

# DAILY THREAT REPORT

Fortune Favors the Prepared | Intelligence Operations Division

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## ⚠️ PREPAREDNESS CONDITION 3 — ELEVATED ⚠️

Friday, 15 May 2026 | Op Epic Fury Day 77 | Hormuz Blockade Day 33 | LBN CF Day 30 (T-3 to expiry) | Trend: DETERIORATING

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

24 [NOAA Weather Radio](#) transmitters affected, 14 states (15 OOS + 9 DEG) | KS Ulysses WXXN81 OOS inside SW Kansas dry-microburst zone (Dodge City CWA) | AK 8-transmitter Kodiak/Anchorage cluster degraded | NM triple-gap continues (Roswell + Carlsbad + Artesia, cycle 7) | Full basis: PREP-CON Assessment (SEC 10)

## SPACE WEATHER CONDITION: SWX-CON 3 — MODERATE (G2 WATCH 15-MAY)

Kp 2-3 quiet/unsettled | greatest expected Kp 4.33 (below G-scale) | 10.7 cm flux 126 sfu | R1-R2 probability 15-30% as L=330 active regions rotate Earth-facing | HF favorable for emergency comms | [SWPC](#) G1-G2 watch issued for Friday 15-MAY (T+1) coronal hole HSS arrival | Full basis: Space Weather (SEC 7A)

Publication (UTC)	15 MAY 2026 / 1530 UTC
Reporting Period	14-MAY 1530 UTC through 15-MAY 1530 UTC
Analyst / Watch Officer	Fortune Favors the Prepared — OSINT Desk
FLASH Threshold	Risk Score $\geq$ 20 — 14 FLASH events this cycle
Version / SOP	1.0 — SOP v5.52   All v5.52 hooks 14-18 PASSED   Source linkify pass complete

## BOTTOM LINE UP FRONT

### BLUF — 15 MAY 2026

**STATUS:** PREP-CON 3 ELEVATED, Trend DETERIORATING. Op Epic Fury Day 77; US naval blockade of Iran Day 33; Lebanon ceasefire Day 30 (T-2 to weekend collapse window). SWX-CON elevated from 1 (QUIET) to 3 (MODERATE) on G2 watch firing today.

**URGENT:** Three concurrent cyber decision triggers: (1) CYB-007 [Cisco](#) SD-WAN ED 26-03 update 14-MAY with 3-day FCEB patch deadline Sunday 17-MAY (T-2); (2) CYB-005 Linux Copy Fail FCEB deadline REACHED TODAY (compliance unknown); (3) CYB-008 Fragnesia CVE-2026-46300 Linux LPE disclosed 14-MAY with distro patches available.

**LEBANON:** Ceasefire Day 30. Strikes continuing per 6-MAY airstrike on Majdelzoun village ([NPR/AFP](#)) and 10-MAY collapse-fear reporting ([CNN](#)). Formal collapse **likely** this weekend; IDF Beirut Dahieh strike-pattern resumption remains the dominant tripwire. US-mediated diplomatic channel (Ambassador Karam track) continuing.

**IRAN-HORMUZ:** Project Freedom paused 6-MAY citing “great progress.” [IRGC](#) announced “safe transit” with new procedures via Larak Island corridor. US naval blockade of Iranian ports remains in effect. Pakistan PM Sharif mediating US-Iran negotiations. Hormuz traffic ~5% of pre-war per Lloyd’s List / [Kpler](#); ~800 vessels in Gulf, many local-route only.

**RUSSIA-UKRAINE:** Kinetic envelope unchanged from yesterday. Pokrovsk axis ~70m/day pace. Strategic-tier Sarmat ICBM test signaling absorbed; US/[NATO](#) public posture response window 7-14 days from test date.

**HEALTH:** HLTH-001 Andes hantavirus surveillance Day 2 post first US-side case (Dr Kornfeld, [UNMC](#) biocontainment). Zero second-generation cases reported. Second-generation transmission **very unlikely** through 21-JUN surveillance window per KJ-4.

**SEVERE WX:** [SPC](#) ENHANCED RISK across much of Iowa today (Day 1) with supercells, large hail, damaging winds, tornado potential late afternoon into evening. SLIGHT extending OK/TX panhandles. SAT-SUN (Day 2-3): SLIGHT RISK central Plains and lower MO Valley with potential for a strong tornado and 3-inch hail. [NWR](#) transmitter outages widened to 26 sites across 14 states.

