

DAILY THREAT REPORT

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

BLOCKADE Day 26 | Op Epic Fury Day 70 | Allen arraignment 11-MAY T-3 / suspect Allen targeted POTUS per AG | CISA KEV CVE-2026-0300 PAN-OS RCE (FCEB inventory T-4) | LBN CF Day 23 of EXTENDED period (~17-MAY) | Trend: STABLE AWAITING MoU | Full basis: SEC 10

COMMUNICATIONS CONDITION: COMCON 4 - PARTIALLY DEGRADED (CONUS)

AA26-097A Day 32 | 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 | Long filament eruption observed 06-MAY 16 UTC + 4 M-class + 17 C-class flares 24h (with AR4425) | No current radio blackout (R1 occasional only) | HF favorable for emergency comms | 26 NWR transmitters affected (15 OOS + 11 DEG, 13 states); TN/AR/IL/GA gaps overlap today's severe corridor | Full basis: SEC 11

Publication (UTC)	08 MAY 2026 / 1530 UTC
Reporting Period	0000 24-APR through 1500 27-APR 2026 (72-hour sweep)
Analyst / Watch Officer	Fortune Favors the Prepared - OSINT Desk
FLASH Threshold	Risk Score \geq 20 - EIGHT FLASH EVENTS THIS CYCLE
PREP-CON Baseline	PREP-CON 3 - ELEVATED (Brown) Trend: STABLE AWAITING MoU Op Epic Fury Day 70 Blockade Day 26 LBN CF Day 23 of EXTENDED period (~17-MAY) WHCD Day 14 (Allen indicted 05-MAY) CISA KEV CVE-2026-0300 (CVE-2026-0300 PAN-OS RCE; FCEB T-1) Iran FM US-Iran 14-pt MoU response window St Petersburg 08-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 ▶	<p>CYB-001 CVE-2026-0300 PAN-OS RCE FCEB T-1 (09-MAY) / NO PATCH / CVSS 9.3 GEO-001 14-pt MoU response window / M/T Hasna disabled 06-MAY</p> <p>GEO-001 Hormuz dual blockade Day 26 / M/T Hasna disabled 06-MAY / 52 ships redirected GEO-CF-LBN LBN CF Day 23 of EXTENDED period (~17-MAY) / Hezbollah called meaningless FIN-001 Brent \$101.65 +1.59% rebound (after -7.8% Wed collapse on MoU news, intraday low \$96) / WTI ~\$96 / AAA \$4.536/gal AVN-001 EASA CZIB R7 issued 24-APR (extends to 01-MAY)</p>
FLASH ▶ cont.	
HIGH/NEW ★	<p>GEO-002 Iran FM US-Iran 14-pt MoU response window St Petersburg 08-MAY (today) / left Pakistan 26-APR without meeting US GEO-AXIS-001 347 UKR drones overnight 06-07 MAY across 20 RU regions / Russia Victory Day 09-MAY NWR-001 26 NWR transmitters affected (15 OOS + 11 DEG, 13 states); TN/AR/IL/GA gaps overlap today's severe storm corridor</p>
HIGH/UPDATED ↻	<p>CYB-002 KEV 4-CVE batch (PaperCut, TeamCity, Kentico, Quest KACE CVSS 10.0, Zimbra) FCEB-due 04-MAY (T-6) CYB-003 KEV 24-APR additions (Samsung, SimpleHelp x2, D-Link) NUC-001 440.9 kg HEU / IAEA blackout Day 70 / Bulletin Atomic Scientists 24-APR pre-strike Isfahan transfer analysis PHS-001 M7.4 Sanriku 20-APR / JMA megaquake advisory CLOSED 27-APR (background reverts to 0.1%) / M6.1 Hokkaido 26-APR</p>
HIGH/CONT ▶	<p>INS-001 IRGC/MOIS + DIA TER-002 NTAS Gap Day 60 AGR-001 Fertilizer Locked / Winter wheat 30% G/E (down from 45% YoY) CN-001 PRC SCS structural baseline (Scarborough + Paracels) 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</p>

CRITICAL TIME HACK

WHCD: Allen federally indicted 05-MAY; arraignment 11-MAY T-3 US Dist DC.

CISA KEV CVE-2026-0300: FCEB device-inventory due 11:59PM EST 01-MAY (T-3) - see CYB-001.

SEVERE WEATHER: NWS national headline: Storm Systems Impact Central/Eastern US Through Weekend; SPC Day 1 Slight Risk Lower MS Valley to TN Valley today - see WX-001 + NWR-001.

LEBANON CF: CF Day 23 of extended period (~17-MAY); Netanyahu 26-APR "vigorously attack" order - see GEO-CF-LBN.

IRAN TRACK: Iran reviewing US response to 14-pt MoU framework via Pakistan; Trump optimistic 06-MAY - see GEO-001 + FIN-001.

FORCE POSTURE: Hormuz Day 26 / 3 carriers ME first since 2003 / M/T Hasna disabled 06-MAY - see GEO-001.

OIL / FUEL: Brent \$101.65 (+2.64%); WTI \$96 (recovered from \$90.5 low); AAA \$4.031 - see FIN-001.

UKMTO / MARITIME: 5-nation transit regime; ~20,000 seafarers stranded; mine reports persist - see SC-001.

UKRAINE/RUSSIA: 347 UKR drones overnight 06-07 MAY across 20 RU regions inc Moscow + Russia Victory Day 09-MAY - see GEO-AXIS-001.

DPRK: Quiet 24-27 APR; last launch 19-APR Sinpo cluster-bomb SRBM cycle.

SPACE WEATHER: Kp 1-3 quiet; HF favorable for SKYWARN today - see SWX-001.

AVIATION: EASA CZIB R7 to 01-MAY (T-3); Sterling VA TFR 26-APR - see AVN-001.

CYBER: KEV CVE-2026-0300 T-4 (CYB-001); KEV 4-CVE batch T-6 to 04-MAY (CYB-002); AA26-097A Day 32 (CYB-005).

TERRORISM: DHS NTAS gap Day 70 (TER-002); INS-001 IRGC/MOIS homeland threat profile.

NUCLEAR: IAEA blackout Day 70; 440.9 kg 60% HEU - see NUC-001.

NWR: 26 affected (15 OOS + 11 DEG, 13 states); TN/AR/IL/GA gaps overlap today's severe corridor - see NWR-001.

PHS / EARTHQUAKES: M7.4 Sanriku 20-APR; JMA megaquake advisory CLOSED 27-APR (background reverts to 0.1%) - see PHS-001.

PRC GRAY-ZONE: Structural baseline (no current-cycle delta) - see CN-001.

GEO-AXIS-001 (CONT): Adversary exploitation of US attention bandwidth pattern continues - see GEO-AXIS-001.

SECTION INDEX

SEC 2 - BLUF & Market Indicators

CYB-001 PAN-OS RCE FCEB T-1 09-MAY | **GEO-001** 14-pt MoU response window / M/T Hasna disabled 06-MAY | GEO-CF-LBN Beirut Dahieh strike 06-MAY (first since 17-APR CF) + S Lebanon 07-MAY | **SC-001** CMA CGM San Antonio struck 05-MAY / Project Freedom paused | **FIN-001** Brent collapsed -7.8% Wed | **CYB-005** Linux Copy Fail FCEB T-7 | GEO-AXIS-001 347 UKR drones / Victory Day 09-MAY | Commodity Tracker | 6 FLASH (Sec 3)

SEC 3 - FLASH Events

CYB-001 PAN-OS CVE-2026-0300 FCEB T-1 (25) | **GEO-001** 14-pt MoU + Hasna disabled (25) | GEO-CF-LBN Beirut Dahieh + S Lebanon 07-MAY (27) | **SC-001** CMA CGM San Antonio struck / Project Freedom paused (21) | **FIN-001** Brent -7.8% Wed (22) | **CYB-005** Linux Copy Fail FCEB T-7 (22) | GEO-AXIS-001 347 UKR drones / Victory Day 09-MAY (22)

<p><u>SEC 4A - Cyber / IT / Threat Actors</u></p>	<p><u>CYB-001</u> PAN-OS RCE FCEB T-1 (09-MAY) / no patch <u>CYB-005</u> Linux Copy Fail FCEB T-7 (15-MAY) <u>CYB-002</u> KEV pointer (POINTER) <u>CYB-007</u> Volt Typhoon standing</p>
<p><u>SEC 4B - Physical / Geopolitical / IO</u></p>	<p><u>GEO-001</u> 14-pt MoU response window / Hasna disabled 06-MAY GEO-CF-LBN Beirut Dahieh + S Lebanon strikes GEO-AXIS-001 347 UKR drones + Victory Day 09-MAY <u>NUC-001</u> IAEA Blackout Day 70 / 440.9kg 60% HEU</p>
<p><u>SEC 5 - Energy / Infrastructure / Supply Chain</u></p>	<p><u>NUC-001</u> IAEA blackout Day 70 / 14-pt MoU 30-day verification window pending <u>SC-001</u> CMA CGM San Antonio struck / Project Freedom paused / 46 incidents / 10 IMO fatalities <u>FIN-001</u> Brent collapsed Wed - 7.8%</p>
<p><u>SEC 6 - Aviation / Transportation</u></p>	<p><u>AVN-001</u> EASA CZIB 2026-03-R7 issued 24-APR; extends to 01-MAY; 11-state ME airspace Sterling VA TFR FDC 6/5355 26-APR (WHCD aftermath; impact IAD) FAA USNS→NMS transition 18-APR</p>
<p><u>SEC 7 - Meteorological Weather & Severe Weather + NWR Outages</u></p>	<p><u>WX-001</u> NWS national headline: Storm Systems Impact Central and Eastern US Through Weekend / SPC Day 1 Slight Risk Lower MS Valley to TN Valley / Damaging winds + few tornadoes + flooding / WPC heavy/excessive rainfall same area / Two storm systems through weekend NWR 26 affected (15 OOS + 11 DEG, 13 states) TN Shelbyville WXK63 + AR Fountain Hill KGG86 + IL Hillsboro KXI79 + GA Baxley WXM65 OOS within today's Lower MS / TN Valley severe storm corridor; NM triple-gap continues cycle 7; AK 12-transmitter Juneau WFO impairment</p>
<p><u>SEC 7A - Space Weather & EMCMM</u></p>	<p><u>SWX-001</u> Past 24h Kp 1-3 quiet Coronal hole HSS arriving today Unsettled-active expected; slight chance G1 minor Long filament eruption 06-MAY 16 UTC Powerhouse sunspot returning to disk 10.7 cm flux 120 sfu HF favorable for SKYWARN today</p>
<p><u>SEC 7B - Agriculture, Food & Supply Chain</u></p>	<p><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 24-APR settlements: corn 455.00 / soybeans 1163.75 / wheat 608.25</p>
<p><u>SEC 8 - 72-Hour Outlook</u></p>	<p>09-MAY Russia Victory Day 09-MAY CYB-001 FCEB deadline 11-MAY Allen arraignment T-3 12-MAY WASDE 13-MAY first PAN-OS patches 15-MAY CYB-005 FCEB ~17-MAY LBN CF expiry</p>
<p><u>SEC 10 - PREP-CON Assessment</u></p>	<p>PREP-CON 3 ELEVATED / Trend STABLE AWAITING MoU Op Epic Fury Day 70 / Blockade Day 26 / LBN CF Day 23 fortunefavorstheprepared.com/preparedness-book-of-knowledge-2/planning/preparedness-conditions-prep-con/</p>
<p><u>SEC 11 - Alert & Readiness Conditions Panel</u></p>	<p>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</p>
<p><u>SEC 12 - Source Registry Summary</u></p>	<p>24 Threat Areas 358 Standing Sources (v1.8) 51 Citations This Cycle T1: 22 T2: 29 T3: 0 fortunefavorstheprepared.com/dtr-source-registry/</p>
<p><u>SEC 13 - Closing Block</u></p>	<p>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/</p>

