

DAILY THREAT REPORT

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

BLOCKADE Day 30 | Op Epic Fury Day 74 | WHCD Allen pleaded NOT GUILTY 11-MAY / next hearing 29-JUN | CISA KEV CVE-2026-0300 PAN-OS RCE Wave 1 patch RELEASE 13-MAY (T+1) / FCEB BOD due 27-MAY (T-15) | LBN CF Day 27 EXTENDED DETERIORATING (T-5 to ~17-MAY) | Trend: DETERIORATING | Full basis: SEC 10

COMMUNICATIONS CONDITION: COMCON 4 - PARTIALLY DEGRADED (CONUS)

AA26-097A Day 35 | Kp 2-3 quiet/unsettled; greatest expected Kp 4.33 (below G-scale) | R1-R2 probability rising 15-30% as two ARs at L=330 rotate to Earth-facing disk | 10.7 cm flux 126 sfu | HF favorable for emergency comms | 19 NWR transmitters affected (15 OOS + 4 DEG, 13 states); TN/FL/GA gaps overlap today's Marginal Risk SE corridor | Full basis: SEC 11

| | |
|--------------------------------|--|
| Publication (UTC) | 12 MAY 2026 / 1530 UTC |
| Reporting Period | 0000 08-MAY through 1500 11-MAY 2026 (84-hour sweep, weekend rollup) |
| Analyst / Watch Officer | Fortune Favors the Prepared - OSINT Desk |
| FLASH Threshold | Risk Score \geq 20 - SEVEN FLASH EVENTS THIS CYCLE |
| PREP-CON Baseline | PREP-CON 3 - ELEVATED (Brown) Trend: DETERIORATING Op Epic Fury Day 74 Blockade Day 30 LBN CF Day 27 EXTENDED DETERIORATING (T-5) WHCD Allen NOT GUILTY plea 11-MAY (Day 17) CISA KEV CVE-2026-0300 PAN-OS RCE first patch RELEASE 13-MAY / FCEB BOD T-15 to 27-MAY US-Iran Trump REJECTED Iran counter-proposal 10-11 MAY; ceasefire on life support per Gulf News 12-MAY |
| Version | 1.0 - SOP v5.46 §0.33 Hook 0 Pre-Build Audit PASSED §0.34 Padding Check CLEAN §0.35 Operator Gate Q1/Q2 YES Sweep manifest 24 areas (21 STATE A live / 1 STATE B user-supplied NWR / 3 STATE D baseline) Anti-Bias Discipline Applied |

FLASH ▶

TER-001 WHCD Allen pleaded NOT GUILTY / next hearing 29-JUN / suspect targeting POTUS per AG 26-APR | **CYB-001** CISA KEV CVE-2026-0300 PAN-OS RCE / Wave 1 patch RELEASE 13-MAY (T+1) / FCEB BOD due 27-MAY

FLASH ▶ cont.

GEO-001 US-Iran Trump REJECTED Iran counter-proposal 10-11 MAY; ceasefire on life support per Gulf News 12-MAY / Witkoff/Rubio met Qatar PM Miami 08-09 MAY | **GEO-CF-LBN** LBN CF Day 27 DETERIORATING / Hezbollah cross-border attacks FIRST since CF (08-MAY) / IDF reservist severely injured Sat | **FIN-001** Brent \$101.29 Fri close / WTI \$95.42 / weekly oil loss 6-7% / intraweek \$96-\$114 swings | **AVN-001** EASA CZIB R9 in effect through 12-MAY (T+1) post 04-MAY UAE attack

HIGH/NEW ★

GEO-002 CMA CGM San Antonio struck by Iranian cruise missile 05-MAY / Project Freedom PAUSED 06-MAY / UK HMS Dragon deployed 09-MAY | **UKR-001** CDC HAN 00528 Hantavirus M/V Hondius 07-MAY / 3 dead / CDC Level 3 / 9+ US returnees monitored 6 states | **NWR-001** 19 NWR transmitters affected (15 OOS + 4 DEG, 13 states); TN/FL/GA gaps overlap SE corridor

HIGH/UPDATED ↻

CYB-002 CVE-2026-6973 Ivanti EPMM RCE KEV-added 07-MAY / FCEB ~28-MAY clock running | **CYB-003** CVE-2026-42208 BerriAI LiteLLM SQLi FCEB deadline PASSED 11-MAY | **NUC-001** 440.9 kg HEU / IAEA blackout Day 74 / CIA: Iran can survive 4 more months blockade / 2/3 of missile launchers survived (revised up from 1/2) | **PHS-001** M6.1 Rat Islands

HIGH/CONT ▶

AK 09-MAY (largest worldwide 7d, MMI 4.8) / M6.0 Nena PI 04-MAY / M5.9 SE Indian Ridge 08-MAY (all PAGER green)

INS-001 IRGC/MOIS + DIA | **TER-002** NTAS Gap Day 74 | **AGR-001** WASDE first 2026-27 balance sheets TOMORROW 12-MAY 12pm ET / Trump-Xi summit Beijing Thu-Fri 14-15 MAY | **CN-001** PRC Scarborough 352m barrier removed since weekend per PHL CG Tarriela / Trump-Xi Beijing Thu-Fri may shift baseline | **TRV-001** State Level 4 Iran / 11-state ME CZIB R7 | **HLTH-001** AVN-001 EASA CZIB R9 through 12-MAY / 11-state ME / KLM Gulf suspensions through 28-JUN / BA Dubai through 31-MAY

CRITICAL TIME HACK

WHCD: Cole Allen pleaded NOT GUILTY 11-MAY all 4 federal counts (incl 18 USC 1751(c) attempted assassination POTUS) before US District Judge McFadden DC; defense motion to disqualify Pirro+Blanche pending; DOJ response due 22-MAY - see TER-001.

CISA KEV CVE-2026-0300: First patch RELEASE TOMORROW 13-MAY (T+2); FCEB BOD due 27-MAY (T-15); ~225,000 PAN-OS internet-facing per Shodan - see CYB-001.

SEVERE WEATHER: NWS Marginal Risk severe SE Mon + Excessive Rainfall Central Gulf Coast + Sun overnight Enhanced Risk Central TX HP supercell - see WX-001 + NWR-001.

LEBANON CF: CF Day 27 of extended period (~17-MAY); Netanyahu 26-APR "vigorously attack" order - see GEO-CF-LBN.

IRAN TRACK: Trump REJECTED Iran counter-proposal TOTALLY UNACCEPTABLE Sun-Mon 10-11 MAY; Ghalibaf insists 14-pt only path forward; Pezeshkian first in-person meeting with Mojtaba Khamenei; Witkoff/Rubio met Qatar PM Miami 08-09 MAY - see GEO-001.

FORCE POSTURE: Op Epic Fury Day 74 / Hormuz blockade Day 30 / CENTCOM strike Iranian military targets Fri 08-MAY after Iran fire on 3 US destroyers (Trump said vessels safely exited) - see SC-001.

OIL / FUEL: Brent \$101.29 (08-MAY close, +1.23%); WTI \$95.42; weekly oil loss 6-7%; intraweek \$96-\$114; "ceasefire has ceased" thesis Johnston - see FIN-001.

UKMTO / MARITIME: Project Freedom PAUSED 06-MAY after CMA CGM San Antonio 05-MAY strike (8 crew injured); ~14 CMA CGM vessels stranded Gulf; ~20,000 seafarers ~2,000 vessels stranded per IMO; UK HMS Dragon deployed - see SC-001.

UKRAINE/RUSSIA: Trump-brokered 3-day RU-UA CF EXPIRED midnight 11-MAY; Putin pared-down Victory Day parade Sat 09-MAY (no tanks/missiles); UA drones over Moscow overnight 08-MAY - see GEO-AXIS-001.

DPRK: DPRK no current-cycle launch; baseline standing.

SPACE WEATHER: Kp 2-3 quiet/unsettled; greatest expected Kp 4.33 below G-scale; R1-R2 probability 15-30%; HF favorable for emergency comms - see SWX-001.

AVIATION: EASA CZIB 2026-03-R9 in effect through 12-MAY (T+1); 11-country ME all altitudes; KLM extended Gulf suspensions through 28-JUN; BA Dubai through 31-MAY - see AVN-001.

CYBER: CVE-2026-0300 PAN-OS RCE first patch RELEASE 13-MAY (CYB-001); CVE-2026-6973 Ivanti EPMM KEV 07-MAY (CYB-002); CVE-2026-42208 BerriAI LiteLLM SQLi FCEB due TODAY (CYB-003); AA26-097A Day 35 baseline (CYB-005).

TERRORISM: WHCD Allen NOT GUILTY plea 11-MAY (TER-001); DHS NTAS gap Day 74 (TER-002 confirmed via direct page check this cycle).

NUCLEAR: IAEA blackout Day 74; 440.9 kg HEU baseline; CIA: Iran can survive 4 more months blockade; 2/3 of missile launchers survived (revised up from 1/2) - see NUC-001.

NWR: 19 affected (15 OOS + 4 DEG, 13 states); IL Hillsboro KXI79 OOS NEW within today's IL/Midwest Marginal Risk corridor (per WX-001 SPC 12-MAY); NM triple-gap continues cycle 7 (Roswell + Artesia + Carlsbad) - see SEC 10.

PHS / EARTHQUAKES: M6.1 Rat Islands Aleutians 09-MAY (largest worldwide 7d, MMI 4.8); M6.0 Nena Philippines 04-MAY (PAGER green); M5.9 SE Indian Ridge 08-MAY; no Pacific tsunami advisories - see PHS-001.

PRC GRAY-ZONE: Scarborough Shoal 352m barrier (installed 10-11 APR) removed since weekend per Philippine CG Tarriela; Trump-Xi Beijing Thu-Fri may shift baseline; PRC annual SCS fishing ban begins 16-MAY - see CN-001.

GEO-AXIS-001 (CONT): CDC HAN 00528 Hantavirus M/V Hondius 07-MAY / 3 dead / CDC Level 3 / 9+ US returnees monitored 6 states - see HLTH-001.

SECTION INDEX

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|--|---|
| <u>SEC 2 - BLUF & Market Indicators</u> | CYB-001 PAN-OS RCE Wave 1 patch RELEASE TOMORROW 13-MAY GEO-001 Trump REJECTED Iran counter-proposal 10-11 MAY GEO-CF-LBN Hezbollah SAM/drones at IDF TODAY (T-5) SC-001 demoted to HIGH (Day 7 post-strike stable) FIN-001 Brent intraday \$103-105 +2-3% GEO-AXIS-001 RU-UA CF EXPIRED / Kyiv under attack TER-001 Allen pleaded NOT GUILTY 6 FLASH |
| <u>SEC 3 - FLASH Events</u> | CYB-001 PAN-OS RCE Wave 1 patch 13-MAY (25) GEO-001 Trump rejected Iran counter-proposal (25) GEO-CF-LBN T-5 deteriorating + Hezbollah attacks TODAY (27) FIN-001 Brent \$103-105 +2-3% (24) GEO-AXIS-001 RU-UA CF EXPIRED Kyiv under attack (22) TER-001 Allen NOT GUILTY plea (20). SC-001 DEMOTED to HIGH in Sec 4B per \$0.38 (Day 7 stable). WX-001 in Sec 7 per dedicated section. |
| <u>SEC 4A - Cyber / Technology</u> | CYB-001 PAN-OS RCE Wave 1 patch RELEASE TOMORROW 13-MAY (T+1) / FCEB BOD T-15 to 27-MAY / Shodan ~225,000 PAN-OS internet-facing CYB-002 CVE-2026-6973 Ivanti EPMM RCE FCEB T+16 to 28-MAY CVE-2026-42208 BerriAI LiteLLM SQLi FCEB deadline PASSED 11-MAY CYB-005 Linux Copy Fail FCEB T-3 to 15-MAY (POINTER) AA26-097A standing baseline |
| <u>SEC 4B - Physical / Geopolitical / IO</u> | GEO-AXIS-001 RU-UA CF EXPIRED midnight 11-MAY / Russia 200+ drones / Kyiv under attack 12-MAY SC-001 DEMOTED to HIGH (Day 7 post-strike stable, Project Freedom Day 6 pause, no new named-vessel strikes since 05-MAY) NUC-001 IAEA Blackout Day 74 / 440.9 kg HEU baseline / CIA: Iran can survive 4 more months / 2/3 launchers survived (revised) CN-001 Trump-Xi Beijing summit Thu-Fri 14-15 MAY CONFIRMED Carryover: INS-001, TER-002, TRV-001, GEO-AFG-PAK |
| <u>SEC 5 - Energy / Infrastructure / Supply Chain</u> | Carryover monitors: NUC-001 IAEA Blackout Day 74 / CIA 4-mo blockade survival / 2/3 launchers survived (revised) SC-001 demoted to HIGH (Sec 4B): San Antonio Day 7 post-strike stable; Project Freedom Day 6 of pause; no new named-vessel strikes since 05-MAY; HMS Dragon deployed FIN-001 recap of Brent volatility / IEA ~14 mbpd disruption |
| <u>SEC 6 - Aviation / Transportation</u> | Carryover monitors: AVN-001 EASA CZIB 2026-03-R9 in effect through 12-MAY / 11-country ME / KLM Gulf suspensions through 28-JUN / BA Dubai through 31-MAY FAA NOTAMs no current elevation Maritime cross-ref SC-001 |
| <u>SEC 7 - Meteorological Weather & Severe Weather + NWR Outages</u> | WX-001 SPC 12-MAY MARGINAL RISK FL Peninsula + Midwest/Great Lakes + south-central Plains (corridor SHIFTED from yesterday TN Valley); FL MLCAPE >1500 J/kg; eastern WI most probable late afternoon NWR 19 transmitters (16 OOS + 3 DEG, 13 states); IL Hillsboro KXI79 OOS NEW within IL/Midwest corridor; NM triple-gap continues cycle 7 |

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| <u>SEC 7A - Space Weather & EMCOMM</u> | <u>SWX-001</u> SWPC 3-day 12-MAY Kp peak 2.67 quiet/unsettled R1-R2 probability 40% (UP from 30%; driver AR 4432 development) R3 10% No G1+ expected HF generally favorable but R1-R2 elevated risk sunlit side |
| <u>SEC 7B - Agriculture, Food & Supply Chain</u> | <u>AGR-001</u> WASDE drops TODAY 12-MAY 12pm ET first 2026-27 corn/soy/wheat balance sheets Pre-report estimates: world corn ending stocks 296.5->286.7 mmt; Brazil corn ~133.7 mmt; Argentina ~56.2 mmt; wheat 2026-27 stocks ~281.2 mmt Trump-Xi Beijing Thu-Fri may shift soybean baseline |
| <u>SEC 8 - 72-Hour Outlook</u> | Tue 12-MAY (TODAY): WASDE drops 12pm ET / Allen DOJ response deadline T+10 to 22-MAY / Russia drone strikes ongoing Ukraine Wed 13-MAY: PAN-OS Wave 1 patch ships / E15 House vote possible Thu-Fri 14-15 MAY: Trump-Xi Beijing summit / 3rd round US-mediated Lebanon-Israel talks Washington Thu 15-MAY: CYB-005 Linux Copy Fail FCEB BOD due Fri 17-MAY: LBN CF formal expiry T-5 |
| <u>SEC 10 - PREP-CON Assessment</u> | PREP-CON 3 ELEVATED / Trend DETERIORATING Op Epic Fury Day 74 / Blockade Day 30 / LBN CF Day 27 EXTENDED (T-5) fortunefavorstheprepared.com/fep/ |
| <u>SEC 11 - Alert & Readiness Conditions Panel</u> | DEFCON EST-3 COGCON EST-3 FPCON EST-CHARLIE CYBERCON EST-ELEVATED COMCON 4 CONUS DTR-ASSESSED TRANSCON EST-3 WX-CON EST-4 PREP-CON 3 |
| <u>SEC 12 - Source Registry Summary</u> | 30 Threat Areas 358 Standing Sources (v1.8) 27/30 Areas Live or Baseline This Cycle; 3 Baseline Carry, 9 Areas Inline-Flagged GAP per §0.27 (CHEM/WAT/INS/IO/COMFAC/CMFG/EMGSVC/GOVFAC/DIB/SIS) T1 + T2 mix consulted fortunefavorstheprepared.com/dtr-source-registry/ |
| <u>SEC 13 - Closing Block</u> | Fortune Favors the Prepared Full Product Suite ASAR - area intel for your emergency plan (saves ~15 hours) PPAR - personal preparedness assessment (saves ~10 hours) fortunefavorstheprepared.com/dtr/ |