**SPACE WX:** [SWPC](#) G2 (Moderate) WATCH IN EFFECT for 15-MAY UTC-day. G1 (Minor) watches 16-17 MAY. Drivers: coronal hole high-speed stream (CH HSS) + co-rotating interaction region (CIR). M5 (R2 Moderate) radio blackout 10-MAY (1335 UTC) confirmed. HF radio fades likely at higher latitudes; aurora visible as far south as NY/WI/WA tonight.

**MARKETS:** Oil markets absorbed Hormuz partial reopening; Brent and WTI levels stable from yesterday's pricing. [AAA](#) pump ~\$4.51/gal. [USDA WASDE](#) wheat at 54-year-low (1.561 bb 2026-27) unchanged. Lebanon collapse remains primary upside risk to Brent for Monday open.

## PRACTITIONER POSTURE — 72-HOUR DECISION TRIGGERS

1. [Cisco](#) SD-WAN ED 26-03 update 14-MAY: 3-day FCEB patch deadline **SUNDAY 17-MAY (T-2; URGENT)**. CVE-2026-20182 active exploitation per [Cisco](#) Talos. See [\[CYB-007\]](#).
2. Lebanon ceasefire collapse window **THIS WEEKEND** — watch for IDF Beirut Dahieh strike-pattern resumption. See [\[GEO-CF-LBN\]](#).
3. [SWPC](#) G2 (Moderate) geomagnetic storm watch **IN EFFECT TODAY 15-MAY** — HF radio fades + GPS dips likely at higher latitudes; aurora visible to NY/WI/WA tonight. See Section 7A below for full [SWPC](#) posture.
4. [SPC](#) severe-weather corridor **15-17 MAY** — Enhanced today Iowa; Saturday-Sunday central Plains with strong-tornado potential. Pre-position household shelter plans IA/KS/OK/NE/MO. See [\[WX-001\]](#).
5. CYB-005 Linux Copy Fail FCEB deadline **REACHED TODAY (compliance unknown)** + new CYB-008 Frgnesia (CVE-2026-46300) LPE — chained-exploitation pivot window now open. See [\[CYB-005\]](#), [\[CYB-008\]](#).

## WHAT CHANGED SINCE YESTERDAY'S CYCLE

**+ ADDED:** NEW CYB-007 [Cisco](#) SD-WAN ED 26-03 update 14-MAY (CVE-2026-20182 active exploitation per [Cisco](#) Talos; 3-day FCEB patch deadline Sun 17-MAY). NEW CYB-008 Frgnesia CVE-2026-46300 Linux kernel XFRM ESP-in-TCP LPE disclosed 14-MAY (CVSS 7.8; distro patches available). [SWPC](#) G2 (Moderate) watch firing 15-MAY (CH HSS + CIR drivers) elevates SWX-CON from 1 to 3. 26 [NWR](#) transmitter sites down/degraded across 14 states (worsened from 24 yesterday). M5 (R2 Moderate) flare 10-MAY confirmed at 1335 UTC.

**~ CHANGED:** CYB-005 Linux Copy Fail FCEB deadline transitioned from "TOMORROW" to "REACHED TODAY" (compliance posture pending [CISA](#) telemetry). PAN-OS FCEB BOD clock advanced T-13 → T-12 to 27-MAY. Op Epic Fury Day 76 → 77; US naval blockade Day 32 → 33; Lebanon CF Day 29 → 30. Severe-wx corridor shifted from yesterday's central Kansas SLIGHT framing to today's Iowa ENHANCED; weekend strong-tornado signal now firmer for Saturday (was Day 4 Sunday signal). Hormuz framing shifted from "fully blockaded" to "partial reopening with new [IRGC](#) procedures" following 6-MAY Project Freedom pause.

**= NO MATERIAL CHANGE:** Op Epic Fury baseline; US naval blockade of Iranian ports posture; Andes Hondius cohort CFR; PAN-OS exposure surface; Russia kinetic tempo on Pokrovsk axis; markets pricing absorbed; Andes [UNMC](#) biocontainment posture.

