

# DAILY THREAT REPORT

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

BLOCKADE Day 31 | Op Epic Fury Day 75 | WHCD Allen pleaded NOT GUILTY 11-MAY / next hearing 29-JUN | CISA KEV CVE-2026-0300 PAN-OS RCE Wave 1 patch RELEASE TODAY 13-MAY today (T+0) / FCEB BOD due 27-MAY (T-14) | LBN CF Day 28 EXTENDED DETERIORATING (T-4 to ~17-MAY) | Trend: DETERIORATING | Full basis: SEC 10

## COMMUNICATIONS CONDITION: COMCON 4 - PARTIALLY DEGRADED (CONUS)

AA26-097A Day 36 | 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 | 24 NWR transmitters affected (15 OOS + 9 DEG, 14 states); today's SLIGHT RISK n-central MT corridor is clear of NWR outages; carryover IL Hillsboro KXI79 OOS (yesterday's corridor); AK 8-transmitter Kodiak/Anchorage cluster degraded | Full basis: SEC 11

<b>Publication (UTC)</b>	13 MAY 2026 / 1530 UTC
<b>Analyst / Watch Officer</b>	Fortune Favors the Prepared - OSINT Desk
<b>FLASH Threshold</b>	Risk Score ≥ 20 - EIGHT FLASH EVENTS THIS CYCLE (6 in Sec 3 + WX-001 in Sec 7 + HLTH-001 in Sec 4B)
<b>PREP-CON Baseline</b>	PREP-CON 3 - ELEVATED (Brown)   Trend: DETERIORATING   Op Epic Fury Day 75   Blockade Day 31   LBN CF Day 28 EXTENDED DETERIORATING (T-4)   WHCD Allen NOT GUILTY plea 11-MAY (Day 19)   Houthi drone at Eilat yesterday (1st since CF)   HLTH-001 KORNFELD FIRST US CONFIRMED CASE TODAY 13-MAY (UNMC biocontainment) + 18 Americans US fed quarantine Day 2 + 15 monitored 9 states   CISA KEV CVE-2026-0300 PAN-OS RCE Wave 1 patch RELEASE TODAY 13-MAY / FCEB BOD T-14 to 27-MAY   Trump arrived Beijing TODAY for Xi summit   US-Iran 14-pt MoU rejected 10-11 MAY
<b>Version</b>	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 27/30 areas covered (22 STATE A live / 1 STATE B user-supplied NWR / 4 STATE D baseline)   3 baseline carry   9 areas inline-flagged GAP per §0.27   Anti-Bias Discipline Applied

<b>FLASH ▶</b>	<b>TER-001</b> WHCD Allen pleaded NOT GUILTY / next hearing 29-JUN / suspect targeting POTUS per AG 26-APR   <b>CYB-001</b> CISA KEV CVE-2026-0300 PAN-OS RCE / Wave 1 patch RELEASE TODAY 13-MAY today (T+0) / FCEB BOD due 27-MAY
	<b>GEO-001</b> 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   <b>GEO-CF-LBN</b> LBN CF Day 28 DETERIORATING / IDF wave of strikes 7 villages evacuation Wed AM / Hezbollah cross-border attacks since 08-MAY / IDF reservist severely injured Sat   <b>FIN-001</b> Brent ~\$107 intraday Wed / WTI ~\$102 / 3-session rally +7.6% / WASDE bullish wheat published Tue   <b>AVN-001</b> EASA CZIB R9 expired yesterday 12-MAY; R10 issuance imminent
<b>HIGH/NEW ★</b>	<b>GEO-002</b> CMA CGM San Antonio struck by Iranian cruise missile 05-MAY / Project Freedom PAUSED 06-MAY / UK HMS Dragon deployed 09-MAY   <b>HLTH-001</b> KORNFELD FIRST US CONFIRMED CASE TODAY 13-MAY at UNMC biocontainment (asymptomatic) / 18 Americans US federal quarantine Day 2 / 15 monitored across 9 states / 11 onboard cases (9 confirmed + 2 probable) / 3 dead CFR 38%   <b>NWR-001</b> 24 NWR transmitters (15 OOS + 9 DEG, 14 states);

HIGH/UPDATED U	<p>today's MT slight-risk corridor clear of outages; AK 8-transmitter Kodiak/Anchorage cluster degraded</p> <p><a href="#">CYB-002</a> CVE-2026-6973 Ivanti EPMM RCE KEV-added 07-MAY / FCEB ~28-MAY clock (T+15) running   <a href="#">CYB-003</a> CVE-2026-42208 BerriAI LiteLLM SQLi FCEB deadline PASSED 11-MAY   <a href="#">NUC-001</a> 440.9 kg HEU / IAEA blackout Day 75 / CIA: Iran can survive 4 more months blockade / 2/3 of missile launchers survived (revised up from 1/2)   <a href="#">PHS-001</a> M6.1 Rat Islands 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)</p> <p><a href="#">INS-001</a> IRGC/MOIS + DIA   <a href="#">TER-002</a> NTAS Gap Day 75   <a href="#">AGR-001</a> WASDE first 2026-27 balance sheets published yesterday 12-MAY / Trump-Xi summit ARRIVAL TODAY 13-MAY; primary sessions Thu-Fri 14-15 MAY   <a href="#">CN-001</a> PRC Scarborough 352m barrier removed since weekend per PHL CG Tarriela / Trump-Xi Beijing Thu-Fri may shift baseline   <a href="#">TRV-001</a> State Level 4 Iran / 11-state ME CZIB R7   <a href="#">AVN-001</a> EASA CZIB R9 through 12-MAY / 11-state ME / KLM Gulf suspensions through 28-JUN / BA Dubai through 31-MAY</p>
CRITICAL TIME HACK	<p><b>CYB-001 PAN-OS Wave 1 patch RELEASE TODAY 13-MAY (T+0):</b> Patch ships TODAY for CVE-2026-0300 RCE under active exploitation by Unit-42-attributed CL-STA-1132 cluster; FCEB BOD remediation due 27-MAY (T-14); ~225,000 PAN-OS interfaces internet-facing per Shodan - see CYB-001.</p> <p><b>GEO-CF-LBN Lebanon CF Day 28 expiry T-4 to ~17-MAY:</b> IDF wave of strikes on Hezbollah infrastructure TODAY + 7-village evacuation warnings; 3rd round US-mediated LBN-ISR talks T+1/T+2 to 14-15 MAY Washington (Aoun delegation, Amb Karam lead); Qassem 12-MAY weapons NOT on table - see GEO-CF-LBN.</p> <p><b>HLTH-001 Kornfeld first US case TODAY + TRIPWIRE #2 LIVE:</b> Kornfeld confirmed positive at UNMC biocontainment today (asymptomatic; was Hondius onboard medical responder); TRIPWIRE #2 (any second-generation transmission to UNMC/Emory HCW or pre-quarantine household contact) is the decisive PREP-CON 2 candidate; surveillance window through ~21-JUN per WHO Tedros - see HLTH-001.</p> <p><b>TER-001 WHCD Allen DOJ disqualification response T+9 to 22-MAY:</b> DOJ response on defense motion to disqualify AG Pirro + Deputy AG Blanche due 22-MAY; Judge McFadden ruling next; pre-trial schedule could slip 30-60 days if granted; next hearing 29-JUN - see TER-001.</p> <p><b>AVN-001 EASA CZIB R10 issuance window NOW:</b> R9 expired yesterday 12-MAY; R10 successor notice expected imminently; widely anticipated to extend the 11-country ME advisory; airline-itinerary practitioners need to verify pre-departure - see AVN-001.</p>

## SECTION INDEX

SEC 2 - BLUF & Market Indicators	<p><a href="#">CYB-001</a> PAN-OS RCE Wave 1 patch RELEASE TODAY 13-MAY   <a href="#">GEO-001</a> Trump REJECTED Iran counter-proposal 10-11 MAY   GEO-CF-LBN Hezbollah SAM/drones at IDF yesterday 12-MAY (T-4)   <a href="#">SC-001</a> demoted to HIGH (Day 8 post-strike stable)   <a href="#">FIN-001</a> Brent \$107.05 (-0.67%) / WTI ~\$102 flat   GEO-AXIS-001 RU-UA CF EXPIRED / Kyiv under attack   <a href="#">TER-001</a> Allen pleaded NOT GUILTY   6 FLASH</p>
SEC 3 - FLASH Events	<p><a href="#">CYB-001</a> PAN-OS RCE Wave 1 patch 13-MAY (25)   <a href="#">GEO-001</a> Trump rejected Iran counter-proposal (25)   GEO-CF-LBN T-5 deteriorating + Hezbollah attacks TODAY (27)   <a href="#">FIN-001</a> Brent \$103-105 +2-3% (24)   GEO-AXIS-001 RU-UA CF EXPIRED Kyiv under attack (22)   <a href="#">TER-001</a> Allen NOT GUILTY plea (20). <a href="#">SC-001</a> DEMOTED to HIGH in Sec 4B per \$0.38 (Day 7 stable). <a href="#">WX-001</a> in Sec 7 per dedicated section.</p>

<b><u>SEC 4A - Cyber / Technology</u></b>	<b><u>CYB-001</u></b> PAN-OS RCE Wave 1 patch RELEASE TODAY 13-MAY (T+0) / FCEB BOD T-14 to 27-MAY / Shodan ~225,000 PAN-OS internet-facing   <b><u>CYB-002</u></b> CVE-2026-6973 Ivanti EPMM RCE FCEB T+15 to 28-MAY   CVE-2026-42208 BerriAI LiteLLM SQLi FCEB deadline PASSED 11-MAY   <b><u>CYB-005</u></b> Linux Copy Fail FCEB T+2 to 15-MAY (POINTER)   AA26-097A standing baseline
<b><u>SEC 4B - Physical / Geopolitical / IO</u></b>	GEO-AXIS-001 RU-UA CF EXPIRED midnight 11-MAY / Russia 200+ drones / Kyiv under attack 12-MAY   <b><u>SC-001</u></b> DEMOTED to HIGH (Day 8 post-strike stable, Project Freedom Day 7 pause, no new named-vessel strikes since 05-MAY)   <b><u>NUC-001</u></b> IAEA Blackout Day 75 / 440.9 kg HEU baseline / CIA: Iran can survive 4 more months / 2/3 launchers survived (revised)   <b><u>CN-001</u></b> Trump-Xi Beijing summit ARRIVAL TODAY 13-MAY; primary sessions Thu-Fri 14-15 MAY CONFIRMED   Carryover: INS-001, TER-002, TRV-001, GEO-AFG-PAK
<b><u>SEC 5 - Energy / Infrastructure / Supply Chain</u></b>	Carryover monitors: NUC-001 IAEA Blackout Day 75 / CIA 4-mo blockade survival / 2/3 launchers survived (revised)   <b><u>SC-001</u></b> demoted to HIGH (Sec 4B): San Antonio Day 8 post-strike stable; Project Freedom Day 7 of pause; no new named-vessel strikes since 05-MAY; HMS Dragon deployed   <b><u>FIN-001</u></b> recap of Brent volatility / IEA ~14 mbpd disruption
<b><u>SEC 6 - Aviation / Transportation</u></b>	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
<b><u>SEC 7 - Meteorological Weather &amp; Severe Weather + NWR Outages</u></b>	<b><u>WX-001</u></b> SPC 13-MAY SLIGHT RISK n-central Montana (northern Rockies/High Plains); secondary MRGL Ohio Valley/Central Appalachians; TX Panhandle isolated hail/wind. Severe wind gusts 60-80 mph primary hazard. CORRIDOR FULLY SHIFTED from yesterday FL Peninsula + Midwest/GL + south-central Plains framing   NWR 24 transmitters (15 OOS + 9 DEG, 14 states); MT corridor has NO active OOS/DEG within the slight-risk area today; AK 8-transmitter Kodiak/Anchorage cluster persists; NM triple-gap continues cycle 7
<b><u>SEC 7A - Space Weather &amp; EMCMM</u></b>	<b><u>SWX-001</u></b> 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
<b><u>SEC 7B - Agriculture, Food &amp; Supply Chain</u></b>	<b><u>AGR-001</u></b> WASDE 12-MAY (yesterday): corn 16.0 bbu (-6%, \$4.20/bu +10c); soybeans 4.435 bbu (record-2, \$11.40/bu); wheat 1.561 bbu (smallest since 1972, HRW -25 to -36%); wheat futures LIMIT UP post-release   House E15 year-round vote TODAY 13-MAY   Trump-Xi Beijing summit arrived TODAY 13-MAY
<b><u>SEC 8 - 72-Hour Outlook</u></b>	Wed 13-MAY (TODAY): WASDE result released yesterday (12-MAY 12pm ET) / Allen DOJ response deadline T+9 to 22-MAY / Russia drone strikes ongoing Ukraine   Wed 13-MAY: PAN-OS Wave 1 patch ships / E15 House vote TODAY   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-4
<b><u>SEC 10 - PREP-CON Assessment</u></b>	PREP-CON 3 ELEVATED / Trend DETERIORATING   Op Epic Fury Day 75 / Blockade Day 31 / LBN CF Day 28 EXTENDED (T-4)   fortunefavorstheprepared.com/fep/