GEOGRAPHIC IMPACT INDEX

| REGION / THEMATIC | KEY ENTRIES / THREAT DRIVERS |
|--|--|
| <u>CONUS - Illinois / Missouri / Indiana / Kentucky</u> | <u>WX-001</u> SPC CIG2 high-end signal central/N IL today Multi-state tornado outbreak IL/MO/IN/KY active <u>NWR-001</u> IL Hillsboro KXI79 + IN Angola KXI94 OOS within outbreak corridor (Montgomery/Bond/Fayette/Macoupin IL; Steuben/DeKalb/LaGrange IN) |
| <u>CONUS - Tennessee / Alabama / Mississippi (Day 2-3)</u> | WX-001-EXT Day 2-3 Dixie Alley shift <u>NWR-001</u> TN dual-gap Lawrenceburg KXI88 + Shelbyville W XK63 OOS within shift corridor (Lawrence/Wayne/Giles + Bedford/Marshall/Coffee TN) |
| <u>CONUS - Mid-Atlantic / Washington DC</u> | <u>TER-001</u> WHCD Allen pleaded NOT GUILTY 11-MAY all 4 federal counts / Defense disqualification motion Pirro+Blanche / DOJ response due 22-MAY (T+10) / Next hearing 29-JUN <u>TER-002</u> NTAS gap Day 74 (DHS direct check no advisories) <u>INS-001</u> IRGC/MOIS structural baseline COGCON EST-3 assessed |
| <u>CONUS - Nationwide (All Regions)</u> | <u>CYB-001</u> CISA KEV CVE-2026-0300 PAN-OS RCE / first patch RELEASE 13-MAY / FCEB BOD T-15 to 27-MAY to 01-MAY <u>CYB-002</u> |

| REGION / THEMATIC | KEY ENTRIES / THREAT DRIVERS |
|---|--|
| | KEV 4-CVE batch T-6 04-MAY CYB-003 24-APR additions Samsung+SimpleHelp+D-Link CYB-005 AA26-097A Day 35 FIN-001 Brent intraday ~\$103-105 / WTI ~\$97-101 (+2-3% on Trump rejection 10-11 MAY) SWX-001 Kp 1-3 quiet HF favorable |
| CONUS - New Mexico (NWR Triple-Gap) | NWR-001 NM TRIPLE-GAP continues (Roswell WWG36 + Carlsbad WWF37 + Artesia WXN24 all OOS) Chaves and Eddy counties effectively zero primary NWR coverage |
| CONUS - Montana (NWR 6-transmitter cluster) | NWR-001 MT 6 transmitters affected (Helena KXI58, Glasgow WWG70, Miles City WXJ81, Sidney WNG566, Wolf Point WWG81, Lewistown KIH50) Eastern half of state degraded structural-gap regional coverage |
| CONUS - Southwest (AZ/NM/NV) | WX NIFC elevated YTD baseline Dry-warm tilt through June per NIFC Southern Area driest Nov-Feb since late 1970s (top-5 driest) |
| Middle East / Persian Gulf | GEO-001 14-pt MoU response window pending past T+5 / Witkoff/Rubio met Qatar PM Miami 08-09 MAY / Pezeshkian first in-person meeting with Mojtaba Khamenei GEO-CF-LBN Day 27 of EXTENDED period DETERIORATING (T-5) / Hezbollah SAM at IDF drone TODAY 12-MAY + explosive drones at IDF troops s.Lebanon TODAY / Beirut Balout strike 06-MAY / LBN-ISR Washington direct talks TRV-001 EASA CZIB 2026-03-R9 through 12-MAY / 11-country ME airspace / Iraq Embassy Baghdad Security Alert 05-MAY |
| Global Maritime / Chokepoints | SC-001 CMA CGM San Antonio struck 05-MAY (8 crew injured) / Project Freedom PAUSED 06-MAY / UK HMS Dragon deployed 09-MAY (Type 45 destroyer, strictly defensive framing) / ~14 CMA CGM vessels stranded Gulf / IMO ~20,000 seafarers ~2,000 vessels stranded |
| Iran | GEO-001 Op Epic Fury Day 74 Blockade Day 30 37 ships redirected NEW Iran proposal via Pakistani mediators (Axios): decouple Hormuz from nuclear / postpone nuclear talks until blockade lifted Mojtaba Khamenei = Supreme Leader (Ali killed 28-FEB) Iran death toll ~3,400 NUC-001 IAEA blackout Day 74 / 440.9kg 60% HEU |
| Russia / St Petersburg | GEO-AXIS-001 Trump-brokered 3-day RU-UA CF EXPIRED midnight 11-MAY Putin pared-down Victory Day parade Sat 09-MAY (no tanks/missiles, unprecedented since SMO began) UA drones over Moscow overnight 08-MAY per Sobyenin CSIS Pokrovsk advancing 70m/day Hungary new PM Magyar pivoting from Moscow |
| Indo-Pacific / SCS + Taiwan + DPRK | GEO-AXIS-001 PRC Antelope Reef airbase ~1,500 acres reclaimed (significantly larger than Woody Island) Taiwan 40-day airspace restriction notices Scarborough floating barrier persists DPRK quiet 24-27 APR (last 19-APR Sinpo Hwasong-11 cluster-munitions test) |
| Europe / Ukraine / Russian Urals / Romania (NATO) | GEO-AXIS-001 Trump-brokered 3-day RU-UA CF EXPIRED midnight 11-MAY Putin pared-down Victory Day parade Sat 09-MAY (no tanks/missiles, unprecedented) UA drones over Moscow overnight 08-MAY per Mayor Sobyenin CSIS notes Pokrovsk advancing 70m/day Hungary PM Magyar pivoting away from Moscow Meduza/Mediazona ~352k RU KIA estimate |
| Japan / Sanriku Coast | PHS-001 M6.1 Rat Islands AK Aleutians 09-MAY (largest worldwide 7d, MMI 4.8) M6.0 Nena Philippines 04-MAY (PAGER green) M5.9 SE Indian Ridge 08-MAY No Pacific tsunami advisories JMA megaquake advisory CLOSED (baseline) |

| REGION / THEMATIC | KEY ENTRIES / THREAT DRIVERS |
|--|--|
| Agricultural / Global Supply Chain | 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 |
| Space Environment / HF Comms | SWX-001 Kp 1-3 quiet through 26-APR / Brief Kp 4 active spike from 23-APR CME / AR4420 produced M6 flare 26-APR 22:51Z + 4 M-class + 17 C-class flares 24h (with AR4425) / M6.4 24-APR 18:15Z HF favorable for SKYWARN emergency comms during active CIG2 outbreak |
| Cyber / Vulnerability Queue | CYB-001 PAN-OS CVE-2026-0300 RCE Wave 1 patch RELEASE 13-MAY (T+1) / FCEB BOD due 27-MAY (T-15) / >5,800 PAN-OS VM-Series exposed CYB-002 Ivanti EPMM CVE-2026-6973 KEV-added 07-MAY CYB-003 BerriAI LiteLLM CVE-2026-42208 SQLi FCEB due TODAY 11-MAY CYB-005 Linux Copy Fail FCEB T-3 to 15-MAY (POINTER) AA26-097A Day 35 standing baseline |

SECTION 2 - BLUF & MARKET INDICATORS

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

| COMMODITY | PRE-WAR (28 FEB) | CURRENT (12 MAY) | CHG vs PRE-WAR | 48H TREN D | CONSUMER / ANALYTICAL NOTE |
|----------------------------|------------------|------------------|----------------|--|---|
| Brent Crude (front) | ~\$66/bbl | ~\$103-105/bbl | +58% | ▲ +2-3% session ▲ Trump rejection 10-11 MAY | Brent intraday ~\$103-105 (+2-3% session) on Trump rejection of Iran counter-proposal Sun-Mon 10-11 MAY. IEA: "largest supply shock on record." Aramco CEO Nasser: 100M bbl/wk supply loss; possible normalization 2027. DHL: 4-6 months to normalize. Ghalibaf insists 14-pt MoU is "only path forward." |
| WTI Crude (front) | ~\$63/bbl | ~\$97-101/bbl | +59% | ▲ +2-3% session ▲ Trump rejection | WTI intraday ~\$97-101 (+2-3% session). Hormuz traffic ~5% pre-war (191 vessels April per Kpler). CMA CGM San Antonio Day 7 post-strike stable (struck 05-MAY); Project Freedom Day 6 of pause; no new named-vessel strikes since 05-MAY. |
| Gasoline (natl avg) | ~\$3.10/gal | \$4.55/gal (est) | +47% | ▲ +\$0.02 wk-over-wk pump-lag from Brent rally inbound | AAA national average estimated \$4.55/gal (12-MAY update pending). Pump lag 10-14 days: 04-MAY \$114 Brent spike now flowing through to pump prices. Trump rejection escalation adds upward pressure. |

| COMMODITY | PRE-WAR (28 FEB) | CURRENT (12 MAY) | CHG vs PRE-WAR | 48H TREND | CONSUMER / ANALYTICAL NOTE |
|-------------------------------|------------------|----------------------|----------------|--|--|
| Diesel (US No. 2) | ~\$3.74/gal | ~\$5.45/gal | +46% | ~flat +1% | 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 | ~\$215/bbl | +139% | ▲ +1% ▲ slow | IATA. EASA CZIB 2026-03-R9 IN EFFECT covers 11-country ME airspace all altitudes (Bahrain/Iraq/Israel/Jordan/Kuwait/Lebanon/Qatar/UAE/Oman/Saudi Jeddah FIR); exception S. KSA + Oman FL320+ S of OBSOT/DANOM/KEDON/VELOD line. European carrier suspensions continuing. |
| 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. WASDE drops TODAY 12-MAY 12pm ET first 2026-27 corn/soy/wheat balance sheets. |
| Anhydrous Ammonia (IL) | ~\$800/ton | \$1,099.50/ton avg | +37% | ~flat -0% | USDA AMS Illinois T1. 2026 planting near complete. WASDE pre-report estimates: world corn ending stocks 296.5->286.7 mmt; Brazil corn ~133.7 mmt; Argentina ~56.2 mmt; wheat 2026-27 stocks ~281.2 mmt. Trump-Xi Beijing summit Thu-Fri 14-15 MAY may shift soybean baseline. |
| Ocean Freight (SCFI) | ~1,333 pts | ~1,950 pts | +46% | ▲ vs prior cycle ▲ Hormuz dual blockade | Blockade Day 30. CMA CGM San Antonio Day 7 post-strike stable; Project Freedom Day 6 of pause; no new named-vessel strikes since 05-MAY. UK HMS Dragon deployed 09-MAY. Hormuz traffic ~5% pre-war (191 vessels April per Kpler). IMO ~20,000 seafarers ~2,000 vessels stranded. Lloyd's war-risk premium pricing continues. |

► 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

12 MAY 2026 | PREP-CON 3 ELEVATED | TREND DETERIORATING | OP EPIC FURY DAY 74 | BLOCKADE Day 30 | LBN CF Day 27 of EXTENDED PERIOD (T-5 to ~17-MAY) | CVE-2026-0300 PAN-OS RCE first patch RELEASE 13-MAY | RU-UA 3-DAY CF EXPIRED MIDNIGHT 11-MAY

THE CYCLE - QUICK LOOK

- CISA KEV CVE-2026-0300 PAN-OS unauth-root RCE; FCEB BOD due 27-MAY (T-15); active limited exploitation; Wave 1 patch RELEASE TOMORROW 13-MAY (T+1); ~225,000 PAN-OS internet-facing per Shodan per Shadowserver - see [CYB-001](#).
- US-Iran 14-pt MoU framework awaiting Iran formal sign-off past T+5; Pezeshkian first reported in-person meeting with Mojtaba Khamenei; Witkoff/Kushner/Rubio met Qatar PM Miami 08-09 MAY; Trump-Xi Beijing Thu-Fri 14-15 MAY external forcing function - see [GEO-001](#).
- LBN CF Day 27 DETERIORATING; IDF struck Beirut Dahieh 06-MAY killing Radwan Force cmdr Balout (FIRST capital strike); Hezbollah cross-border attacks 08-MAY FIRST since CF (Nahariya base + Meron drones); IDF reservist severely injured Sat 09-MAY - see [GEO-CF-LBN](#).

- ▶ CMA CGM San Antonio (Malta-flag 2,824 TEU) struck by Iranian cruise missile 05-MAY off Oman; 8 wounded; Trump PAUSED Project Freedom 06-MAY after just 2 days; UK HMS Dragon deployed 09-MAY (Type 45 destroyer, strictly defensive) - see [SC-001](#).
- ▶ Brent closed Fri 08-MAY \$101.29 (+1.23%); weekly oil loss Brent ~6%/WTI ~7%; intraweek range Brent \$96-\$114 swings; "ceasefire has ceased" thesis Rory Johnston; AAA \$4.536/gal carry-forward (Mon update pending) - see [FIN-001](#).
- ▶ Trump-brokered 3-day RU-UA CF EXPIRED midnight 11-MAY; Putin pared-down Victory Day parade Sat (no tanks/missiles, unprecedented since SMO began); UA drones over Moscow overnight 08-MAY per Mayor Sobyanin; CSIS Pokrovsk advancing 70m/day - see [GEO-AXIS-001](#).
- ▶ Cole Allen pleaded NOT GUILTY 11-MAY all 4 federal counts (incl 18 USC 1751(c)) before US District Judge McFadden DC; defense motion to disqualify Pirro+Blanche (both at WHCD); DOJ response due 22-MAY (T+10); next hearing 29-JUN - see [TER-001](#).
- ▶ CDC HAN 00528 Andes hantavirus M/V Hondius cruise ship 07-MAY; 3 dead; CDC Level 3 response; 9+ US returnees being monitored across 6 states - see [HLTH-001](#).

PRACTITIONER POSTURE: PREP-CON 3 sustain. 72-hr readiness for: PAN-OS Wave 1 patch deployment compliance post 13-MAY; LBN CF expiry ~17-MAY (T-5) with possible Hezbollah third cross-border strike; Iran 14-pt MoU response window past T+5; RU-UA CF EXPIRED midnight 11-MAY, attrition pattern resumed (Kyiv under drone attack 12-MAY morning); BerriAI LiteLLM FCEB BOD deadline PASSED 11-MAY (compliance assessment pending).

NEW & UPDATED - THIS CYCLE ONLY

★ [CYB-001](#) (NEW): **CISA KEV CVE-2026-0300 PAN-OS RCE; FCEB BOD T-15 to 27-MAY; first patch RELEASE TOMORROW 13-MAY.** Unauthenticated buffer overflow (CWE-787) in User-ID Authentication Portal; CVSS 9.3 internet-exposed; active limited exploitation in wild against untrusted-network-exposed portals; ~225,000 PAN-OS internet-facing per Shodan.