## SECTION 1 — KEY JUDGMENTS

*Formal analytical conclusions per ICD 203. These are NOT operational decision triggers (see BLUF above) and NOT rolling decision tracker (see Critical Time Hack).*

**KJ-1.** I assess it is **likely** (55-80%) that the Lebanon ceasefire (LBN CF) formally collapses this weekend 16-17 MAY, because (a) Israeli airstrikes have continued through 6-MAY (Majdelzoun village strike), (b) per [CNN](#) reporting 10-MAY collapse fears are intensifying with deadly Israeli strikes and continued Hezbollah

attacks, and (c) the Lebanese Army has so far failed to enforce Hezbollah disarmament — an essential CF condition. This matters because formal collapse resumes the kinetic envelope paused 16-APR, with cascading effects on Hormuz oil pricing and US Eastern Mediterranean force posture. I would change my mind if a deescalation token (US-brokered extension announcement or unilateral IDF withdrawal pause) emerges before Saturday evening UTC.

**KJ-2.** I assess it is **almost certain** (95-99%) that the [Cisco](#) Catalyst SD-WAN CVE-2026-20182 FCEB patch deadline Sunday 17-MAY (T-2) passes with non-zero non-compliance among Federal Civilian Executive Branch agencies, because the 3-day FCEB window is among the shortest in the Emergency Directive 26-03 history and active exploitation has been observed by [Cisco](#) Talos against [Cisco](#) Catalyst SD-WAN Controller and Manager (former vSmart and vManage) via DTLs port 12346. This matters because non-compliant SD-WAN management infrastructure is reachable via the authentication bypass and enables broad network configuration manipulation across enterprise WAN fabrics.

**KJ-3.** I assess it is **likely** (55-80%) that chained exploitation pairing PAN-OS initial access (CVE-2026-0300) with Linux kernel privilege escalation (CVE-2026-31431 Linux Copy Fail and/or CVE-2026-46300 Fragnesia) is observed in the wild within 14-30 days from today, because (a) today is the Linux Copy Fail FCEB deadline (non-compliance almost certain per KJ-2 historical compliance rates), (b) Fragnesia disclosed yesterday is a separate XFRM ESP-in-TCP LPE with deterministic page-cache corruption primitive, and (c) the existing operator-level interest in CVE-2026-0300 ([Unit 42](#) CL-STA-1132 attribution) demonstrates motivated capability already targeting the chained surface. This matters because chained exploitation converts the limited targeted operation observed against PAN-OS into broad ransomware-affiliate pickup.

**KJ-4.** I assess it is **very unlikely** (5-20%) that the Andes hantavirus outbreak aboard M/V Hondius produces sustained US community transmission within the WHO-confirmed 4-42 day incubation window through ~21-JUN, because (a) the initial US case (Dr Kornfeld, [UNMC](#) biocontainment) remains asymptomatic on Day 2 of surveillance, (b) the federal posture remains active quarantine with no second-generation cases reported in 48 hours, and (c) confirmed onboard person-to-person transmission occurred in close-quarters cruise conditions not replicated in the US monitoring population. This matters because the public-health communication window remains operationally manageable; a single second-generation case at [UNMC](#) or [Emory](#) staff would invert this assessment.

## CRITICAL TIME HACK — 0-72H DECISION TRIGGERS

*Items ordered by (probability × impact). Each card is a standalone decision trigger per SOP §0.71. Bracketed IDs are clickable cross-references to the matching FLASH entry per §0.72.*

### [SWPC](#) G2 (Moderate) geomagnetic storm watch IN EFFECT.

[TODAY | 15-MAY (T+0) | SPACE WX]

**DECISION TRIGGER:** Coronal hole high-speed stream (CH HSS) + co-rotating interaction region (CIR) drivers. HF radio fades likely at higher latitudes. GPS positional dips of meters possible. Aurora visible to NY/WI/WA tonight. See [\[SWX-001\]](#).

### FCEB BOD deadline REACHED for Linux Copy Fail (CVE-2026-31431).

[TODAY | 15-MAY (T+0) | CYBER]

**DECISION TRIGGER:** Federal Civilian Executive Branch (FCEB) Binding Operational Directive (BOD) remediation deadline REACHED for CVE-2026-31431 Linux Copy Fail privilege escalation. Compliance unknown pending [CISA](#) telemetry; non-zero non-compliance **almost certain**. See [\[CYB-005\]](#).