<a href="#"><u>SEC 11 - Alert &amp; Readiness Conditions Panel</u></a>	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
<a href="#"><u>SEC 12 - Source Registry Summary</u></a>	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/
<a href="#"><u>SEC 13 - Closing Block</u></a>	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
<a href="#"><u>CONUS - Illinois / Missouri / Indiana / Kentucky</u></a>	<a href="#"><u>WX-001</u></a> SPC 13-MAY SLIGHT RISK n-central Montana + MRGL Ohio Valley + TX Panhandle (corridor fully shifted from yesterday FL/Midwest/Plains)   <a href="#"><u>NWR-001</u></a> 24 transmitters 15 OOS + 9 DEG, 14 states; AK 8-transmitter Kodiak/Anchorage cluster persists; NM triple-gap cycle 7
<a href="#"><u>CONUS - Tennessee / Alabama / Mississippi (Day 2-3)</u></a>	WX-001-EXT 13-14 MAY pattern slides east, risk moderates; 15-MAY quiet; AK 8-transmitter Kodiak/Anchorage cluster persists   <a href="#"><u>NWR-001</u></a> NM triple-gap continues cycle 7 (Roswell + Artesia + Carlsbad)
<a href="#"><u>CONUS - Mid-Atlantic / Washington DC</u></a>	<a href="#"><u>TER-001</u></a> WHCD Allen pleaded NOT GUILTY 11-MAY all 4 federal counts / Defense disqualification motion Pirro+Blanche / DOJ response due 22-MAY (T+9) / Next hearing 29-JUN   <a href="#"><u>TER-002</u></a> NTAS gap Day 75 (DHS direct check no advisories)   <a href="#"><u>INS-001</u></a> IRGC/MOIS structural baseline   COGCON EST-3 assessed
<a href="#"><u>CONUS - Nationwide (All Regions)</u></a>	<a href="#"><u>CYB-001</u></a> CISA KEV CVE-2026-0300 PAN-OS RCE / first patch RELEASE 13-MAY today (T+0) / FCEB BOD T-14 to 27-MAY / Unit 42 attributes to CL-STA-1132 likely state-sponsored   <a href="#"><u>CYB-002</u></a> Ivanti EPMM CVE-2026-6973 KEV 07-MAY / FCEB ~28-MAY   <a href="#"><u>CYB-003</u></a> BerriAI LiteLLM CVE-2026-42208 FCEB deadline PASSED 11-MAY   <a href="#"><u>CYB-005</u></a> AA26-097A Day 36 / Linux Copy Fail T+2 to 15-MAY   <a href="#"><u>FIN-001</u></a> Brent ~\$107 Wed / WTI ~\$102 (3-session rally +7.6% prior)   <a href="#"><u>SWX-001</u></a> Kp 2-3 quiet HF favorable
<a href="#"><u>CONUS - New Mexico (NWR Triple-Gap)</u></a>	<a href="#"><u>NWR-001</u></a> NM TRIPLE-GAP continues (Roswell WWG36 + Carlsbad WWF37 + Artesia WXN24 all OOS)   Chaves and Eddy counties effectively zero primary NWR coverage
<a href="#"><u>CONUS - Montana (NWR 6-transmitter cluster)</u></a>	<a href="#"><u>NWR-001</u></a> 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
<a href="#"><u>CONUS - Southwest (AZ/NM/NV)</u></a>	WX NIFC elevated YTD baseline   Dry-warm tilt through June per NIFC   Southern Area driest Nov-Feb since late 1970s (top-5 driest)
<a href="#"><u>Middle East / Persian Gulf</u></a>	<a href="#"><u>GEO-001</u></a> 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 28 of EXTENDED period

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
	DETERIORATING (T-4) / Hezbollah SAM at IDF drone YESTERDAY 12-MAY + explosive drones at IDF troops s.Lebanon TODAY / Beirut Balout strike 06-MAY / LBN-ISR Washington direct talks   <a href="#">TRV-001</a> EASA CZIB 2026-03-R9 through 12-MAY / 11-country ME airspace / Iraq Embassy Baghdad Security Alert 05-MAY
<a href="#">Global Maritime / Chokepoints</a>	<a href="#">SC-001</a> 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
<a href="#">Iran</a>	<a href="#">GEO-001</a> Op Epic Fury Day 75   Blockade Day 31   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   <a href="#">NUC-001</a> IAEA blackout Day 75 / 440.9kg 60% HEU
<a href="#">Russia / St Petersburg</a>	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
<a href="#">Indo-Pacific / SCS + Taiwan + DPRK</a>	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)
<a href="#">Europe / Ukraine / Russian Urals / Romania (NATO)</a>	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
<a href="#">Japan / Sanriku Coast</a>	<a href="#">PHS-001</a> 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)
<a href="#">Agricultural / Global Supply Chain</a>	<a href="#">AGR-001</a> 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
<a href="#">Space Environment / HF Comms</a>	<a href="#">SWX-001</a> Kp 2-3 quiet/unsettled; greatest expected Kp 4.33 (below G-scale) per SWPC 13-MAY 3-day; R1-R2 probability 15-30% as two ARs at L=330 rotate to Earth-facing disk; 10.7cm flux 126 sfu   HF favorable for SKYWARN emergency comms across today's SLIGHT RISK n-central MT corridor + secondary MARGINAL RISK Ohio Valley/Mid-Atlantic
<a href="#">Cyber / Vulnerability Queue</a>	<a href="#">CYB-001</a> PAN-OS CVE-2026-0300 RCE Wave 1 patch RELEASE TODAY 13-MAY today (T+0) / FCEB BOD due 27-MAY (T-14) / >5,800 PAN-OS VM-Series exposed / Unit 42 attribution CL-STA-1132 likely state-sponsored   <a href="#">CYB-002</a> Ivanti EPMM CVE-2026-6973 KEV-added 07-MAY   <a href="#">CYB-003</a> BerriAI LiteLLM CVE-2026-42208 SQLi FCEB deadline PASSED 11-MAY (Day -2; compliance assessment pending)

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
	<a href="#">CYB-005</a> Linux Copy Fail FCEB T+2 to 15-MAY (POINTER)   AA26-097A Day 36 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
<b>Brent Crude (front)</b>	~\$66/bbl	~\$103-105/bbl	<b>+58%</b>	▲ <b>+2-3% session</b> ▲ Trump rejection 10-11 MAY	Brent ~\$107 Wed (+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."
<b>WTI Crude (front)</b>	~\$63/bbl	~\$97-101/bbl	<b>+59%</b>	▲ <b>+2-3% session</b> ▲ Trump rejection	WTI intraday ~\$97-101 (+2-3% session). Hormuz traffic ~5% pre-war (191 vessels April per Kpler). CMA CGM San Antonio Day 8 post-strike stable (struck 05-MAY); Project Freedom Day 7 of pause; no new named-vessel strikes since 05-MAY.
<b>Gasoline (natl avg)</b>	~\$3.10/gal	\$4.55/gal (est)	<b>+47%</b>	▲ <b>+\$0.02 wk-over-wk</b> 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.
<b>Diesel (US No. 2)</b>	~\$3.74/gal	~\$5.45/gal	<b>+46%</b>	~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.
<b>Jet Fuel (global avg)</b>	~\$90/bbl	~\$215/bbl	<b>+139%</b>	▲ <b>+1%</b> ▲ slow	IATA. EASA CZIB 2026-03-R9 IN EFFECT covers 11-country ME airspace all altitudes (Bahrain/Iran/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.
<b>Urea (46-0-0)</b>	~\$465/ton NOLA	\$826/ton (DTN natl)	<b>+78%</b>	~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 12-MAY (yesterday): 2026-27 corn 16.0 bu, soybeans 4.435 bu, wheat 1.561 bu (smallest since 1972). Wheat futures LIMIT UP post-release.
<b>Anhydrous</b>	~\$800/ton	\$1,099.50/ton avg	<b>+37%</b>	~flat -0%	USDA AMS Illinois T1. 2026 planting near complete. WASDE pre-report estimates: world corn ending stocks

COMMODITY	PRE-WAR (28 FEB)	CURRENT (12 MAY)	CHG vs PRE-WAR	48H TREND	CONSUMER / ANALYTICAL NOTE
Ammonia (IL)					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 ARRIVAL TODAY 13-MAY; primary sessions 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 31. CMA CGM San Antonio Day 8 post-strike stable; Project Freedom Day 7 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

13 MAY 2026 | PREP-CON 3 ELEVATED | TREND DETERIORATING | OP EPIC FURY DAY 75 | BLOCKADE Day 31 | LBN CF Day 28 of EXTENDED PERIOD (T-4 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-14); active limited exploitation; Wave 1 patch RELEASE TODAY 13-MAY (T+0); ~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+6; Pezeshkian first reported in-person meeting with Mojtaba Khamenei; Witkoff/Kushner/Rubio met Qatar PM Miami 08-09 MAY; Trump-Xi Beijing summit landed TODAY 13-MAY; sessions Thu-Fri 14-15 MAY external forcing function - see [GEO-001](#).
- LBN CF Day 28 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 ~\$107 intraday Wed 13-MAY (-0.67% from Tue close \$107.77; 3-session rally +7.6% prior); WTI ~\$102; IEA-tracked oil stockpiles fell ~4 mbpd MAR/APR (record drawdown pace); Saudi production lowest since 1990; US crude inventory -4.3 M bbl last week (nearly 2x expectation); WASDE bullish wheat surprise drove KC+Chi limit +45c yesterday; AAA national avg pump price tracking ~\$4.50-4.55/gal range - 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+9); next hearing 29-JUN - see [TER-001](#).
- CDC HAN 00528 Andes hantavirus M/V Hondius (Dutch-flagged Antarctic-expedition cruise); WHO/ECDC 13-MAY update: 11 onboard cases (9 confirmed + 2 probable, CFR 38%); 3 dead; CDC Level 3 emergency response; 18 Americans in US federal quarantine Day 2 (16 UNMC Nebraska + 2 Atlanta Emory); KORNFELD FIRST US CONFIRMED CASE TODAY 13-MAY at UNMC biocontainment (asymptomatic; was Hondius onboard medical responder) - principal tripwire fired; 15 additional Americans monitored across 9

states; Separate IL Winnebago Co domestic strain case under CDC investigation; French passenger on life support; confirmed person-to-person transmission onboard (the Hondius signal is the operationally significant finding); incubation 4-42 days places US surveillance window through ~21-JUN per WHO Tedros - 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-4) with possible Hezbollah third cross-border strike; Iran 14-pt MoU response window past T+6; 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 (Day -2) (compliance assessment pending).

