001 IAEA Verification Blackout Day 68 / 440.9 kg HEU / Pre-strike Isfahan Transfer Analysis: IAEA verification blackout Day 68 (since 28-FEB strike). 440.9 kg of UF6 enriched up to 60% retained per IAEA Sep 2025 verification report basis. Bulletin of the Atomic Scientists 03-MAY analysis: satellite imagery suggests Iran likely transferred 60% HEU to Isfahan before the June 2025 strikes; per Grossi 09-MAR ~200 kg at Isfahan; per Grossi a single cascade of 200 IR-6 centrifuges could enrich 50 kg from 60% to 90% in ~10 days. Damage assessment per missilestrikes.com: Natanz FEP ~75% damaged, Fordow ~30% (core may be intact), Isfahan conversion ~90%, Arak ~60%, Parchin ~50%. Post-strike breakout estimate ~12 weeks (medium confidence).

SECTION 6 — AVIATION / TRANSPORTATION

CARRYOVER MONITORS — AVIATION / TRANSPORTATION

FAA Sterling VA TFR (current): FDC 6/5355 issued 05-MAY — 5nm AML050010, 0830–1830 local 05-MAY — WHCD aftermath; impact IAD. FAA USNS→NMS transition 18-APR; some TFRs missing from web display (FNS NOTAM Search authoritative).

SECTION 7 — METEOROLOGICAL WEATHER & SEVERE WEATHER

WX-001 | 06-MAY severe outbreak Day 2 of multi-day sequence / SPC Day 1 Slight Risk TX > lower MS Valley > TN Valley / Very large hail (3-4 inch) + few tornadoes + MCS evolution / WPC Day 1 ERO Slight Risk same area 2"/hr / 06-MAY damage: 2 tornadoes (Germantown IL + Hanover AR) + 260,000+ no power MO/IL/KY/IN/WI/MI + 1 fatality MI tree fall

FLASH | NEW | 25

WHY THIS CYCLE

Day 2 of multi-day outbreak. SPC Day 1 today: Slight Risk ArkLATex into Mid-South with very large hail (3-4 inch) and few tornadoes. WPC ERO Day 1: Slight Risk same area with 2"/hr rates; flash flooding potential. NWR overlap: TN Shelbyville WXK63 OOS in TN Valley evening corridor; AR Fountain Hill KGG86 OOS in lower MS Valley MCS corridor; GA Baxley WXM65 OOS in Day 2-3 Dixie Alley shift zone (also wildfire smoke compound).

Summary

Size: 06-MAY severe outbreak Day 2 of multi-day sequence; SPC Day 1 Slight Risk (CIG2 high-end signal central/N IL); WPC ERO Slight Risk 2"/hr; 06-MAY damage: 2 tornadoes (Germantown IL + Hanover AR) + 260,000+ no-power MO/IL/KY/IN/WI/MI + 1 fatality MI (tree fall); NWR 18 transmitters affected (15 OOS / 3 DEG, 16 states) with IL/IN/TN gaps overlapping today's CIG2 corridor.

Activity: Active multi-state severe-weather outbreak: very large hail (3–4 inch), few tornadoes, MCS evolution; SPC CIG2 first IL warning issued ~13:58 CDT; W IL ~2 PM CT first arrivals; WPC Day 1 Slight-Risk 2"/hr excessive rainfall; Day 2–3 Dixie Alley shift (TN/AL/MS) forecast; widespread power outages + damage path; NWR primary alerting degraded in IL Hillsboro KXI79 + IN Angola KXI94 (overlap CIG2 corridor) + TN dual-gap Lawrenceburg KXI88 + Shelbyville WXK63 (overlap Day 2–3 shift); GA Baxley WXM65 OOS within wildfire-smoke corridor (compound with WLDFFR-001).

Location: Day 1 corridor: TX → lower MS Valley → TN Valley (very large hail / few tornadoes / MCS); central/N IL CIG2 high-end signal; Day 2–3 Dixie Alley shift (TN/AL/MS); already-