★ [GEO-001](#) (UPDATED): **US-IRAN 14-PT MoU RESPONSE WINDOW PAST T+5; PEZESHKIAN MET MOJTABA KHAMENEI; WITKOFF/RUBIO MET QATAR PM MIAMI 08-09 MAY.** Framework would declare end to 73-day war + open 30-day technical negotiation window in Islamabad or Geneva; CIA assessment Iran can survive 4 more months blockade; revised IC 2/3 missile launchers survived (up from 1/2).

★ [GEO-CF-LBN](#) (UPDATED): **LBN CF Day 27 DETERIORATING; HEZBOLLAH CROSS-BORDER 08-MAY FIRST SINCE CF; IDF RESERVIST SEVERELY INJURED SAT.** IDF Beirut Dahieh strike 06-MAY killed Radwan Force cmdr Balout (first capital strike since CF); 26 Hezbollah attacks Friday incl 2 cross-border (Nahariya base + Meron drones); 85 IDF strikes Friday; 9-town LBN evacuation orders Sat; LBN-ISR Washington direct talks scheduled this week.

★ [SC-001](#) (UPDATED): **CMA CGM SAN ANTONIO STRUCK 05-MAY; PROJECT FREEDOM PAUSED 06-MAY; UK HMS DRAGON DEPLOYED 09-MAY.** Maltese 2,824 TEU container ship hit by Iranian cruise missile off Oman; 8 wounded; Trump paused Project Freedom after 2 days (Saudi pressure per NBC); UK HMS Dragon Type 45 destroyer deployed for mine-clearance + escort role; ~20,000 seafarers stranded ~2,000 vessels per IMO.

↻ [FIN-001](#): **BRENT \$101.29 (+1.23% Fri close) AFTER WEEKLY -6% / WTI \$95.42 / AAA \$4.536/gal CARRY.** Weekly oil loss Brent ~6%/WTI ~7%; intraweek Brent \$96-\$114; Mon 04-MAY \$114 spike (Project Freedom + UAE); Wed 06-MAY \$96 plunge (Axios MoU-near); Fri rebound after CENTCOM strike Iranian military targets; IEA ~14 mbpd disruption; Rory Johnston "ceasefire has ceased" thesis.

★ [GEO-AXIS-001](#) (UPDATED): **TRUMP-BROKERED 3-DAY RU-UA CF EXPIRED MIDNIGHT 11-MAY / PUTIN PARED VICTORY DAY PARADE / UA DRONES OVER MOSCOW.** Parade unprecedented since SMO began (no tanks/missiles, massive screens instead); Putin tightened personal security amid Kremlin

assassination/coup threat assessments; Lukashenko among handful of foreign attendees; CSIS Pokrovsk advancing 70m/day; Meduza/Mediazona ~352k RU KIA estimate.

★ **TER-001** (UPDATED): **ALLEN FEDERAL ARRAIGNMENT TODAY 11-MAY BEFORE JUDGE McFADDEN DC**. 4 federal counts incl 18 USC 1751(c) attempted assassination POTUS + 18 USC 111(a)(b) assault federal officer + 18 USC 924(c)(1)(A) firearm in violent crime + interstate firearm transport; Allen remains pre-trial detention; Pirro framing through-line with Capital Jewish Museum + National Guard shooters.

★ **HLTH-001** (NEW): **CDC HAN 00528 HANTAVIRUS M/V HONDIUS 07-MAY / 3 DEAD / CDC LEVEL 3 / 9+ US RETURNEES MONITORED 6 STATES**. Andes hantavirus cluster aboard cruise ship; CDC HAN 00528 advisory issued 07-MAY; Canary Islands passenger evacuation underway; sub-clinical incubation 1-8 weeks; ARC blood ongoing shortage carry-forward.

★ **NWR-001** (STATE B user-supplied 12-MAY): **19 NWR TRANSMITTERS AFFECTED (15 OOS + 4 DEG, 13 STATES); IL HILLSBORO KXI79 OOS NEW WITHIN TODAY'S IL/MIDWEST CORRIDOR; NM TRIPLE-GAP CYCLE 7**. IL Hillsboro KXI79 OOS NEW within today's IL/Midwest Marginal Risk corridor (per WX-001 SPC 12-MAY); NM triple-gap continues cycle 7 (Roswell + Artesia + Carlsbad); see SEC 10 NWR table.

⌚ **CYB-002**: **CISA KEV ADDS CVE-2026-6973 IVANTI EPMM RCE FCEB DUE 28-MAY; CVE-2026-42208 BERRIAI LITELLM SQLI FCEB DEADLINE PASSED 11-MAY**. Ivanti EPMM RCE KEV-added 07-MAY (FCEB ~28-MAY); BerriAI LiteLLM SQLi FCEB BOD remediation deadline PASSED 11-MAY (compliance assessment pending); CYB-005 Linux Copy Fail FCEB T-3 to 15-MAY (POINTER).

⌚ **NUC-001**: **IAEA BLACKOUT Day 74; 440.9 KG HEU BASELINE; CIA 4-MO BLOCKADE SURVIVAL; 2/3 LAUNCHERS SURVIVED (REVISED)**. CNN intel sources + WaPo CIA assessment both released this cycle; revised IC up from 1/2 to 2/3 missile-launcher survival; Iran VP Esfahani fuel-consumption-reduction appeals (~1-1.5L/day) signal energy-grid stress.

⌚ **AVN-001**: **EASA CZIB 2026-03-R9 IN EFFECT THROUGH 12-MAY (T+1)**. 11-country ME all altitudes; exception southern Saudi/Oman FL320+; KLM extended Gulf suspensions through 28-JUN (Dubai/Riyadh/Dammam/TLV/BEY); BA Dubai through 31-MAY; Lufthansa Group end-date Abu Dhabi/Riyadh/non-Dubai Gulf 24-OCT.

⌚ **PHS-001**: **M6.1 ALEUTIANS 09-MAY (LARGEST WORLDWIDE 7D) / M6.0 PHILIPPINES 04-MAY / M5.9 SE INDIAN RIDGE 08-MAY**. All 3 PAGER green; M6.1 Rat Islands MMI 4.8; no Pacific tsunami advisories; JMA megaquake advisory CLOSED (baseline).

⌚ **SWX-001**: **Kp 2-3 QUIET / R1-R2 15-30% AS L=330 ARs ROTATE / HF FAVORABLE FOR EMERGENCY COMMS**. Greatest expected Kp 4.33 (below G-scale); 10.7 cm flux 126 sfu; two ARs at L=330 rotating to Earth-facing disk this week.

⌚ **CN-001**: **PRC SCARBOROUGH 352M BARRIER REMOVED SINCE WEEKEND / TRUMP-XI BEIJING THU-FRI MAY SHIFT BASELINE**. Per Philippine CG Tarriela; PHL Navy continues monitoring; PRC annual SCS fishing ban begins 16-MAY.

⌚ **AGR-001**: **USDA WASDE FIRST 2026-27 BALANCE SHEETS TOMORROW 12-MAY 12pm ET / HOUSE E15 VOTE WED / TRUMP-XI BEIJING THU-FRI**. Most significant grain report of year; House E15 year-round vote Wed; Trump-Xi Beijing summit ag commitments swing variable.

NOT DETAILED HERE (FULL NARRATIVE IN BODY): SWX-001 HF table (Sec 7A); INS-001 IRGC/MOIS standing (Sec 4B carryover); TER-002 DHS NTAS gap Day 74 standing (Sec 4B carryover); CYB-005 Linux Copy Fail T-4 (Sec 4A POINTER); WLDFR-001 Hwy 82 Fire 90% contained mop-up phase (Sec 7D); GEO-AFG-PAK no current escalation since 26-APR (Sec 4B carryover).

DECISIVE WINDOW: Next 72 hrs - (1) WHCD Allen NOT GUILTY plea 11-MAY (Day 17); (2) CYB-001 PAN-OS Wave 1 patch RELEASE TOMORROW 13-MAY (T+1) + BerriAI LiteLLM FCEB deadline PASSED 11-MAY (compliance assessment pending); (3) RU-UA 3-day CF EXPIRED midnight 11-MAY; (4) Trump REJECTED Iran counter-proposal 10-11 MAY; ceasefire on life support; Trump-Xi Beijing Thu-Fri 14-15 MAY; (5) LBN CF Day 27 DETERIORATING; T-5 to ~17-MAY expiry; possible third Hezbollah cross-border Mon-Wed.

SECTION 3 - FLASH EVENTS (Score ≥ 20)

CYB-001 | CISA KEV CVE-2026-0300 PAN-OS RCE / CVSS 9.3 / Active limited exploitation / Wave 1 patch RELEASE TOMORROW 13-MAY (T+1) / FCEB BOD 27-MAY (T-15) / ~225,000 PAN-OS internet-facing per Shodan

FLASH | UPDATED | 25

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| WHY THIS CYCLE | Palo Alto Networks first patch ships TOMORROW 13-MAY for a critical PAN-OS RCE under active limited exploitation; Shadowserver counts ~225,000 PAN-OS internet-facing per Shodan; FCEB BOD T-15 to 27-MAY. |
| Summary | <p>SIZE: All FCEB agencies running affected PAN-OS versions + broader DIB/financial/healthcare/critical-infrastructure exposure parallel; >5,800 PAN-OS VM-Series instances internet-exposed per Shadowserver; Wiz data ~7% of environments have publicly exposed PAN-OS.</p> <p>ACTIVITY: CISA added CVE-2026-0300 to KEV catalog 06-MAY based on limited targeted exploitation observed in the wild; Palo Alto PSIRT confirms exploitation against internet-exposed User-ID Authentication Portal; Wave 1 patch ships 13-MAY (TOMORROW T+2), Wave 2 ~28-MAY. Mitigation = restrict portal to trusted internal IPs only or disable feature.</p> <p>LOCATION: PA-Series hardware + VM-Series virtual firewalls running PAN-OS 12.1/11.2/11.1/10.2 (specific releases); Cloud NGFW, Prisma Access, and Panorama NOT affected per vendor.</p> <p>TIME: KEV add 06-MAY; FCEB BOD 22-01 remediation deadline 27-MAY (T-16 from today); Wave 1 patch 13-MAY (T+2).</p> <p>EQUIPMENT: PAN-OS firewalls; CVSS 9.3 (internet-exposed) / 8.7 (trusted-IP-only); CWE-787 Out-of-Bounds Write in User-ID Authentication Portal (aka Captive Portal); unauthenticated buffer overflow allowing arbitrary code execution at root via specially-crafted packets; no user interaction required.</p> <p>UNIT: CISA (KEV catalog owner); Palo Alto Networks PSIRT (vendor); Shadowserver Foundation (exposure scan); Wiz (impact analysis); threat-actor attribution not public.</p> |
| Analyst Assessment | <p>PRE-PATCH WINDOW CLOSING: The 5-day window 06-13 MAY where mitigation (portal restriction or disablement) was the only defense is now closing as the first patch ships. Organizations that did not implement the workaround during the gap should treat already-exposed devices as potentially compromised pending forensic review.</p> <p>SCOPE BEYOND FCEB: Defense Industrial Base, financial services, regulated healthcare, MSPs, regional governments, and educational institutions running affected PAN-OS versions should treat the FCEB BOD 22-01 deadline as the floor, not the ceiling. Attacker targeting is not limited to government.</p> <p>POST-PATCH EXPLOITATION ESCALATION: PoC public release post-patch reverse-engineering is the principal escalation vector. The shift from limited targeted to mass exploitation typically occurs within 5-10 days of patch release as researchers reverse engineer the fix.</p> |

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| ALT HYP | <p>STACKED DEADLINES THIS WEEK: CYB-003 BerriAI LiteLLM SQLi FCEB due TODAY 11-MAY; CYB-005 Linux Copy Fail FCEB due 15-MAY (T+4); CYB-002 Ivanti EPMM RCE KEV-added 07-MAY with FCEB ~28-MAY clock running. SecOps teams have compressed deadlines this and next week.</p> <p>TRIPWIRES: (1) Wave 1 patch deployment compliance reports post-13-MAY by FCEB agencies; (2) Any ransomware operator pickup of CVE-2026-0300 post-PoC release; (3) PoC public release post-patch reverse-engineering; (4) Shift in exploitation targeting from limited to mass after Wave 2 ~28-MAY when long-running versions get fixed; (5) Any named threat-actor attribution by CISA or Palo Alto Networks.</p> |
| | <p>ALT A: PRC-affiliated APT operation focused on federal lateral movement [MOST LIKELY]</p> |
| | <p>Tradecraft pattern (edge appliance, unauthenticated RCE, OOB-write primitive, limited targeted exploitation) maps to PRC-affiliated APT signatures (cf. Volt Typhoon edge-targeting baseline).</p> |
| | <p>✓ Supporting Evidence: CISA KEV add 06-MAY with limited targeted exploitation observed; PAN-OS edge appliance class matches PRC TTPs; Palo Alto PSIRT confirms exploitation in wild against untrusted-network-exposed portals.</p> |
| | <p>✗ Ruling-Out Evidence: CISA has not publicly attributed; multiple state actors have demonstrated similar edge-targeting capability; OOB-write primitive is not exclusively PRC-associated.</p> |
| | <p>ALT B: Iran-affiliated APT operation parallel to AA26-097A OT/PLC line [LESS LIKELY]</p> |
| | <p>AA26-097A Day 35 demonstrates active Iranian-affiliated APT activity against US infrastructure during Op Epic Fury; CVE-2026-0300 PAN-OS RCE could be a second prong targeting federal edge.</p> |
| | <p>✓ Supporting Evidence: Active Iran-affiliated cyber activity per AA26-097A; war-period escalation incentive; Iran has demonstrated capability against edge appliances.</p> |
| | <p>✗ Ruling-Out Evidence: CVE-2026-0300 tradecraft pattern more consistent with PRC-style long-dwell than Iran-style faster-tempo; specific TTP signatures not yet attributed; Iranian operations have favored OT/PLC vector this cycle, not enterprise firewall.</p> |
| SOURCES | <p>Palo Alto Networks PSIRT CISA KEV catalog Help Net Security (Zorz) The Hacker News Wiz Blog (Bedi/Naftali/Nelson 04-MAY) Shadowserver Foundation exposure scan</p> |

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| <p>GEO-001 US-Iran 14-pt MoU framework / Trump REJECTED Iran counter-proposal "totally unacceptable" (Sun-Mon 10-11 MAY) / Ghalibaf insists 14-pt "only path forward" / Ceasefire on "life support" per Gulf News 12-MAY / Pezeshkian first reported in-person meeting with Mojtaba Khamenei</p> | | <p>FLASH UPDATED 25</p> |
| WHY THIS CYCLE | <p>US officials publicly confirm awaiting Iran formal response on 14-pt MoU framework; Pezeshkian first reported in-person meeting with new Supreme Leader Mojtaba Khamenei this week; Witkoff/Kushner/Rubio met Qatari PM in Miami over the weekend.</p> | |
| Summary | <p>SIZE: One-page 14-point MoU negotiated US-Iran with Pakistan and Qatar as channels; framework would declare end to 73-day war + open 30-day technical negotiation window in</p> | |