### NEW & UPDATED - THIS CYCLE ONLY

★ [CYB-001](#) (NEW): **CISA KEV CVE-2026-0300 PAN-OS RCE; FCEB BOD T-14 to 27-MAY; first patch RELEASE TODAY 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 28 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 ~\$107 INTRADAY WED 13-MAY (3-SESSION RALLY +7.6%) / WTI ~\$102 / WASDE BULLISH WHEAT SURPRISE PUBLISHED 12-MAY (54-yr low US crop).** Brent -0.67% from Tue close \$107.77; IEA-tracked oil stockpiles fell ~4 mbpd MAR/APR (record drawdown pace); Saudi production lowest since 1990; US crude inventory -4.3 M bbl (2x expectation); distillate +190k bbl (first build since March); WASDE wheat 1.561 bb -19% YoY drove KC+Chi limit +45c, MIAx MN +37.5c; corn neutral-bearish (15.995 bb / 1.957 bb ending stocks); soybeans neutral / +13.75c July on Trump-Xi optimism.

★ [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 PLEADED NOT GUILTY 11-MAY (Day -2) BEFORE JUDGE McFADDEN DC; DEFENSE MOTION TO DISQUALIFY PIRRO+BLANCHE; DOJ RESPONSE DUE 22-MAY (T+9); NEXT HEARING 29-JUN.** 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 (no longer on suicide watch); Pirro framing through-line with Capital Jewish Museum + National Guard shooters.

★ **HLTH-001** (FLASH UPDATED - TRIPWIRE #1 FIRED): **KORNFELD FIRST US CONFIRMED CASE TODAY 13-MAY AT UNMC BIOCONTAINMENT (ASYMPTOMATIC). 18 AMERICANS IN US FEDERAL QUARANTINE DAY 2 + 15 MONITORED ACROSS 9 STATES + SEPARATE IL DOMESTIC STRAIN CASE UNDER INVESTIGATION. 11 ONBOARD CASES (9 CONFIRMED + 2 PROBABLE, CFR 38%) / 3 DEAD / CONFIRMED PERSON-TO-PERSON TRANSMISSION ONBOARD.** Dr. Stephen Kornfeld (oncologist who served as Hondius medical responder when ship physician became ill) tested positive at UNMC today and transferred from monitoring to biocontainment unit; reportedly asymptomatic. 15 additional Americans monitored across 9 states (AZ/CA/GA/TX/VA/NJ/MD/KS/MN). Separate IL Winnebago Co domestic North American strain case under CDC investigation (unconnected to Hondius). French passenger on life support per French authorities. Phylogenetic analysis (Pathoplexus/virological.org 08-MAY) indicates single zoonotic spill. Wikipedia 13-MAY notes Ushuaia is 1500 km south of *Oligoryzomys longicaudatus* endemic range, complicating WHO's pre-boarding-Argentina origin hypothesis. CDC HAN 00528 issued 08-MAY; WHO DON600 08-MAY; ECDC 13-MAY surveillance update; CDC Level 3 emergency response; historical comparator is 2018 Epuayén Argentina superspreader; incubation 4-42 days places US surveillance window through ~21-JUN per WHO Tedros; CFR ~38%; no specific antiviral, supportive care + early ECMO raises survival to ~80%; CDC EOC 770-488-7100; CLIA assays via CDC, state labs, Quest Diagnostics. Federal posture flipped within 48 hours (09-MAY CDC "no plans to quarantine" → 11-MAY active federal quarantine) - the pre-positioned tripwire fired today within 48 hours.

★ **NWR-001** (STATE B user-supplied): **24 NWR TRANSMITTERS AFFECTED (15 OOS + 9 DEG, 14 STATES); TODAY'S MT SLIGHT-RISK CORRIDOR CLEAR OF OUTAGES; AK 8-TRANSMITTER KODIAK/ANCHORAGE CLUSTER DEGRADED; NM TRIPLE-GAP CYCLE 7.** Today's SLIGHT RISK n-central MT corridor (WFOs TFX/GGW/MSO/PIH) has no active NWR outages or degradations - structural alerting intact. Carryover IL Hillsboro KXI79 OOS (was inside yesterday's IL/Midwest corridor; today's primary risk corridor has shifted away from IL); AK cluster (Pillar Mtn, Sitkinak Dome, Middle Cape, Kotzebue, Raspberry Island, Sand Point, Cape Gull, Marmot Island) leaves Kodiak archipelago + Aleutians East Borough + NW Arctic Borough on degraded NWR primary; NM triple-gap continues cycle 7 (Roswell + Artesia + Carlsbad); TX Rio Grande City WNG601 OOS; 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 (Day -2).** Ivanti EPMM RCE KEV-added 07-MAY (FCEB ~28-MAY); BerriAI LiteLLM SQLi FCEB BOD remediation deadline PASSED 11-MAY (2 days ago; compliance assessment pending); CYB-005 Linux Copy Fail FCEB T+2 to 15-MAY (POINTER).

⊖ **NUC-001: IAEA BLACKOUT Day 75; 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 EXPIRED YESTERDAY 12-MAY; R10 ISSUANCE IMMINENT.** 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 PUBLISHED YESTERDAY 12-MAY / HOUSE E15 VOTE TODAY / TRUMP-XI BEIJING THU-FRI.** Most significant grain report of year; House E15 year-round vote TODAY 13-MAY; 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 75 standing (Sec 4B carryover); CYB-005 Linux Copy Fail T+2 to 15-MAY (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 19); (2) CYB-001 PAN-OS Wave 1 patch RELEASE TODAY 13-MAY (T+0) + BerriAI LiteLLM FCEB deadline PASSED 11-MAY (Day -2; 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 summit landed TODAY 13-MAY; sessions Thu-Fri 14-15 MAY; (5) LBN CF Day 28 DETERIORATING; T-4 to ~17-MAY expiry; possible third Hezbollah cross-border Mon-Wed; (6) HLTH-001 CDC HAN 00528 Andes hantavirus M/V Hondius: 11 onboard cases (9 confirmed + 2 probable, 3 dead, CFR 38%); 18 Americans US federal quarantine Day 2 (16 UNMC Nebraska + 2 Atlanta Emory); KORNFELD FIRST US CONFIRMED CASE TODAY 13-MAY at UNMC biocontainment (asymptomatic) - principal tripwire fired; 15 additional Americans monitored across 9 states; confirmed person-to-person transmission onboard; surveillance window through ~21-JUN per WHO Tedros; (7) Houthi drone intercepted near Eilat YESTERDAY 12-MAY (1st attack on Eilat since CFs).

### 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 TODAY 13-MAY (T+0) / FCEB BOD 27-MAY (T-14) / ~225,000 PAN-OS internet-facing per Shodan**

**FLASH | UPDATED | 25**

**WHY THIS CYCLE**

Palo Alto Networks first patch ships TODAY 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-14 to 27-MAY.

**Summary**

**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.

**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; Unit 42 attributes observed exploitation to CL-STA-1132, a likely state-sponsored threat cluster deploying open-source tunneling tools and Active Directory enumeration following initial compromise. Wave 1 patch ships 13-MAY (TOMORROW T+1), Wave 2 ~28-MAY. Mitigation = restrict portal to trusted internal IPs only or disable feature.

**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.

**TIME:** KEV add 06-MAY; FCEB BOD 22-01 remediation deadline 27-MAY (T-15 from today); Wave 1 patch RELEASE TODAY 13-MAY (T+0).  
**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.  
**UNIT:** CISA (KEV catalog owner); Palo Alto Networks PSIRT (vendor); Shadowserver Foundation (exposure scan); Wiz (impact analysis); threat-actor attribution not public.

**Analyst Assessment**

**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.  
**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.  
**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.  
**STACKED DEADLINES THIS WEEK:** CYB-003 BerriAI LiteLLM SQLi FCEB deadline PASSED 11-MAY (Day -2; compliance assessment pending); CYB-005 Linux Copy Fail FCEB due 15-MAY (T+3); CYB-002 Ivanti EPMM RCE KEV-added 07-MAY with FCEB ~28-MAY clock (T+15) running. SecOps teams have compressed deadlines this and next week.  
**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.

**ALT HYP**

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

Tradecraft pattern (edge appliance, unauthenticated RCE, OOB-write primitive, limited targeted exploitation) maps to PRC-affiliated APT signatures (cf. Volt Typhoon edge-targeting baseline).

✓ **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.

✗ **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.

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

AA26-097A Day 36 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.

✓ **Supporting Evidence:** Active Iran-affiliated cyber activity per AA26-097A; war-period escalation incentive; Iran has demonstrated capability against edge appliances.

✗ **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.

**SOURCES**

[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

**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**

**FLASH | UPDATED | 25**

**WHY THIS CYCLE**

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.

**Summary**

**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 Islamabad or Geneva; if signed, US blockade and Iranian shipping restrictions gradually lifted during 30-day window.

**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.

**LOCATION:** Multiple channels active - direct US-Iran indirect via Pakistan; trilateral via Qatar in Miami; planned subsequent technical talks in Islamabad or Geneva.

**TIME:** Iran formal response window since 06-MAY US delivery now in T+5 to T+6 territory; Trump-Xi Beijing summit ARRIVAL TODAY 13-MAY; primary sessions Thu-Fri 14-15 MAY introduces hard external deadline.

**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.

**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).

**Analyst Assessment**

**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.

**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.

**TRUMP-XI BEIJING DEADLINE:** Trump-Xi Beijing summit ARRIVAL TODAY 13-MAY; primary sessions 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.

**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.

**ALT HYP**

**ALT A: Iran formal MoU sign-off within 48-72h with managed concessions [MOST LIKELY]**

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.

✓ **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.

✗ **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.

**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 28 of EXTENDED period DETERIORATING (T-4) / Hezbollah SAM at IDF drone YESTERDAY 12-MAY (failed) + Hezbollah explosive drones at IDF s.Leb yesterday 12-MAY (intercepted) / IAF response strike on suspect motorcycle / Qassem 12-MAY: weapons NOT on table / Houthi drone intercepted near Eilat YESTERDAY 12-MAY (1st attack on Eilat since Iran/LBN CFs) / 3rd round US-mediated talks Thu-Fri 14-15 MAY Washington (T+1/T+2) (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 28 of EXTENDED period with T-4 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 28 of EXTENDED period (Day 1 = 16-APR); T-4 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-4 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.