impacted footprint MO/IL/KY/IN/WI/MI; AR Fountain Hill KGG86 in MCS path; NM triple-gap (Roswell/Carlsbad/Artesia) drought/wildfire-readiness baseline gap; GA Baxley dual-hazard zone (severe shift + Brantley smoke corridor).
Unit: NWS SPC (Day 1 outlook + CIG2 issuance); NWS WPC (ERO Slight Risk); NWS WFOs (local warnings); local EM coordinators in outbreak corridor; SKYWARN spotter networks (HF favorable today per SWX-001); state EOCs MO/IL/KY/IN/WI/MI/TN/AL/MS; NWR transmitter network (NOAA Weather Radio All-Hazards). Compound coordination: Brantley CIMT for GA dual-hazard.
Time: Outbreak Day 2 (06-MAY); SPC CIG2 first warning ~13:58 CDT today; W IL first arrivals ~2 PM CT; evening peak through TN Valley corridor; Day 2-3 Dixie Alley shift forecast for tomorrow + day after; space weather Kp 1-3 quiet today (HF favorable for SKYWARN); G1 watch 29-30 APR may degrade HF in next 24-48 h.
Equipment: NWS warning + watch products; NWR transmitter network (degraded — 18 affected); WEA-capable mobile devices + FEMA App + local broadcast EAS as primary alternates in NWR-gap counties; SPC + WPC modeling; SKYWARN HF (Kp 1-3 quiet); local EM activation systems; mutual-aid + ARC blood-products coordination already at Day 99 (HLTH baseline).

Analyst Assessment

SLIGHT RISK BUT HIGH-IMPACT POTENTIAL: Slight Risk + 3-4 inch hail + 2"/hr rates is operationally significant despite the lower SPC categorical level - the impact distribution this Slight Risk produces (large hail in densely-trafficked I-30 / I-20 corridor + flash flooding in drought-recovering soils) drives outsized property and life-safety consequences.
NWR OVERLAP CRITICAL: NWR live-status overlap is operationally significant today (see NWR-001): TN Shelbyville W XK63 OOS sits inside the TN Valley evening severe corridor; AR Fountain Hill KGG86 OOS sits inside the ArkLATex MCS corridor. GA Baxley WXM65 OOS adds Day 2-3 Dixie Alley shift exposure plus wildfire-smoke compound (WLDFR-001).
MULTI-DAY SEQUENCE CONTEXT: This is Day 2 of a multi-day pattern. 06-MAY produced 2 confirmed tornadoes + 260,000 power outages + 1 fatality despite Moderate Risk verification at the lower end. 23-APR Enid OK EF-4 was first EF-4 of 2026 and first in Garfield County since 1991. The 23-27 APR sequence has its own Wikipedia entry; expect Day 2 verification by NWS surveys later this week.
FATALITY DRIVER: Mobile-home and weak-structure exposure is the dominant fatality driver in EF2+ events - pre-position alternative shelter before evening hours in TN Valley risk corridor. NWR-degraded counties (Shelbyville TN; Fountain Hill AR; Baxley GA) face additional alerting friction.
SPACE WEATHER: Kp 2-3 quiet/unsettled; HF favorable for SKYWARN today. G1 (minor) watch late 29-30 APR may degrade HF in next 24-48h.
CONFIDENCE: HIGH - SPC T1; WPC T1; NWS local offices T1; multi-source 06-MAY damage verification (Watchers + AP + SPC Storm Reports + Wikipedia outbreak sequence entry).
TRIPWIRES: (1) Categorical upgrade to Enhanced or Moderate Risk in afternoon SPC update; (2) PDS Tornado Watch issuance; (3) Confirmed strong tornado in TN Valley or ArkLATex; (4) Initial reports of EF3+ damage; (5) Flash Flood Emergency issuance; (6) Major-city impact (Memphis, Nashville, Shreveport, Little Rock); (7) NWR transmitter restorations or additions inside outbreak corridor.

ALT HYP

ALT A: Slight Risk verifies as forecast - multiple severe reports + isolated tornadoes + flash flooding [MEDIUM-HIGH]

SPC + WPC alignment; environment + dynamics consistent.

✓ **Supporting Evidence:** CAPE/shear/PWAT all align; 06-MAY pattern continuation expected.

✗ **Ruling-Out Evidence:** Mesoscale boundary uncertainty could limit organized convection to discrete cells.

ALT B: Boundary alignment focuses higher-end localized event (training storms or strong tornado) [MEDIUM]

West-east boundary orientation could focus training rain rates and tornadoes.

✓ **Supporting Evidence:** WPC ERO discussion explicitly notes this scenario; bulk shear vectors support it.

✗ **Ruling-Out Evidence:** Most cycles do not realize the most aggressive scenario; storm-mode favoring QLCS may dominate.