GEOGRAPHIC IMPACT INDEX

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
<u>CONUS - Illinois / Missouri / Indiana / Kentucky</u>	<u>WX-001</u> SPC Day 1 Slight Risk Lower MS to TN Valley today NWS national headline: Storm Systems Impact Central/Eastern US Through Weekend <u>NWR-001</u> IL Hillsboro KXI79 + AR Fountain Hill KGG86 + TN Shelbyville WXK63 + GA Baxley WXM65 OOS within today's Lower MS / TN Valley severe corridor
<u>CONUS - Tennessee / Alabama / Mississippi (Day 2-3)</u>	WX-001-EXT TN Valley + Lower MS Valley severe weekend continuation <u>NWR-001</u> TN Shelbyville WXK63 OOS within TN Valley severe corridor (Bedford/Marshall/Coffee TN)
<u>CONUS - Mid-Atlantic / Washington DC</u>	<u>TER-002</u> NTAS gap Day 70 <u>INS-001</u> IRGC/MOIS structural COGCON assessed <u>TER-001</u> calendar carry: Allen indicted 05-MAY, arraignment 11-MAY (T-3) US Dist DC J. McFadden
<u>CONUS - Nationwide (All Regions)</u>	<u>CYB-001</u> CISA KEV CVE-2026-0300 CVE-2026-0300 PAN-OS RCE / FCEB T-1 to 01-MAY <u>CYB-002</u> KEV 4-CVE batch T-6 04-MAY <u>CYB-003</u> 24-APR additions Samsung+SimpleHelp+D-Link <u>CYB-005</u> AA26-097A Day 32 <u>FIN-001</u> Brent \$101.65 intraday (highest since March; +2.71% session) +13% weekly <u>SWX-001</u> Kp 1-3 quiet HF favorable
<u>CONUS - New Mexico (NWR Triple-Gap)</u>	<u>NWR-001</u> NM TRIPLE-GAP continues cycle 7 (Roswell + Carlsbad + Artesia OOS); ALASKA 12 transmitters affected (Juneau WFO impairment)
<u>CONUS - Alaska (NWR 12-transmitter cluster)</u>	<u>NWR-001</u> ALASKA 12 transmitters affected (Sand Point WNG714 OOS + 11 DEG, mostly Juneau WFO) SE Alaska coverage broadly impaired
<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 26 / M/T Hasna disabled 06-MAY 14:00 UTC / 52 ships redirected (CENTCOM cumulative) / 3 US carriers in ME first time since 2003 (USS GHW Bush 24-APR) GEO-CF-LBN Day 23 of extended period (Day 15 since 23-APR extension) (~17-MAY) / Hezbollah meaningless / Netanyahu 26-APR vigorously attack <u>TRV-001</u> EASA CZIB 2026-03-R7 issued 24-APR / valid through 01-MAY (T-3) / 11-state ME airspace
<u>Global Maritime / Chokepoints</u>	<u>SC-001</u> M/T Hasna disabled 06-MAY / 5-nation transit regime (CN/RU/IN/IQ/PK; +MY/TH/PH later) / 52 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 70 Blockade Day 26 52 ships redirected NEW Iran proposal via Pakistani mediators (Axios): decouple Hormuz from nuclear / postpone nuclear talks until blockade lifted Iran Supreme Leader holds Supreme Leader role since 28-FEB strikes Iran death toll ~3,400 <u>NUC-001</u> IAEA blackout Day 70 / 440.9kg 60% HEU
<u>Russia / St Petersburg</u>	GEO-AXIS-001 US-Iran 14-pt MoU response window meeting OCCURRED 27-APR St Petersburg / Putin received WRITTEN MESSAGE from Iran Supreme Leader (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-001 347 UKR drones overnight 06-07 MAY across 20 RU regions / Russia Victory Day 09-MAY / parade without military equipment first time ~20 yrs / Moscow internet+SMS shutdown 09-MAY
<u>Europe / Ukraine / Russian Urals / Romania (NATO)</u>	GEO-AXIS-001 GEO-AXIS-001 347 UKR drones overnight 06-07 MAY across 20 RU regions inc Moscow (RU MoD; 2nd-largest of war) Russia unilateral CF 08-09 MAY for Victory Day UKR declined RU CF / offered

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
	own 30-day RU rejected Victory Day parade 09-MAY without military equipment first time ~20 yrs Moscow internet+SMS shutdown 09-MAY
<u>Japan / Sanriku Coast</u>	PHS-001 M7.4 Sanriku Japan 20-APR; JMA megaquake advisory 1-week period closes today 27-APR M6.1 Hokkaido 26-APR Aftershock pattern monitoring continues
<u>Agricultural / Global Supply Chain</u>	AGR-001 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>	SWX-001 Past 24h Kp 1-3 quiet / Coronal hole HSS arriving today / Unsettled-active expected; slight chance G1 minor / Long filament eruption 06-MAY 16 UTC / Powerhouse sunspot region returning to disk / 10.7 cm flux 120 sfu HF favorable for SKYWARN today's severe corridor
<u>Cyber / Vulnerability Queue</u>	CYB-001 PAN-OS CVE-2026-0300 RCE FCEB T-1 (09-MAY) NO PATCH CYB-005 Linux CopyFail CVE-2026-31431 FCEB T-7 (15-MAY) container-escape risk CYB-002 prior-cycle KEV windows passed (POINTER) AA26-097A Day 32 structural baseline

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 27-APR	Brent peaked above \$108 early 27-APR session before paring to ~\$106 on Iran proposal reports. pared on MoU news, +5.98% over month last week (largest since early March). Trump 26-APR 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 27-APR. Risk premium reflects 3 US carriers in Middle East (first time since 2003 with USS GHW Bush 24-APR), M/T Hasna disabled 06-MAY, 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	AAA national average \$4.031/gal direct 27-APR (down from \$4.09 wk-over-wk; from \$4.16 two weeks ago). Most expensive CA (\$5.84); least OK (\$3.40);

COMMODITY	PRE-WAR (28 FEB)	CURRENT (27 APR)	CHG vs PRE-WAR	48H TREND	CONSUMER / ANALYTICAL NOTE
				rally inbound	GA \$3.62 statewide. Pump lag 10-14 days: 27-APR Brent \$101.65 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 24-APR (extends to 01-MAY) covers 11-state ME airspace, sustaining supply constraint. European carriers continuing suspensions.
Urea (46-0-0)	~\$465/ton NOLA	\$826/ton (DTN natl)	+78%	~flat ~0%	DTN Week 4 March; USDA AMS \$624/ton Iowa 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 26. CENTCOM 52 ships redirected (cumulative). M/T Hasna (Iranian-flagged tanker) disabled 06-MAY 14:00 UTC by CENTCOM after multiple warnings of blockade violation. 3 US carriers in Middle East first time since 2003 (USS George H.W. Bush arrived 24-APR). 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

08 MAY 2026 | PREP-CON 3 ELEVATED | TREND STABLE AWAITING MoU | OP EPIC FURY Day 70 | BLOCKADE Day 26 | LBN CF Day 23 of EXTENDED PERIOD (~17-MAY, T-9) | CVE-2026-0300 PAN-OS RCE FCEB T-1 | RUSSIA VICTORY DAY T-1

THE CYCLE - QUICK LOOK

- ▶ CISA KEV CVE-2026-0300 PAN-OS unauth-root RCE; FCEB enforcement deadline 09-MAY (T-1); active limited exploitation; NO PATCH yet (first 13-MAY) - see [CYB-001](#).
- ▶ US-Iran 14-pt MoU response window live; Iran reviewing US response via Pakistan; Trump optimistic 06-MAY (very good talks 24h); CENTCOM disabled M/T Hasna 06-MAY 14:00 UTC after warnings - see [GEO-001](#).
- ▶ IDF struck Beirut Dahieh 06-MAY killing Radwan Force ops cmdr Balout (FIRST capital strike since 17-APR CF); IDF S. Lebanon strikes 07-MAY (Ain Baal/Tyre + 3x Dibbin + 3x Nabatieh) - see [GEO-CF-LBN](#).
- ▶ CMA CGM San Antonio (Maltese 2,824 TEU) struck by missile 05-MAY off Oman; 8 wounded; Trump PAUSED Project Freedom 06-MAY after just 2 days - see [SC-001](#).
- ▶ Brent COLLAPSED -7.8% Wed 06-MAY to \$101.27 close on MoU news; today \$101.65 (+1.59% rebound); WTI ~\$96; AAA \$4.536/gal; CA gasoline >\$6/gal first time - see [FIN-001](#).
- ▶ CISA KEV CVE-2026-31431 Linux Kernel Copy Fail; FCEB deadline 15-MAY (T-7); container-escape risk Docker/LXC/K8s; PoC public - see [CYB-005](#).
- ▶ 347 UKR drones overnight 06-07 MAY across 20 RU regions inc Moscow (2nd-largest of war); Russia unilateral CF 08-09 MAY for Victory Day; UKR declined; Victory Day parade 09-MAY without military equipment first time ~20 yrs - see [GEO-AXIS-001](#).

PRACTITIONER POSTURE: PREP-CON 3 sustain. 72-hr readiness for: PAN-OS exploitation surge as FCEB 09-MAY deadline passes with no patch; Russia Victory Day 09-MAY (Moscow internet/SMS shutdown, foreign embassy evacuation advised in Kyiv); Iran response to US 14-pt MoU response (deal possible before Trump China trip).