### [SPC](#) ENHANCED RISK across much of Iowa today (Day 1).

[TODAY | 15-MAY (T+0) | SEVERE WX]

**DECISION TRIGGER:** Supercells, large hail, damaging winds, tornado potential late afternoon into evening. SLIGHT extending to OK/TX panhandles. [NWR](#) transmitter outages widen impact in 14 affected states. See [\[WX-001\]](#).

### [SPC](#) Day 2 SLIGHT RISK central Plains; strong tornado possible.

[SATURDAY | 16-MAY (T-1) | SEVERE WX]

**DECISION TRIGGER:** Severe storms with potential for a strong tornado, hailstones to 3 inches, and damaging wind across the central Plains and lower-mid Missouri Valley. Pre-position household shelter plans IA/KS/OK/NE/MO. See [\[WX-001\]](#).

### [Cisco](#) SD-WAN ED 26-03 FCEB patch deadline (CVE-2026-20182).

[SUNDAY | 17-MAY (T-2) | CYBER]

**DECISION TRIGGER:** [Cisco](#) SD-WAN Emergency Directive 26-03 (update 14-MAY) FCEB patch deadline. CVE-2026-20182 critical authentication bypass under active exploitation per [Cisco](#) Talos. Non-compliance **almost certain** per KJ-2. See [\[CYB-007\]](#).

### Lebanon ceasefire weekend collapse window.

[SUNDAY | 17-MAY (T-2) | LEBANON]

**DECISION TRIGGER:** Formal collapse **likely** per KJ-1. IDF Beirut Dahieh strike pattern resumption is the trip-wire (per observed 06-MAY Majdelzoun pattern). See [\[GEO-CF-LBN\]](#).

## SECTION 3 — FLASH EVENTS (Score ≥ 20)

14 FLASH events this cycle. Entries ordered by risk score descending. Score color band: red ≥ 25, orange 20-24, gold = NEW THIS CYCLE.

### PAN-OS CVE-2026-0300: Wave 1 shipped; FCEB BOD clock T-12 to 27-MAY.

[CYB-001 | FLASH | UPDATED | Score 25]

#### DELTA SINCE YESTERDAY

~ **CHANGED:** FCEB BOD remediation clock advanced to T-12 to 27-MAY (was T-13 yesterday). PoC reverse-engineering window now T+2 from patch ship date; mass-exploitation pivot risk increasing.

= **NO MATERIAL CHANGE:** [Unit 42](#) CL-STA-1132 attribution; ~225,000 internet-facing instances via [Shadowserver](#); PSIRT Wave 2 patch ETA ~28-MAY.

#### WHY THIS CYCLE

[CISA](#) Known Exploited Vulnerabilities (KEV) catalog entry for CVE-2026-0300 PAN-OS Out-of-Bounds Write in the User-ID Authentication Portal under active limited exploitation; Wave 1 patch shipped from [Palo Alto Networks](#) 13-MAY (Wed, T-2); Federal Civilian Executive Branch (FCEB) Binding Operational Directive (BOD) remediation deadline 27-MAY (T-12). Approximately 225,000 PAN-OS instances internet-facing per [Shodan](#) via [Shadowserver](#).

### SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	All FCEB agencies running affected PAN-OS versions plus broader Defense Industrial Base (DIB), financial services, regulated healthcare, and critical-infrastructure exposure; over 5,800 PAN-OS VM-Series instances internet-exposed per <a href="#">Shadowserver</a> ; <a href="#">Wiz</a> impact data: ~7% of enterprise environments have publicly exposed PAN-OS.
<b>ACTIVITY</b>	<a href="#">CISA KEV</a> add 06-MAY based on limited targeted exploitation observed in the wild. <a href="#">Palo Alto PSIRT</a> confirms exploitation against internet-exposed User-ID Authentication Portal. <a href="#">Unit 42</a> attributes observed exploitation to CL-STA-1132 (likely state-sponsored cluster) deploying open-source tunneling tools and Active Directory enumeration following initial compromise.
<b>LOCATION</b>	PA-Series hardware and VM-Series virtual firewalls running PAN-OS 12.1 / 11.2 / 11.1 / 10.2 (specific releases). Cloud Next-Generation Firewall (NGFW), Prisma Access, and Panorama NOT affected per vendor advisory.
<b>TIME</b>	KEV add 06-MAY; Wave 1 patch shipped 13-MAY (T-2); FCEB BOD 22-01 remediation deadline 27-MAY (T-12); Wave 2 patch expected ~28-MAY.
<b>EQUIPMENT</b>	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.
<b>UNIT</b>	<a href="#">CISA</a> (KEV catalog owner); <a href="#">Palo Alto Networks PSIRT</a> (vendor); <a href="#">Shadowserver</a> (exposure scan); <a href="#">Wiz</a> (impact analysis); <a href="#">Unit 42</a> (threat-actor attribution).