ALT C: Convection underperforms; capping limits coverage [LOWER]

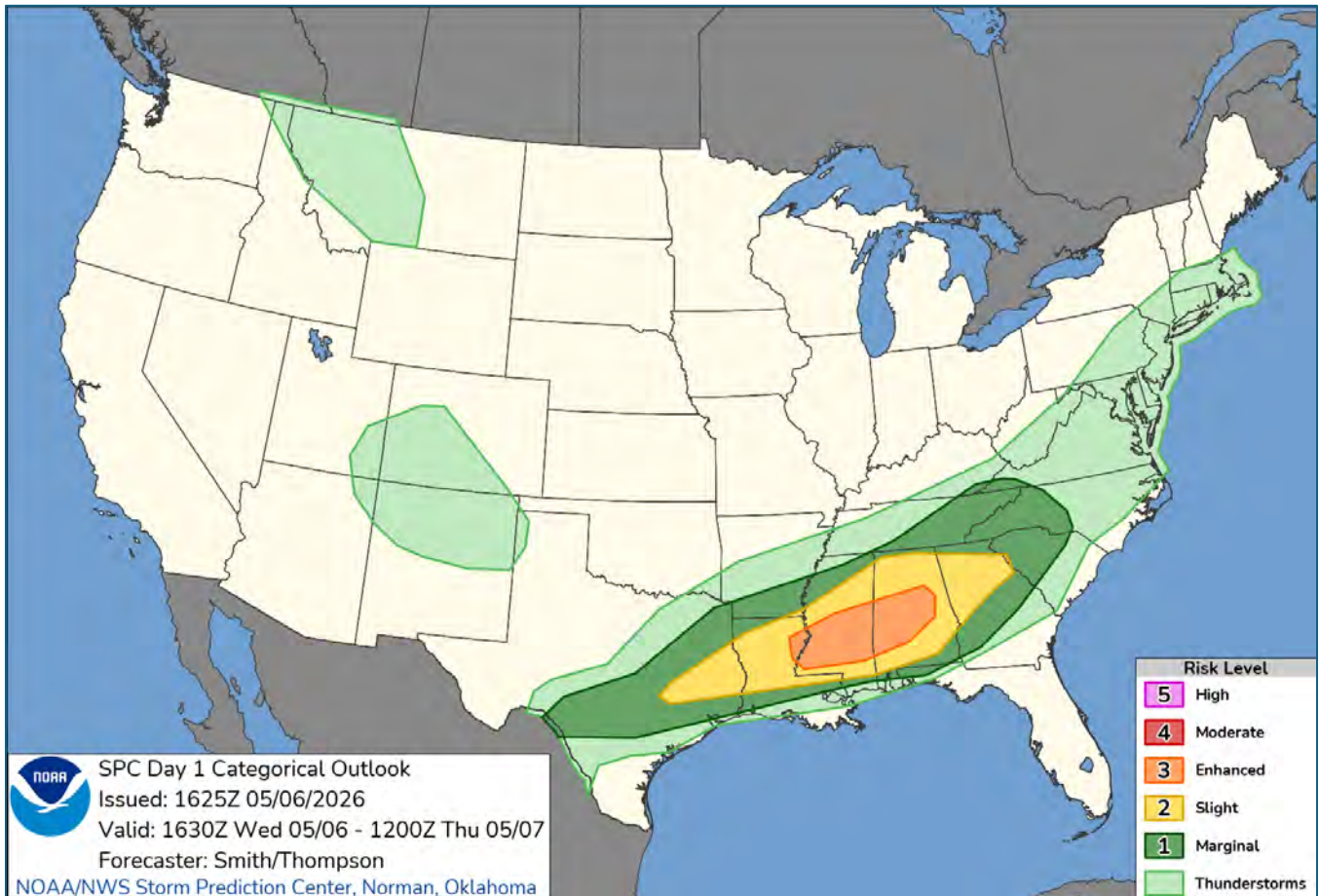
MLCIN may inhibit surface-based initiation in some sub-zones.

✓ **Supporting Evidence:** Some prior days in this sequence have produced less-than-expected coverage.

✗ **Ruling-Out Evidence:** Forcing is robust; dryline and front interaction supports initiation.

SOURCES

[NOAA SPC Day 1 Outlook](#) | [NOAA SPC Day 2 Outlook](#) | [NOAA WPC ERO Day 1](#) | [NWS Local Offices](#) | [NWS NWR Outages](#) | [Wikipedia outbreak sequence](#)



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 06-MAY. Spring pre-conditioning. SW 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 06-MAY. Offshore flow risk moderate. NM triple-gap NWR continues.	SDG&E/SCE transmission infrastructure. Oil/gas pipeline corridors WUI.	Humidity recovery ongoing 24-26 APR. No Santa Ana active 06-MAY. Sources: NIFC, CAL FIRE.
Pacific Northwest	MONITOR	No significant fires 24-26 APR. Snowpack above normal. OR Portland KIG98 NWR DEGRADED.	Columbia River Gorge transmission. Forest products.	Pattern transitioning late-April; PNW snowpack supports near-normal season onset. Sources: NIFC, USFS PNW.
Northern Rockies	MONITOR	Season not active 24-26 APR. Snowpack at or above normal. MT 6-transmitter NWR coverage gap.	Energy corridor. Mountain WUI. Transmission rights-of-way.	No fire weather activity 24-26 APR. Season onset June-July. Sources: NIFC.
S. Plains (TX/OK Panhandle)	WATCH	Post-severe-wx dryline development watch 06-MAY. No current active orders. Quiet relative to IL/MO/IN/KY corridor.	Oil/gas wellhead. Electric co-op transmission. Rural propane.	Post-system dry/wind pattern variable 28-29 APR. Sources: SPC Fire Wx, NIFC.
CONUS Outlook (April)	NSTR	No major active fires with confirmed evacuations at collection (06-MAY).	No CI-exposure fires active.	Transitional month closing. Primary risk: SW and S.Plains. Season May-June. Sources: NIFC, USFS NICC.