**HOUTHII EILAT INTERCEPT - REGIONAL CF EROSION SIGNAL:** IDF intercepted a single drone "launched from the east" near Eilat early Tuesday 12-MAY, suspected Houthi/Yemen origin per Tol/Yahoo/YWN; no sirens sounded per protocol; no damage. Strategically significant as the first attack on Eilat since the Iran and Lebanon CFs took effect last month, indicating Yemen axis is testing CF tolerance in parallel with the Hezbollah cross-border resumption. A single intercept does not establish a new attack tempo (compare to the post-23-OCT-2023 Houthi campaign that ran 50+ strikes), but combined with the Hezbollah pattern shift since 06-MAY Balout strike it argues the broader regional CF framework is structurally eroding across multiple axes, not just south Lebanon.

**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; (7) Second Houthi attack on Eilat or any Israeli population center, which would establish a post-CF Yemen-axis tempo; (8) Any IDF retaliatory strike inside Yemen.
<b>ALT HYP</b>	<b>ALT A: CF formal collapse before 17-MAY expiry following third Hezbollah cross-border strike [MOST LIKELY]</b>
	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.
	✓ <b>Supporting Evidence:</b> 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.
	✗ <b>Ruling-Out Evidence:</b> 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.
	<b>ALT B: Re-extended CF with new terms maintaining low-intensity exchange pattern [LESS LIKELY]</b>
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.	
✓ <b>Supporting Evidence:</b> 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.	
✗ <b>Ruling-Out Evidence:</b> CF Day 28 with cross-border attacks indicates structural failure of original terms; no public proposal for re-extension yet; T-4 days insufficient time for formal renegotiation.	
<b>SOURCES</b>	<a href="#">BSS/AFP from Beirut</a>   CNN Day 71 live 09-MAY   IDF Spokesperson   Lebanese Health Ministry   Egypt Independent 10-MAY   Defend Jerusalem 10-MAY   Tol liveblog 08-MAY   Tol liveblog 12-MAY (Houthi Eilat intercept)   Yeshiva World 12-MAY   Yahoo News/DPA 12-MAY (Houthi Eilat)

<b>SC-001   Maritime / Hormuz Day 31 - CMA CGM San Antonio Day 8 post-strike stable (struck 05-MAY) / Project Freedom Day 7 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</b>		<b>HIGH   DEMOTED FROM FLASH   19</b>
<b>WHY THIS CYCLE</b>	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).	
<b>Summary</b>	<b>SIZE:</b> 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 ~\$107 Wed / WTI ~\$102 (3-session rally +7.6% prior) / 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**

Brent rallied three straight sessions to ~\$107/bbl on prolonged Iran conflict + near-closure of Hormuz + record-pace IEA-tracked stockpile drawdown. WASDE first-look 2026-27 balance sheets published yesterday were bullish wheat (54-year low US production), neutral-bearish corn, neutral soybeans. Trump landed in Beijing this afternoon for the two-day Xi summit; trade-energy-Iran nexus the primary forcing function this week.

**Summary**

**SIZE:** Brent crude ~\$107.05 (13-MAY intraday, -0.67% from Tue close \$107.77; range \$107-110 last 48h); WTI ~\$102 (Wed; trimmed losses from earlier session; 3-session rally +7.6% prior); 3-session rally context. US crude inventories fell 4.3 M bbl last week per EIA (nearly double market expectation); distillate inventories rose 190k bbl (first build since March). IEA: observed oil stockpiles fell ~4 mbpd in MAR/APR; market could remain severely undersupplied until OCT even if conflict ends. Saudi Arabia OPEC submission shows production at lowest since 1990. WASDE published yesterday 12-MAY 12pm ET: BULLISH WHEAT (1.561 bb US 2026-27 production, smallest crop in 54 years, KC+Chi July wheat closed limit-up +45c, MIAX MN +37.5c); corn neutral-bearish (15.995 bb, ending stocks 1.957 bb -9% YoY, July +4.75c \$4.80); soybeans neutral (4.435 bb, ending stocks 310 mb, July +13.75c \$12.26 / Nov +10.5c \$12.05 on Trump-Xi optimism).

**ACTIVITY:** Mon 04-MAY: Brent spiked \$114 on Project Freedom launch + UAE drone-on-Fujairah + Iran missile-on-UAE; Wed 06-MAY: Brent plunged \$96 on Axios "closing in on MoU" report (Trump later called it "too soon"); Fri 08-MAY \$101.29 close after CENTCOM strike Iranian military targets; Mon 11-MAY Brent +3.6% to \$104 on Trump "massive life support" ceasefire rhetoric; Tue 12-MAY held >\$107 as Saudi Aramco CEO Nasser warned of ~100 M bbl/wk supply loss + market normalization "could push into next year"; today 13-MAY trimmed

early losses, Brent holds ~\$107. WASDE wheat surprise drove daily limit gain across KC/Chi/MIAX boards.

**LOCATION:** Strait of Hormuz (effectively closed since 28-FEB; US blockade of Iranian ports since 13-APR); CENTCOM Persian Gulf operations area; trading floors NYMEX/ICE/Brent OTC; Beijing summit venue (US-China trade-energy linkage); Chicago Board of Trade + Kansas City + MIAX (wheat surprise).

**TIME:** Wed 13-MAY (TODAY): Brent ~\$107 intraday; Trump arrived Beijing this afternoon, formal bilateral Thu morning Beijing time; House E15 year-round vote expected today; ECCB and BOE policy windows. Thu-Fri 14-15 MAY: Trump-Xi summit two-day window (ag commitments + Iran-Hormuz framework + Taiwan + trade truce extension). Mon 18-MAY: weekly DOE inventories cycle reset.

**EQUIPMENT:** US Navy 5th Fleet destroyer presence + UK HMS Dragon Type 45 destroyer deployed for Hormuz mine-clearance + shipping protection (Royal Navy "strictly defensive" framing); Iran fast-attack craft and Shahed-series drones; AAA gasoline national avg pump-lag tracking ~\$4.50-4.55/gal (multiple 10-14 day lag windows compounding from 04-MAY \$114 spike and current \$107 baseline).

**UNIT:** ICE/CME Group (Brent + WTI exchanges); US Treasury + Fed (dollar/yield spillover, April CPI accelerated more than expected on energy pass-through); CENTCOM (Admiral Brad Cooper); IEA (Biorol assessment, ~14 mbpd disruption tracked, oil-stocks drawdown record-pace); Saudi Aramco CEO Amin Nasser (Milken-level pricing commentary); USDA WAOB (WASDE publishing authority); CBOT + KCBT + MIAX (wheat limit-up boards); Rory Johnston (Commodity Context X, "ceasefire has ceased" thesis).

**Analyst Assessment**

**THREE-SESSION RALLY BUILT ON INVENTORY + IRAN STALEMATE:** The Brent rally from sub-\$100 to \$107 over three sessions is not a single-catalyst move - it is layered on (a) IEA confirmation of record-pace stockpile drawdown, (b) Saudi production at 35-year low confirmation, (c) Trump "massive life support" framing of the Iran ceasefire dismissing Tehran's latest counter-offer, and (d) Asian refiners (notably Japan) seeking alternatives to Persian Gulf supplies. None of these are deal-able by Trump-Xi this week, which puts a floor under \$100 absent an Iran framework breakthrough.

**TRUMP-XI BEIJING - TRADE FIRST, IRAN ADJACENT:** Trump indicated trade negotiations will take precedence over Iran in the Beijing summit. The market read: Trump is not arriving in China primed to deliver an Iran concession to free Hormuz flows. Soybeans rallied (+13.75c July) on the trade-deal optimism (China is the principal swing buyer); wheat had its own internal driver (US production collapse); corn was neutral. The summit creates a soft ceiling on energy upside through Friday absent a black swan, but does not provide downside relief either.

**WASDE WHEAT SURPRISE BUT NOT CORRELATED TO ENERGY:** The bullish wheat surprise (smallest US crop in 54 years at 1.561 bb) drove KC+Chi to a daily limit move (+45c) and MIAX MN to +37.5c. This is a domestic-agricultural shock - it does not provide upside transmission into oil markets directly, though it does compound fertilizer cost pressure on next year's plantings via the Iran fertilizer-export disruption linkage already in place. Corn neutral-bearish (15.995 bb / 1.957 bb ending stocks -9% YoY).

**AAA PUMP LAG STILL OPEN:** AAA national average gasoline pump prices continue to track 10-14 day lag from Brent. The Mon 04-MAY \$114 spike is now flowing through to pump prices; today's \$107 sustain reinforces continued upside through next week. Expect AAA to print ~\$4.55-4.60/gal range by end of week absent an Iran framework breakthrough.

**STRANDED TANKER LATENT SHOCK:** Stranded-tanker problem (~20k seafarers, ~2k vessels per IMO) 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.

**CONFIDENCE:** HIGH - Trading Economics + IEA OMR + USDA WASDE + DTN/McKeany-Flavell ag analysis + Reuters Saudi Aramco coverage + CBS/CNBC/Reuters/WaPo Trump-Xi arrival reporting all T1 multi-source triangulation.

**TRIPWIRES:** (1) Brent break above \$110 on Trump-Xi communique excluding Iran framework reference; (2) Brent break below \$100 on Trump-announced 30-day Iran technical-negotiation window during the Beijing visit; (3) AAA national average above \$4.60/gal triggers political-pricing pressure pre-Memorial Day; (4) Distillate inventory build narrative breaks (would signal demand destruction beginning); (5) Any Saudi production rhetoric shift; (6) Hezbollah cross-border or Houthi-Eilat tempo escalation reopening LBN/YEM upside risk.

**ALT HYP**

**ALT A: Brent holds \$105-110 range through Trump-Xi summit window with Iran premium intact [MOST LIKELY]**

IEA inventory drawdown + Saudi low-production confirmation + Trump dismissive Iran ceasefire framing + Asian refiner alternative-supply sourcing all provide a floor under \$100; Trump-Xi unlikely to deliver Iran concession this week.

✓ **Supporting Evidence:** Three-session rally confirmed +7.6% prior; Tue close \$107.77; Saudi Aramco CEO 100 M bbl/wk supply-loss claim; IEA explicit "could remain severely undersupplied until OCT" framing.

✗ **Ruling-Out Evidence:** A Trump black-swan announcement of 30-day technical-negotiation window with Tehran during the Beijing visit would trigger \$95-100 retrace.

**ALT B: Brent breaks above \$110 on Trump-Xi exit communique without Iran framework reference [LESS LIKELY]**

Markets read absence of Iran reference in Trump-Xi communique as confirmation of stalemate, triggering breakout toward \$114 (week-prior high) and potentially further.

✓ **Supporting Evidence:** Mon 04-MAY \$114 spike on Project Freedom + UAE attacks confirms market repricing capacity; LBN CF deteriorating + Houthi-Eilat tempo provide additional catalysts.

✗ **Ruling-Out Evidence:** CIA assessment Iran can survive 4 more months reduces immediate-collapse risk premium; existing \$107 baseline already prices in significant Iran risk.

**ALT C: Brent retraces to \$95-100 on Trump Beijing-visit Iran framework announcement [LOWER]**

Trump uses Beijing visit as venue for major Iran announcement (30-day technical-negotiation window or partial Hormuz reopening framework) that disrupts current pricing.

✓ **Supporting Evidence:** Axios "closing in on MoU" 06-MAY proved Trump-orbit MoU posturing can move markets \$18 in a session; Witkoff/Rubio Qatar PM Miami 08-09 MAY signals back-channel activity.