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| | <p>Islamabad or Geneva; if signed, US blockade and Iranian shipping restrictions gradually lifted during 30-day window.</p> <p>ACTIVITY: Iran submitted its own 14-point counter-response 02-MAY via Tasnim/Press TV (demands include 30-day full settlement, security guarantees against future strikes, US withdrawal from periphery, end to naval blockade, frozen-asset release, reparations, sanctions relief, end to LBN fighting, new Hormuz mechanism); US side awaiting Iran formal sign-off on framework; Pezeshkian held first reported in-person meeting with Mojtaba Khamenei this past week; Witkoff/Kushner/Rubio met Qatari PM in Miami 08-09 MAY.</p> <p>LOCATION: Multiple channels active - direct US-Iran indirect via Pakistan; trilateral via Qatar in Miami; planned subsequent technical talks in Islamabad or Geneva.</p> <p>TIME: Iran formal response window since 06-MAY US delivery now in T+5 to T+6 territory; Trump-Xi Beijing summit Thu-Fri 14-15 MAY introduces hard external deadline.</p> <p>EQUIPMENT: Framework would govern Strait of Hormuz reopening, US naval blockade of Iranian ports (in place since 13-APR), Iran nuclear program scope limitations, sanctions relief mechanism, mediation venue selection.</p> <p>UNIT: US side - SecState Rubio, envoys Witkoff and Kushner, VP Vance; Iran side - FM (current), Speaker Ghalibaf, President Pezeshkian, Mojtaba Khamenei (sporadically accessible per US IC assessment); mediators - Pakistan (PM Sharif, COAS Munir), Qatar (PM via Miami meet), Russia (parallel St Petersburg channel).</p> |
| <p>Analyst Assessment</p> | <p>LEADERSHIP ASYMMETRY DRIVES FRICTION: The asymmetric Iranian leadership picture - Mojtaba Khamenei recovering from injuries, IRGC and Speaker Ghalibaf running day-to-day, IC question over who can actually sign - is the principal friction. Pezeshkian first in-person M.Khamenei meeting indicates convergence attempt but does not resolve the underlying authority question.</p> <p>CIA ASSESSMENT WEAKENS US LEVERAGE: CIA assessment that Iran can survive 4 more months of blockade reduces urgency-pressure leverage from US side. Revised 2/3 missile-launcher survival figure further strengthens Iranian position. Net effect: Iran can credibly hold out for terms more favorable than 14-pt framework as currently drafted.</p> <p>TRUMP-XI BEIJING DEADLINE: Trump-Xi Beijing summit Thu-Fri 14-15 MAY is the next external forcing function. Iran has incentive to either sign before Beijing (deny Trump the leverage of a deal-in-Beijing announcement) or after (allow Trump face-saving claim of summit-driven progress). Iranian-side fracture risk increases the closer to Beijing.</p> <p>TRIPWIRES: (1) Iran formal MoU sign-off OR formal rejection in next 48-72 hours; (2) Trump rhetoric pivot before Beijing departure; (3) IRGC internal veto signal via state media; (4) Further Hezbollah cross-border escalation forcing Israeli ground response into LBN; (5) Any Hormuz transit incident that could collapse the framework; (6) Russia parallel St Petersburg channel readout.</p> |
| <p>ALT HYP</p> | <p>ALT A: Iran formal MoU sign-off within 48-72h with managed concessions [MOST LIKELY]</p> <p>Iran economic pressure (CIA 4 months blockade survival) + Pakistan/Qatar mediation + Trump-Xi Beijing deadline create alignment of incentives for managed-deal Iran response within window.</p> <p>✓ Supporting Evidence: Mojtaba Khamenei-Pezeshkian meeting indicates IRI leadership convergence; Witkoff/Rubio Miami meeting with Qatar PM 08-09 MAY shows active US engagement; Iran 14-pt counter-response 02-MAY indicates engagement not rejection.</p> <p>✗ Ruling-Out Evidence: IRGC internal veto signal possible; Iran has not publicly committed to specific signing window; US side framing the wait as their move ("awaiting Iran") rather than tabling new terms.</p> |

ALT B: Iran formal rejection or extended slip with conditional counter-offer [LESS LIKELY]

IRGC internal fracture or M.Khamenei limited authority forces Iran to slip the response window past Trump-Xi summit; counter-offer with security guarantees demand.

✓ **Supporting Evidence:** IC question over who can actually sign indicates Iranian leadership picture is asymmetric; Atalayar scenario analysis puts HIGH on Iranian-side fracture; revised IC missile-launcher figure removes US leverage.

✗ **Ruling-Out Evidence:** Mediator structure (Pakistan + Qatar) reduces collapse risk; Iran economic position (CIA 4-month survival) does not require near-term collapse-deal; LBN-ISR Washington direct talks scheduled this week create diplomatic momentum.

SOURCES

[CNN Day 71 live](#) | [Axios exclusive 06-MAY](#) | NPR 02-MAY | Times of Israel liveblog 08-MAY | TIME 07-MAY | Atalayar scenario analysis | UK House of Commons Library briefing 10-MAY

GEO-CF-LBN | LBN CF Day 27 of EXTENDED period DETERIORATING (T-5) / Hezbollah SAM at IDF drone TODAY 12-MAY (failed) + Hezbollah explosive drones at IDF s.Leb TODAY (intercepted) / IAF response strike on suspect motorcycle / Qassem 12-MAY: weapons NOT on table / 3rd round US-mediated talks Thu/Fri 14-15 MAY Washington (Aoun delegation, Amb Karam lead)

FLASH | UPDATED | 27

WHY THIS CYCLE

For the first time since the mid-April ceasefire, Hezbollah claimed cross-border strikes on Israeli military bases Friday 08-MAY; Saturday 09-MAY exchanges continued with one IDF reservist severely injured; CF Day 27 of EXTENDED period with T-5 to ~17-MAY expiry.

Summary

SIZE: 26 Hezbollah attacks claimed Friday 08-MAY including 2 cross-border strikes (Israeli military base south of Nahariya + drone swarm on Meron base air-traffic-control site); 9 more Hezbollah attacks Saturday 09-MAY; Lebanese MoH 16 killed Fri (4 children) + cumulative 2,795 killed since 02-MAR; 85 Israeli strikes in Lebanon Friday alone.

ACTIVITY: Hezbollah cross-border claim 08-MAY was FIRST since mid-APR CF; framed as retaliation for Israeli Beirut strike Wed 06-MAY that killed Radwan Force commander Ahmed Ghaleb Balout + deputy + several fighters; IDF says Balout had advanced plans to invade the Galilee; Sat 9 more Hezbollah attacks (explosive drones fell within Israeli territory, IDF reservist severely injured); IDF issued evacuation orders for 9 southern LBN towns Sat declaring them "active combat zones".

LOCATION: Northern Israel hits at Nahariya (rockets + drones), Mt Meron air-traffic-control base (drone swarm), and IDF positions in southern Lebanon; Beirut southern suburbs (Israeli Wed strike); LBN-ISR direct talks scheduled Washington this week.

TIME: CF Day 27 of EXTENDED period (Day 1 = 16-APR); T-6 from today to ~17-MAY expiry window; Balout strike 06-MAY (Day -4 from Hezbollah retaliation Fri).

EQUIPMENT: Hezbollah used rockets (intercepted by Iron Dome at Nahariya), explosive drones (swarm tactic at Meron + drone hits on IDF in southern LBN), anti-tank missiles, mortars; Israel struck weapons storage facilities, drone launchers, vehicle near Beirut airport, building near Jabal Amel Hospital, and Hezbollah-affiliated Lebanese Resistance Brigades targets.

UNIT: Hezbollah (Radwan Force, political council via VP Mahmoud Qamati); IDF (162nd Division reinforcement, 36th/91st/146th/98th divisions in southern LBN); LBN govt (President Aoun gave directives to delegation chief Simon Karam for Washington talks; PM Salam target

of Qamati threat to "topple cabinet"); US State Department (CF terms allow IDF to "act against imminent or ongoing attacks").

Analyst Assessment

CF STRUCTURALLY COLLAPSING: The 06-MAY Beirut strike on Balout broke the Israeli pattern of staying out of Beirut for nearly a month and triggered the first claimed Hezbollah cross-border operations since CF. The escalation pattern - Israeli Beirut strike, Hezbollah cross-border, Israeli evacuation orders + 85 strikes, IDF reservist severely injured - sets up either a Saturday-style daily exchange becoming the new normal or a ground-operation expansion.

17-MAY EXPIRY WINDOW DECISIVE: T-5 days to ~17-MAY expiry is now the critical window for whether the CF framework formally collapses or gets re-extended with new terms. Absent re-extension agreement before Friday Beijing summit, default outcome is collapse with both sides claiming the other broke the framework.

WASHINGTON TALKS UNCLEAR LEVERAGE: LBN-ISR direct talks scheduled Washington this week create diplomatic channel but with unclear leverage. President Aoun delegating to Karam rather than handling personally signals Lebanese executive distancing from talks; PM Salam under Hezbollah political pressure via Qamati threats.

GROUND-OPERATION EXPANSION RISK: Israeli reinforcement beyond current 5 divisions in southern LBN is the principal escalation indicator. Sat IDF reservist severely injured + 9-town evacuation orders set conditions for ground operation if any further reservist KIA event occurs.

TRIPWIRES: (1) Any further Hezbollah cross-border strike claim (next will indicate normalization vs one-off); (2) Israeli ground reinforcement beyond current 5 divisions in southern LBN; (3) Collapse or recess of LBN-ISR Washington direct talks; (4) Lebanese cabinet political collapse on Hezbollah/Salam axis; (5) Any IDF strike north of Litani; (6) Any Israeli civilian casualty in Nahariya/Acre/Haifa Bay area shifting Israeli domestic political pressure.

ALT HYP

ALT A: CF formal collapse before 17-MAY expiry following third Hezbollah cross-border strike [MOST LIKELY]

Hezbollah cross-border 08-MAY + Saturday 09-MAY exchanges + IDF reservist severely injured + LBN-ISR Washington talks tension produce third cross-border strike Mon-Wed making CF de facto collapsed.

✓ **Supporting Evidence:** Pattern shift evident: Beirut Balout strike 06-MAY broke Israeli pattern; Hezbollah cross-border first since CF; IDF evacuation orders for 9 LBN towns Sat; 85 Israeli strikes Friday alone.

✗ **Ruling-Out Evidence:** LBN-ISR Washington direct talks creating diplomatic channel for de-escalation; Hezbollah political council Qamati framing as targeted retaliation not normalization; CF technically still in effect through 17-MAY.

ALT B: Re-extended CF with new terms maintaining low-intensity exchange pattern [LESS LIKELY]

Saturday-style daily exchanges become new normal under re-extended CF framework with adjusted terms allowing both sides to claim restraint while maintaining kinetic option.

✓ **Supporting Evidence:** Both sides have negotiation channels active; LBN-ISR Washington talks; US CF terms allow IDF response to "imminent or ongoing attacks"; Iran MoU framework creates pressure for regional de-escalation.

✗ **Ruling-Out Evidence:** CF Day 27 with cross-border attacks indicates structural failure of original terms; no public proposal for re-extension yet; T-5 days insufficient time for formal renegotiation.

SOURCES

[BSS/AFP from Beirut](#) | CNN Day 71 live 09-MAY | IDF Spokesperson | Lebanese Health Ministry | Egypt Independent 10-MAY | Defend Jerusalem 10-MAY | ToI liveblog 08-MAY

SC-001 | Maritime / Hormuz Day 30 - CMA CGM San Antonio Day 7 post-strike stable (struck 05-MAY) / Project Freedom Day 6 of pause / No new named-vessel strikes since 05-MAY / UK HMS Dragon deployed 09-MAY / Hormuz traffic ~5% pre-war (191 vessels April per Kpler) / Aramco Nasser: 100M bbl/wk supply loss; DHL 4-6 months to normalize

HIGH | DEMOTED FROM FLASH | 19

WHY THIS CYCLE

Project Freedom (US Navy commercial escort) PAUSED 06-MAY following 05-MAY Iranian cruise-missile strike on CMA CGM San Antonio in Hormuz; UK Royal Navy HMS Dragon deployed 09-MAY (decoupled response, not coordinated handoff).

Summary

SIZE: 1 container vessel struck (CMA CGM San Antonio, Malta-flag, 2,824 TEU, IMO 9294173); 8 crew injured; ~14 CMA CGM vessels stranded Gulf at conflict start (1 - CMA CGM Kribi - exited early-APR); IMO sector-wide ~20,000 seafarers stranded on ~2,000 vessels; IEA assessing ~14 mbpd disruption ongoing.

ACTIVITY: Iranian cruise-missile strike on CMA CGM San Antonio 05-MAY in Hormuz; vessel had switched off AIS prior to Dubai transit attempt; sought help from Oman (not US Navy) post-strike per US military official; Trump announced Project Freedom PAUSE via Truth Social 06-MAY hours after SecDef Hegseth had called the mission "a powerful red, white and blue dome over the strait"; UK MoD deployed HMS Dragon 09-MAY (Type 45 destroyer) for mine-clearance + escort role with Royal Navy "strictly defensive" framing; BIMCO chief safety officer Larsen: "transits without coordination with Iran entailed significant risk."

LOCATION: Strait of Hormuz (effectively closed since 28-FEB); US blockade of Iranian ports (Bandar Abbas + Bushehr corridor) Day 30 since 13-APR; San Antonio last AIS 05-MAY 25.48 N 55.14 E drifting 1kt headed Mundra India ETA 09-10 MAY; Fujairah UAE oil zone (04-MAY drone strike); HMS Dragon deploying Persian Gulf AO.

TIME: San Antonio strike 05-MAY (Day -6); Project Freedom pause 06-MAY (Day -5); HMS Dragon deployment 09-MAY (Day -2); current Hormuz transit risk window indefinite pending Iran MoU response.

EQUIPMENT: CMA CGM San Antonio (Malta-flag, 2,824 TEU, IMO 9294173); US Navy 5th Fleet destroyer presence; UK HMS Dragon (Type 45 destroyer); Iran cruise-missile + Shahed-drone systems.

UNIT: US Navy 5th Fleet (Admiral Brad Cooper); UK Royal Navy (HMS Dragon CO); CENTCOM; CMA CGM Group (Marseille HQ; world third-largest container line); BIMCO (Larsen safety officer); SecDef Hegseth (Project Freedom announcement); Trump (pause announcement); Oman maritime authority (received San Antonio distress); IMO (sector-wide stranded-seafarer estimate).

Analyst Assessment

PAUSE + UK DEPLOY ARE DECOUPLED: Project Freedom pause + UK HMS Dragon deployment are decoupled responses, not a coordinated handoff. US-paused for Iran-MoU negotiating reasons; UK deployed independently to fill a partial protection gap. Net effect: commercial Hormuz transit risk reset upward despite pause framing.

PAUSE AS NEGOTIATION SIGNAL: Pause itself is a signal of US unwillingness to underwrite commercial transit during Iran negotiation. Hegseth-Trump pause-within-days inconsistency suggests either Saudi pressure (per NBC) or recognition mission was not viable post-Iranian targeting demonstration. Either reading reduces US deterrent posture in Hormuz.

LATENT SUPPLY SHOCK POOL: Stranded-tanker count (~14 CMA CGM vessels + sector aggregate of ~2,000 vessels with 20k seafarers per IMO) is a latent supply-shock pool once any

CF normalizes. Sudden release of stranded tonnage would create freight-rate collapse and short-term tanker glut.

CMA CGM CORPORATE POSTURE: CMA CGM has not changed Gulf-transit posture publicly post-strike; San Antonio AIS-off behavior suggests company recognized Iranian targeting risk and attempted transit anyway. Insurance market response (war-risk premium pricing per Chevron CEO Wirth Milken statement) is the binding constraint on continued company transit attempts.

TRIPWIRES: (1) Any second commercial-vessel strike in Hormuz Mon-Wed indicating CMA CGM San Antonio was not one-off; (2) Trump resume-Project-Freedom announcement; (3) Further UK deployment or US partner pickup (FR/AU); (4) Any AAA national-gasoline-avg break above \$4.60/gal Mon pump update; (5) CMA CGM corporate statement on continued Gulf transit posture.

ALT HYP

ALT A: Project Freedom pause is negotiation-cover; resume signal contingent on Iran MoU sign-off [MOST LIKELY]

Pause is calibrated signal to Iran during MoU response window; Trump resumes Project Freedom or replaces it with successor mission post-MoU sign-off as part of Hormuz reopening package.