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.

NWR TRANSMITTER OUTAGE STATUS — 06 MAY 2026

Source: weather.gov/nwr/outages | Live data provided 06-MAY-2026 (user-supplied) | 14 OUT OF SERVICE | 4 DEGRADED | 16 States

ST	Callsign	Location	Freq	WFO	Status	Counties / Areas Affected
AK	WNG529	Cape Gull	162.450	Fairbanks AK	DEGRADED	Cape Gull / Katmai NP coastal area, AK
AK	KWN30	Kotzebue	162.550	Fairbanks AK	DEGRADED	Kotzebue / Northwest Arctic Borough, AK
AR	KGG86	Fountain Hill	162.450	Little Rock AR	OUT OF SVC	Ashley, Drew, Chicot counties, AR — WITHIN today's lower MS Valley / ArkLATex MCS corridor (WX-001)
CO	WXM56	Colorado Springs	162.475	Pueblo CO	OUT OF SVC	El Paso, Teller counties, CO
GA	WXM65	Baxley	162.450	Jacksonville FL	OUT OF SVC	Appling, Pierce, Wayne, Jeff Davis counties, GA — WITHIN GA wildfire smoke corridor (WLDFR-001) AND Day 2-3 Dixie Alley shift zone
IL	KXI79	Hillsboro	162.425	St. Louis MO	OUT OF SVC	Montgomery, Bond, Fayette, Macoupin counties, IL — Day 2 residual MCS / Mid-South risk
IN	KXI94	Angola	162.425	Northern Indiana IN	OUT OF SVC	Steuben, DeKalb, LaGrange counties, IN — NW Indiana residual MCS / wind risk
KS	WXN81	Ulysses	162.500	Dodge City KS	OUT OF SVC	Grant, Stanton, Haskell counties, KS
ME	WNG547	Sugarloaf Mtn	162.475	Caribou ME	OUT OF SVC	Franklin, Somerset (high terrain), ME
MI	WNG572	Petoskey	162.500	Gaylord MI	OUT OF SVC	Emmet, Charlevoix, Cheboygan counties, MI
MN	KXI45	Gun Flint Lake	162.500	Duluth MN	OUT OF SVC	Cook County / BWCAW area, MN
NM	WXN24	Artesia	162.425	Midland/Odessa TX	OUT OF SVC	Eddy County (alt), Chaves County, NM — TRIPLE-GAP cycle 6
NM	WWG36	Roswell	162.450	Albuquerque NM	OUT OF SVC	Chaves, Lincoln counties, NM — TRIPLE-GAP cycle 6
NM	WWF37	Carlsbad	162.475	Midland/Odessa TX	OUT OF SVC	Eddy County, NM — TRIPLE-GAP cycle 6
OR	KIH32	Coos Bay	162.400	Medford OR	OUT OF SVC	Coos, western Douglas counties, OR
OR	KIG98	Portland	162.550	Portland OR	DEGRADED	Portland metro area, OR
TN	WXK63	Shelbyville	162.475	Nashville TN	OUT OF SVC	Bedford, Marshall, Coffee counties, TN — WITHIN today's TN Valley evening severe corridor (WX-001)
TX	WWG34	Brownsville	162.550	Brownsville TX	DEGRADED	Cameron, Willacy counties, TX

SOURCE: NWR transmitter outage data live from weather.gov/nwr/outages provided by user 06-MAY (STATE B per §0.28). 18 affected (14 OOS + 4 DEG) across 16 states.