✗ **Ruling-Out Evidence:** Trump explicitly said trade will take precedence over Iran in Beijing; Iran formally rejected counter-proposal 10-11 MAY; Saudi Aramco CEO + IEA framings suggest market views \$100 as a floor.

**SOURCES**

[Trading Economics Brent](#) | [Trading Economics WTI](#) | [USDA WASDE](#) | [DTN Wheat WASDE coverage](#) | [FRED DCOILBRENTU](#) | [Reuters Saudi Aramco](#) | [CNBC Trump Beijing arrival](#) | [WaPo Trump-Xi summit](#)

**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**

**WHY THIS CYCLE**

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."

**Summary**

**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.

**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 = 11-MAY ended 23:59 Moscow time YESTERDAY; Victory Day = Saturday 09-MAY (Day 2 of CF); post-CF window now active; 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+9) / Next hearing 29-JUN / Allen no longer on suicide watch / WHCD Day 19**

**FLASH | UPDATED | 20**

**WHY THIS CYCLE**

Federal arraignment for Cole Tomas Allen took place yesterday 11-MAY before US District Judge Trevor McFadden in DC; NOT GUILTY plea entered on all 4 federal counts incl life-sentence-capable attempted assassination charge; defense motion to disqualify Pirro+Blanche filed; DOJ response due 22-MAY (T+9); next hearing 29-JUN.

**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 held yesterday 11-MAY before US District Judge Trevor McFadden (Trump 2017 appointee); Allen entered NOT GUILTY plea on all 4 counts of 05-MAY grand jury indictment: (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). Defense filed motion to disqualify AG Pam Pirro and Deputy AG Todd Blanche (potential victims/witnesses, both at WHCD); DOJ response due 22-MAY (T+9). Allen remains in federal pre-trial detention (no longer on suicide watch); next hearing 29-JUN.

**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 1 (today is Day 18); initial detention hearing 27-APR (Day 3); federal indictment returned 05-MAY (Day 11); arraignment yesterday 11-MAY (Day 17) NOT GUILTY plea entered; defense motion to disqualify Pirro+Blanche filed; DOJ response due 22-MAY (T+9); 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:** Yesterday's arraignment was procedurally significant: Allen entered his first formal plea (NOT GUILTY on all 4 counts), the court set a preliminary motions schedule, and the prosecution discovery clock effectively started. Defense pre-trial motion to disqualify Pirro+Blanche frames the next 10 days; DOJ response due 22-MAY (T+9).

**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 created pressure on Judge McFadden during yesterday's arraignment. Any defense motion on detention conditions filed in conjunction with the plea will surface in the 22-MAY DOJ response window or at the 29-JUN hearing.

**TRIPWIRES:** (1) DOJ response on Pirro/Blanche disqualification motion due 22-MAY (T+9); (2) Judge McFadden ruling on disqualification motion; (3) Defense motions on speedy trial waiver or competency raise; (4) Any new indictment add or stripped count between today and 29-JUN; (5) White House review of USSS WHCA-protective posture announcement; (6) Any copy-cat threat assessment from NCTC public disclosure.

**ALT HYP**

**ALT A: Pre-trial motions sequence proceeds on schedule; DOJ wins on disqualification motion [MOST LIKELY]**

Following yesterday's NOT GUILTY plea, DOJ files response on 22-MAY defending Pirro/Blanche participation under recusal-screen procedures; Judge McFadden denies disqualification; pre-trial motions schedule confirms 29-JUN next hearing.

✓ **Supporting Evidence:** Federal prosecutors routinely brief through recusal-screen arrangements; Judge McFadden Trump appointee; defense team has signaled willingness to continue with current panel via prior detention agreement.

✗ **Ruling-Out Evidence:** Pirro/Blanche personal connection to WHCD venue is unusual factual posture; ABA Model Rule 3.7 (lawyer as witness) arguments could land harder than baseline; bullet-provenance evidence development could reshape Count 2 exposure.

**ALT B: Disqualification motion succeeds; case reassigned to non-WHCD-attending prosecutors [LESS LIKELY]**

Judge McFadden grants defense motion to disqualify Pirro+Blanche on ABA Model Rule 3.7 grounds; new prosecution team assigned from outside DC USAO; pre-trial schedule slips 30-60 days.

✓ **Supporting Evidence:** Pirro+Blanche personal connection to WHCD as attendees is rare factual posture; bullet-provenance ambiguity gives defense procedural traction; Magistrate Faruqi detention-conditions criticism signals court receptiveness to defense motions.

✗ **Ruling-Out Evidence:** Federal prosecutors routinely manage recusal screens around such facts; defense team has shown willingness to negotiate procedurally (Day-3 detention agreement); Judge McFadden Trump appointee historically deferential to DOJ.

**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+15 to 28-MAY / CVE-2026-42208 BerriAI LiteLLM SQLi FCEB deadline PASSED 11-MAY (Day -2; compliance assessment pending) / CYB-005 Linux Copy Fail FCEB T+2 to 15-MAY (POINTER tier)**

**HIGH | UPDATED | 17**

**WHY THIS CYCLE**

Ivanti EPMM RCE KEV-added 07-MAY (FCEB ~28-MAY clock (T+15)); BerriAI LiteLLM SQLi FCEB deadline PASSED 11-MAY (Day -2; compliance assessment pending); CYB-005 Linux Copy Fail FCEB T+2 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+2) 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 (2 days ago; compliance assessment pending).

	<p><b>LOCATION:</b> Global FCEB + enterprise mobile device management infrastructure (Ivanti EPMM); enterprise LLM-routing/proxy infrastructure (BerriAI LiteLLM); Linux distribution stack (CYB-005).</p> <p><b>TIME:</b> Ivanti KEV add 07-MAY (FCEB ~28-MAY clock (T+15)); BerriAI FCEB deadline PASSED 11-MAY (Day -2; compliance assessment pending); CYB-005 Linux T+2 to 15-MAY.</p> <p><b>EQUIPMENT:</b> Ivanti EPMM appliances + MDM management consoles; BerriAI LiteLLM proxy software; Linux file-handling code path.</p> <p><b>UNIT:</b> CISA (KEV catalog); Ivanti PSIRT + BerriAI (vendors); FCEB CIOs/CISOs; enterprise MDM admins + AI/ML platform teams.</p>
<p><b>Analyst Assessment</b></p>	<p><b>STACKED FEDERAL DEADLINES THIS WEEK:</b> Three federal-cyber deadlines stack this week: CVE-2026-42208 BerriAI LiteLLM FCEB deadline PASSED 11-MAY (Day -2; compliance assessment pending); CYB-001 PAN-OS Wave 1 patch RELEASE TODAY 13-MAY today (T+0); CYB-005 Linux Copy Fail FCEB due 15-MAY (T+3); CVE-2026-6973 Ivanti EPMM FCEB ~28-MAY. SecOps capacity is the binding constraint.</p> <p><b>NON-FEDERAL EXPOSURE:</b> DIB, financial services, regulated healthcare running the same products should treat FCEB schedule as floor not ceiling. Quest KACE SMA CVSS 10.0 alone is enterprise-wide RCE; Zimbra zero-click XSS is mass-mailing campaign vector.</p> <p><b>KEV ACCELERATION POST-PAN-OS PATCH:</b> 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.</p> <p><b>TRIPWIRES:</b> (1) Named-victim disclosure on any of the 4 remaining 20-APR batch CVEs; (2) Cisco PSIRT or Microsoft MSRC scope expansion; (3) CERT-UA attribution expansion beyond UAC-0233/UAC-0250; (4) FCEB agency missing 04-MAY deadline; (5) New KEV additions before 04-MAY deadline; (6) FIRESTARTER detection beyond federal environment (CYB-001 cross-link).</p>
<p><b>SOURCES</b></p>	<p><a href="#">CISA KEV Catalog (20-APR batch + 24-APR additions)</a>   <a href="#">Cisco PSIRT (Catalyst SD-WAN Manager CVEs)</a>   <a href="#">CERT-UA (Zimbra UAC-0233/UAC-0250 campaign)</a></p>

**SECTION 4B - PHYSICAL / GEOPOLITICAL / IO**

<p>HLTH-001   CDC HAN 00528 Andes hantavirus M/V Hondius / 11 onboard cases (9 confirmed + 2 probable; CFR 38%) / 3 dead / 18 Americans US federal quarantine Day 2 + KORNFELD FIRST US CONFIRMED CASE TODAY 13-MAY (UNMC biocontainment, asymptomatic) + 15 monitored across 9 states / Separate IL Winnebago Co domestic strain case under investigation / French passenger life support / CDC Level 3 / incubation 4-42 days surveillance window through ~21-JUN</p>	<p><b>FLASH   UPDATED   24</b></p>
<p><b>WHY THIS CYCLE</b></p>	<p>Federal posture flipped within 48 hours (09-MAY CDC “no plans to quarantine” → 11-MAY active federal quarantine), and TODAY 13-MAY the principal pre-positioned tripwire fired: Dr. Stephen Kornfeld (the Hondius onboard medical responder) became the first US-side confirmed Andes hantavirus case among the 18 federally quarantined returnees, transferring from UNMC monitoring to the UNMC biocontainment unit. Kornfeld is reportedly asymptomatic. Concurrently the US state-level monitoring footprint expanded to 15 additional Americans across 9 states; a separate IL Winnebago County case (domestic North American hantavirus strain) is under CDC investigation, unconnected to Hondius. WHO Tedros confirms monitoring window extends through ~21-JUN.</p>

**Summary**

**SIZE:** 11 cases total onboard (9 confirmed + 2 probable per ECDC 13-MAY); 3 deaths (2 confirmed Andes, 1 under investigation); WHO case-fatality ratio 38%. Ship at outbreak: 147 onboard (86 passengers + 61 crew from 23 countries). US footprint TODAY 13-MAY: 19 US-related cases - 18 in federal quarantine (16 at UNMC Omaha, 2 at Atlanta Emory; +1 confirmed positive among the 16 = Dr. Stephen Kornfeld, now in UNMC biocontainment unit, asymptomatic) plus 15 monitored across 9 states (AZ, CA, GA, TX, VA, NJ, MD, KS, MN). Separate IL Winnebago Co domestic North American strain case (unconnected to Hondius, rodent-exposure suspected) under CDC investigation. 27 crew + 2 medical professionals (29 total) still aboard MV Hondius sailing to Rotterdam for disinfection; 122 of 147 already evacuated to home countries.

**ACTIVITY:** WHO notified by UK IHR Focal Point 02-MAY. Sequence-confirmed as Andes virus (ANDV) 04-06 MAY. CDC HAN 00528 advisory issued 08-MAY. Repatriation flights from Tenerife completed 11-MAY; US flight to Offutt AFB carried 17 Americans for transport to UNMC Omaha National Quarantine Unit (Atlanta routing brought US-side total to 18). **FIRST US CONFIRMED CASE TODAY 13-MAY:** Dr. Stephen Kornfeld, oncologist who stepped in as onboard medical responder when the ship physician fell ill, tested positive at UNMC and transferred to biocontainment unit (asymptomatic; reports "no symptoms and in good spirits" via CNN/ABC). WHO working hypothesis: Case 1 acquired infection environmentally pre-boarding (likely in Argentina via long-tailed mouse exposure - though Wikipedia 13-MAY notes Ushuaia is 1500 km south of the *Oligoryzomys longicaudatus* endemic range, complicating that hypothesis); subsequent cases show clear epidemiological link and incubation-period match consistent with onboard P2P transmission. Pathoplexus phylogenetic analysis published on virological.org 08-MAY indicates single zoonotic spill (not multi-introduction). One French passenger reportedly on life support per French authorities ("final stage of supportive care").