NEW & UPDATED - THIS CYCLE ONLY

★ [CYB-001](#) (NEW): **PAN-OS CVE-2026-0300 KEV ADDED 06-MAY; FCEB T-1 (09-MAY); NO PATCH; CVSS 9.3.** Buffer overflow in User-ID Authentication Portal; unauth-root RCE; active limited exploitation; mitigation = restrict portal to trusted internal IPs.

★ [GEO-001](#) (UPDATED): **US-IRAN 14-PT MoU RESPONSE WINDOW; M/T HASNA DISABLED 06-MAY.** Iran reviewing US response via Pakistan; Trump optimistic; possible deal before Trump China trip; CENTCOM disabled Iranian-flagged tanker after warnings.

★ [GEO-CF-LBN](#) (UPDATED): **IDF BEIRUT DAHIEH STRIKE 06-MAY (FIRST SINCE 17-APR CF) + S LEBANON 07-MAY.** Radwan Force ops cmdr Balout killed; 7x strikes S. Lebanon 07-MAY; IDF evac orders Deir al-Zahrani/Bafroa/Habush; 220+ Hezbollah killed since CF; draft US-Iran agreement WOULD include LBN CF.

★ [SC-001](#) (UPDATED): **CMA CGM SAN ANTONIO STRUCK 05-MAY; PROJECT FREEDOM PAUSED 06-MAY.** Maltese 2,824 TEU container ship hit by Iranian missile off Oman; 8 wounded (3 ICU); Trump paused Project Freedom after 2 days (Saudi pressure per NBC); UKMTO 46 incidents since 28-FEB; IMO 10 cumulative seafarer fatalities.

★ [CYB-005](#) (NEW): **LINUX KERNEL COPY FAIL CVE-2026-31431 KEV ADDED 01-MAY; FCEB T-7.** 9-yr-old logic bug algif_aead module; 732-byte exploit; container-escape Docker/LXC/K8s; PoC public; Go+Rust ports detected; fixed kernel 6.18.22, 6.19.12, 7.0.

★ [GEO-AXIS-001](#) (UPDATED): **347 UKR DRONES OVERNIGHT (2ND-LARGEST OF WAR) + RUSSIA VICTORY DAY 09-MAY.** Russia unilateral CF 08-09 MAY (Ukraine declined; offered own 30-day RU rejected); parade 09-MAY without military equipment first time ~20 yrs; Moscow internet+SMS shutdown 09-MAY; RU FFM advised foreign embassies in Kyiv to evacuate; Crimea cancelled own parade.

🔄 [FIN-001](#): **BRENT \$101.65 (+1.59% TODAY) AFTER COLLAPSING -7.8% WED ON MoU.** Wed close \$101.27 (intraday low \$96, -11%); WTI ~\$96 (recovered from \$90.5 low); AAA \$4.536/gal LIVE pump-lag; CA gasoline >\$6/gal first time; IEA 14M bpd disruption; markets pricing 60-70% MoU acceptance.

↳ **NWR-001** (user-supplied 08-MAY): **26 NWR TRANSMITTERS AFFECTED (15 OOS + 11 DEG, 13 STATES)**. TN Shelbyville + AR Fountain Hill + IL Hillsboro + GA Baxley OOS within today's Lower MS / TN Valley severe corridor; NM triple-gap continues cycle 7; AK 12-transmitter Juneau WFO impairment.

↳ **CYB-002** (DEMOTED to POINTER): **PRIOR-CYCLE KEV WINDOWS PASSED**. 04-MAY 4-CVE batch FCEB deadline passed; 24-APR additions FCEB windows past; current-cycle KEV pressure carried by CYB-001 + CYB-005.

↳ **NUC-001: IAEA BLACKOUT Day 70; 440.9 KG 60% HEU; 30-DAY VERIFICATION WINDOW PENDING IF MoU SIGNED**. Grossi cannot assure peaceful program; no access to 4 declared enrichment facilities; if 14-pt MoU signed, 30-day enrichment-suspension verification window operative.

↳ **AVN-001: EASA CZIB 2026-03-R9 IN FORCE (R8 EXPIRED 05-MAY)**. 11 countries; exception S Saudi/Oman FL320+; Iran 04-MAY UAE attack drove R9 extension.

NOT DETAILED HERE (FULL NARRATIVE IN BODY): CYB-007 Volt Typhoon (standing); INS-001 IRGC/MOIS structural; TER-002 NTAS gap (standing); TER-001 WHCD investigation (Allen indicted 05-MAY, arraignment 11-MAY T-3 - calendar carry, no FLASH); WLDNR-001 GA fires (containment improving, see Sec 4B); WX-001 Storm Systems Central/Eastern US Through Weekend (see Sec 7); SWX-001 HSS arriving today, slight chance G1 (see Sec 7A); HLTH-001 CDC measles 1,814 (Sec 7C); AGR-001 USDA Crop Progress 04-MAY, WASDE 12-MAY T-4 (Sec 7B); PHS-001 quiet seismic week (Sec 7E).

DECISIVE WINDOW: Next 72 hrs - (1) CISA KEV CVE-2026-0300 FCEB enforcement 09-MAY (T-1) with NO patch available; (2) Russia Victory Day 09-MAY (Moscow internet/SMS shutdown, foreign embassy evacuation advisory in Kyiv, RU mass-strike threat if disrupted); (3) Iran response to US 14-pt MoU framework (deal possible before Trump China trip); (4) LBN CF expiry ~17-MAY (T-9); (5) Brent volatility on next MoU update.

SECTION 3 - FLASH EVENTS (Score ≥ 20)

CYB-001 CISA KEV CVE-2026-0300 PAN-OS Out-of-Bounds Write User-ID Authentication Portal unauth-root RCE / CVSS 9.3 / Active limited exploitation in wild / NO PATCH available; first patches 13-MAY / FCEB enforcement deadline 09-MAY 23:59 EST (T-1 today)		FLASH NEW 25
WHY THIS CYCLE	CISA added CVE-2026-0300 to KEV catalog 06-MAY; FCEB enforcement deadline 09-MAY 23:59 EST (T-1 today); active limited exploitation observed; NO PATCH yet (first 13-MAY).	
Summary	<p>SIZE: All Federal Civilian Executive Branch agencies running affected PAN-OS versions; broader DIB/financial/healthcare/critical-infrastructure exposure parallel.</p> <p>ACTIVITY: CISA added CVE-2026-0300 to KEV catalog 06-MAY; FCEB enforcement deadline 09-MAY 23:59 EST (T-1 today). Buffer overflow in PAN-OS User-ID Authentication Portal (Captive Portal) allows unauthenticated remote attacker to execute arbitrary code with root privileges via specially-crafted packets; no user interaction required. Active limited exploitation observed in the wild against internet-exposed portals; PoC code circulating on underground forums. NO PATCH currently available; first patches expected 13-MAY (T+5), second batch 28-MAY. Mitigation: restrict User-ID Authentication Portal to trusted internal IPs only or disable feature.</p> <p>LOCATION: PA-Series and VM-Series firewalls running PAN-OS 12.1, 11.2, 11.1, 10.2 (specific releases). Prisma Access, Cloud NGFW, and Panorama appliances NOT affected.</p> <p>TIME: KEV 06-MAY; FCEB 09-MAY (T-1).</p> <p>EQUIPMENT: PAN-OS firewalls; CVSS 9.3 critical; CWE-787 Out-of-Bounds Write; QVS 95.</p> <p>UNIT: CISA + Palo Alto Networks Security Advisory; threat actor attribution not public.</p>	

Analyst Assessment	<p>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.</p> <p>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. CVE-2026-0300 PAN-OS RCE targeting is not limited to government.</p> <p>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.</p> <p>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.</p> <p>TRIPWIRES: (1) Any FCEB agency missing the 01-MAY reporting deadline; (2) Disclosure of compromise indicators by named federal agency; (3) Patch release 13-MAY (T+5); (4) Threat actor attribution development; (5) Exploitation surge after 09-MAY FCEB deadline passes without patch.</p>
ALT HYP	<p>ALT A: CVE-2026-0300 PAN-OS RCE PRC-affiliated APT operation focused on federal lateral movement [MOST LIKELY]</p> <p>CVE-2026-0300 PAN-OS RCE targeting and tradecraft pattern (Cisco edge, persistence via base OS, long dwell) maps to PRC-affiliated APT signatures (cf. Volt Typhoon CYB-007 baseline).</p> <p>✓ Supporting Evidence: CISA + Palo Alto Networks Security Advisory; CVSS 9.3 critical; QVS 95; active exploitation observed; FCEB enforcement T-1 with no patch.</p> <p>✗ Ruling-Out Evidence: CISA has not publicly attributed; multiple state actors have demonstrated similar Cisco-edge targeting capability.</p> <p>ALT B: Iran-affiliated APT operation parallel to AA26-097A OT/PLC line [LESS LIKELY]</p> <p>AA26-097A Day 32 demonstrates active Iranian-affiliated APT activity against US infrastructure during Op Epic Fury; CVE-2026-0300 PAN-OS RCE could be a second prong.</p> <p>✓ Supporting Evidence: Active Iran-affiliated cyber activity per AA26-097A; war-period escalation.</p> <p>✗ Ruling-Out Evidence: CVE-2026-0300 PAN-OS RCE 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.</p>

<p>GEO-001 Hormuz dual blockade Day 26 / 52 ships redirected by US (cumulative) / M/T Hasna (Iranian-flagged tanker) disabled 06-MAY 14:00 UTC by CENTCOM / 3 US carriers in ME first time since 2003</p>	<p>FLASH UPDATED 25</p>
WHY THIS CYCLE	<p>US delivered response to Iran 14-pt MoU framework via Pakistan; Iran reviewing (Baghaei 06-MAY); Trump optimistic; CENTCOM disabled M/T Hasna 06-MAY 14:00 UTC after warnings.</p>
Summary	<p>SIZE: 13+ US KIA + 2+ non-combat (baseline); Iran ~3,400 KIA (Iran forensics chief baseline 24-APR); Lebanon 2,491 KIA / 7,719 wounded (Lebanese MoH baseline since 02-MAR).</p> <p>ACTIVITY: Hormuz dual blockade Day 26; CENTCOM disabled M/T Hasna (Iranian-flagged tanker) 06-MAY 14:00 UTC after multiple warnings of blockade violation; Hasna observed transiting international waters en route to Iranian Gulf of Oman port. US delivered response to Iran's 14-pt MoU framework via Pakistan; Iran reviewing per FM spokesman Baghaei 06-MAY</p>

(response expected within days). Trump 06-MAY: very good talks 24h, possible deal before China trip; cautioned big assumption Iran accepts. Iran issued expanded Hormuz control map. Iran allows transits for 5 nations (CN, RU, IN, IQ, PK; +MY/TH/PH later). 3 US carriers in Middle East first time since 2003.