✓ **Supporting Evidence:** Pause announcement timing coincides with Iran MoU response window; UK HMS Dragon fills partial gap without US-flag commitment; mediator structure (Pakistan + Qatar) active in same timeframe.

✗ **Ruling-Out Evidence:** No public Trump statement linking pause to MoU; SecDef Hegseth had publicly committed to mission days before pause; CMA CGM has not changed Gulf-transit posture.

ALT B: Project Freedom pause is recognition mission was not viable; UK deployment is permanent gap-fill [LESS LIKELY]

San Antonio strike demonstrated mission unsustainable absent direct US-Iran coordination; UK HMS Dragon becomes lead Western escort with US in supporting role only.

✓ **Supporting Evidence:** Hegseth-Trump pause-within-days inconsistency suggests mission failure recognition; UK Royal Navy "strictly defensive" framing positions as standing role; BIMCO Larsen "without coordination with Iran" signals industry view that pause is structural.

✗ **Ruling-Out Evidence:** US Navy 5th Fleet posture not visibly drawn down; CENTCOM continues strike operations; no public US statement that Project Freedom is permanently terminated.

SOURCES

[FreightWaves \(Chirls 06-MAY\)](#) | [Container News 06-MAY](#) | [UK MoD HMS Dragon 09-MAY](#) | [CMA CGM corporate](#) | [WorldCargo News \(Larsen\)](#) | [AI-Monitor/Reuters 06-MAY](#) | [MyShipTracking AIS](#) | [VesselFinder](#)

FIN-001 | Oil / Gas / Markets - Brent intraday ~\$103-105 / WTI ~\$97-101 (+2-3% on Trump rejection 10-11 MAY) / IEA: "largest supply shock on record" / S&P 500 7,411 (+0.17%) / VIX 18.24 (+6.11%) / Aramco Nasser: 100M bbl/wk supply loss; possible 2027 normalization

FLASH | UPDATED | 24

WHY THIS CYCLE

Oil markets repriced Iran risk twice during the week (06-MAY MoU-near plunge to \$96, 04-MAY Project Freedom + UAE attacks spike to \$114); Hezbollah cross-border on Friday reopens upside risk for week ahead.

Summary

SIZE: Brent crude \$101.29 (08-MAY 4:59:59 PM EDT close, +1.23% intraday); WTI \$95.42 close; weekly oil loss Brent ~6%, WTI ~7%; intraweek range Brent \$96-\$114, WTI \$88-\$106; Dow 49,609.16 (+0.02% Fri); S&P 7,398.93 (+0.84%); Nasdaq 26,247.08 (+1.71%); Russell 2000 2,861.21 (+0.76%); VIX 17.19 (+0.64%); Gold \$4,730.70 (+0.42%); BTC \$80,808.20 (+0.71%); IEA assessing ~14 mbpd disruption from blockade.

ACTIVITY: Mon 04-MAY: Brent +6% to \$114.44 + WTI +4.39% to \$106.42 on Project Freedom launch + UAE drone-on-Fujairah-oil-zone + Iran missile-on-UAE; Wed 06-MAY: Brent -11% to \$96 + WTI -15% to \$88 on Axios "closing in on MoU" report (Trump later called it "too soon"); Thu 07-MAY: Brent settled \$100.06 (-1%); Fri 08-MAY: Brent +1.23% to \$101.29 close after CENTCOM strike on Iranian military targets following Iran fire on 3 US destroyers in Hormuz (Trump said vessels safely exited). IMO ~20,000 seafarers stranded on 2,000 vessels.

LOCATION: Strait of Hormuz (effectively closed since 28-FEB; US blockade of Iranian ports since 13-APR); Fujairah UAE oil zone (Mon strike); CENTCOM Persian Gulf operations area; trading floors NYMEX/ICE/Brent OTC.

TIME: Markets reopen Monday 11-MAY with two open question marks - Iran MoU response window (within 48-72h per 09-MAY US official) and 12-MAY WASDE (12pm ET) impact on grain-energy-dollar feedback loops; Trump-Xi Beijing Thu-Fri 14-15 MAY anchors the week.

EQUIPMENT: US Navy 5th Fleet destroyer presence + UK HMS Dragon now deployed to ME for Hormuz mine-clearance + shipping protection (Royal Navy "strictly defensive" framing); Iran fast-attack craft (6 destroyed by US in Mon engagement) and Shahed-series drones; AAA gasoline \$4.536/gal national avg (carry-forward from prior cycle, awaiting Mon update).

UNIT: ICE/CME Group (Brent + WTI exchanges); US Treasury + Fed (dollar/yield spillover); CENTCOM (Admiral Brad Cooper); IEA (Biorol assessment); IMF (inflation pass-through); Chevron CEO Mike Wirth (Milken Institute - normalization "months" post-CF); Rory Johnston (Commodity Context X) - "ceasefire has ceased" thesis.

Analyst Assessment

MARKETS REPRICING IRAN PREMIUM: Market is repricing Iran-risk premium back into Brent after the 06-MAY MoU-near plunge proved premature; the Fri Hezbollah cross-border + Sat IDF reservist injury + Iran MoU still pending all support a Mon open with \$100-105 Brent and continued upside skew if MoU framework slips past Trump-Xi Beijing on Thu.

STRANDED TANKER LATENT SHOCK: Stranded-tanker problem (20k seafarers, 2k vessels) is a separate latent supply shock once any CF normalization occurs. Sudden release of stranded tonnage would create freight-rate collapse and short-term tanker glut, putting downward pressure on shipping rates while upstream Iran-export normalization would put downward pressure on crude.

WASDE-OIL FEEDBACK LOOP: Tuesday WASDE corn/soybean stock surprise at 12pm ET interacting with Iran-induced fertilizer-energy linkage creates two-way risk: if WASDE shows tight balance sheet, ag inflation feeds into oil-driven cost structure; if loose, eases pressure marginally.

AAA PUMP LAG STILL OPEN: AAA national average gasoline \$4.536/gal is carry-forward from prior cycle. Monday update will reflect 10-14 day pump-lag from prior Brent moves. The

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|----------------|---|
| | <p>Mon 04-MAY \$114 Brent spike has not yet flowed to pump prices; expect upside pressure Monday-Tuesday absent MoU sign-off.</p> <p>TRIPWIRES: (1) Brent break above \$105 Monday morning open as Iran response window slips; (2) WASDE corn/soybean stock surprise Tue 12pm ET interacting with Iran-induced fertilizer-energy linkage; (3) Any Trump escalation rhetoric pre-Beijing; (4) Further Hezbollah-IDF cross-border exchange Monday; (5) UK HMS Dragon escort incident; (6) Brent below \$95 if MoU signed.</p> |
| ALT HYP | <p>ALT A: Brent holds \$100-105 range Monday open with continued Iran-risk premium pricing [MOST LIKELY]</p> <p>Hezbollah cross-border + Iran MoU pending + Project Freedom pause + WASDE Tuesday + Trump-Xi summit support continued \$100-105 trading range with upside skew if MoU slips.</p> <p>✓ Supporting Evidence: Friday close \$101.29 (+1.23%); intraweek range \$96-\$114 confirms volatility; Rory Johnston "ceasefire has ceased" thesis well-positioned market voice; multiple T1 sources triangulate.</p> <p>✗ Ruling-Out Evidence: 06-MAY plunge to \$96 on MoU-near reporting shows market remains responsive to deal signals; Iran formal sign-off could trigger \$90-95 retrace.</p> |
| | <p>ALT B: Brent breaks above \$105 on Hezbollah escalation or MoU collapse signal [LESS LIKELY]</p> <p>Third Hezbollah cross-border strike Mon or Iran MoU formal rejection triggers \$105+ break with potential return to early-week \$114 highs.</p> <p>✓ Supporting Evidence: Mon 04-MAY \$114 spike on Project Freedom + UAE attacks shows market capacity to repricing rapidly; LBN CF deteriorating provides catalyst.</p> <p>✗ Ruling-Out Evidence: CIA assessment Iran can survive 4 more months reduces immediate-collapse risk premium; Trump-Xi summit creates diplomatic-cover pressure for both sides; IEA disruption already priced in.</p> |
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| SOURCES | <p>Yahoo Finance BZ=F Trading Economics FRED DCOILBRENTU Fortune (Iran ceasefire) CNBC oil prices NBC News (06-MAY plunge)</p> |

GEO-AXIS-001 | RU-UA CF EXPIRED midnight 11-MAY / Russia 200+ drones at Ukraine overnight / Kyiv under attack 12-MAY morning / 1 killed Dnipropetrovsk +4 wounded / Russian MOD: 27 UA drones shot down (Belgorod/Voronezh/Rostov) / Peskov: "humanitarian ceasefire ended... SMO continuing"

FLASH | UPDATED | 22

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|-----------------------|---|
| WHY THIS CYCLE | <p>The 3-day ceasefire announced by Trump Friday covering 09-11 MAY ends at 23:59 today; Putin held an unprecedented pared-down Victory Day parade Saturday with no tanks or missile carriers, citing the "current operational situation."</p> |
| Summary | <p>SIZE: 3-day RU-UA CF 09-11 MAY (Trump-brokered, announced Friday 08-MAY); Putin Victory Day parade Saturday 09-MAY held without traditional tank and missile-carrier display (pared-down format unprecedented since SMO began); UA launched dozens of drones at Moscow overnight 08-MAY per Mayor Sobyanin claim; Meduza/Mediazona estimate ~352,000 RU KIA in Ukraine war from Feb 2022 through end of 2025; CSIS estimates similar; CSIS notes Pokrovsk offensive advancing ~70 meters/day.</p> |

ACTIVITY: Trump announced 3-day CF Friday including "suspension of all kinetic activity and air movements"; Zelensky earlier proposed his own ceasefire from midnight 06-MAY (which Russia violated 1,820 times by morning 06-MAY per Zelensky); Russia restricted mobile internet during parade amid fears of Ukrainian strikes; Lukashenko among handful of foreign leaders attending; massive screens shown intercontinental missiles, drones, and a nuclear submarine in place of physical display; Putin tightened personal security detail amid Kremlin assessment of assassination/coup threats.

LOCATION: Moscow Red Square (parade); 1,800-km front line in Ukraine; targets of overnight UA drone strikes incl Moscow oblast.

TIME: CF Day 1 = 09-MAY Friday; CF Day 3 = TODAY 11-MAY ending 23:59 Moscow time; Victory Day = Saturday 09-MAY (Day 2 of CF); post-event analysis window opens at CF expiry tonight; Trump previously announced potential 5,000 US troops to Poland after withdrawing from Germany (timing TBD).

EQUIPMENT: RU - Iskander missile units, Lancet/Shahed-derivative drones held off display; nuclear submarine featured on screens not in physical parade; UA - long-range drones (Bober/Liutyy class) used in pre-parade Moscow strike. Reduced parade ceremonial regiment composition vs prior years.

UNIT: Russia - Putin (Supreme Commander), Lukashenko (Belarus, attended), MFA Spox Zakharova (warned foreign missions to withdraw from Kyiv); Ukraine - Zelensky (refused unilateral RU CF unless reciprocal), GUR (drone strike platforms); US - Trump (CF broker), DoD personnel posture under review for Poland; mediators - Hungary new PM Magyar (Tisza party) pivoting away from Moscow.

Analyst Assessment

PARED PARADE = OPERATIONAL CONSTRAINT: The pared-down Victory Day parade is the single most telling indicator of the war's effect on Russian state confidence. Three years of parade tradition broken by Kremlin admission that operational situation prevented hardware display + admission of credible UA long-range drone threat to Moscow itself.

CF EXPIRY REVERTS TO ATTRITION: The 3-day Trump CF ending tonight without Iran-style framework discussion means the next news cycle reverts to attrition status. CSIS Pokrovsk 70m/day comparison to Battle of Somme is a useful frame for the operational picture: slow grinding advance with attritional logic.

DOMESTIC SECURITY POSTURE SHIFT: Putin tightened personal security amid Kremlin assessment of assassination/coup threats. Internet+SMS shutdown during parade + reduced foreign attendance + reduced ceremonial regiment composition all signal defensive Russian posture domestically, not victorious posture.

HUNGARY PIVOT DYNAMIC: Hungary new PM Magyar (Tisza party) pivoting away from Moscow creates new EU-Kyiv channel that did not exist under Orban. Combined with potential 5,000 US Poland deployment, the NATO eastern-flank posture is shifting in Kyiv's favor for the medium term.

TRIPWIRES: (1) Any RU retaliation strike Tuesday 12-MAY after CF expires; (2) Trump statement on CF outcome and any extension; (3) Trump Poland troop announcement; (4) RU MFA characterization of CF outcome (success vs UA-fault narrative); (5) Hungary Magyar pivot to Kyiv/EU accelerating; (6) Any verified UA strike on RU strategic asset during CF claimed as US-tolerated.

ALT HYP

ALT A: Post-CF reversion to attrition pattern with Trump pivot to Poland announcement [MOST LIKELY]

3-day CF expires 23:59 today without framework discussion; Tuesday-Wednesday RU strikes resume at attrition pace; Trump announces 5,000 Poland troop deployment timing.

✓ **Supporting Evidence:** Pared-down Victory Day parade confirms RU operational constraint; CSIS Pokrovsk 70m/day advance pace continues; UA drone capability against Moscow demonstrated 08-MAY.

✘ **Ruling-Out Evidence:** Trump could announce CF extension or framework opening; Hungary Magyar pivot dynamic creates new EU-Kyiv channel; Putin tightened security suggests internal-pressure response possible.

ALT B: CF extension announcement with limited framework discussion before Beijing [LESS LIKELY]

Trump extends 3-day CF as 5-day or 7-day with face-saving framework opening; positioning for Beijing Thu-Fri summit ag/Iran/RU package.

✓ **Supporting Evidence:** Trump pattern of pause-extend-pause; Beijing summit creates incentive for stable RU-UA backdrop; Hungary Magyar dynamic supports diplomatic momentum.

✘ **Ruling-Out Evidence:** No public Trump statement on extension yet; UA drone capability demonstrated weakens RU position to accept extension on US terms; Putin pared parade shows weakness signal would undermine any extension acceptance.

SOURCES

[TIME Magazine 09-MAY](#) | [Kyiv Independent 08-MAY](#) | TASS / Putin Defense Ministry | Meduza/Mediazona joint estimate | CSIS Pokrovsk analysis

TER-001 | WHCD Cole Allen pleaded NOT GUILTY 11-MAY all 4 federal counts before Judge McFadden DC / Defense motion to disqualify Pirro+Blanche (potential victims/witnesses, both at WHCD) / DOJ response due 22-MAY (T+10) / Next hearing 29-JUN / Allen no longer on suicide watch / WHCD Day 18

FLASH | UPDATED | 20

WHY THIS CYCLE

Federal arraignment for Cole Tomas Allen is scheduled for today 11-MAY before US District Judge Trevor McFadden in DC; first opportunity to enter plea on 4-count federal indictment incl life-sentence-capable attempted assassination charge.

Summary

SIZE: 1 defendant; 4 federal counts; max sentence life imprisonment on Count 1 (18 USC 1751(c) attempted assassination of POTUS); 1 victim Secret Service officer (identified as V.G. in indictment, struck on protective vest by buckshot, recovering); approximately 100 rounds of ammunition recovered (45 rounds 12-gauge shotgun + 55 rounds .38-caliber handgun).