### DOWNSTREAM — CASCADE IMPLICATION

Mass-exploitation pivot is **likely** within 5-10 days of patch shipment as proof-of-concept (PoC) reverse engineering converts the limited targeted operation into broad ransomware-operator pickup; ~T+2 to T+5 of that window now elapsed. Non-FCEB exposure (Defense Industrial Base, financial, healthcare) lags FCEB compliance by 14-21 days historically; cascade visible in [Shadowserver](#) scan-rate inflection ~T+7 to T+14.

### ANALYST ASSESSMENT

I assess the pre-patch mitigation window 06-13 MAY is now closed. Organizations that did not implement the User-ID Authentication Portal restriction during the gap should treat already-exposed devices as **likely** compromised pending forensic review. I judge FCEB compliance probability at 27-MAY deadline is **roughly even chance** (45-55%) of full agency compliance based on historical FCEB BOD telemetry (typical compliance rate at deadline is 60-70%). I would change my mind on compliance probability if [CISA](#) issues a post-deadline supplemental directive (would signal underperformance) or if [Palo Alto PSIRT](#) publishes a Wave 2 patch on or before 22-MAY (would signal vendor acceleration).

### ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (very unlikely):** [Unit 42](#) CL-STA-1132 attribution is incorrect and the observed exploitation is a non-state ransomware affiliate testing capability ahead of campaign launch.

<b>WHAT WOULD SUPPORT</b>	Open-source ransomware-affiliate telemetry showing identical exploitation TTPs; threat-intel community attribution to commodity actor.
<b>WHAT WOULD DISCONFIRM</b>	Continued state-typical post-exploitation tradecraft (Active Directory enumeration disciplined careful tunneling-tool selection) consistent with CL-STA-1132 baseline.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

**Alt-Hyp 2 (very unlikely):** Wave 1 patch contains regression that introduces a second exploitable code path.

<b>WHAT WOULD SUPPORT</b>	<a href="#">Palo Alto PSIRT</a> post-patch advisory; community PoC disclosure showing a second exploitable code path; secondary CVE assignment.
<b>WHAT WOULD DISCONFIRM</b>	Clean patch telemetry from FCEB attestation; quiet community testing window through 21 MAY.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS — WHAT I CANNOT SEE

- Cannot independently confirm Wave 1 patch deployment compliance among FCEB agencies without BOD attestation telemetry (held by [CISA](#)).
- Cannot independently confirm [Unit 42](#) CL-STA-1132 cluster attribution without access to primary forensic dataset.
- [Shadowserver](#) scan visibility is from an internet-facing perspective only; internal-network PAN-OS exposure is not measured.

### SOURCES

[CISA KEV catalog](#) (primary; KEV add 06-MAY) | [Palo Alto Networks PSIRT advisory](#) (vendor; Wave 1 patch release notes 13-MAY) | [Unit 42](#) (threat-actor attribution) | [Shadowserver](#) (exposure scan) | [Wiz](#) (impact analysis) | [Shodan](#) (internet-facing count).

## Linux Copy Fail CVE-2026-31431: FCEB deadline REACHED TODAY; compliance unknown.

[CYB-005 | FLASH | UPDATED | Score 24]

### DELTA SINCE YESTERDAY

~ **CHANGED:** FCEB BOD remediation deadline transitioned from "TOMORROW 15-MAY (T+1)" to "REACHED TODAY 15-MAY (T+0)"; Compliance posture pending [CISA](#) telemetry; non-zero non-compliance almost certain per KJ-2 baseline.

+ **ADDED:** Now compounded by NEW CYB-008 Fragnesia (CVE-2026-46300) disclosed 14-MAY — second concurrent Linux kernel LPE expanding the privilege-escalation toolkit available to operators chaining with CVE-2026-0300 initial access.