LOCATION: Strait of Hormuz, Gulf of Oman, Arabian Gulf, Arabian Sea; CENTCOM AOR.

TIME: Op Epic Fury Day 70; Blockade Day 26 (since 13-APR); MoU response window TODAY.

EQUIPMENT: CENTCOM naval enforcement under ADM Cooper; ~52 vessels redirected cumulative; SecDef Hegseth: blockade continues without hesitation or apology.

UNIT: US-Iran negotiations led by Witkoff + Kushner via Pakistan mediation (FM Araghchi/PM Sharif track).

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: US-Iran 14-pt MoU response window St Petersburg today, immediately after Araghchi left Pakistan without meeting US officials following Trump's 26-APR 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 24-APR ~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 M/T Hasna disabled 06-MAY (CENTCOM + Pinckney + Reuters multi-stream). HIGH on 3 carriers ME first since 2003 (CENTCOM + USNI + Reuters). HIGH on Trump 26-APR negotiator suspension (Reuters + WH). HIGH on US-Iran 14-pt MoU response window 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) Iran response to US 14-pt MoU framework (timing/content); (3) Any direct Iran Supreme Leader outreach beyond written messages; (4) CENTCOM intercept count to 40+; (5) Any US-flag or US-allied-flag vessel incident in TSS; (6) Iran formal statement on Sevan intercept; (7) Sustained kinetic incident with multi-stream attribution.

ALT HYP

ALT A: St Petersburg track produces Russian-mediated framework within 14 days [EQUALLY LIKELY]

US-Iran 14-pt MoU response window 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 Iran Supreme Leader written message). US tolerates as face-saving off-ramp; Iran new Hormuz-nuclear decouple proposal (Axios 26-APR) is the substantive opening offer.

✓ **Supporting Evidence:** US-Iran 14-pt MoU response window 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 26-APR 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 \(US-Iran 14-pt MoU response window scheduling; Pezeshkian\)](#) | [USNI News \(3-carrier Middle East deployment\)](#) | [Media Line \(37-ship cumulative redirection\)](#) | [Iran forensics chief \(24-APR ~3,400 toll\)](#) | [Full Source Registry](#)

GEO-CF-LBN | LBN CF Day 23 of EXTENDED period (~17-MAY, T-9) / IDF struck Beirut Dahieh 06-MAY (FIRST capital strike since 17-APR CF) killing Radwan Force ops cmdr Balout / IDF S. Lebanon strikes 07-MAY: Ain Baal/Tyre + 3x Dibbin/Marjayoun + 3x Nabatieh / 1 KIA + several injured / IDF evac orders 07-MAY: Deir al-Zahrani + Bafroa + Habush / 220+ Hezbollah killed since CF (IDF cumulative) / Reuters: draft US-Iran agreement WOULD include LBN CF (Israel Channel 12) / Tyre family strike 13 KIA + 35 injured + 15 missing



WHY THIS CYCLE

IDF struck Beirut Dahieh 06-MAY killing Radwan Force ops cmdr Balout - first capital strike since 17-APR CF began. IDF S. Lebanon strikes 07-MAY (Ain Baal/Tyre + 3x Dibbin + 3x Nabatieh). IDF evac orders 07-MAY: Deir al-Zahrani, Bafroa, Habush. Reuters: draft US-Iran agreement WOULD include LBN CF.

Summary

SIZE: Lebanon 2,491+ KIA / 7,719+ wounded cumulative since 02-MAR (Lebanese MoH); ~1.2M displaced; 220+ Hezbollah killed since CF (IDF cumulative).
ACTIVITY: IDF struck Beirut Dahieh 06-MAY killing Radwan Force ops cmdr Balout - FIRST capital strike since 17-APR CF began. IDF S. Lebanon strikes 07-MAY: Ain Baal/Tyre + 3x Dibbin/Marjayoun + 3x Nabatieh; 1 KIA + several injured. IDF issued evacuation orders 07-MAY for Deir al-Zahrani, Bafroa, Habush. Tyre family strike 13 KIA + 35 injured + 15 missing. Reuters: draft US-Iran 14-pt agreement WOULD include LBN CF (Israel Channel 12).
LOCATION: Beirut southern suburbs (Haret Hreik); Tyre District; Marjayoun District; Nabatieh; ~6% Lebanese territory remains under Israeli occupation.
TIME: CF Day 23 of EXTENDED period (Day 15 since 23-APR extension; expires ~17-MAY = T-9).

	<p>EQUIPMENT: IDF IAF + ground brigades + targeted-strike capability; Hezbollah retains FPV drone + anti-tank + suicide-vest threat.</p> <p>UNIT: IDF Northern Command; Hezbollah remaining leadership; LAF + UNIFIL on Yellow Line; Defense Min Katz authorization on Beirut strike per Netanyahu order.</p>
<p>Analyst Assessment</p>	<p>FIRST KINETIC KILL CHANGES THE FRAME: Sgt Fooks KIA 26-APR + 4 severely wounded + 27-APR 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: 27-APR 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 27-APR 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 26-APR "vigorously attack" order into sustained shaping operations.</p> <p>TOLL PACE: 37 KIA + 61 wounded between 24-APR and 26-APR baselines (~12-20 KIA/day during CF) - below the 50/day pace earlier in the cycle but operationally significant inside a truce.</p> <p>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.</p> <p>SPLIT CONFIDENCE: HIGH on Fooks KIA + 6 wounded + medevac-follow-on tactic (T1 IDF + Times of Israel + Jerusalem Post). HIGH on IDF 27-APR strike package (T1 IDF + Times of Israel). HIGH on Golani Bint Jbeil HQ + 50+ sites (T1 IDF). HIGH on Hezbollah suicide-bomber threat 27-APR (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).</p> <p>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.</p>
<p>ALT HYP</p>	<p>ALT A: Extended CF holds to ~17-MAY with sustained kinetic friction; no framework [EQUALLY LIKELY]</p> <p>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.</p> <p>✓ Supporting Evidence: 24-APR-26-APR pattern matches; Lebanese Health Ministry toll consistent with sustained-friction model; Netanyahu order without escalation step.</p> <p>✗ 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.</p> <p>ALT B: CF collapses inside extended period; full Hezbollah-IDF resumption [EQUALLY LIKELY]</p>

Hezbollah rocket exchange escalates beyond IDF tolerance; Netanyahu 26-APR order converts to expanded operations; Israel pushes north of Litani; Lebanese government fails to disarm Hezbollah; full kinetic resumption.

✓ **Supporting Evidence:** Netanyahu 26-APR 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 \(Netanyahu 26-APR vigorously-attack order\)](#) | [Reuters \(Hezbollah Fayyad meaningless framing\)](#) | [Al Jazeera \(24-APR Bint Jbeil + Toulune strikes\)](#) | [CPJ \(8 journalists killed baseline\)](#) | [Full Source Registry](#)

FIN-001 | Oil / Gas / Markets - Brent COLLAPSED -7.8% Wed 06-MAY to \$101.27 close (intraday low \$96, -11%) on US-Iran 14-pt MoU news + Project Freedom pause / Brent today 08-MAY \$101.65 (+1.59% rebound) / WTI ~\$96 (recovered from \$90.5 low) / AAA \$4.536/gal LIVE (pump-lag from prior \$116 Brent peak) / CA gasoline >\$6/gal first time / IEA: 14M bpd global supply disruption / Markets pricing 60-70% MoU acceptance probability

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WHY THIS CYCLE

Brent collapsed -7.8% Wed 06-MAY to \$101.27 close (intraday low \$96, -11%) on US-Iran 14-pt MoU news + Project Freedom pause; Brent today \$101.65 (+1.59% rebound); CA gasoline >\$6/gal first time.

Summary

SIZE: Brent crude global benchmark; WTI US benchmark; AAA national average gasoline; IEA-tracked supply disruption ~14M bpd.

ACTIVITY: Brent COLLAPSED -7.8% Wed 06-MAY closing \$101.27 (intraday low \$96, -11%) on US-Iran 14-pt MoU news + Project Freedom pause; today 08-MAY Brent \$101.65 (+1.59% rebound); WTI ~\$96 (recovered from \$90.5 low); AAA national average \$4.536/gal LIVE (pump-lag from prior \$116 Brent peak); CA gasoline >\$6/gal first time. Markets pricing 60-70% MoU acceptance probability. US oil exports record high last week. US gasoline inventories down 12 consecutive weeks; distillate down 9 weeks.

LOCATION: Global oil markets (ICE Brent London; NYMEX WTI Cushing); US retail fuel; California pump impact most acute.

TIME: Wed 06-MAY collapse on MoU news + Project Freedom pause; Thu 07-MAY Brent intraday \$96.9; Fri 08-MAY rebound.

EQUIPMENT: ICE Brent + NYMEX WTI futures; AAA Daily Fuel Gauge Report.
UNIT: IEA (global supply disruption framing); EIA (US inventory data); Trading Economics + Reuters real-time.

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 27-APR Brent \$101.65 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 26-APR negotiator-suspension + Pezeshkian no-negotiations-under-blockade = both sides have closed the formal Pakistani-track door. The substantive successor is US-Iran 14-pt MoU response window St Petersburg today (see GEO-001 + GEO-002). Market read: pricing in 90+ day blockade.

TRIPWIRES: (1) Outcome of US-Iran 14-pt MoU response window 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 27-APR \$107-108 floor; pared on MoU news, +5.98% over month pattern; IEA largest-shock framing; Pezeshkian no-negotiations stance.

✗ **Ruling-Out Evidence:** US-Iran 14-pt MoU response window 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]

US-Iran 14-pt MoU response window 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 26-APR 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 \(Brent +13% weekly; 27-APR session\)](#) | [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 Day 26 - CMA CGM San Antonio (Maltese, 2,824 TEU) struck by missile 05-MAY off Oman / 8 wounded (3 ICU) / Trump PAUSED Project Freedom 06-MAY after just 2 days operating (Saudi pressure per NBC) / CENTCOM cumulative ~52 vessels redirected / UKMTO 46 incidents since 28-FEB / IMO 10 cumulative seafarer fatalities / CMA CGM Saigon (Maltese) safely exited 04-MAY / Iran issued expanded Hormuz control map

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WHY THIS CYCLE

CMA CGM San Antonio (Maltese 2,824 TEU) struck by Iranian missile evening 05-MAY off Oman; 8 wounded (3 ICU); Trump PAUSED Project Freedom 06-MAY after just 2 days operating (Saudi pressure per NBC).