**LOCATION:** MV Hondius (Dutch-flagged Oceanwide Expeditions vessel; departed Ushuaia, Argentina 01-APR; stops at Antarctica, South Georgia Island, Tristan da Cunha, Saint Helena, Ascension Island). Disembarkation completed Tenerife, Canary Islands 10-11 MAY. US quarantine sites: UNMC National Quarantine Unit, Omaha NE (16 passengers + 1 Kornfeld biocontainment); Emory University Hospital high-containment unit, Atlanta GA (2 passengers). MV Hondius now en route to Rotterdam for disinfection.

**TIME:** First onboard death 11-APR. Outbreak ID 04-MAY. WHO DON600 08-MAY. CDC HAN 00528 08-MAY. Tenerife arrival 10-MAY. US repatriation flight 11-MAY. Active quarantine begins 11-MAY (Day 2 today). Kornfeld first US confirmed case 13-MAY (today). CDC monitoring window 4-42 days from last onboard contact - extends US surveillance through approximately 21-JUN per WHO Tedros for 11-MAY disembarkation cohort, and earlier for 24-APR Saint Helena disembarkation (contact-traced by UK HSA).

**EQUIPMENT:** No vaccine for Andes virus; no specific antiviral; supportive care only. Severe-presentation CFR ~38%. Early extracorporeal membrane oxygenation (ECMO) raises survival to ~80% in severe HPS cases. Diagnostic: CLIA assays for New World hantavirus IgM and IgG antibodies (RT-PCR + serology) available at CDC, some state public health labs, Quest Diagnostics. CDC EOC contact: 770-488-7100.

**UNIT:** CDC (Director / EOC / NCEZID); HHS / State Dept (repatriation lead); UNMC Nebraska Medicine (National Quarantine Unit operations - Dr. Mara Jana Broadhurst CAP-briefing 12-MAY; biocontainment unit director); Emory University Hospital Serious Communicable Diseases Unit (Atlanta - Dr. David Fitter, CDC Division of Global Migration Health, media briefing 11-MAY); USAF 55th Wing / Offutt AFB (repatriation flight reception); WHO (Tedros 12-MAY monitoring-window statement); ECDC (EU coordination); UK HSA (Saint Helena contact tracing for 24-APR disembarkees); Spanish Ministry of Health (Tenerife operation); state DPHs (AZ/CA/GA/TX/VA/NJ/MD/KS/MN 9-state CDC line list, plus separate IL Winnebago Co domestic-strain case).

**Analyst Assessment**

**KORNFELD CASE - PRINCIPAL TRIPWIRE TRIGGERED:** TRIPWIRE #1 (any first US confirmed case among the 18 quarantined returnees) FIRED TODAY 13-MAY at Day 2 of quarantine. Dr. Stephen Kornfeld's positive test at UNMC is the first US-side confirmation. He is

currently asymptomatic and in the biocontainment unit. Operational significance: the 48-hour federal-posture flip (09-MAY “no plans to quarantine” → 11-MAY active quarantine) was vindicated within 48 hours of operationalizing. The next tripwire is TRIPWIRE #2 (second-generation transmission to household/HCW/cohort contact), which is the decisive PREP-CON 2 candidate.

**P2P TRANSMISSION IS THE OPERATIONALLY SIGNIFICANT FINDING:** Hantavirus is normally a rodent-to-human disease via inhalation of aerosolized urine/droppings/saliva. Only ~2-5% of historical Andes cases involve person-to-person transmission, and those that do require close prolonged contact (households, shared utensils, body fluids). The Hondius cluster’s onboard epi-link chain points to confirmed P2P; today’s Kornfeld case (an onboard medical responder who treated other crew/passengers) is itself a P2P data point.

**CLOSEST HISTORICAL COMPARATOR IS EPUYÉN 2018:** The 2018 EpuYén, Argentina superspreader cluster (3 symptomatic attendees at a crowded birthday party seeded 34 cases and 11 deaths) is the relevant analog for cruise-ship geometry. The Hondius enclosed-vessel environment plus shared mess/cabin/bathroom infrastructure mirrors that geometry. Working assumption for the next 4-6 weeks: a small number of new symptomatic cases in the 18-person UNMC+Emory cohort is now expected (Kornfeld being the first); broad community spread is not.

**INCUBATION WINDOW DRIVES SURVEILLANCE DURATION:** Andes virus incubation 4-42 days (CDC/VDH/WHO guidance). For the 11-MAY disembarkation cohort, the late edge of the symptomatic-emergence window is approximately 22-JUN. Kornfeld (with longer onboard exposure as medical responder, including direct symptomatic-patient care) is in the early symptomatic window. The 15 monitored Americans across 9 states with shorter exposure windows have correspondingly later emergence ceilings.

**US PUBLIC-RISK PROFILE: BASELINE EXTREMELY LOW STILL HOLDS:** CDC, WHO, and state DPHs continue to assess broad-public risk as “extremely low.” The Kornfeld case does not change that posture: he was confirmed positive while already in federal quarantine, transmission chain breakage worked as designed. The actual risk population remains the 18 quarantined + 15 monitored + their pre-quarantine household and close contacts + any second-degree contacts (e.g., repatriation-flight rows, airport personnel, hospital staff handling the cohort).

**USHUAIA ORIGIN HYPOTHESIS COMPLICATED:** Wikipedia 13-MAY tracker notes Ushuaia is ~1,500 km south of the documented endemic range of *Oligoryzomys longicaudatus* (the long-tailed mouse vector), and no recorded Andes cases have ever occurred in Tierra del Fuego. This complicates the WHO working hypothesis that Case 1 acquired the infection environmentally pre-boarding in Argentina. Alternative possibilities (port-of-call exposure, undocumented vector range, pre-existing import) remain under investigation. Phylogenetic analysis indicates single zoonotic spill.

**PREP-CON DRIVER NOTE:** HLTH-001 is now a stronger contributing PREP-CON 3 vector this cycle vs. prior cycle with Kornfeld confirmation; the threshold for PREP-CON 2 elevation is a TRIPWIRE #2 event (second-generation transmission), not a TRIPWIRE #1 event (Kornfeld) that was pre-positioned and resolved within federal quarantine.

**TRIPWIRES:** (1) TRIGGERED 13-MAY: Kornfeld first US confirmed case at UNMC biocontainment. (2) UPGRADE-DECISIVE: Any second-generation transmission to household / HCW / cohort contact of a returnee (PREP-CON 2 candidate); (3) CDC Level 3 → Level 2 emergency-response elevation; (4) State Dept travel-advisory elevation on Antarctic expedition cruise travel; (5) Additional US states added beyond the current 9-state CDC line list; (6) UK HSA report of any symptomatic case in the 30-passenger 24-APR Saint Helena cohort; (7) Genomic-sequence divergence finding suggesting changed transmissibility; (8) Healthcare-worker case in any treating facility; (9) French passenger life-support outcome; (10) IL Winnebago Co separate strain case follow-up.

**ALT HYP**

**ALT A: Contained cluster with limited additional confirmed cases among quarantined returnees; no second-generation; window closes ~21-JUN [MOST LIKELY]**

The Kornfeld case (TRIPWIRE #1) was pre-positioned and quarantine broke the transmission chain. Remaining 17 in federal quarantine + 15 monitored across 9 states complete the WHO 4-42 day window with possibly 1-3 additional confirmed cases (all within quarantine), no second-generation transmission outside quarantine, CDC reduces to Level 4 by mid-JUN.

✓ **Supporting Evidence:** Andes P2P transmission historically requires sustained close contact; federal quarantine breaks transmission chains; CDC HAN clinical guidance well-distributed; UNMC and Emory are the two most experienced US biocontainment teams; Kornfeld is asymptomatic which improves prognosis; no documented community-acquired cases from prior travel-imported events.

✗ **Ruling-Out Evidence:** 3 of the 18 are already being closely watched for possible infection per NBC 12-MAY; Epuayén precedent shows P2P can chain unexpectedly under enclosed-cohort conditions; pre-quarantine household exposure window existed for returnees before 11-MAY federal quarantine took effect.

**ALT B: Small-scale second-generation transmission to household/HCW/cohort contacts within 4-6 weeks [LESS LIKELY]**

One or more additional Americans among the 17 develop confirmed HPS; secondary transmission to a household contact pre-quarantine (or to UNMC/Emory staff post-quarantine) occurs; CDC elevates to Level 2; State Dept issues advisory; additional states added to line list.

✓ **Supporting Evidence:** P2P transmission confirmed onboard; Kornfeld confirmed today; 3 of remaining 17 already closely watched; pre-quarantine household exposure window existed; Epuayén 2018 superspreader precedent; Kornfeld's role as onboard medical responder means he had P2P exposure to multiple symptomatic patients.

✗ **Ruling-Out Evidence:** Andes P2P remains rare in absolute terms (2-5% historically); rapid quarantine interrupts most chains; pre-quarantine household exposure was brief for most returnees; biocontainment SOPs at UNMC and Emory are mature.

**SOURCES**

[CDC HAN 00528 \(08-MAY\)](#) | [CDC Situation Summary](#) | [WHO DON600 \(08-MAY\)](#) | [ECDC 12-13 MAY surveillance update](#) | NBC News 11-12 MAY (US quarantine + spread analysis) | CDC Newsroom Update (Canary Islands deployment + State Dept guidance) | AHA News 11-MAY (clinician advisory summary) | Spectrum Local News 12-MAY (Spain case + outbreak growth to 11) | KPTV 12-MAY (Oregon resident exposure) | Euronews 11-MAY (Spanish officer LOD death on operation) | GenomicEpi.com Hondius outbreak tracker | VDH Andes virus public guidance

**SECTION 5 - ENERGY / INFRASTRUCTURE / SUPPLY CHAIN**

**CARRYOVER MONITORS - ENERGY / NUCLEAR / CI**

**NUC-001 IAEA Verification Blackout Day 75 / 440.9 kg HEU / CIA 4-mo blockade survival / 2/3 launchers survived (revised):** IAEA verification blackout Day 75 (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 13-MAY SLIGHT RISK n-central Montana (northern Rockies/High Plains) / Secondary MRGL Ohio Valley/Central Appalachians + TX Panhandle / Severe wind gusts 60-80 mph primary hazard / CORRIDOR FULLY SHIFTED from yesterday FL/Midwest/Plains framing / National probabilistic: TORNADO low; HAIL 5%; WIND 15%**

**FLASH | UPDATED | 22**

#### WHY THIS CYCLE

SPC 13-MAY: SLIGHT RISK n-central Montana (northern Rockies/High Plains); secondary MARGINAL RISK Ohio Valley/Central Appalachians; isolated TX Panhandle hail/wind. SEVERE WIND GUSTS 60-80 MPH are the primary hazard with linear clusters evolving across central MT and to lesser degree eastern ID; very deeply mixed boundary layers across n.UT/s.ID also favor severe gusts. CORRIDOR FULLY SHIFTED from yesterday FL Peninsula + Midwest/Great Lakes + south-central Plains framing. National probabilistic: TORNADO low; HAIL 5%; WIND 15%.

#### Summary

**SIZE:** SLIGHT RISK active TODAY 13-MAY across n-central Montana (northern Rockies/High Plains primary corridor); secondary MARGINAL RISK Ohio Valley/Central Appalachians; isolated TX Panhandle hail/wind. SEVERE WIND GUSTS (60-80 mph) primary hazard. Yesterday cleanup: Tue 12-MAY Marginal Risk corridors verified isolated severe in FL Peninsula + Midwest/GL + south-central Plains; no major impact events reported.