⚠ HIGH-GAP ALERT — ACTIVE-WEATHER + WILDFIRE-SMOKE CORRIDOR COMPOUND: Three active-hazard corridor compound situations this cycle. (1) TN VALLEY EVENING SEVERE: Shelbyville WXK63 OOS sits inside today's TN Valley evening severe corridor (Bedford/Marshall/Coffee counties) per WX-001 SPC Day 1 outlook. (2) LOWER MS VALLEY / ARKLATEX MCS: Fountain Hill KGG86 OOS sits inside the lower MS Valley / ArkLATex MCS evolution corridor (Ashley/Drew/Chicot AR) within WPC Day 1 Slight-Risk excessive-rainfall zone. (3) GA WILDFIRE-SMOKE + DAY 2-3 SEVERE: Baxley WXM65 OOS sits within the GA wildfire smoke corridor from the Brantley County Highway 82 Fire (WLDFR-001 FLASH; 22,615+ acres / 87 homes destroyed / 6% containment) AND the Day 2-3 Dixie Alley shift zone — DUAL-HAZARD compound covering Appling/Pierce/Wayne/Jeff Davis counties. DAY-2 RESIDUAL: IL Hillsboro KXI79 + IN Angola KXI94 OOS continue to overlap residual MCS corridor from yesterday's outbreak. NM TRIPLE-GAP CONTINUES (cycle 6): Roswell WWG36 + Carlsbad WWF37 + Artesia WXN24 leave Chaves and Eddy counties with effectively zero primary NWR coverage. Residents in all gap areas should rely on WEA mobile alerts, FEMA App, and local broadcast EAS exclusively. Emergency managers in affected counties: verify alternate alerting pathways are operational and brief served-agency leadership. SAR/EMCOMM teams supporting GA wildfire response: confirm backup HF/VHF coverage given Baxley NWR gap.

SECTION 7A — SPACE WEATHER & EMCOMM

<p>SWX-001 Space Weather — Kp 1-3 Quiet Through 05-MAY / Brief Kp 4 Active Spike from 23-APR CME / AR4419 Two X-Flares 03-MAY Before Far-Side Rotation / M6.4 03-MAY 18:15Z / HF Favorable for Emergency Comms</p>		<p>MODERATE UPDATED 10</p>
<p>WHY THIS CYCLE</p>	<p>Kp 1-3 quiet through 05-MAY; HF favorable for active CIG2 SKYWARN today.</p>	
<p>Summary</p>	<p>SWPC 05-MAY 0030Z 3-Day Forecast (T1): Geomagnetic — 24-hour observed maximum Kp 1-3 quiet through 05-MAY; brief Kp 4 (active) spike observed earlier in cycle from arrival of 23-APR coronal mass ejection associated with AR4419 X-flare activity. AR4419 produced two X-class flares on 03-MAY before rotating off the visible disk to the far side; AR4419 also produced an M6.4 flare at 03-MAY 18:15Z. No M- or X-class flares observed in the 24-hour window since AR4419 far-side rotation. Solar Radiation storms: none observed at S1+ threshold; no S1+ forecast through 06-MAY. Radio Blackouts: none observed at/above R1 threshold in the 24-hour window after AR4419 far-side rotation; probability for R1 or greater is 15% on 06-MAY, 10% on 28-29 APR. Comet C/2026 A1 (MAPS) remains benign CCOR-1 observation. Aurora Timeline Viewer product still unavailable per SWPC. Geophysical Institute 27-day forecast consistent: 27-29 APR quiet Kp 2-3; potential elevated window 30-APR–01-MAY pending CME assessment from final AR4419 disk-edge activity.</p>	
<p>Analyst Assessment</p>	<p>HF EMCOMM STATUS: Quiet conditions favor sustained CONUS HF EMCOMM through the active CIG2 outbreak corridor today and the Day 2 Dixie Alley shift. Removes HF-degradation compound on top of severe-weather + NWR outage geometry.</p> <p>AR4419 FAR-SIDE ROTATION: Region rotated off the visible disk to the far side after producing two X-flares 03-MAY. CMEs in transit from late-cycle AR4419 activity are still possible to arrive; SWPC monitoring. AR will return to visible disk in ~14 days.</p> <p>27-29 APR QUIET WINDOW: Supports any deferred HF tests, readiness drills, and emergency SKYWARN activation. Power-grid operators have cleared the GIC watch window.</p> <p>EMCOMM PROTOCOL: 40m/60m primary and reliable; 20m usable with propagation check; 15m-10m DX bands favorable during quiet conditions.</p> <p>CONFIDENCE: HIGH — SWPC T1 observations + 3-day forecast T1; Geophysical Institute 27-day T1.</p> <p>TRIPWIRES: Late-cycle AR4419 CME arrival; new active region emergence; Kp escalation above forecast; 30-APR–01-MAY potential elevated window pending CME assessment.</p>	
<p>SOURCES</p>	<p>NOAA SWPC 3-Day Forecast SWPC Planetary K-index Geophysical Institute (UAF) Aurora Forecast SpaceWeatherLive</p>	