Summary

SIZE: One Maltese-flagged container vessel struck (CMA CGM San Antonio, IMO 9294173, 2,824 TEU); 8 crew wounded (3 ICU); CENTCOM cumulative ~52 vessels redirected; UKMTO 46 reported incidents since 28-FEB; IMO 10 cumulative seafarer fatalities; ~20,000 seafarers stranded Gulf.

ACTIVITY: CMA CGM San Antonio struck by Iranian cruise missile evening 05-MAY off Oman coast while attempting eastward Hormuz transit; AIS turned off pre-transit; last known position off Dubai. Trump PAUSED Project Freedom 06-MAY after just 2 days of operating (15,000 personnel + warships + aircraft); Saudi pressure per NBC for Pakistan-mediated track preference. US military deflected blame: ship operator did not follow Project Freedom check-in protocols (NYT). CMA CGM Saigon (Maltese, 2,824 TEU) safely exited 04-MAY toward Sri Lanka. Iran issued expanded Hormuz control map.

LOCATION: Strait of Hormuz; Omani sector; Arabian Gulf; Gulf of Oman. Vessel destination Mundra India.

TIME: Strike evening 05-MAY; Project Freedom paused 06-MAY; San Antonio still missing AIS as of today.

EQUIPMENT: CMA CGM Midas 2 service container vessel; cruise missile (Iran-attributed).

UNIT: CMA CGM (Marseilles-based 3rd-largest container line); UKMTO; CENTCOM; IMO.

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 52 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 KEV CVE-2026-31431 Linux Kernel "Copy Fail" added 01-MAY - 9-yr-old logic bug in algif_aead module (AF_ALG cryptographic subsystem) / 732-byte exploit / CVSS 7.8 / Container-escape risk Docker/LXC/K8s / Working PoC public; Go+Rust ports detected (Kaspersky); Microsoft Defender testing-activity observed / Fixes in kernel 6.18.22, 6.19.12, 7.0 / FCEB enforcement deadline 15-MAY (T-7)

FLASH | UPDATED | 22

WHY THIS CYCLE	CISA added CVE-2026-31431 Linux Kernel Copy Fail to KEV 01-MAY; FCEB deadline 15-MAY (T-7); 9-yr-old logic bug; container-escape risk Docker/LXC/K8s; PoC public; Go+Rust ports detected.
Summary	<p>SIZE: All FCEB agencies running affected Linux kernel versions; global Linux server fleet (Ubuntu, RHEL, SUSE, Amazon Linux); cloud workloads + container environments (Docker, LXC, Kubernetes); embedded devices.</p> <p>ACTIVITY: CISA added CVE-2026-31431 to KEV catalog 01-MAY citing active exploitation; FCEB remediation deadline 15-MAY (T-7). 9-year-old logic bug in Linux kernel algif_aead module of AF_ALG cryptographic subsystem allowing local privilege escalation to root. 732-byte Python exploit performs 4-byte controlled overwrite in kernel page cache; UID 0 escalation. Container-escape risk: Docker/LXC/K8s grant container processes access to AF_ALG subsystem if algif_aead loaded in host kernel by default. Detection difficult - exploit uses only legitimate system calls. Working PoC public; Go and Rust ports detected in open-source repos (Kaspersky); Microsoft Defender testing-activity observed.</p> <p>LOCATION: Linux hosts globally; FCEB networks; cloud + on-prem servers; container infrastructure.</p> <p>TIME: KEV addition 01-MAY; FCEB deadline 15-MAY (T-7).</p> <p>EQUIPMENT: Linux kernel; fixes available in 6.18.22, 6.19.12, 7.0; CVSS 7.8 High; CWE-699 Incorrect Resource Transfer Between Spheres.</p> <p>UNIT: CISA + Theori + Xint researchers; Kaspersky analysis; FBI assessment of Iranian-affiliated APT proliferation context.</p>
Analyst Assessment	<p>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).</p> <p>UNIT 42 SHIFT SIGNIFICANCE: Rockwell FactoryTalk targeting by CL-STA-1128 indicates target-set evolution, not dormancy. FactoryTalk is the Rockwell OT orchestration layer - a richer target than isolated Unitronics PLCs.</p> <p>OP EPIC FURY DAY 58 COST-BENEFIT: Sustained blockade Day 26 + Trump 26-APR 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.</p> <p>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 KEV CVE-2026-0300 reporting deadline 01-MAY (T-3).</p>
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 - 347 UKR drones overnight 06-07 MAY across 20 RU regions inc Moscow (RU MoD; 2nd-largest of war) / ~100 flights delayed 3 Moscow airports / Russia unilateral CF 08-09 MAY for Victory Day (Ukraine declined; offered own 30-day CF, RU rejected) / Victory Day parade 09-MAY WITHOUT military equipment first time ~20 yrs / Moscow internet+SMS shutdown 09-MAY / RU FFM advised foreign embassies in Kyiv to evacuate / RU warned mass strike on Kyiv if disrupted / Crimea cancelled own parade

FLASH | UPDATED | 22

WHY THIS CYCLE	347 UKR drones overnight 06-07 MAY across 20 RU regions inc Moscow (RU MoD; 2nd-largest of war); Russia unilateral CF 08-09 MAY for Victory Day (UKR declined; offered own 30-day RU rejected); parade 09-MAY without military equipment first time ~20 yrs.
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<p>Summary</p>	<p>SIZE: Russia 20 affected oblasts overnight including Moscow Oblast; Russia Victory Day Moscow Red Square parade 09-MAY (T-1); foreign visiting heads of state at Moscow parade (Xi/CN, Lukashenko/BY, Maduro/VE, Lula/BR).</p> <p>ACTIVITY: Ukraine launched 347 drones overnight 06-07 MAY across 20 RU regions (RU MoD claim) - Russia 2nd-largest UAS strike of war (largest 389 March). ~100 flights delayed at 3 Moscow airports. Russia declared unilateral CF 08-09 MAY (08:00 MSK Friday through 23:59 Saturday) for Victory Day; Ukraine declined RU CF and offered own 30-day CF (RU rejected); Ukraine continues symmetric operations. Victory Day parade 09-MAY WITHOUT military equipment for first time in ~20 years. Moscow internet + SMS shutdown 09-MAY. RU FFM advised foreign embassies in Kyiv to evacuate ahead of 09-MAY. Russia warned mass strike on Kyiv if Victory Day disrupted. Crimea Sevastopol cancelled own Victory Day parade (security). Kharkiv UKR drone strike 07-MAY: 9 wounded including 3 children.</p> <p>LOCATION: Moscow + 19 RU oblasts (Bryansk, Kursk, Belgorod, Voronezh, Ryazan, etc.); Crimea/Sevastopol; Kyiv (RU strike threat).</p> <p>TIME: Drone wave overnight 06-07 MAY; RU CF 08-09 MAY; parade 09-MAY 10:00 MSK Red Square (T-1).</p> <p>EQUIPMENT: UKR long-range one-way attack UAS; RU air defense intercept claims; RU Iskander/Kalibr/Kinzhal threat for retaliation.</p> <p>UNIT: UKR GUR + Defense Forces; RU MoD + RosGvardiya; foreign HoS protective details.</p>
<p>Analyst Assessment</p>	<p>IRAN-RUSSIA PIVOT IS THE STRUCTURAL EVENT: US-Iran 14-pt MoU response window 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.</p> <p>UKR RANGE ESCALATION IS STRUCTURAL: 347-drone overnight 06-07 MAY wave (RU MoD claim; 2nd-largest of war) sustains Ukrainian deep-strike envelope demonstrated through Q1-Q2 2026; Russian Victory Day 09-MAY with no military-equipment parade and Crimea Sevastopol parade cancellation indicates RU prioritizing protective-posture over force-display under sustained UAS pressure.</p> <p>RUSSIA VICTORY DAY POSTURE SIGNALS PROTECTIVE NOT FORCE-DISPLAY: Parade 09-MAY without military equipment for first time in ~20 years + Crimea Sevastopol parade cancellation + Moscow internet+SMS shutdown + foreign embassy evacuation advisory in Kyiv collectively indicate RU prioritizing protective posture under sustained UAS pressure rather than traditional Victory Day force-display. Departure from doctrine.</p> <p>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.</p> <p>SPLIT CONFIDENCE: HIGH on 347 UKR drone wave overnight 06-07 MAY (RU MoD + multi-source wire confirmation). HIGH on Russia unilateral CF declaration 08-09 MAY for Victory Day (Kremlin + RU MFA). HIGH on parade-without-military-equipment first time ~20 years (RU MoD official disclosure). HIGH on Crimea Sevastopol parade cancellation (Razvozhayev TASS). MODERATE on RU mass-strike threat to Kyiv if disrupted (rhetorical signaling, no kinetic indicators).</p> <p>TRIPWIRES: (1) Any disruption to Russia Victory Day 09-MAY parade or Moscow targets; (2) Russian retaliation magnitude if Victory Day disrupted (mass-strike threat to Kyiv); (3) Any UKR target inside Moscow MKAD ring; (4) Iran response timing to US 14-pt MoU framework; (5) Any direct Iran Supreme Leader public appearance or audio/video; (6) Foreign-leader withdrawal from Moscow parade attendance; (7) Embassy-evacuation cascade in Kyiv; (8) RU CF compliance status at 23:59 MSK 09-MAY.</p>
<p>ALT HYP</p>	<p>ALT A: Opportunistic Exploitation of US Attention Window [MOST LIKELY]</p>

Pattern continues: 347 UKR drone wave overnight 06-07 MAY combined with Russia Victory Day defensive posture (no military equipment + Crimea parade cancellation + Moscow shutdown + foreign embassy evacuation advisory) indicates UKR sustained pressure on RU strategic posture during US attention to Iran 14-pt MoU. Moscow pricing UKR capability constraint into operational choices.

✓ **Supporting Evidence:** T1 RU MoD claim of 347 UKR drones overnight (multi-wire corroboration); T1 Kremlin announcement of unilateral CF; T1 RU MoD parade-without-military-equipment disclosure; T1 Sevastopol Razvozhayev parade-cancellation announcement.

✗ **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 347-drone wave + RU defensive Victory Day posture + foreign embassy evacuation advisory + mass-strike threat strains coincidence with Op Epic Fury Day 70 timing and US 14-pt MoU response window.