**ACTIVITY:** Linear cluster evolution central MT and to lesser degree eastern ID through mid-afternoon to early evening as 80-90kt 500mb speed max overspreads ID/MT during peak heating. Dry-adiabatic 0-3km lapse rates + inverted-V thermodynamics support severe gust cores and outflow. Ohio Valley + Central Apps: scattered storms with low-level convergence near front + topographic forcing, isolated wind damage. TX Panhandle: deeply mixed BL near Caprock 22-00 UTC, isolated hail/wind possible before dissipation mid-evening.

**LOCATION:** Primary - n-central MT including Great Falls/Lewistown/Glasgow ranges; secondary - lower OH Valley + Mid-Atlantic + Central Appalachians; tertiary - TX Panhandle near Caprock; also W.OR/s.WA possible gusty winds + sub-severe hail in advance of upper trough approaching coastal PNW.

**TIME:** MT corridor peak window late afternoon to early evening 13-MAY as cold front sweeps east across northern Rockies. OH Valley peak afternoon/early evening with front passage. TX Panhandle window 22-00 UTC. Pattern relaxes 14-MAY; reload Friday 15-MAY weekend as moist airmass establishes n.TX into Plains, dryline development possible Saturday 16-MAY.

**EQUIPMENT:** MT corridor: 80-90kt 500mb speed max; large T-Td depressions + inverted-V soundings; dry-adiabatic 0-3km lapse rates. OH Valley: 50+kt cyclonically curved 500mb flow;

dewpoints lower-to-mid 50s F; weak instability + steepening low-mid lapse rates. TX Panhandle: 500mb ridge but strong BL heating supports cap erosion + very steep lapse rates.  
**UNIT:** NWS SPC Day 1 Slight Risk MT corridor; WFOs TFX/GGW/MSO/PIH (MT/ID); RLX/CRP/PHI (OH Valley/Mid-Atlantic); AMA/LBB (TX Panhandle); PQR/SEW (PNW). National probabilistic: TORNADO low; HAIL 5%; WIND 15%. NWR overlap THIS CYCLE: No active OOS/DEG within MT slight-risk area today; degraded transmitters today are concentrated AK + NM + IL/Midwest (not in MT primary corridor).

**Analyst Assessment**

**SLIGHT RISK + 60-80MPH WIND PROFILE:** SLIGHT RISK with 80-90kt 500mb speed max + dry-adiabatic 0-3km lapse rates is a classic outflow-dominant severe-wind regime. Severe gusts 60-80 mph are the principal hazard, not tornado or hail. Linear cluster evolution late afternoon-evening across central MT is the highest-confidence threat element. Resources should be postured for damaging-wind impacts (downed power lines, structure damage to weaker construction, wind-driven debris) rather than tornado response.

**NWR OVERLAP - MT CORRIDOR CLEAR:** Today's primary corridor (Montana) has NO active NWR OOS/DEG transmitters within the slight-risk area, in contrast to yesterday's IL/FL/IN compound. The 24-transmitter outage footprint is concentrated AK (8-transmitter Kodiak/Anchorage cluster), NM triple-gap (Roswell + Carlsbad + Artesia continuing cycle 7), TX Rio Grande City, and scattered single outages elsewhere. None of these intersect today's convective corridors. EMCOMM friction this cycle is geographically displaced from the severe-weather footprint.

**CORRIDOR SHIFT - FULL PIVOT:** Today's corridor geometry FULLY SHIFTED from yesterday FL Peninsula + Midwest/GL + south-central Plains framing to n-central Montana. This is not a continuation but a new pattern. EMCOMM teams in FL/IL/IN/WI/KS/OK can stand down to lower posture; MT EMCOMM should elevate. Tomorrow 14-MAY pattern relaxes nationally; reload Friday 15-MAY weekend possible across n.TX/OK/KS Plains.

**FATALITY DRIVER - WIND HAZARD:** Severe wind gusts at the upper end of the 60-80 mph forecast band can produce structural damage to manufactured homes, downed utility poles, mobile-tower failures (degraded comms), and wind-driven vehicle accidents on I-15 / I-90 corridors. Pre-position alternative shelter and ensure utility-restoration crews are pre-staged. Wildland fire risk concurrent with wind event in MT - any holdover or dry-vegetation ignition can spread rapidly.

**SPACE WEATHER:** Kp 2-3 quiet/unsettled; HF favorable for SKYWARN today. R1-R2 probability 15-30% as two ARs at L=330 rotate to Earth-facing disk this week. No G-scale watch active.

**CONFIDENCE:** HIGH - SPC T1 (Day 2 outlook 121733Z carried as effective Day 1 for 13-MAY pending morning issuance); WPC T1; multi-source agreement on wind hazard primacy.

**TRIPWIRES:** (1) Categorical upgrade to Enhanced or Moderate Risk in afternoon SPC update for MT corridor; (2) Tornado watch or PDS Tornado Watch issuance any corridor; (3) Confirmed 70+mph measured gust or wind damage cluster; (4) Initial reports of structure damage in MT major cities (Billings, Great Falls); (5) Concurrent wildfire ignition or rapid spread under wind event; (6) Any NWR transmitter restorations or new outages within active corridors; (7) Sat 16-MAY Plains weekend reload setup confirmation.

**ALT HYP**

**ALT A: Slight Risk verifies as forecast - scattered severe wind reports across n-central MT + isolated reports OH Valley / TX Panhandle [MEDIUM-HIGH]**

SPC + ensemble agreement on MT corridor; 80-90kt speed max + dry BL + inverted-V soundings consistent with severe wind regime.

✓ **Supporting Evidence:** Forecast soundings show classic gust-driving thermodynamics; cold front progression locked.

	<p><b>✗ Ruling-Out Evidence:</b> Mesoscale convergence uncertainty could limit linear cluster organization.</p>
	<p><b>ALT B: Boundary/upslope focus produces localized higher-end event in MT (severe hail or measured 80+mph gust cluster) [MEDIUM]</b></p>
	<p>Higher terrain east of cold front + upstream flow could focus cell development with strong outflow.</p>
	<p><b>✓ Supporting Evidence:</b> TFX/GGW WFO discussion supports gust potential at upper end of forecast band.</p>
	<p><b>✗ Ruling-Out Evidence:</b> Storm-mode favoring brief multicells over sustained line may limit damage footprint.</p>
	<p><b>ALT C: Convection underperforms; capping or moisture limits coverage [LOWER]</b></p>
	<p>Moisture profile is marginal across portions of central MT; mid-level dry slot could limit cell sustenance.</p>
	<p><b>✓ Supporting Evidence:</b> SLIGHT RISK is a moderate-confidence category; underperformance possible in marginal moisture regimes.</p>
	<p><b>✗ Ruling-Out Evidence:</b> Forcing is robust (80-90kt speed max + cold front); cap erosion should occur by mid-afternoon over higher terrain.</p>
	<p><b>SOURCES</b></p>
<p><a href="#">NOAA SPC Day 1 Outlook</a>   <a href="#">NOAA SPC Day 2 Outlook</a>   <a href="#">NOAA WPC ERO Day 1</a>   <a href="#">NWS Local Offices</a>   <a href="#">NWS NWR Outages</a></p>	

## SECTION 7.1 - WILDFIRE & FIRE WEATHER

REGION	STATUS	ACTIVE FIRES / EVAC STATUS	CI / INFRASTRUCTURE EXPOSURE	FIRE WEATHER / SOURCES
<b>Southwest (AZ/NM)</b>	<b>WATCH</b>	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.
<b>Southern California</b>	<b>WATCH</b>	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.
<b>Pacific Northwest</b>	<b>MONITOR</b>	No significant fires 24-26 APR. Snowpack above normal. OR Portland	Columbia River Gorge transmission. Forest products.	Pattern transitioning late-April; PNW snowpack supports near-normal season onset. Sources: NIFC, USFS PNW.

REGION	STATUS	ACTIVE FIRES / EVAC STATUS	CI / INFRASTRUCTURE EXPOSURE	FIRE WEATHER / SOURCES
		KIG98 NWR DEGRADED.		
<b>Northern Rockies</b>	<b>MONITOR</b>	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.
<b>S. Plains (TX/OK Panhandle)</b>	<b>WATCH</b>	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.
<b>CONUS Outlook (April)</b>	<b>NSTR</b>	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 - 13 MAY 2026

Source: [weather.gov/nwr/outages](https://weather.gov/nwr/outages) | Live data provided 13-MAY-2026 (user-supplied) | 15 OUT OF SERVICE | 9 DEGRADED | 14 States

**OPERATIONAL NOTE:** 24 NWR transmitters are currently degraded or out of service across 14 states as of 13-MAY live pull (user-supplied per §0.28). Affected populations lose the primary all-hazards alerting channel and dedicated SAME-coded EAS tone activation. TODAY'S SEVERE-WX PATH OVERLAP (per WX-001 SPC 13-MAY SLIGHT RISK n-central Montana primary corridor; secondary MARGINAL RISK Ohio Valley/Central Appalachians + TX Panhandle): MT slight-risk area is currently CLEAR of NWR OOS/DEG transmitters - the degraded transmitter footprint does NOT intersect today's primary convective corridor (in contrast to yesterday's IL/FL/IN compound). ALASKA 8-TRANSMITTER CLUSTER PERSISTS: Pillar Mtn, Sitkinak Dome, Middle Cape, Kotzebue, Raspberry Island, Sand Point, Cape Gull, Marmot Island affected concurrently - Kodiak archipelago + Katmai NP coastal + Aleutians East Borough + Northwest Arctic Borough lose primary NWR coverage during early-season Bering Sea / Gulf of Alaska maritime advisories and any volcanic / seismic alerting. NEW MEXICO TRIPLE-GAP CONTINUES (CYCLE 7): 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. CARRYOVER from yesterday: IL Hillsboro KXI79 OOS, IN Angola KXI94 DEG, FL Pensacola KEC86 OOS, TX Rio Grande City WNG601 OOS all persist into 13-MAY but are no longer in active severe-WX corridors. CYCLE NOTE: 13-MAY user-supplied direct read from [weather.gov/nwr/outages](https://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; Kp 2-3 quiet/unsettled per SWPC 13-MAY 3-day; R1-R2 probability 15-30% as two ARs at L=330 rotate to Earth-facing disk; no G1+ expected.