BAND	STATUS	COLLECTED 06-MAY 0030Z 24-hr observed Kp 1-3 quiet through 05-MAY Brief Kp 4 active spike from 23-APR CME (cleared) AR4419 X-flares 03-MAY before far-side rotation; M6.4 03-MAY 18:15Z HF FAVORABLE for active CIG2 SKYWARN today Next Event Window 30-APR–01-MAY pending late-cycle AR4419 CME assessment
160m (1.8 MHz)	FAIR	Kp 1-3 quiet through 05-MAY. 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 1-3 quiet. Regional EMCOMM viable for IL/MO/IN/KY tornado outbreak SKYWARN. Verify via WWV 3.330 MHz.
60m (5 MHz)	GOOD	✅ PRIMARY EMCOMM TODAY. Kp 1-3 quiet. EMCOMM channel: 5330.5 kHz USB. Good propagation. Verify PSKReporter before committing.

BAND	STATUS	COLLECTED 06-MAY 0030Z 24-hr observed Kp 1-3 quiet through 05-MAY Brief Kp 4 active spike from 23-APR CME (cleared) AR4419 X-flares 03-MAY before far-side rotation; M6.4 03-MAY 18:15Z HF FAVORABLE for active CIG2 SKYWARN today Next Event Window 30-APR-01-MAY pending late-cycle AR4419 CME assessment
40m (7 MHz)	GOOD	✅ RECOMMENDED primary EMCOMM (0-800 km NVIS). Kp 1-3 quiet. Best choice for IL/MO/IN/KY active outbreak SKYWARN. Verify WWV or PSKReporter.
20m (14 MHz)	GOOD	✅ Kp 1-3 quiet. Propagation good. DX paths viable. Verify via PSKReporter. AR4419 far-side rotation — next AR window in ~14 days.
15m-10m (21-28 MHz)	FAIR	Solar flux SFI moderate. High-band DX viable. Not primary EMCOMM. Monitor 30-APR-01-MAY for late-cycle AR4419 CME arrival. Check PSKReporter.
POLAR / TRANS-POLAR: GOOD — Kp 1-3 quiet through 05-MAY. No active polar absorption. Trans-polar paths available. Monitor 30-APR-01-MAY for late-cycle AR4419 CME arrival.		

SECTION 7B — AGRICULTURE, FOOD & SUPPLY CHAIN

AGRICULTURE & FOOD SUPPLY CHAIN — 06 MAY 2026

AGR-001 (Carryover from 4WK MOD): Fertilizer shock structurally embedded; 2026 spring planting cost pass-through to Q3 food prices locked. Urea Egypt FOB ~\$700/MT (+78% pre-war); 30% global urea trade disrupted; China export restrictions through August 2026. Corn 25% planted (vs LY 22% / 5-yr 19%), soybeans 23% planted, spring wheat 19% planted (9pts behind LY) (ahead of 5-year averages). **CRITICAL CYCLE UPDATE:** Winter wheat condition 30% Good/Excellent (down from 34% prior week and from 45% YoY) per USDA NASS Crop Progress 21-APR; KS top-state 24% G/E. Trajectory points toward 2002-style yield-loss profile under sustained drought + pricing pressure. CBOT settlements 03-MAY: corn 455.00 (May contract); soybeans 1163.75 (May); wheat 608.25 (May). Ethiopia gets 90% of nitrogen fertilizer from Gulf via Djibouti; sub-Saharan Africa most exposed. See Sec 4B carryover (AGR-001) for full structural framework.

Sources: [USDA NASS Crop Progress \(21-APR; winter wheat 30% G/E\)](#) | [CBOT futures settlements](#) | [IFPRI April 2026 fertilizer impact](#) | [AFBF Market Intel](#)

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

72-HOUR OUTLOOK | 27-30 APR 2026

The operating environment is rapidly changing and highly fluid. What is true at publication (1500 UTC 06-MAY) may not hold by close of business. Op Epic Fury Day 68 + Hormuz dual blockade Day 24 + LBN CF N/A of extended period + WHCD shooting investigation Day 2 + CISA ED 25-03 V1 ArcaneDoor T-4 + active SPC CIG2 high-end signal IL today — the cycle is heavy with stacked compliance windows, attention-pull events, and weather geometry simultaneously.