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 \(US-Iran 14-pt MoU response window scheduling\)](#) | [Russian MFA \(St Petersburg meeting\)](#) | [AP/Reuters \(347 UKR drone wave 06-07 MAY; Russia Victory Day posture\)](#) | [UKR Air Force / SBU Alpha \(Crimea raid; Yaroslavl strike\)](#) | [Kremlin / RU MFA \(unilateral CF; Victory Day parade arrangements\)](#) | [Taiwan ROC \(40-day airspace restriction notices\)](#) | [Full Source Registry](#)

GEO-AFG-PAK | PK air strike on Dangam (Kunar Province) 04-MAY: 3 civilians KIA + 14 wounded / Targets included homes, schools, health centre, mosques per Afghan Deputy Spokesman Fitrat / Afghanistan accused PK of "war crime" / PK MoIB suggested staged damage / China-mediated April CF effectively ruptured

WATCH | UPDATED | 12

WHY THIS CYCLE

PK air strike on Dangam Kunar Province 04-MAY (3 civilians KIA + 14 wounded) is most significant exchange since China-mediated April CF; Afghanistan accused PK of "war crime"

	with civilian-infrastructure targeting (homes, schools, health centre, mosques); CF effectively ruptured.
Summary	<p>SIZE: PK air strike on Dangam (Kunar Province, Afghanistan) 04-MAY: 3 civilians killed + 14 wounded; targets included homes, schools, health centre, and mosques per Afghan deputy spokesman Hamdullah Fitrat</p> <p>ACTIVITY: PK air strike 04-MAY (most significant exchange since China-mediated April CF). Afghanistan accused PK of deliberately targeting civilian infrastructure ("war crime" framing); PK Ministry of Information dismissed allegations and suggested Kabul may have staged damage (images "inconsistent with artillery strikes"). Earlier 27-APR exchange: 4 Afghan KIA Kunar + 45 wounded; 3 PK civilians injured South Waziristan</p> <p>LOCATION: Dangam district, Kunar Province (E. Afghanistan border with PK Bajaur Agency); prior strikes Asadabad capital + South Waziristan</p> <p>TIME: PK strike 04-MAY (T-4 from today); CF brokered by China April; held through end-April</p> <p>EQUIPMENT: PK air strike package (military aircraft + munitions); prior exchanges used mortars + rockets + small arms</p> <p>UNIT: Afghan Defence Min spokesperson Hamdullah Fitrat (statements); PK Foreign Office (denial); PK MoFA Spokesperson statement 02-MAY accusing Kabul of cross-border aggression and TTP infiltration</p>
Analyst Assessment	<p>CIVILIAN-INFRASTRUCTURE STRIKE PROFILE: PK air strike on Dangam (Kunar) 04-MAY targeting homes, schools, health centre, mosques per Afghan Deputy Spokesman; framed as "war crime" by Kabul. Civilian-infrastructure targeting drives faster international IO/legal-risk reaction than border-post exchanges and accelerates pressure on China-mediated CF.</p> <p>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.</p> <p>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.</p>
SOURCES	<p>Al Jazeera (27-APR strikes coverage) Wikipedia (2026 Afghanistan-Pakistan war) UN OHCHR (March 2026 CF call) TOLONews (Spin Boldak trigger event)</p>

SECTION 4A - CYBER & INFORMATION SECURITY

<p>CYB-002 CISA KEV - 04-MAY 4-CVE batch FCEB deadline PASSED / 24-APR additions Samsung+SimpleHelp+D-Link FCEB windows past / Pointer for non-FCEB compliance (DIB/financial/healthcare) / Current-cycle KEV pressure: CYB-001 PAN-OS T-1 (09-MAY) + CYB-005 Linux CopyFail T-7 (15-MAY)</p>		<p>POINTER DEMOTED 3</p>
WHY THIS CYCLE	<p>Prior-cycle KEV FCEB enforcement windows passed (04-MAY 4-CVE batch + 24-APR additions); current-cycle KEV pressure carried by CYB-001 PAN-OS T-1 + CYB-005 Linux Copy Fail T-7. Pointer for non-FCEB compliance (DIB/financial/healthcare).</p>	
Summary	<p>SIZE: Pointer-only entry per SOP 0.34 padding discipline</p> <p>ACTIVITY: Prior-cycle KEV FCEB enforcement windows have all passed (04-MAY 4-CVE batch; 24-APR additions). No genuine current-cycle delta justifies retention as full FLASH/HIGH entry</p>	

	<p>LOCATION: Tracking baseline only - non-FCEB compliance (DIB, financial services, regulated healthcare) carries forward via BOD 22-01 obligation</p> <p>TIME: All prior-cycle windows past as of 08-MAY</p> <p>EQUIPMENT: Affected products from prior-cycle batches remain in BOD 22-01 violation state for non-compliant FCEB agencies</p> <p>UNIT: CISA KEV program. Current-cycle KEV pressure carried by CYB-001 (PAN-OS RCE FCEB T-1, NO PATCH until 13-MAY) and CYB-005 (Linux Copy Fail FCEB T-7, container-escape risk)</p>
<p>Analyst Assessment</p>	<p>STACKED FEDERAL DEADLINES: Three federal-cyber deadlines stack this and next week: CYB-001 KEV CVE-2026-0300 PAN-OS RCE inventory T-3 (01-MAY); CYB-002 4-CVE KEV batch T-7 (04-MAY); CYB-003 24-APR 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>PRIOR-CYCLE WINDOWS PASSED: All prior-cycle KEV FCEB enforcement deadlines have passed (23-APR Cisco SD-WAN; 04-MAY 4-CVE batch; 24-APR additions). Non-compliant FCEB agencies remain in BOD 22-01 violation state. Current-cycle KEV pressure is carried by CYB-001 PAN-OS T-1 and CYB-005 Linux Copy Fail T-7.</p> <p>TRIPWIRES: (1) New KEV additions in next CISA bulletin cycle; (2) Any named-victim disclosure across prior-cycle batches; (3) Active exploitation observation tied to passed-deadline CVEs; (4) Any FCEB enforcement action announced for non-compliant agencies.</p>
<p>SOURCES</p>	<p>CISA KEV Catalog (20-APR batch + 24-APR 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 60 / 440.9 kg HEU / Pre-strike Isfahan Transfer Analysis: IAEA verification blackout Day 70 (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 24-APR 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 26-APR - 5nm AML050010, 0830-1830 local 26-APR - 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 | NWS national headline: Storm Systems Impact Central and Eastern US Through Weekend / SPC Day 1 Slight Risk Lower MS Valley to TN Valley / Damaging winds, few tornadoes, areas of flooding / WPC heavy/excessive rainfall same area / Two storm systems through weekend / NWR 4-transmitter outage overlap (TN/AR/IL/GA OOS in corridor)

FLASH | UPDATED | 18

WHY THIS CYCLE

NWS national headline today: Storm Systems Impact Central and Eastern US Through Weekend; SPC Day 1 Slight Risk Lower MS Valley to TN Valley with damaging winds, few tornadoes, and areas of flooding; WPC heavy/excessive rainfall same area; two storm systems through weekend; critical NWR 4-transmitter outage overlap in storm corridor (TN Shelbyville + AR Fountain Hill + IL Hillsboro + GA Baxley OOS - see NWR-001).

Summary

SIZE: NWS national headline today: Storm Systems Impact Central and Eastern US Through Weekend; SPC Day 1 Slight Risk covering Lower MS Valley to TN Valley; WPC heavy/excessive rainfall same area; multi-day weekend continuation.

ACTIVITY: Damaging winds, few tornadoes, and areas of flooding possible today through weekend; two storm systems through period; severe weather corridor compounded by NWR 4-transmitter outage overlap (TN Shelbyville WXK63 + AR Fountain Hill KGG86 + IL Hillsboro KXI79 + GA Baxley WXM65 all OOS within risk zone - see NWR-001).

LOCATION: Lower MS Valley extending into TN Valley (Mid-South corridor); WPC ERO Slight Risk centered same area.

TIME: Storms intensify through afternoon-evening today 08-MAY; weekend continuation 09-10 MAY (T+1, T+2).

EQUIPMENT: NWS SPC Day 1 Slight Risk; WPC ERO Slight Risk for heavy/excessive rainfall; NWR primary alerting impaired in 4 corridor counties.

UNIT: NWS SPC + WPC + Local WFOs (Memphis, Nashville, Jackson MS, Little Rock, Birmingham); critical NWR alerting gaps in storm corridor (NWR-001).

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 WXK63 + AR Fountain Hill KGG86 + IL Hillsboro KXI79 + GA Baxley WXM65 OOS within today's Lower MS Valley / TN Valley severe corridor; AK 12-transmitter Juneau WFO impairment; NM triple-gap cycle 7.

WEEKEND CONTINUATION CONTEXT: Two storm systems through weekend with severe potential continuing 09-10 MAY. Today's Slight Risk Lower MS to TN Valley is operationally significant given drought-recovering soils in WPC Slight ERO zone (flash flooding) plus mobile-home exposure in TN Valley evening corridor. Weekend severe shift expected to remain in same general corridor; NWS surveys ongoing for any confirmed tornadoes.

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 today. NWR-degraded counties (TN Shelbyville WXK63 + AR Fountain Hill KGG86 + IL Hillsboro KXI79 + GA Baxley WXM65 all OOS) face additional alerting friction during today's outbreak window.

SPACE WEATHER: Kp 1-3 quiet earlier; HSS arriving today drives unsettled-active with slight G1 chance. HF still favorable for SKYWARN during today's severe corridor window; brief HF degradation possible during peak HSS arrival.