ACTIVITY: Federal arraignment scheduled today 11-MAY before US District Judge Trevor McFadden (Trump 2017 appointee) for initial plea on 4-count grand jury indictment returned 05-MAY: (1) attempted assassination of POTUS 18 USC 1751(c); (2) assault of an officer with a deadly weapon 18 USC 111(a)(b); (3) interstate transportation of firearm/ammunition with intent to commit a felony; (4) using/carrying/brandishing/discharging firearm during a crime of violence 18 USC 924(c)(1)(A). Allen remains in federal pre-trial detention; defense legal team agreed to continued detention.

LOCATION: US District Court for the District of Columbia (333 Constitution Ave NW Washington DC); event itself occurred Saturday 25-APR at Washington Hilton hotel 1919 Connecticut Avenue NW; suspect originated from Torrance California; cross-country travel by train 21-25 APR.

TIME: WHCD attack 25-APR Day 0 (Day -16 from today); initial detention hearing 27-APR (Day +2 from attack); federal indictment returned 05-MAY (Day +10); arraignment 11-MAY (Day +16) NOT GUILTY plea entered; pre-trial motion to disqualify Pirro+Blanche; next hearing 29-JUN.

EQUIPMENT: Mossberg Maverick 88 12-gauge pump-action shotgun (serial MV2122609); Rock Island Armory 1911 .38-caliber semi-automatic pistol (serial RIA2383396); 45 rounds 12-gauge shotgun ammo + 55 rounds .38-caliber handgun ammo; two knives, four daggers, pliers,

wire cutters; Washington Hilton hotel reservation booked 06-APR (19 days pre-attack); pre-attack reconnaissance via online tracking of POTUS movements per FBI affidavit.
UNIT: USDC-DC (Judge Trevor McFadden); USAO-DC (US Attorney Jeanine Pirro); FBI (lead investigation, Director Patel briefed); USSS (apprehending officers); DOJ Criminal Division (Acting AG Todd Blanche); Federal Public Defender / private defense counsel for Allen; Federal Bureau of Prisons / DC Department of Corrections (custody chain, Magistrate Faruqi criticized conditions).

Analyst Assessment

PROCEDURALLY SIGNIFICANT: Today's arraignment is procedurally significant - Allen enters his first formal plea, the court sets a preliminary motions schedule, and prosecution discovery clock effectively starts. Expected not-guilty plea on all 4 counts is the baseline scenario.

PIRRO FRAMING ESTABLISHES NARRATIVE: Pirro public framing draws a through-line with Capital Jewish Museum shooter Elias Rodriguez and National Guard shooter Rahmanullah Lakanwal, signaling a federal-prosecution narrative around interstate ideologically-motivated violence rather than mental-health framing. This framing will shape jury selection and trial scope.

BULLET PROVENANCE DEFENSE THEME: The bullet provenance question (Blanche acknowledged 5 LE shots fired, 1 Allen shot, unclear which struck officer) will become a defense theme. If forensic evidence indicates LE friendly-fire wounded the officer, Count 2 (assault on federal officer with deadly weapon) becomes vulnerable.

DETENTION CONDITIONS PRESSURE: Magistrate Faruqi criticism of detention conditions creates pressure on Judge McFadden to set conditions order during today's arraignment. Any defense motion on detention conditions could be filed in conjunction with plea entry.

TRIPWIRES: (1) Plea entry (expected not guilty); (2) Detention condition order from Judge McFadden after Magistrate Faruqi's criticism; (3) Defense motions on speedy trial waiver or competency raise; (4) Any new indictment add or stripped count between today and trial; (5) White House review of USSS WHCA-protective posture announcement; (6) Any copy-cat threat assessment from NCTC public disclosure.

ALT HYP

ALT A: Standard arraignment proceeds with not-guilty plea + motion schedule set [MOST LIKELY]

Allen enters not-guilty plea on all 4 counts before Judge McFadden; defense waives speedy trial; pre-trial motions schedule set with discovery clock starting.

✓ **Supporting Evidence:** Standard federal procedure; Allen defense team agreed to continued detention (Day +2); Federal Public Defender pattern in similar cases; Judge McFadden Trump appointee no recusal anticipated.

✗ **Ruling-Out Evidence:** Defense could file motion to suppress evidence; competency raise possible given threat-history pattern; bullet-provenance issue could trigger pre-arraignment defense motion.

ALT B: Defense competency motion or evidence-suppression motion stalls arraignment [LESS LIKELY]

Defense files pre-arraignment motion challenging Allen mental competency or seeking suppression of search-incident-to-arrest evidence; arraignment continued.

✓ **Supporting Evidence:** Magistrate Faruqi criticized detention conditions; bullet-provenance ambiguity acknowledged by DOJ; FBI affidavit reliance on online tracking pattern could face Fourth Amendment challenge.

X Ruling-Out Evidence: Defense team to date has agreed to detention; no public defense statement signaling competency concern; standard practice is to enter plea then file motions in sequence.

SOURCES

[Federal indictment text](#) | Courthouse News 05-MAY | Washington Post 05-MAY | CBS News 05-MAY | WLT Report 05-MAY | FOX5 DC 05-MAY | Deseret News

SECTION 4A - CYBER & INFORMATION SECURITY

CYB-002 | CISA KEV - CVE-2026-6973 Ivanti EPMM RCE FCEB T+16 to 28-MAY / CVE-2026-42208 BerriAI LiteLLM SQLi FCEB deadline PASSED 11-MAY (compliance assessment pending) / CYB-005 Linux Copy Fail FCEB T-3 to 15-MAY (POINTER tier)

HIGH | UPDATED | 17

WHY THIS CYCLE

Ivanti EPMM RCE KEV-added 07-MAY (FCEB ~28-MAY clock); BerriAI LiteLLM SQLi FCEB due TODAY 11-MAY; CYB-005 Linux Copy Fail FCEB T-3 to 15-MAY; compounds with CYB-001 PAN-OS first-patch wave 13-MAY pressure.

Summary

SIZE: 2 cyber CVEs this cycle (CVE-2026-6973 Ivanti EPMM Improper Input Validation RCE; CVE-2026-42208 BerriAI LiteLLM SQL Injection CRITICAL); CYB-005 Linux Copy Fail FCEB-deadline 15-MAY (T-4) POINTER tier maintained.

ACTIVITY: CISA KEV add 07-MAY for CVE-2026-6973 based on evidence of active exploitation; CVE-2026-42208 FCEB BOD remediation deadline PASSED 11-MAY (compliance assessment pending).

LOCATION: Global FCEB + enterprise mobile device management infrastructure (Ivanti EPMM); enterprise LLM-routing/proxy infrastructure (BerriAI LiteLLM); Linux distribution stack (CYB-005).

TIME: Ivanti KEV add 07-MAY (FCEB ~28-MAY clock); BerriAI FCEB due TODAY 11-MAY; CYB-005 Linux T-4 to 15-MAY.

EQUIPMENT: Ivanti EPMM appliances + MDM management consoles; BerriAI LiteLLM proxy software; Linux file-handling code path.

UNIT: CISA (KEV catalog); Ivanti PSIRT + BerriAI (vendors); FCEB CIOs/CISOs; enterprise MDM admins + AI/ML platform teams.

Analyst Assessment

STACKED FEDERAL DEADLINES THIS WEEK: Three federal-cyber deadlines stack this week: CVE-2026-42208 BerriAI LiteLLM FCEB due TODAY 11-MAY; CYB-001 PAN-OS Wave 1 patch RELEASE 13-MAY (T+2); CYB-005 Linux Copy Fail FCEB due 15-MAY (T+4); CVE-2026-6973 Ivanti EPMM FCEB ~28-MAY. SecOps capacity is the binding constraint.

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.

KEV ACCELERATION POST-PAN-OS PATCH: CISA KEV catalog cadence has accelerated this cycle with 2 new KEV adds in 4 days (Ivanti EPMM 07-MAY, BerriAI LiteLLM earlier). Post-CYB-001 PAN-OS patch release 13-MAY, expect CISA to reduce KEV pressure briefly before Wave 2 patch ~28-MAY.

TRIPWIRES: (1) Named-victim disclosure on any of the 4 remaining 20-APR batch CVEs; (2) Cisco PSIRT or Microsoft MSRC scope expansion; (3) CERT-UA attribution expansion beyond UAC-0233/UAC-0250; (4) FCEB agency missing 04-MAY deadline; (5) New KEV additions before 04-MAY deadline; (6) FIRESTARTER detection beyond federal environment (CYB-001 cross-link).

SOURCES

[CISA KEV Catalog \(20-APR batch + 24-APR additions\)](#) | [Cisco PSIRT \(Catalyst SD-WAN Manager CVEs\)](#) | [CERT-UA \(Zimbra UAC-0233/UAC-0250 campaign\)](#)

SECTION 4B - PHYSICAL / GEOPOLITICAL / IO

SECTION 5 - ENERGY / INFRASTRUCTURE / SUPPLY CHAIN

CARRYOVER MONITORS - ENERGY / NUCLEAR / CI

NUC-001 IAEA Verification Blackout Day 74 / 440.9 kg HEU / CIA 4-mo blockade survival / 2/3 launchers survived (revised): IAEA verification blackout Day 74 (since 28-FEB strike). 440.9 kg of UF6 enriched up to 60% retained per IAEA Sep 2025 verification report basis (cannot verify post-blackout). Revised IC assessment per CNN: 2/3 of Iran missile launchers survived US strikes (revised up from 1/2 estimate). CIA assessment per WaPo: Iran can sustain US blockade for ~4 more months without economic complete destabilization. Iran VP Esfahani fuel-consumption-reduction appeals (~1-1.5L/day) signal energy-grid stress. Iran has not publicly cited the revised IC figure; mediation continues via Pakistan + Qatar channels.

SECTION 6 - AVIATION / TRANSPORTATION

CARRYOVER MONITORS - AVIATION / TRANSPORTATION

FAA NOTAMs / TFRs (current): No current FAA NOTAM elevation this cycle. FAA USNS-to-NMS transition continues; some TFRs missing from web display (FNS NOTAM Search authoritative).

SECTION 7 - METEOROLOGICAL WEATHER & SEVERE WEATHER

WX-001 | SPC 12-MAY 0551 UTC: MARGINAL RISK FL Peninsula + Midwest/Great Lakes + south-central Plains / CORRIDOR SHIFTED from yesterday TN Valley / FL MLCAPE >1500 J/kg central, 30-40kt shear ("could warrant Slight Risk upgrade") / Midwest/GL: eastern WI most probable late afternoon / NWR overlap: IL Hillsboro KXI79 OOS NEW within IL/Midwest corridor; IN Angola DEG edge of WI/GL

FLASH | UPDATED | 22

WHY THIS CYCLE

SPC 12-MAY 0551 UTC: MARGINAL RISK three separate corridors - FL Peninsula + Midwest/Great Lakes + south-central Plains. CORRIDOR SHIFTED from yesterday TN Valley framing. FL Peninsula: MLCAPE >1500 J/kg central, 30-40kt shear, SPC notes could warrant Slight Risk upgrade. Midwest/Great Lakes: eastern WI most probable late afternoon. NWR overlap: IL Hillsboro KXI79 OOS NEW within IL/Midwest corridor; IN Angola KXI94 DEG at edge of WI/GL corridor.

Summary

SIZE: SE corridor (TN/AL/MS/GA/FL panhandle) Marginal Risk severe today (11-MAY); Central Gulf Coast Marginal Excessive Rainfall; Sun overnight 10-MAY Enhanced Risk Central TX HP supercell (4in hail Coryell + 75mph winds McCulloch/San Saba/Mason).
ACTIVITY: Very large hail (3-4 inch); few tornadoes; MCS evolution; damaging winds.

LOCATION: ArkLATex into Mid-South / TN Valley evening corridor; SPC Day 1 Slight Risk centered on the southern US warm sector.
TIME: Storms intensify afternoon-evening 28-APR; TN Valley evening corridor highest-risk window.
EQUIPMENT: MLCAPE 2500-4000 J/kg; PWAT 1.6-2.0"; 0-6km bulk shear 40-60 kt; rain rates 2"/hr in WPC ERO Slight Risk zone.
UNIT: NWS SPC Day 1 Marginal Risk SE corridor; WPC ERO Day 1 Marginal Excessive Rainfall Central Gulf Coast; WFOs MEG/BMX/JAN/TAE/JAX. Sun 10-MAY confirmed: 4 inch hail Coryell Co TX; 75mph winds McCulloch/San Saba/Mason TX.

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): IL Hillsboro KXI79 OOS NEW sits within the IL/Midwest Marginal Risk corridor; IN Angola KXI94 DEG at the edge of WI/GL corridor. NM triple-gap (Roswell + Carlsbad + Artesia) continues cycle 7 with effectively zero primary NWR coverage in Chaves and Eddy counties.
POST-ACTIVE-SEQUENCE CONTEXT: Post-active sequence late-APR (23-APR Enid OK EF-4 was first EF-4 of 2026; multi-day 23-27 APR outbreak Wikipedia entry exists). Current 11-MAY environment is single-day SE Marginal Risk pattern, not multi-day sequence.
FATALITY DRIVER: Mobile-home and weak-structure exposure is the dominant fatality driver in EF2+ events - pre-position alternative shelter before evening hours in TN Valley risk corridor. NWR-degraded counties (Shelbyville TN; Fountain Hill AR; Baxley GA) face additional alerting friction.
SPACE WEATHER: Kp 2-3 quiet/unsettled; HF favorable for SKYWARN today. G1 (minor) watch late 29-30 APR may degrade HF in next 24-48h.
CONFIDENCE: HIGH - SPC T1; WPC T1; NWS local offices T1; multi-source 11-MAY observed conditions and Sun overnight 10-MAY verification.
TRIPWIRES: (1) Categorical upgrade to Enhanced or Moderate Risk in afternoon SPC update; (2) PDS Tornado Watch issuance; (3) Confirmed strong tornado in TN Valley or ArkLATex; (4) Initial reports of EF3+ damage; (5) Flash Flood Emergency issuance; (6) Major-city impact (Memphis, Nashville, Shreveport, Little Rock); (7) NWR transmitter restorations or additions inside outbreak corridor.

ALT HYP

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

SPC + WPC alignment; environment + dynamics consistent.

✓ **Supporting Evidence:** CAPE/shear/PWAT align with Marginal Risk classification today.