### WHY THIS CYCLE

CVE-2026-31431 Linux Copy Fail is a local privilege-escalation (LPE) vulnerability in the Linux kernel's copy\_from\_user/copy\_to\_user fast-path. Added to [CISA](#) Known Exploited Vulnerabilities (KEV) catalog 12-MAY with FCEB Binding Operational Directive (BOD) remediation deadline TODAY 15-MAY (T+0). The 3-day FCEB compliance window is the shortest in the catalog; non-compliance non-zero per KJ-2.

### SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	All FCEB agencies running affected Linux kernel versions; broader Linux-based critical infrastructure (cloud, container, ICS gateway) exposure parallel.
<b>ACTIVITY</b>	Active local exploitation reported by <a href="#">AA26-097A</a> advisory; technique is post-initial-access privilege escalation suitable for chaining with web RCE or phishing footholds. Patch backports issued by major distros (RHEL, Ubuntu, Debian, SUSE).
<b>LOCATION</b>	Linux kernels 5.10.x through 6.8.x in the affected range; specific minor versions per distro advisory.

<b>TIME</b>	KEV add 12-MAY; FCEB BOD remediation deadline 15-MAY TODAY (T+0); 3-day compliance window — shortest in KEV catalog.
<b>EQUIPMENT</b>	CVSS 7.8 (local); CWE-787 Out-of-Bounds Write in copy_from_user fast path; requires unprivileged local access (SSH, container escape, or chained RCE).
<b>UNIT</b>	<a href="#">CISA</a> (KEV catalog); <a href="#">AA26-097A</a> advisory authoring agencies ( <a href="#">CISA</a> + <a href="#">NSA</a> + <a href="#">FBI</a> joint).

### DOWNSTREAM — CASCADE IMPLICATION

FCEB non-compliance non-zero given 3-day window. [CISA](#) **likely** issues supplemental directive within 7-14 days post-deadline. Ransomware operators **likely** add Linux Copy Fail (now alongside Fragnesia) to standard post-exploitation toolkit within 14-21 days. Chained exploitation pivot risk against the PAN-OS surface elevated per KJ-3.

### ANALYST ASSESSMENT

I judge this is the highest-friction cyber decision-trigger of the week. The 3-day FCEB window is operationally infeasible for most agencies; I expect [CISA](#) itself acknowledges this with a post-deadline statement within the next 7 days. I assess that chained exploitation (CVE-2026-0300 PAN-OS RCE for initial access + CVE-2026-31431 Linux Copy Fail or CVE-2026-46300 Fragnesia for privilege escalation) is **likely** observed in the wild within 14-30 days. I would change my mind on the chaining likelihood if Palo Alto Wave 2 patch ships before 22-MAY (would reduce CVE-2026-0300 dwell time).

### ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (very unlikely):** KEV addition is a [CISA](#) error and the vulnerability is not under active exploitation.

<b>WHAT WOULD SUPPORT</b>	<a href="#">CISA KEV catalog</a> removal of CVE-2026-31431 within 7 days; <a href="#">AA26-097A</a> authoring-agency rescission statement.
<b>WHAT WOULD DISCONFIRM</b>	Continued KEV listing past 7 days; <a href="#">CISA</a> supplemental directive reinforcing the BOD.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS — WHAT I CANNOT SEE

- [AA26-097A](#) advisory does not name the threat actor; cannot attribute to a specific cluster.
- Cannot measure how many FCEB agencies have already patched without BOD telemetry.
- Container-escape exploitation paths are not visible in standard NDR telemetry; underreporting likely.

### SOURCES

[CISA KEV catalog](#) | [AA26-097A](#) advisory ([CISA](#) + [NSA](#) + [FBI](#) joint) | Linux kernel CVE database.

## CISCO SD-WAN: ED 26-03 update 14-MAY; patch deadline T-2 (Sun 17-MAY).

[CYB-007 | FLASH | NEW | Score 26]

### DELTA SINCE YESTERDAY

+ **ADDED:** NEW THIS CYCLE: [CISA](#) Emergency Directive (ED) 26-03 update issued 14-MAY directing FCEB agencies to patch CVE-2026-20182 (critical authentication bypass in [Cisco](#) Catalyst SD-WAN Controller and Manager) within 3 days. [Cisco](#) Talos confirms active exploitation. All five CVEs in this [Cisco](#) SD-WAN campaign (CVE-2026-20122, -20127, -20128, -20133, -20182 + CVE-2022-20775) now in KEV catalog.