06-MAY (TODAY / Op Epic Fury Day 68 / Blockade Day 24 / WHCD Day 4 of investigation): TOP-LINE: Araghchi MET Putin in St Petersburg today; Putin disclosed receiving WRITTEN MESSAGE from Mojtaba Khamenei (Iran's Supreme Leader since 28-FEB strikes killed Ali Khamenei). NEW Iranian proposal via Pakistani mediators (Axios): decouple Hormuz from nuclear, postpone nuclear track until blockade lifted — the proposal pared Brent from peak >\$108 to ~\$106. SPC CIG2 high-end signal IL today — multi-state outbreak IL/MO/IN/KY ACTIVE; first IL tornado warning issued ~13:58 CDT. WHCD shooting Sat 25-APR — Allen arraigned 06-MAY federal court (firearm in COV + assault on fed officer); 1,000+ word "friendly federal assassin" manifesto; Patel + Blanche presser today; Senate Judiciary briefing scheduled (Grassley). CISA ED 25-03 V1 ArcaneDoor (CYB-001) FCEB device-inventory due 11:59PM EST 01-MAY (T-3). NWR 18

transmitters affected (15 OOS + 3 DEG, 16 states); IL Hillsboro KXI79 + IN Angola KXI94 OOS within active outbreak corridor. Brent \$111.16 (+2.64%); WTI \$95.83. Kp 1-3 quiet (HF favorable for SKYWARN). NEW: UKR drone crashed in Galati Romania (NATO) 25-APR — Romanian property damaged, FM summoned RU ambassador.

06-MAY (Day 2 / Dixie Alley shift): Outbreak corridor shifts south into TN/AL/MS overnight 27-28 APR + 06-MAY. TN dual-gap NWR (Lawrenceburg KXI88 + Shelbyville WXX63 both OOS, Nashville WFO) within Day 2 shift footprint. Lebanon CF N/A of extended period; IDF kinetic tempo continues per Netanyahu 05-MAY vigorously-attack order. Araghchi-Putin meeting outcome (announcement, framework signal, or no readout) will reset the diplomatic-track frame.

29-APR (Day 3): Outbreak Day 3 fades; SPC sequence likely concludes. Op Epic Fury Day 68 baseline. Lebanon CF Day 14 of extended period. KEV deadlines T-5 to 04-MAY (CYB-002 4 CVEs PaperCut/TeamCity/Kentico/Quest KACE/Zimbra). CISA ED 25-03 V1 (CYB-001) T-2.

30-APR (Day 4): Op Epic Fury Day 61. CISA ED 25-03 V1 ArcaneDoor T-1 (deadline 11:59PM EST 01-MAY). Lebanon CF Day 15 of extended period; halfway through extended window; trilateral track readiness check. Potential elevated SWX window Kp 5 30-APR–01-MAY pending CME assessment from late-cycle AR4419 disk-edge activity.

NEXT-CYCLE TASKING: (1) WHCD investigation: any motive disclosure; co-conspirator identification; AR or weapons-trafficking findings; second-incident reporting. (2) GEO-001 Iran-Russia track: Araghchi-Putin meeting outcome and any Russian framework proposal; CENTCOM intercept count to 40+; any kinetic incident at the Strait. (3) GEO-CF-LBN: any IDF operation north of Litani; Hezbollah long-range rocket fire; Lebanese army deployment announcement; Aoun-Netanyahu trilateral. (4) CYBER COMPLIANCE: CISA ED 25-03 V1 (CYB-001) T-4 ArcaneDoor FCEB inventory; 4-CVE KEV batch (CYB-002) T-6 04-MAY; any new KEV additions; CL-STA-1128 expansion; named CI victim; any FIRESTARTER detection beyond federal environment. (5) AVN-001: EASA CZIB R7 expiration 01-MAY (T-3) and likely R8 issuance content. (6) GEO-AXIS-001 THREADS: any UKR strike beyond 2,000km range; PRC Antelope Reef runway operational disclosure; Taiwan ROC formal airspace-restriction protest; PLAN cross-theater operations; Russian retaliation to Sverdlovsk/Chelyabinsk first-strikes. (7) WEATHER: SPC Day 2/Day 3 evolution of CIG2 outbreak sequence; tornado watch issuance with PDS language; named EF3+ event; NWR transmitter restorations or additions inside outbreak corridor. (8) DHS NTAS: any bulletin issuance (Day 58+ gap; WHCD shooting + Op Epic Fury Day 68 are operationally distinct from but adjacent to a NTAS-trigger profile). (9) NUC-001: any Iranian signal on HEU down-blending; IAEA Day 68 verification statement; Bulletin Atomic Scientists follow-on Isfahan analysis. (10) PHS-001: JMA megaquake advisory closure 06-MAY (today); any JMA resumption or extension; Sanriku/Hokkaido aftershock pattern. (11) AGR-001: USDA NASS next Crop Progress (06-MAY Mon) winter wheat trajectory; KS revision; CBOT settlement direction. (12) HLTH-001: SC measles count revision; FL trajectory; H5N1 Week 16 reporting; ARC blood Day 99. (13) Standing tripwire: any Houthi Bab el-Mandeb activation (no attacks since 28-FEB-2026).