ALT HYP	<p>CONFIDENCE: HIGH - SPC T1; WPC T1; NWS local offices T1; multi-source 27-APR damage verification (Watchers + AP + SPC Storm Reports + Wikipedia outbreak sequence entry).</p> <p>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.</p>
	<p>ALT A: Slight Risk verifies as forecast - multiple severe reports + isolated tornadoes + flash flooding [MEDIUM-HIGH]</p>
	<p>SPC + WPC alignment; environment + dynamics consistent.</p>
	<p>✓ Supporting Evidence: CAPE/shear/PWAT all align; 27-APR pattern continuation expected.</p>
	<p>✗ Ruling-Out Evidence: Mesoscale boundary uncertainty could limit organized convection to discrete cells.</p>
	<p>ALT B: Boundary alignment focuses higher-end localized event (training storms or strong tornado) [MEDIUM]</p>
	<p>West-east boundary orientation could focus training rain rates and tornadoes.</p>
	<p>✓ Supporting Evidence: WPC ERO discussion explicitly notes this scenario; bulk shear vectors support it.</p>
	<p>✗ Ruling-Out Evidence: Most cycles do not realize the most aggressive scenario; storm-mode favoring QLCS may dominate.</p>
	<p>ALT C: Convection underperforms; capping limits coverage [LOWER]</p>
	<p>MLCIN may inhibit surface-based initiation in some sub-zones.</p>
	<p>✓ Supporting Evidence: Some prior days in this sequence have produced less-than-expected coverage.</p>
<p>✗ Ruling-Out Evidence: Forcing is robust; dryline and front interaction supports initiation.</p>	
SOURCES	<p>NOAA SPC Day 1 Outlook NOAA SPC Day 2 Outlook NOAA WPC ERO Day 1 NWS Local Offices NWS NWR Outages Wikipedia outbreak sequence</p>

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 27-APR. 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 27-APR. Offshore flow	SDG&E/SCE transmission infrastructure.	Humidity recovery ongoing 24-26 APR. No Santa Ana active

REGION	STATUS	ACTIVE FIRES / EVAC STATUS	CI / INFRASTRUCTURE EXPOSURE	FIRE WEATHER / SOURCES
		risk moderate. NM triple-gap NWR continues.	Oil/gas pipeline corridors WUI.	27-APR. 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 27-APR. 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 (27-APR).	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 - 08 MAY 2026

Source: weather.gov/nwr/outages | Live data provided 28-APR-2026 (user-supplied) | 14 OUT OF SERVICE | 4 DEGRADED | 16 States

ST	Callsign	Location	Freq	WFO	Status	Counties / Areas Affected
AK	WNG714	Sand Point	162.550	Anchorage AK	OUT OF SVC	Aleutians East Borough, AK
AK	KZZ89	Sukkwon Island	162.425	Juneau AK	DEGRADED	Sukkwon Island / Prince of Wales-Hyder area, AK
AK	KAD96	Manleyville	162.500	Juneau AK	DEGRADED	Manleyville / Petersburg area, AK
AK	KWN30	Kotzebue	162.550	Fairbanks AK	DEGRADED	Northwest Arctic Borough, AK
AK	KZZ86	Althorp Peak	162.425	Juneau AK	DEGRADED	Althorp Peak / Glacier Bay area, AK
AK	WNG529	Cape Gull	162.500	Kodiak AK (WSO)	DEGRADED	Cape Gull / Katmai NP coastal, AK
AK	KZZ92	Duke Island	162.450	Juneau AK	DEGRADED	Duke Island / Ketchikan area, AK
AK	KZZ95	Mt. McArthur	162.525	Juneau AK	DEGRADED	Mt. McArthur / SE Alaska, AK
AK	KZZ96	Gravina Island	162.525	Juneau AK	DEGRADED	Gravina Island / Ketchikan area, AK
AK	WZ2555	Duffield Peninsula	162.525	Juneau AK	DEGRADED	Duffield Peninsula / SE Alaska, AK
AK	KZZ91	Zarembo Island	162.450	Juneau AK	DEGRADED	Zarembo Island / Wrangell area, AK
AK	KZZ88	Cape Fanshaw	162.425	Juneau AK	DEGRADED	Cape Fanshaw / SE Alaska, AK

ST	Callsign	Location	Freq	WFO	Status	Counties / Areas Affected
AR	KG86	Fountain Hill	162.475	Jackson MS	OUT OF SVC	Ashley, Drew, Chicot counties, AR - WITHIN today's Lower MS Valley severe corridor (WX-001)
CO	WXM56	Colorado Springs	162.475	Pueblo CO	OUT OF SVC	El Paso, Teller counties, CO
GA	WXM65	Baxley	162.525	Jacksonville FL	OUT OF SVC	Appling, Pierce, Wayne, Jeff Davis counties, GA - WITHIN TN Valley/Lower MS storm corridor (WX-001) AND adjacent to GA wildfire smoke (WLDLFR-001)
IL	KXI79	Hillsboro	162.425	St. Louis MO	OUT OF SVC	Montgomery, Bond, Fayette, Macoupin counties, IL - WITHIN today's Lower MS Valley severe corridor (WX-001)
IN	KXI94	Angola	162.425	Northern Indiana IN	DEGRADED	Steuben, DeKalb, LaGrange counties, IN
KS	WXN81	Ulysses	162.450	Dodge City KS	OUT OF SVC	Grant, Stanton, Haskell counties, KS
ME	WNG547	Sugarloaf Mtn	162.450	Gray/Portland ME	OUT OF SVC	Franklin, Somerset (high terrain), ME
MI	WNG572	Petoskey	162.475	Gaylord MI	OUT OF SVC	Emmet, Charlevoix, Cheboygan counties, MI
MN	KXI45	Gunflint Lake	162.525	Duluth MN	OUT OF SVC	Cook County / BWCAW area, MN
NM	WWG36	Roswell	162.450	Albuquerque NM	OUT OF SVC	Chaves, Lincoln counties, NM - TRIPLE-GAP cycle 7
NM	WWF37	Carlsbad	162.475	Midland/Odessa TX	OUT OF SVC	Eddy County, NM - TRIPLE-GAP cycle 7
NM	WXN24	Artesia	162.425	Midland/Odessa TX	OUT OF SVC	Eddy County (alt), Chaves County, NM - TRIPLE-GAP cycle 7
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 severe corridor (WX-001)

SOURCE: NWR transmitter outage data live from weather.gov/nwr/outages provided by user 28-APR (STATE B per §0.28). 18 affected (14 OOS + 4 DEG) across 16 states.

⚠️ HIGH-GAP ALERT - ACTIVE-WEATHER + WILDFIRE-SMOKE CORRIDOR COMPOUND: Four active-hazard corridor compound situations this cycle covering today's Lower MS Valley / TN Valley severe storm corridor (per WX-001 NWS national headline). (1) TN VALLEY SEVERE: Shelbyville WXK63 OOS sits inside today's TN Valley severe corridor (Bedford/Marshall/Coffee counties). (2) LOWER MS VALLEY: Fountain Hill KG86 OOS sits inside the Lower MS Valley severe corridor (Ashley/Drew/Chicot AR) within WPC heavy/excessive rainfall zone. (3) IL CORRIDOR: Hillsboro KXI79 OOS sits within Lower MS Valley severe corridor (Montgomery/Bond/Fayette/Macoupin IL). (4) GA WILDFIRE-SMOKE + SEVERE: Baxley WXM65 OOS sits within GA wildfire smoke corridor from the active Pineland Road Fire (32,575 ac / 65% contained) and Highway 82 Fire (22,471 ac / 85% contained) per WLDLFR-001 AND TN Valley/Lower MS Valley extended risk zone - DUAL-HAZARD compound covering Appling/Pierce/Wayne/Jeff Davis counties. NM TRIPLE-GAP CONTINUES (cycle 7): Roswell WWG36 + Carlsbad WWF37 + Artesia WXN24 leave Chaves and Eddy counties with effectively zero primary NWR coverage. ALASKA HEAVY DEGRADATION: 12 transmitters affected (Sand Point WNG714 OOS + 11 SE Alaska DEG: Sukkwan, Manleyville, Althorp Peak, Cape Gull, Duke Island, Mt. McArthur, Gravina Island, Duffield Peninsula, Zarembo Island, Cape Fanshaw, Kotzebue) - broad Juneau WFO coverage impairment. 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

SWX-001 | Space Weather - Past 24h Kp 1-3 quiet / Coronal hole HSS arriving today 08-MAY / Unsettled-active expected with slight chance G1

MODERATE | UPDATED | 10

minor / Long filament eruption 06-MAY 16 UTC / Powerhouse sunspot region returning to disk / 10.7 cm flux 120 sfu

WHY THIS CYCLE

Past 24h Kp 1-3 quiet; coronal hole HSS arriving today 08-MAY with unsettled-active expected and slight chance G1 minor; HF favorable for SKYWARN during today's severe corridor; powerhouse sunspot region returning to Earth-facing disk.

Summary

SIZE: Past 24h Kp 1-3 quiet observation period; today 08-MAY coronal hole HSS arrival period.
ACTIVITY: Quiet conditions earlier yielding to coronal hole high-speed stream arrival today; unsettled-to-active conditions expected; slight chance G1 minor geomagnetic storm; long filament eruption observed 06-MAY 16 UTC GOES-19 SUVI. Powerhouse sunspot region returning to Earth-facing disk.
LOCATION: Geosphere; HF propagation sensitivity primarily mid-to-high latitudes (aurora oval).
TIME: HSS arrival 08-MAY; conditions ease to quiet-to-unsettled 09-MAY (T+1); long-window 27-day forecast notes elevated potential through return of major sunspot region.
EQUIPMENT: SWPC 3-Day Forecast (T1); GOES-19 SUVI imagery; 10.7 cm radio flux 120 sfu; Kp index real-time.
UNIT: NOAA SWPC; CMECS observation network; FFTP cross-link to NWR-001 for HF SKYWARN viability and to AVN-001 for HF aviation comms quality.

Analyst Assessment

HF EMCOMM STATUS: Quiet 24-hr Kp baseline yielding to HSS arrival today; HF favorable for SKYWARN through today's Lower MS Valley / TN Valley severe corridor (see WX-001) before HSS-driven degradation. Removes immediate HF compound on top of severe-weather + NWR outage geometry; brief unsettled-active window late today / early tomorrow.
POWERHOUSE SUNSPOT REGION RETURNING: Major active region rotating back onto Earth-facing disk; SWPC monitoring for renewed M/X-class flare and CME activity in coming days. Combine with HSS arriving today, current cycle has elevated potential for solar-radio degradation as the week progresses.
08-09 MAY OUTLOOK: HSS arrival today drives unsettled-active; 09-MAY conditions ease to quiet-to-unsettled; slight chance G1 minor geomagnetic storm. Power-grid operators in mid-to-high latitudes monitor GIC; HF degradation possible briefly during HSS peak.
EMCOMM PROTOCOL: 40m/60m primary; 20m usable with propagation check during HSS arrival window; 15m-10m DX bands favorable during pre-HSS quiet portion of today.
CONFIDENCE: HIGH - SWPC T1 observations + 3-day forecast T1; Geophysical Institute 27-day T1.
TRIPWIRES: HSS arrival peak Kp escalation above slight-G1 chance; powerhouse sunspot region M/X-class flare on Earth-facing return; long filament eruption (06-MAY 16 UTC) CME arrival assessment.

SOURCES

[NOAA SWPC 3-Day Forecast](#) | [SWPC Planetary K-index](#) | [Geophysical Institute \(UAF\) Aurora Forecast](#) | [SpaceWeatherLive](#)

BAND	STATUS	COLLECTED 08-MAY 1500Z 24-hr observed Kp 1-3 quiet Coronal hole HSS arriving 08-MAY (today) Unsettled-to-active expected; slight chance G1 minor Long filament eruption observed 06-MAY 16 UTC GOES-19 SUVI Powerhouse sunspot region returning to Earth-facing disk 10.7 cm flux 120 sfu HF FAVORABLE for SKYWARN today
160m (1.8 MHz)	FAIR	Kp 1-3 quiet through 26-APR. 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.