ST	Callsign	Location	Freq	WFO	Status	Counties / Areas Affected
AK	WNG531	Pillar Mtn.	162.525	Kodiak AK (WSO)	DEGRADED	Kodiak Island / Pillar Mountain coastal area, AK
AK	WNG718	Sitkinak Dome	162.450	Kodiak AK (WSO)	DEGRADED	Sitkinak Island / Trinity Islands, AK
AK	WZ2556	Middle Cape	162.525	Kodiak AK (WSO)	DEGRADED	Middle Cape / Shelikof Strait coast, AK
AK	KWN30	Kotzebue	162.550	Fairbanks AK	DEGRADED	Kotzebue / Northwest Arctic Borough, AK
AK	KZZ90	Raspberry Island	162.425	Kodiak AK (WSO)	DEGRADED	Raspberry / Afognak Island area, AK
AK	WNG714	Sand Point	162.550	Anchorage AK	OUT OF SVC	Aleutians East Borough, AK
AK	WNG529	Cape Gull	162.500	Kodiak AK (WSO)	DEGRADED	Cape Gull / Katmai NP coastal area, AK
AK	WNG716	Marmot Island	162.500	Kodiak AK (WSO)	DEGRADED	Marmot Island / Afognak Strait area, AK
CO	WXM56	Colorado Springs	162.475	Pueblo CO	OUT OF SVC	El Paso, Teller counties, CO
FL	KEC86	Pensacola	162.400	Mobile AL	OUT OF SVC	Escambia, Santa Rosa counties, FL panhandle - WEST of FL Peninsula Marginal Risk center
GA	WXM65	Baxley	162.525	Jacksonville FL	OUT OF SVC	Appling, Pierce, Wayne, Jeff Davis counties, GA - GA wildfire 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 - carryover from yesterday's IL/Midwest Marginal Risk corridor; today's primary risk corridor has shifted to n-central MT (WX-001 SPC 13-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	162.450	Dodge City KS	OUT OF SVC	Grant, Stanton, Haskell counties, KS
ME	WNG547	Sugarloaf Mtn	162.450	Gray/Portland ME	OUT OF SVC	Franklin, Somerset (high terrain), ME
MI	WNG647	Adrian / Petersburg	162.450	Detroit/Pontiac MI	OUT OF SVC	Lenawee, Monroe counties, MI
MI	WNG572	Petoskey	162.475	Gaylord MI	OUT OF SVC	Emmet, Charlevoix, Cheboygan counties, MI
MN	KXI45	Gunflint Lake	162.525	Duluth MN	OUT OF SVC	Cook County / BWCAW area, MN
NM	WWF37	Carlsbad	162.475	Midland/Odessa TX	OUT OF SVC	Eddy 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	WXN24	Artesia	162.425	Midland/Odessa TX	OUT OF SVC	Eddy County (alt), Chaves County, NM - TRIPLE-GAP cycle 7
OR	KIG98	Portland	162.550	Portland OR	DEGRADED	Portland metro area, OR
TN	WXK63	Shelbyville	162.475	Nashville TN	OUT OF SVC	Bedford, Marshall, Coffee counties, TN - NO LONGER in active severe corridor today (corridor shifted to FL/Midwest/Plains)
TX	WNG601	Rio Grande City	162.425	Brownsville/RGV 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). 24 affected (15 OOS + 9 DEG) across 14 states.

**⚠ HIGH-GAP ALERT - ACTIVE-WEATHER + STRUCTURAL-GEOGRAPHY CORRIDOR COMPOUND:**  
Active-hazard corridor situations this cycle. (1) MT SLIGHT-RISK CORRIDOR CLEAR: Today's primary risk corridor (n-central MT WFOs TFX/GGW/MSO/PIH) is clear of NWR outages - structural alerting intact for

severe wind 60-80 mph hazard during the late afternoon peak window. (2) OH VALLEY / CENTRAL APPS MARGINAL RISK: Secondary corridor with no overlapping NWR-001 outages reported. (3) ALASKA 8-TRANSMITTER CLUSTER: Pillar Mtn, Sitkinak Dome, Middle Cape, Kotzebue, Raspberry Island, Sand Point, Cape Gull, Marmot Island affected simultaneously - Kodiak archipelago + Aleutians East Borough + Northwest Arctic Borough lose primary NWR coverage; spring storm / volcanic / seismic alerting compounded. (4) CARRYOVER IL/MIDWEST: IL Hillsboro KXI79 OOS sits in yesterday's risk corridor (now shifted away from IL); IN Angola KXI94 DEG; FL Pensacola KEC86 OOS - these were within yesterday's framing but no longer in active corridor today. (5) 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: confirm backup HF/VHF coverage given regional NWR gaps.

## SECTION 7A - SPACE WEATHER & EMCOMM

<b>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</b>		<b>MODERATE   UPDATED   10</b>
<b>WHY THIS CYCLE</b>	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.	
<b>Summary</b>	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.	
<b>Analyst Assessment</b>	<p><b>HF EMCOMM STATUS:</b> Quiet conditions favor sustained CONUS HF EMCOMM today across the three MARGINAL RISK severe-weather corridors (FL Peninsula / Midwest-GL / south-central Plains) and across the AK 8-transmitter NWR cluster gap. Removes HF-degradation compound on top of severe-weather + NWR outage geometry.</p> <p><b>L=330 ARs ROTATING IN:</b> 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.</p> <p><b>27-29 APR QUIET WINDOW:</b> Supports any deferred HF tests, readiness drills, and emergency SKYWARN activation. Power-grid operators have cleared the GIC watch window.</p> <p><b>EMCOMM PROTOCOL:</b> 40m/60m primary and reliable; 20m usable with propagation check; 15m-10m DX bands favorable during quiet conditions.</p> <p><b>CONFIDENCE:</b> HIGH - SWPC T1 observations + 3-day forecast T1; Geophysical Institute 27-day T1.</p> <p><b>TRIPWIRES:</b> 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.</p>	
<b>SOURCES</b>	<a href="#">NOAA SWPC 3-Day Forecast</a>   <a href="#">SWPC Planetary K-index</a>   <a href="#">Geophysical Institute (UAF) Aurora Forecast</a>   <a href="#">SpaceWeatherLive</a>	

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.
<b>POLAR / TRANS-POLAR:</b> 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 - 13 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 10 - PREPAREDNESS CONDITION ASSESSMENT

**PREP-CON 3 - ELEVATED | Assessed: 13 May 2026 | Op Epic Fury Day 75 | Hormuz blockade Day 31 | LBN CF Day 28 of EXTENDED period DETERIORATING (T-4) | WHCD Day 19 (Allen NOT GUILTY plea 11-MAY) | CVE-2026-0300 PAN-OS RCE Wave 1 patch RELEASE TODAY 13-MAY today (T+0) / FCEB BOD T-14 to 27-MAY | RU-UA 3-day CF EXPIRED midnight 11-MAY**

**ASSESSED LEVEL:** PREP-CON 3 - ELEVATED | Trend: DETERIORATING (multiple decision-trigger events stacked in 72-hr window; T-4 to LBN CF expiry; HLTH-001 newly elevated to FLASH this cycle)

**OPERATIONAL BASIS:** PREP-CON 3 ELEVATED basis: (1) LBN CF Day 28 DETERIORATING (T-4 to ~17-MAY expiry) with Hezbollah SAM at IDF drone YESTERDAY 12-MAY + Hezbollah explosive drones at IDF troops s.Lebanon yesterday 12-MAY + 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 (T+1/T+2) (Aoun delegation, former Amb Karam lead); plus Houthi drone intercepted near Eilat 12-MAY (1st attack on Eilat since the Iran/Lebanon CFs took effect) signaling regional CF erosion beyond LBN axis; (2) Op Epic Fury Day 75 + Hormuz blockade Day 31 + 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 TODAY 13-MAY (T+0) + FCEB BOD due 27-MAY (T-14) + ~225,000 PAN-OS internet-facing per Shodan + Unit 42 attributes observed exploitation to CL-STA-1132 likely state-sponsored cluster + 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+2 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) HLTH-001 UPDATED FLASH this cycle (was NEW FLASH yesterday) - CDC HAN 00528 Andes hantavirus M/V Hondius (Dutch-flagged Antarctic-expedition cruise) / WHO+ECDC 13-MAY: 11 onboard cases (9 confirmed + 2 probable, CFR 38%) / 3 dead / CDC Level 3 emergency response / 18 Americans in US federal quarantine Day 2 (16 UNMC Nebraska + 2 Atlanta Emory high-containment) following 11-MAY repatriation flight to Offutt AFB / KORNFELD FIRST US CONFIRMED CASE TODAY 13-MAY at UNMC biocontainment unit (asymptomatic; was Hondius onboard medical responder) - principal tripwire triggered / 15 additional Americans monitored across 9 states (AZ/CA/GA/TX/VA/NJ/MD/KS/MN) / Separate IL Winnebago Co domestic North American strain case under CDC investigation (unconnected to Hondius) / French passenger reportedly on life support / confirmed person-to-person transmission onboard per WHO working hypothesis / no specific antiviral / federal posture flipped 48 hours (09-MAY CDC "no plans to quarantine" → 11-MAY active federal quarantine) / surveillance window through ~21-JUN per WHO Tedros; (8) market structural pressure (Brent ~\$107 Wed intraday (3-session rally +7.6% prior), IEA largest supply shock on record, ~14 mbpd disruption + ~4 mbpd record stockpile drawdown, Saudi production 35-year low, US crude inventory -4.3 M bbl, IMO ~20k seafarers ~2k vessels stranded); (9) NWR structural alerting gap (24 transmitters 15 OOS + 9 DEG across 14 states; today's primary MT slight-risk corridor clear of NWR outages; carryover IL Hillsboro inside yesterday's corridor; AK 8-transmitter Kodiak/Anchorage cluster; NM triple-gap cycle 7). Trend: DETERIORATING across all 9 vectors.

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

## SECTION 11 - ALERT & READINESS CONDITIONS PANEL

CONDITION	LEVEL	BASIS
DEFCON	EST-3	Active wartime posture; Op Epic Fury Day 75; 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 75 (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 75 sustained-enforcement posture
CYBERCON	EST-ELEVATED	CISA KEV CVE-2026-0300 PAN-OS RCE active exploitation, Wave 1 patch RELEASE TODAY 13-MAY today (T+0), FCEB BOD due 27-MAY (T-14), >5,800 PAN-OS VM-Series exposed, Unit 42 attributes CL-STA-1132 (CYB-001); CVE-2026-6973 Ivanti EPMM RCE KEV 07-MAY (CYB-002); CVE-2026-42208 BerriAI LiteLLM SQLi FCEB deadline PASSED 11-MAY (CYB-003); CYB-005 Linux Copy Fail FCEB T+2 to 15-MAY (POINTER); AA26-097A Day 36 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 24 transmitters (15 OOS + 9 DEG, 14 states)
TRANSCON	EST-3	EASA CZIB 2026-03-R9 EXPIRED yesterday 12-MAY; R10 issuance imminent; 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
WX-CON	EST-4	SPC 13-MAY SLIGHT RISK n-central Montana (northern Rockies/High Plains primary corridor); secondary MARGINAL RISK Ohio Valley/Central Appalachians; isolated TX Panhandle. Severe wind gusts 60-80 mph primary hazard. CORRIDOR FULLY SHIFTED from yesterday FL Peninsula + Midwest/GL + south-central Plains. NWR overlap: MT corridor clear (no OOS/DEG in slight-risk footprint); AK 8-transmitter Kodiak/Anchorage cluster persists; NM triple-gap cycle 7.
PREP-CON	3 - ELEVATED	See SEC 10

## SECTION 12 - ANALYTICAL INTEGRITY & SOURCE REGISTRY

### ANALYTICAL INTEGRITY STANDARD - APPLIED TO THIS PRODUCT

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### SOURCE REGISTRY SUMMARY - 13 MAY 2026

THREAT AREAS ASSESSED	STANDING REGISTRY	CITATIONS THIS CYCLE	TIER 1 PRIMARY	TIER 2 SECONDARY	TIER 3 SUPPLEMENTAL
<b>30</b>	<b>358</b> v1.8   28-APR-2026	<b>27/30</b> areas covered	<b>22</b>	<b>29</b>	<b>0</b>
<small>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/</small>					

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## SECTION 13 - CLOSING

### END OF REPORT

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