SECTION 10 — PREPAREDNESS CONDITION ASSESSMENT

PREP-CON 3 — ELEVATED | Assessed: 28 April 2026 | Op Epic Fury Day 68 | Hormuz dual blockade Day 24 | LBN CF N/A of extended period | WHCD shooting Day 2 of investigation | CISA ED 25-03 V1 ArcaneDoor T-4 | SPC CIG2 high-end signal IL today

ASSESSED LEVEL: PREP-CON 3 — ELEVATED | Trend: STABLE-ELEVATED (sustained pressure with no immediate decision-trigger event in 72-hr window)

OPERATIONAL BASIS: PREP-CON 3 ELEVATED basis: (1) Op Epic Fury Day 68 + Hormuz dual blockade Day 24 with Sevan intercept 25-APR + 3 US carriers in ME first time since 2003 (sustained-enforcement posture); (2) WHCD shooting Sat 25-APR + Day 2 of investigation (suspect Cole Tomas Allen 31 in custody; AG Blanche 05-MAY believes targeting POTUS+admin) elevates federal-protective-detail threat profile; (3)

CISA ED 25-03 V1 ArcaneDoor (CYB-001) FCEB device-inventory T-4 due 01-MAY (parallel state-actor cyber pressure during Op Epic Fury); (4) SPC CIG2 high-end signal central/N IL today — multi-state tornado outbreak IL/MO/IN/KY active with NWR transmitter compound (IL Hillsboro KXI79 + IN Angola KXI94 OOS within outbreak corridor); (5) structural oil-market pressure (Brent \$111.16 intraday (highest since March; +2.71% session) sustained; +13% weekly; IEA largest-supply-shock framing). Trend: STABLE-ELEVATED — no near-term decision-trigger event but sustained simultaneous pressure across 5 distinct vectors.

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

SECTION 11 — ALERT & READINESS CONDITIONS PANEL

CONDITION	LEVEL	BASIS
DEFCON	EST-3	Active wartime posture; Op Epic Fury Day 68; Hormuz dual blockade Day 24; 3 US carriers in ME first time since 2003; Trump 05-MAY negotiator suspension
COGCON	EST-3	Elevated continuity posture during active kinetic operations; IRGC/MOIS homeland threat (INS-001); WHCD shooting 25-APR (TER-001) elevates federal-protective-detail profile; DHS NTAS gap Day 68 (TER-002)
FPCON	EST-CHARLIE	US forces actively targeted by Iran-backed Shiite militias per DIA 16-APR baseline ("hundreds" of attacks since 28-FEB); Op Epic Fury Day 68 sustained-enforcement posture
CYBERCON	EST-ELEVATED	CISA ED 25-03 V1 ArcaneDoor T-4 (CYB-001) FCEB device-inventory due 01-MAY; AA26-097A Day 22 (CYB-005); KEV 4-CVE batch T-6 due 04-MAY (CYB-002 PaperCut/TeamCity/Kentico/Quest KACE/Zimbra); 03-MAY additions Samsung MagicINFO + SimpleHelp x2 + D-Link DIR-823X (CYB-003); 3 Cisco Catalyst SD-WAN due 23-APR PASSED
COMCON	4 CONUS DTR-ASSESSED	Kp 1-3 quiet through 05-MAY; brief Kp 4 active spike from 23-APR CME but cleared (SWX-001); HF favorable for SKYWARN during active CIG2 outbreak; AR4419 X-flares 03-MAY before far-side rotation; AA26-097A OT impact (CYB-005); NWR 18 transmitters affected (15 OOS + 3 DEG, 16 states)
TRANSCON	EST-3	EASA CZIB R7 issued 03-MAY; extends to 01-MAY; 11-state ME airspace; Sterling VA TFR FDC 6/5355 05-MAY (WHCD aftermath; impact IAD); FAA USNS→NMS transition 18-APR
WX-CON	EST-4	SPC CIG2 high-end signal central/N IL today; multi-state tornado outbreak IL/MO/IN/KY; Day 2-3 Dixie Alley shift; NWR compound (IL Hillsboro + IN Angola OOS within corridor; TN dual-gap for Day 2 shift)
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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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 — 27 APR 2026

THREAT AREAS ASSESSED	STANDING REGISTRY	CITATIONS THIS CYCLE	TIER 1 PRIMARY	TIER 2 SECONDARY	TIER 3 SUPPLEMENTAL
24	358 v1.8 06-MAY-2026	51	22	29	0
24 Threat Areas 358 Standing Sources (v1.8) 51 Citations This Cycle T1 USG domains include whitehouse.gov, state.gov, defense.gov, cia.gov, odni.gov, dhs.gov, justice.gov, treasury.gov Registry: fortunefavorstheprepared.com/dtr-source-registry/					

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SECTION 13 — CLOSING

END OF REPORT

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