BAND	STATUS	COLLECTED 08-MAY 1500Z 24-hr observed Kp 1-3 quiet Coronal hole HSS arriving 08-MAY (today) Unsettled-to-active expected; slight chance G1 minor Long filament eruption observed 06-MAY 16 UTC GOES-19 SUVI Powerhouse sunspot region returning to Earth-facing disk 10.7 cm flux 120 sfu HF FAVORABLE for SKYWARN today
60m (5 MHz)	GOOD	✓ PRIMARY EMCOMM TODAY. Kp 1-3 quiet. EMCOMM channel: 5330.5 kHz USB. Good propagation. Verify PSKReporter before committing.
40m (7 MHz)	GOOD	✓ RECOMMENDED primary EMCOMM (0-800 km NVIS). Kp 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 today before HSS arrival. Verify via PSKReporter. Powerhouse sunspot region returning to disk - monitor through week.
15m-10m (21-28 MHz)	FAIR	Solar flux SFI moderate (10.7cm flux 120 sfu). High-band DX viable today. Not primary EMCOMM. Monitor through week for sunspot region returning to Earth-facing disk. Check PSKReporter.

POLAR / TRANS-POLAR: GOOD - Kp 1-3 quiet earlier. No active polar absorption. Trans-polar paths available before HSS arrival. Monitor through week for sunspot region returning to Earth-facing disk and possible HSS-driven Kp escalation.

SECTION 7B - AGRICULTURE, FOOD & SUPPLY CHAIN

AGRICULTURE & FOOD SUPPLY CHAIN - 08 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 24-APR: 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 | 08-10 MAY 2026

The operating environment has stabilized into a wait-and-watch posture pending Iran response to the US 14-pt MoU framework. Today is Op Epic Fury Day 70 + Hormuz dual blockade Day 26 + LBN CF Day 23 of EXTENDED period (T-9 to ~17-MAY expiry) + CYB-001 PAN-OS FCEB enforcement T-1 (no patch until 13-MAY) + Russia Victory Day T-1 with elevated retaliation/strike threat geometry over Moscow.

08-MAY (TODAY / Op Epic Fury Day 70 / Blockade Day 26 / LBN CF Day 23 / WHCD Day 14): TOP-LINE: Iran reviewing US response to 14-pt MoU framework via Pakistan; Trump 06-MAY very good talks 24h, possible deal before China trip. CENTCOM disabled M/T Hasna 06-MAY 14:00 UTC. CMA CGM San Antonio struck 05-MAY off Oman; Project Freedom paused 06-MAY. CISA KEV CVE-2026-0300 PAN-OS RCE FCEB enforcement T-1 (09-MAY) with NO PATCH available. CISA KEV CVE-2026-31431 Linux Copy Fail FCEB T-

7. NWS national headline: Storm Systems Impact Central/Eastern US Through Weekend; SPC Day 1 Slight Risk Lower MS Valley to TN Valley today (damaging winds, few tornadoes, flash flooding). NWR 26 transmitters affected (15 OOS + 11 DEG, 13 states). Brent \$101.65 (+1.59% rebound after -7.8% Wed collapse). Kp 1-3 quiet earlier; coronal hole HSS arriving today, slight chance G1 minor. Russia warned mass strike on Kyiv if Victory Day 09-MAY disrupted; RU FFM advised foreign embassies in Kyiv to evacuate.

09-MAY (T+1 / Russia Victory Day / CYB-001 FCEB Deadline): CRITICAL: Russia Victory Day Moscow Red Square parade 10:00 MSK without military equipment for first time in ~20 years. Foreign visiting heads of state at Moscow (Xi/CN, Lukashenko/BY, Maduro/VE, Lula/BR). Moscow internet + SMS shutdown. RU unilateral CF day 2 (UKR continues symmetric). Crimea Sevastopol parade cancelled. Russia warned mass strike on Kyiv if disrupted. CYB-001 PAN-OS RCE FCEB enforcement deadline 23:59 EST - exploitation surge expected post-deadline with no patch available until 13-MAY. SWX easing to quiet-to-unsettled.

10-MAY (T+2 / RU CF Ends / Lebanon CF Day 25): Russia unilateral CF expires 23:59 MSK. UKR likely full operational tempo resumes. LBN CF Day 25 of EXTENDED period (T-7 to ~17-MAY expiry); IDF S. Lebanon kinetic tempo continues per pattern. Op Epic Fury Day 72; Hormuz Blockade Day 28; Iran response to US 14-pt MoU expected within window. CYB-005 Linux Copy Fail FCEB T-5.

11-MAY (T+3 / Allen Arraignment / Lebanon CF Day 26): Allen federal arraignment US Dist DC J. McFadden (4 counts inc 18 USC 1751(c) attempted POTUS assassination). LBN CF Day 26; T-6 to ~17-MAY expiry. Op Epic Fury Day 73; Hormuz Day 29. WASDE T-1 (12-MAY).

NEXT-CYCLE TASKING: (1) GEO-001 14-pt MoU: Iran response timing/content; any signed framework; Brent reaction; CENTCOM blockade enforcement tempo. (2) GEO-CF-LBN: any IDF strike north of Litani; Hezbollah retaliatory rocket fire; trilateral track readout; CF expiry posture as ~17-MAY approaches. (3) CYB-001 PAN-OS: post-deadline 09-MAY exploitation tempo without patch availability; 13-MAY first patch release. (4) GEO-AXIS-001: Russia Victory Day 09-MAY parade and any strike/disruption; UKR strike posture during RU CF; Russian retaliation if disrupted. (5) SC-001: Project Freedom resumption decision; CMA CGM San Antonio AIS recovery; any new Strait incident. (6) FIN-001: Brent volatility on next MoU update; CA gasoline trajectory; AAA national average pump-lag tracking. (7) CYB-005 Linux Copy Fail: FCEB compliance trajectory T-7; observed exploitation in container environments. (8) NUC-001: any IAEA verification window opening if MoU signed; 30-day enrichment-suspension framework activation. (9) NWR-001: AK Juneau WFO restoration progress; severe-corridor transmitter restoration in TN/AR/IL/GA. (10) AGR-001: WASDE 12-MAY; KS winter wheat condition; soybean/corn planting trajectory. (11) HLTH-001: CDC weekly measles update; UT trajectory; any new outbreak jurisdictions. (12) Standing tripwire: any Houthi Bab el-Mandeb activation (no attacks since 28-FEB-2026); DHS NTAS gap continues (Day 70).

SECTION 10 - PREPAREDNESS CONDITION ASSESSMENT

PREP-CON 3 - ELEVATED | Assessed: 08 May 2026 | Op Epic Fury Day 70 | Hormuz dual blockade Day 26 | LBN CF Day 23 of EXTENDED period (T-9) | CVE-2026-0300 PAN-OS RCE FCEB T-1 | Russia Victory Day T-1

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 70 + Hormuz dual blockade Day 26 with M/T Hasna disabled 06-MAY + 14-pt MoU response window (sustained-enforcement posture); (2) LBN CF Day 23 of EXTENDED period - T-9 to ~17-MAY expiry with IDF Beirut Dahieh strike 06-MAY (first capital strike since 17-APR CF) and ongoing S Lebanon kinetic tempo; (3) CISA KEV CVE-2026-0300 PAN-OS RCE FCEB T-1 (09-MAY) with NO PATCH available + CYB-005 Linux Copy Fail T-7; (4) Russia Victory Day 09-MAY (T-1) with elevated retaliation threat geometry, RU FFM evacuation advisory for foreign embassies in Kyiv, mass-strike threat if disrupted; (5) market structural pressure (Brent collapsed -7.8% Wed; CA gasoline >\$6/gal first time; IEA 14M bpd supply disruption). Trend: STABLE AWAITING MoU - sustained

simultaneous pressure across 5 vectors but no near-term decision-trigger event in 72-hr window absent MoU signature or Victory Day disruption.

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

SECTION 11 - ALERT & READINESS CONDITIONS PANEL

CONDITION	LEVEL	BASIS
DEFCON	EST-3	Active wartime posture; Op Epic Fury Day 70; Hormuz dual blockade Day 26; 3 US carriers in ME first time since 2003; CENTCOM disabled M/T Hasna 06-MAY; 14-pt MoU response window live
COGCON	EST-3	Elevated continuity posture during active kinetic operations; IRGC/MOIS homeland threat (INS-001); WHCD Day 14 calendar carry (Allen indicted 05-MAY; arraignment 11-MAY T-3); DHS NTAS gap Day 70 (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 70 sustained-enforcement posture
CYBERCON	EST-ELEVATED	CISA KEV CVE-2026-0300 PAN-OS RCE FCEB enforcement T-1 (09-MAY) with NO PATCH available (CYB-001); CVE-2026-31431 Linux Copy Fail FCEB T-7 (15-MAY) with container-escape risk (CYB-005); CYB-002 prior-cycle KEV windows passed (POINTER); AA26-097A Day 32 structural baseline; CYB-007 Volt Typhoon standing
COMCON	4 CONUS DTR-ASSESSED	Kp 1-3 quiet earlier; coronal hole HSS arriving today - unsettled-active expected with slight chance G1 minor; HF favorable for SKYWARN during today's severe corridor; powerhouse sunspot region returning; 10.7cm flux 120 sfu; NWR 26 transmitters affected (15 OOS + 11 DEG, 13 states) with critical TN/AR/IL/GA overlap in today's severe corridor and AK 12-transmitter Juneau WFO impairment
TRANSCON	EST-3	EASA CZIB 2026-03-R9 in force (R8 expired 05-MAY); 11-country ME airspace; exception S Saudi/Oman FL320+; Iran 04-MAY UAE attack drove R9 extension; Project Freedom paused 06-MAY after CMA CGM San Antonio strike
WX-CON	EST-4	NWS national headline: Storm Systems Impact Central/Eastern US Through Weekend; SPC Day 1 Slight Risk Lower MS Valley to TN Valley (damaging winds, few tornadoes, flash flooding); WPC heavy/excessive rainfall same area; NWR critical 4-transmitter overlap in storm corridor (TN Shelbyville + AR Fountain Hill + IL Hillsboro + GA Baxley OOS)
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-launders, 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 - 08 MAY 2026

THREAT AREAS ASSESSED	STANDING REGISTRY	CITATIONS THIS CYCLE	TIER 1 PRIMARY	TIER 2 SECONDARY	TIER 3 SUPPLEMENTAL
24	358 <small>v1.8 28-APR-2026</small>	51	22	29	0
<small>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/</small>					

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SECTION 13 - CLOSING

END OF REPORT

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