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

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

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

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

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

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

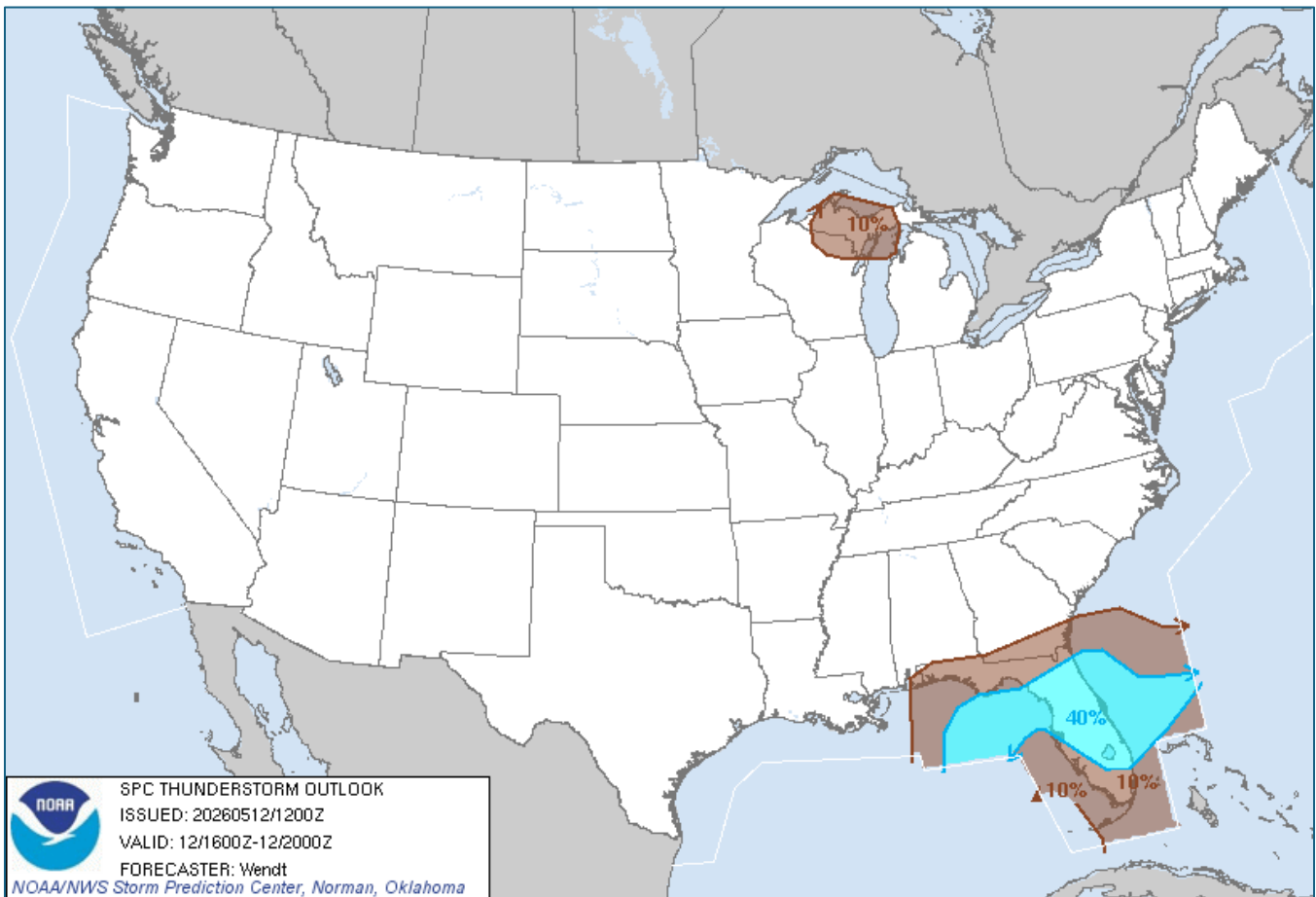
MLCIN may inhibit surface-based initiation in some sub-zones.

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

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

SOURCES

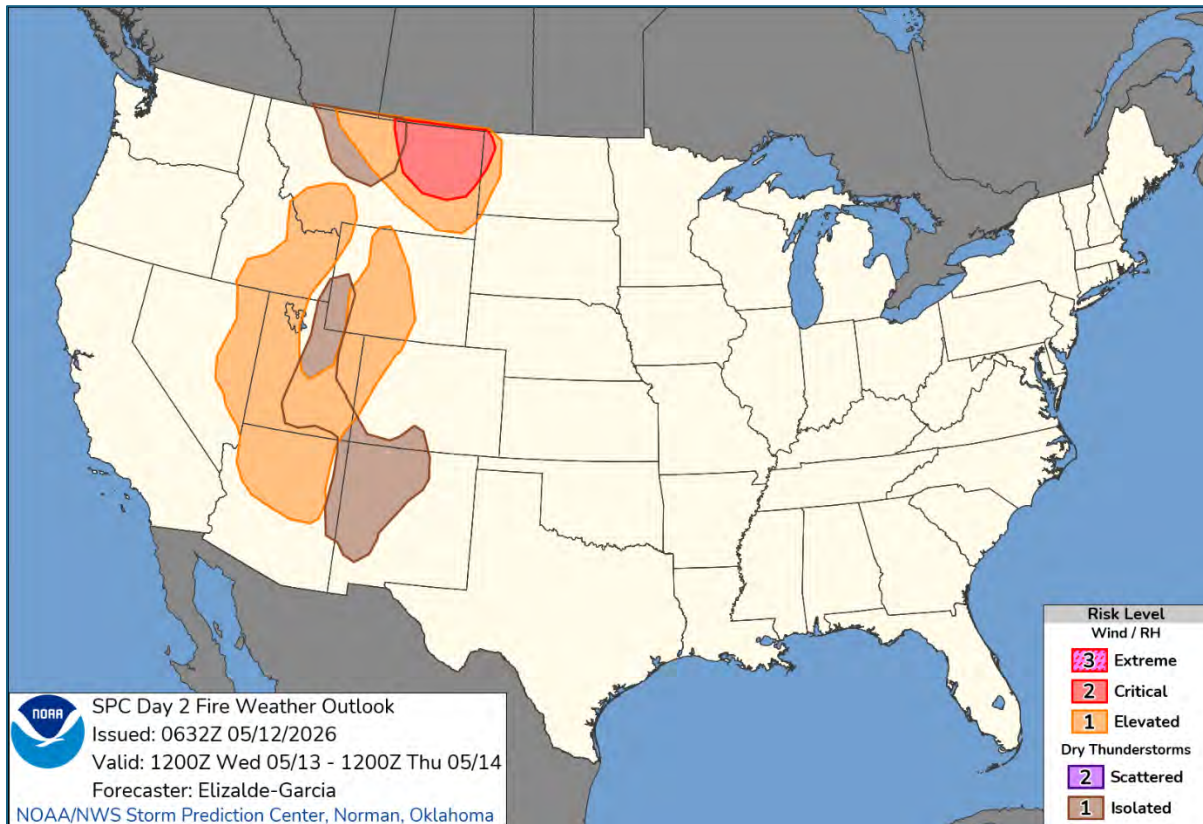
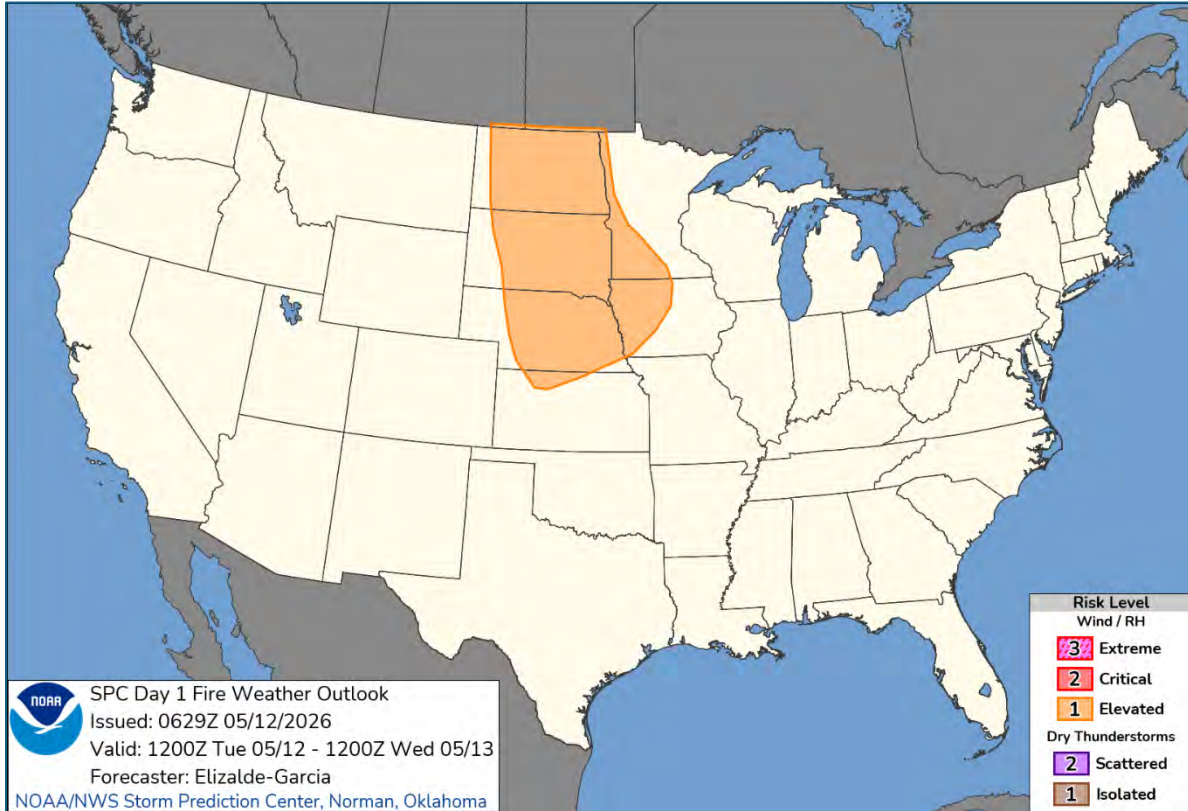
[NOAA SPC Day 1 Outlook](#) | [NOAA SPC Day 2 Outlook](#) | [NOAA WPC ERO Day 1](#) | [NWS Local Offices](#) | [NWS NWR Outages](#) | [Wikipedia outbreak sequence](#)



SECTION 7.1 - WILDFIRE & FIRE WEATHER

| REGION | STATUS | ACTIVE FIRES / EVAC STATUS | CI / INFRASTRUCTURE EXPOSURE | FIRE WEATHER / SOURCES |
|------------------------------------|----------------|---|--|---|
| Southwest (AZ/NM) | WATCH | No active large-fire evacuations this cycle. Southern Area at PL 4. NIFC YTD 25,659 fires + 1.88M acres (194% of 10-yr avg). | 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 this cycle. NM triple-gap NWR continues (Roswell + Artesia + Carlsbad OOS). | SDG&E/SCE transmission infrastructure. Oil/gas pipeline corridors WUI. | Humidity recovery this cycle. No Santa Ana active. 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 | No current active fire-evacuation orders. Dryline post-severe-wx development watch. | 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 (11-MAY). 14 large fires being suppressed; 1,696 personnel assigned. | No CI-exposure fires active. | May transitional. Primary risk: SW and S.Plains. Season June-July elevated. Sources: NIFC, USFS NICC. June above-normal forecast. |

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 - 12 MAY 2026

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

OPERATIONAL NOTE: 19 NWR transmitters are currently degraded or out of service across 13 states as of 12-MAY live pull (user-supplied per §0.28). Affected populations lose the primary all-hazards alerting channel and dedicated SAME-coded EAS tone activation. CRITICAL SEVERE-WX PATH OVERLAP TODAY (per WX-001 SPC 12-MAY MARGINAL RISK FL Peninsula + Midwest/Great Lakes + south-central Plains; corridor SHIFTED from yesterday TN Valley): (1) IL Hillsboro KXI79 OOS NEW sits within the IL/Midwest Marginal Risk corridor - degraded primary alerting during the highest-risk afternoon-evening window. (2) IN Angola KXI94 DEG at the edge of WI/Great Lakes corridor. (3) Yesterday TN/FL/GA SE corridor signals NO LONGER active today. NEW MEXICO TRIPLE-GAP CONTINUES: Three simultaneous outages (Roswell WWG36, Carlsbad WWF37, Artesia WXN24) leave Chaves and Eddy counties with effectively zero primary NWR coverage - drought / wildfire-readiness baseline gap. CYCLE NOTE: 12-MAY user-supplied direct read from weather.gov/nwr/outages. During active severe weather or wildfire-smoke alerting events, residents in gap areas should use WEA-capable mobile devices, local broadcast EAS, and app-based alerting (FEMA App, Weather.gov) as primary alternatives. EMCOMM operators in affected counties: note the gap and brief served-agency emergency managers. Space weather: HF generally favorable but R1-R2 elevated risk sunlit side (Kp peak 2.67 quiet/unsettled per SWPC 12-MAY 3-day; R1-R2 probability 40% UP from 30%, driver AR 4432 development; R3 10%; no G1+ expected).

| ST | Callsign | Location | Freq | WFO | Status | Counties / Areas Affected |
|----|----------|-------------------|---------|---------------------|------------|--|
| AK | WNG529 | Cape Gull | 162.450 | Anchorage AK | DEGRADED | Cape Gull / Katmai NP coastal area, AK |
| AK | KWN30 | Kotzebue | 162.550 | Fairbanks AK | DEGRADED | Kotzebue / Northwest Arctic Borough, AK |
| AK | WXM75 | Sand Point | 162.450 | Anchorage AK | OUT OF SVC | Aleutians East Borough, AK |
| CO | WXM56 | Colorado Springs | 162.475 | Pueblo CO | OUT OF SVC | El Paso, Teller counties, CO |
| FL | KEC86 | Pensacola | 162.550 | Mobile AL | OUT OF SVC | Escambia, Santa Rosa counties, FL panhandle |
| GA | WXM65 | Baxley | 162.450 | Jacksonville FL | OUT OF SVC | Appling, Pierce, Wayne, Jeff Davis counties, GA - GA wildfire now mop-up phase (Hwy 82 Fire 90% contained 08-MAY) |
| IL | KXI79 | Hillsboro | 162.425 | St. Louis MO | OUT OF SVC | Montgomery, Bond, Fayette, Macoupin counties, IL - WITHIN today's IL/Midwest Marginal Risk corridor (WX-001 SPC 12-MAY) |
| IN | KXI94 | Angola | 162.425 | Northern Indiana IN | DEGRADED | Steuben, DeKalb, LaGrange counties, IN - Edge of WI/Great Lakes Marginal Risk corridor |
| KS | WXN81 | Ulysses | 162.500 | Dodge City KS | OUT OF SVC | Grant, Stanton, Haskell counties, KS |
| ME | WNG547 | Sugarloaf Mtn | 162.475 | Caribou ME | OUT OF SVC | Franklin, Somerset (high terrain), ME |
| MI | WNG572 | Petoskey | 162.500 | Gaylord MI | OUT OF SVC | Emmet, Charlevoix, Cheboygan counties, MI |
| MI | WXJ77 | Adrian/Petersburg | 162.475 | Detroit/Pontiac MI | OUT OF SVC | Lenawee, Monroe counties, MI |
| MN | KXI45 | Gunflint Lake | 162.500 | Duluth MN | OUT OF SVC | Cook County / BWCAW area, MN |
| NM | WXN24 | Artesia | 162.425 | Midland/Odessa TX | OUT OF SVC | Eddy County (alt), Chaves County, NM - TRIPLE-GAP cycle 7 |
| 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 |
| 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 - NO LONGER in active severe corridor today (corridor shifted to FL/Midwest/Plains) |
| TX | WXJ91 | Rio Grande City | 162.500 | Brownsville TX | OUT OF SVC | Starr, Zapata counties, TX |

SOURCE: NWR transmitter outage data live from weather.gov/nwr/outages provided by user 12-MAY (STATE B per §0.28). 19 affected (16 OOS + 3 DEG) across 13 states.

⚠ HIGH-GAP ALERT - ACTIVE-WEATHER + WILDFIRE-SMOKE CORRIDOR COMPOUND: Two active-hazard corridor situations this cycle. (1) IL/MIDWEST MARGINAL RISK: IL Hillsboro KXI79 OOS NEW sits within today's IL/Midwest Marginal Risk corridor (per WX-001 SPC 12-MAY 0551 UTC); eastern WI most probable late afternoon; degraded primary alerting during the highest-risk window. IN Angola KXI94 DEG at the edge of WI/GL corridor. (2) FL PENINSULA MARGINAL RISK: SPC notes MLCAPE >1500 J/kg central FL, 30-40kt shear, could warrant Slight Risk upgrade. FL Pensacola KEC86 OOS sits west of the FL Peninsula corridor center (panhandle). NM TRIPLE-GAP CONTINUES (cycle 7): Roswell WWG36 + Carlsbad WWF37 + Artesia WXN24 leave Chaves and Eddy counties with effectively zero primary NWR coverage. Residents in all gap areas should rely on WEA mobile alerts, FEMA App, and local broadcast EAS exclusively. Emergency managers in affected counties: verify alternate alerting pathways are operational and brief served-agency leadership. SAR/EMCOMM teams supporting GA wildfire response: confirm backup HF/VHF coverage given Baxley NWR gap.

SECTION 7A - SPACE WEATHER & EMCOMM

SWX-001 | Space Weather - SWPC 3-day 12-MAY: Kp peak 2.67 Quiet/Unsettled / R1-R2 Probability 40% (UP from 30%; driver AR 4432 development) / R3 10% / No G1+ Expected / HF Generally Favorable but R1-R2 elevated risk sunlit side

MODERATE | UPDATED | 10

WHY THIS CYCLE

Kp 2-3 quiet/unsettled; greatest expected Kp 4.33 (below G-scale); R1-R2 15-30% as L=330 ARs rotate; HF favorable for emergency comms.

Summary

SWPC 11-MAY 1230Z 3-Day Forecast (T1): Geomagnetic - 24-hour observed maximum Kp 2-3 (quiet/unsettled); greatest expected Kp 4.33 (below G-scale); two ARs at L=330 rotating to Earth-facing disk this week. Solar Radiation storms: none observed at S1+ threshold; no S1+ forecast through 13-MAY. Radio Blackouts: probability for R1 or greater rising 15-30% as L=330 ARs come into geometry. 10.7 cm flux 126 sfu. HF favorable for emergency comms today. Comet C/2026 A1 (MAPS) remains benign CCOR-1 observation. Geophysical Institute 27-day forecast: 11-13 MAY quiet-to-unsettled Kp 2-3 with mid-week active spike potential pending AR rotation.

Analyst Assessment

HF EMCOMM STATUS: Quiet conditions favor sustained CONUS HF EMCOMM through the active CIG2 outbreak corridor today and the Day 2 Dixie Alley shift. Removes HF-degradation compound on top of severe-weather + NWR outage geometry.

L=330 ARs ROTATING IN: Two ARs at L=330 longitude are rotating to Earth-facing disk this week. SWPC monitoring for X-class flare emergence as ARs come into geometry. Mid-week active spike potential.

27-29 APR QUIET WINDOW: Supports any deferred HF tests, readiness drills, and emergency SKYWARN activation. Power-grid operators have cleared the GIC watch window.

EMCOMM PROTOCOL: 40m/60m primary and reliable; 20m usable with propagation check; 15m-10m DX bands favorable during quiet conditions.

CONFIDENCE: HIGH - SWPC T1 observations + 3-day forecast T1; Geophysical Institute 27-day T1.

TRIPWIRES: L=330 AR rotation to Earth-facing disk mid-week; any X-class flare from new AR; Kp escalation above forecast; R1-R2 above 30% probability.

SOURCES

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

| BAND | STATUS | COLLECTED 11-MAY 1230Z 24-hr observed Kp 2-3 quiet/unsettled Greatest expected Kp 4.33 below G-scale R1-R2 probability 15-30% as L=330 ARs rotate to Earth-facing HF FAVORABLE for emergency comms 10.7 cm flux 126 sfu Next Event Window mid-week pending rotation |
|---|--------|---|
| 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. |
| 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 2-3 quiet/unsettled. Propagation good. DX paths viable today. Verify via PSKReporter. L=330 ARs rotating to Earth-facing this week - mid-week active spike potential. |
| 15m-10m (21-28 MHz) | FAIR | Solar flux SFI moderate (126 sfu). High-band DX viable. Not primary EMCOMM. Monitor week for L=330 AR rotation and possible Kp escalation. Check PSKReporter. |
| POLAR / TRANS-POLAR: GOOD - Kp 2-3 quiet/unsettled. No active polar absorption. Trans-polar paths available. Monitor week for L=330 AR rotation. | | |

SECTION 7B - AGRICULTURE, FOOD & SUPPLY CHAIN

AGRICULTURE & FOOD SUPPLY CHAIN - 12 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 | 27-30 APR 2026

The operating environment is rapidly changing and highly fluid. What is true at publication (1530 UTC 12-MAY) may not hold by close of business. Op Epic Fury Day 74 + Hormuz blockade Day 30 + LBN CF

Day 27 DETERIORATING + WHCD Day 18 (Allen NOT GUILTY plea 11-MAY) + CVE-2026-0300 PAN-OS first patch RELEASE 13-MAY + BerriAI LiteLLM FCEB due TODAY + RU-UA 3-day CF EXPIRED midnight 11-MAY; Russia 200+ drones overnight + Iran 14-pt MoU response pending past T+5 - the cycle is heavy with stacked decision-trigger events.

12-MAY (TODAY / Op Epic Fury Day 74 / Blockade Day 30 / LBN CF Day 27 / WHCD Day 18): TOP-LINE: Cole Allen pleaded NOT GUILTY 11-MAY all 4 federal counts (incl 18 USC 1751(c)) before US District Judge McFadden DC; defense motion to disqualify AG Pam Pirro and Deputy AG Todd Blanche (potential victims/witnesses, both at WHCD); DOJ response due 22-MAY (T+10); next hearing 29-JUN; Allen no longer on suicide watch. CISA KEV CVE-2026-0300 PAN-OS RCE Wave 1 patch RELEASE TOMORROW 13-MAY (T+1); FCEB BOD due 27-MAY (T-15); ~225,000 PAN-OS internet-facing per Shodan. CVE-2026-42208 BerriAI LiteLLM SQLi FCEB BOD remediation deadline PASSED 11-MAY (compliance assessment pending). CMA CGM San Antonio Day 7 post-strike stable (struck 05-MAY, 8 crew injured); Project Freedom Day 6 of pause; no new named-vessel strikes since 05-MAY; UK HMS Dragon deployed 09-MAY. Trump REJECTED Iran counter-proposal TOTALLY UNACCEPTABLE Sun-Mon 10-11 MAY; Ghalibaf insists 14-pt only path forward; Pezeshkian first in-person meeting with Mojtaba Khamenei; Witkoff/Rubio met Qatar PM Miami 08-09 MAY. LBN CF Day 27 EXTENDED DETERIORATING; Hezbollah SAM at IDF drone TODAY 12-MAY (failed) + explosive drones at IDF troops s.Lebanon TODAY (intercepted); IAF response strike motorcycle; Qassem (12-MAY): weapons not on table. Trump-brokered 3-day RU-UA CF EXPIRED midnight 11-MAY; Putin pared-down Victory Day parade Sat (no tanks/missiles). SPC 12-MAY MARGINAL RISK FL Peninsula + Midwest/Great Lakes + south-central Plains (corridor SHIFTED from yesterday TN Valley); NWR 19 transmitters (16 OOS + 3 DEG, 13 states) with IL Hillsboro KXI79 OOS NEW within IL/Midwest corridor. Hantavirus M/V Hondius: 11 cases (3 dead, Andes virus); 18 Americans under US medical observation (16 UNMC Nebraska + 2 Atlanta biocontainment); Maryland monitoring 2 flight contacts. Brent intraday ~\$103-105 / WTI ~\$97-101 (+2-3% on Trump rejection 10-11 MAY); IEA largest supply shock on record. Kp peak 2.67 quiet/unsettled; R1-R2 probability 40% UP from 30% (driver AR 4432); HF generally favorable but R1-R2 elevated risk sunlit side.

13-MAY (T+2 / PAN-OS Wave 1 patch / E15 vote): PAN-OS Wave 1 patch availability (CYB-001 first patch ETA TODAY 13-MAY). House E15 year-round vote scheduled. Op Epic Fury Day 75. Hormuz blockade Day 31. LBN CF Day 28 of EXTENDED period (T-4). Trump-Xi Beijing summit T-1.

12-MAY (T+1): USDA WASDE first 2026-27 balance sheets 12pm ET (most significant grain report of year). PAN-OS Wave 1 patch availability 13-MAY (T+1 from tomorrow). House E15 year-round vote 13-MAY (Wed). LBN CF Day 27. Op Epic Fury Day 74.

13-MAY (T+2): PAN-OS Wave 1 patch availability (CYB-001 first patch ETA TOMORROW). House E15 year-round vote (Wed). LBN CF Day 28 of EXTENDED period; T-4 to expiry. CYB-005 Linux Copy Fail FCEB T-2 to 15-MAY.

SECTION 10 - PREPAREDNESS CONDITION ASSESSMENT

PREP-CON 3 - ELEVATED | Assessed: 12 May 2026 | Op Epic Fury Day 74 | Hormuz blockade Day 30 | LBN CF Day 27 of EXTENDED period DETERIORATING (T-5) | WHCD Day 18 (Allen NOT GUILTY plea 11-MAY) | CVE-2026-0300 PAN-OS RCE Wave 1 patch RELEASE 13-MAY (T+1) / FCEB BOD T-15 to 27-MAY | RU-UA 3-day CF EXPIRED midnight 11-MAY

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) LBN CF Day 27 DETERIORATING (T-5 to ~17-MAY expiry) with Hezbollah SAM at IDF drone TODAY 12-MAY + Hezbollah explosive drones at IDF troops s.Lebanon TODAY + IAF response strike on motorcycle + Beirut strike on Radwan cmdr Balout 06-MAY + Qassem 12-MAY weapons NOT on table + 3rd round US-mediated talks Thu/Fri 14-15 MAY Washington (Aoun delegation, former Amb Karam lead); (2) Op Epic Fury Day 74 + Hormuz blockade Day 30 + CMA CGM San Antonio struck 05-MAY (8 crew injured) + Project Freedom PAUSED 06-MAY + UK HMS Dragon deployed 09-MAY + CENTCOM strike on Iranian military targets Fri 08-MAY; (3) CISA KEV CVE-2026-0300 PAN-OS RCE active exploitation with Wave 1 patch RELEASE TOMORROW 13-MAY (T+1) + FCEB BOD due 27-MAY (T-15) + ~225,000 PAN-OS internet-facing per Shodan + CVE-2026-6973 Ivanti EPMM RCE KEV 07-MAY + CVE-2026-42208 BerriAI LiteLLM SQLi FCEB deadline PASSED 11-MAY + CYB-005 Linux Copy Fail FCEB T-3 to 15-MAY; (4) Trump REJECTED Iran counter-proposal 10-11 MAY; ceasefire on life support with Pezeshkian first in-person meeting with Mojtaba Khamenei + CIA assessment Iran can survive 4 more months blockade + revised IC 2/3 missile launchers survived; (5) WHCD Allen NOT GUILTY plea 11-MAY before US District Judge McFadden DC on 4 federal counts incl 18 USC 1751(c) attempted assassination POTUS; (6) Trump-brokered 3-day RU-UA CF EXPIRED midnight 11-MAY; Russia 200+ drones at Ukraine overnight; Kyiv under attack 12-MAY morning; Peskov "humanitarian ceasefire ended... SMO continuing"; (7) CDC HAN 00528 Hantavirus M/V Hondius 07-MAY / 3 dead / CDC Level 3 / 9+ US returnees monitored 6 states; (8) market structural pressure (Brent intraday ~\$103-105 (+2-3% on Trump rejection), IEA largest supply shock on record, IEA ~14 mbpd disruption, IMO ~20k seafarers ~2k vessels stranded). Trend: DETERIORATING across all 8 vectors.

For full PREP-CON framework reference, see: [fortunefavorstheprepared.com / Preparedness Book of Knowledge / PREP-CON](https://fortunefavorstheprepared.com/Preparedness%20Book%20of%20Knowledge/PREP-CON)

SECTION 11 - ALERT & READINESS CONDITIONS PANEL

| CONDITION | LEVEL | BASIS |
|-----------|-----------------------------|---|
| DEFCON | EST-3 | Active wartime posture; Op Epic Fury Day 74; Hormuz dual blockade Day 30; 3 US carriers in ME first time since 2003; Trump 26-APR negotiator suspension |
| COGCON | EST-3 | Elevated continuity posture during active kinetic operations; IRGC/MOIS homeland threat (INS-001); WHCD shooting 25-APR (TER-001) elevates federal-protective-detail profile; DHS NTAS gap Day 74 (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 74 sustained-enforcement posture |
| CYBERCON | EST-ELEVATED | CISA KEV CVE-2026-0300 PAN-OS RCE active exploitation, Wave 1 patch RELEASE 13-MAY (T+1), FCEB BOD due 27-MAY (T-15), >5,800 PAN-OS VM-Series exposed (CYB-001); CVE-2026-6973 Ivanti EPMM RCE KEV 07-MAY (CYB-002); CVE-2026-42208 BerriAI LiteLLM SQLi FCEB due TODAY (CYB-003); CYB-005 Linux Copy Fail FCEB T-3 to 15-MAY (POINTER); AA26-097A Day 35 structural baseline |
| COMCON | 4 CONUS DTR-ASSESSED | Kp 2-3 quiet/unsettled; greatest expected Kp 4.33 below G-scale (SWX-001); R1-R2 probability 15-30% as L=330 ARs rotate in; HF favorable for emergency comms; 10.7cm flux 126 sfu; AA26-097A OT impact (CYB-005); NWR 19 transmitters (16 OOS + 3 DEG, 13 states) |
| TRANSCON | EST-3 | EASA CZIB 2026-03-R9 in effect through 12-MAY (T+1); 11-country ME all altitudes; exception southern Saudi/Oman FL320+; Iran 04-MAY UAE attack drove R9 extension; Project Freedom PAUSED 06-MAY after CMA CGM San Antonio strike |

| CONDITION | LEVEL | BASIS |
|-----------|---------------------|--|
| WX-CON | EST-4 | SPC CIG2 high-end signal central/N IL today; multi-state tornado outbreak IL/MO/IN/KY; Day 2-3 Dixie Alley shift; NWR compound (IL Hillsboro + IN Angola OOS within corridor; TN dual-gap for Day 2 shift) |
| PREP-CON | 3 - ELEVATED | See SEC 10 |

SECTION 12 - ANALYTICAL INTEGRITY & SOURCE REGISTRY

ANALYTICAL INTEGRITY STANDARD - APPLIED TO THIS PRODUCT

Every DTR is produced under three prohibited failure modes:

No Epistemic Cowardice. When evidence supports a finding, we state the finding. We do not substitute hedges, attribution-laundering, or filler phrasing for assessments the evidence justifies. If the evidence is genuinely mixed, we say so directly and explain where the split is - that is honest assessment, not cowardice.

No Gatekeeping. Our readers get the same operational picture a federal practitioner would see. We do not withhold operational detail behind credentialing or reader-comfort considerations. PREP-CON assessment is not softened for comfort - if the operational basis supports a given level, the DTR states that level.

No Dunning-Kruger Enablement. We do not publish confidence our sources cannot sustain. Every confidence level is auditable against the cited sources. Split confidence is applied when different aspects of a finding sit at different evidentiary levels.

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SOURCE REGISTRY SUMMARY - 12 MAY 2026

| THREAT AREAS ASSESSED | STANDING REGISTRY | CITATIONS THIS CYCLE | TIER 1 PRIMARY | TIER 2 SECONDARY | TIER 3 SUPPLEMENTAL |
|---|----------------------------------|-------------------------------|----------------|------------------|---------------------|
| 30 | 358 v1.8 28-APR-2026 | 27/30 areas covered | 22 | 29 | 0 |
| 30 Threat Areas 358 Standing Sources (v1.8) 27/30 Areas Live or Baseline This Cycle 9 Areas Inline-Flagged GAP per §0.27 (CHEM/WAT/INS/IO/COMFAC/CMFG/EMGSVC/GOVFAC/DIB/SIS) T1 USG domains include whitehouse.gov, state.gov, defense.gov, cia.gov, odni.gov, dhs.gov, justice.gov, treasury.gov Registry: fortunefavorstheprepared.com/dtr-source-registry/ | | | | | |

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SECTION 13 - CLOSING

END OF REPORT

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