### WHY THIS CYCLE

Per [Cisco Talos](#) and [Tenable](#), CVE-2026-20182 is a critical authentication bypass via DTLS port 12346 affecting [Cisco](#) Catalyst SD-WAN Controller (formerly SD-WAN vSmart) and [Cisco](#) Catalyst SD-WAN Manager (formerly SD-WAN vManage). Active exploitation observed since May 2026. [CISA Emergency Directive 26-03](#) updated 14-MAY adds CVE-2026-20182 to the existing [Cisco](#) SD-WAN ED with a 3-day patch deadline (Sunday 17-MAY).

### SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	All FCEB agencies operating <a href="#">Cisco</a> Catalyst SD-WAN Controller or Manager appliances (on-premises, cloud, or hybrid). Non-FCEB <a href="#">Cisco</a> SD-WAN install base much larger — enterprise, telco, MSP.
<b>ACTIVITY</b>	Active exploitation per <a href="#">Cisco</a> Talos blog. Indicators of compromise include unexplained “Accepted publickey for vmanage-admin” entries in /var/log/auth.log from unknown source IPs and anomalous control connections (state:up with challenge-ack:0). Successful exploitation grants administrative access enabling network configuration manipulation across the SD-WAN fabric.
<b>LOCATION</b>	<a href="#">Cisco</a> Catalyst SD-WAN Controller (formerly vSmart) and Manager (formerly vManage). Management plane internet-exposed by misconfiguration; control plane authenticated via DTLS port 12346.
<b>TIME</b>	<a href="#">Cisco</a> advisory updated April 2026 confirming in-wild exploitation of multiple SD-WAN CVEs. ED 26-03 update issued 14-MAY (Thu); 3-day FCEB patch deadline Sunday 17-MAY (T-2).
<b>EQUIPMENT</b>	CVE-2026-20182 critical authentication bypass (CVSS not yet publicly assigned; severity per Talos and <a href="#">CISA</a> judgment is critical). Companion CVE-2026-20127 (CVSS 10) auth bypass and CVE-2022-20775 path traversal also in scope of ED 26-03.
<b>UNIT</b>	<a href="#">CISA</a> (ED 26-03); <a href="#">Cisco Talos</a> (exploitation telemetry); <a href="#">Cisco PSIRT</a> (vendor advisory).

### DOWNSTREAM — CASCADE IMPLICATION

FCEB non-compliance at the 3-day deadline **almost certain** per KJ-2 (95-99%). Lateral-movement risk into managed enterprise WAN infrastructure **likely** within 14-21 days. Pair with PAN-OS initial access and Linux LPE for complete chained-exploitation toolkit per KJ-3.

### ANALYST ASSESSMENT

I assess this is the highest-leverage cyber decision-trigger this weekend. The combination of (a) active exploitation, (b) critical-severity auth bypass on a management-plane appliance, and (c) a 3-day FCEB deadline establishes an exceptionally narrow compliance window. I judge ransomware-affiliate pickup **likely** within 14-30 days. I would change my mind on rapid pickup if [Cisco](#) PSIRT issues a hardening guidance update within 48 hours that materially raises the bar for exploitation (e.g. mandatory pairwise-key configuration enforcement).

### ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (very unlikely):** [Cisco](#) Talos exploitation telemetry is from a single isolated red-team test and the vulnerability is not under broad active exploitation.

<b>WHAT WOULD SUPPORT</b>	<a href="#">Cisco</a> Talos rescission within 7 days; <a href="#">CISA</a> ED 26-03 withdrawal.
<b>WHAT WOULD DISCONFIRM</b>	Continued <a href="#">Cisco</a> Talos blog updates; additional exploited-organization disclosures.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS — WHAT I CANNOT SEE

- Cannot independently measure the size of the [Cisco](#) SD-WAN install base internet-exposed.
- Cannot validate [Cisco](#) Talos exploitation telemetry without primary forensic dataset.

- Lateral-movement post-exploitation impact assessment depends on victim-side disclosure which lags 30-90 days.

## SOURCES

[CISA Emergency Directive 26-03](#) | [Cisco Talos](#) | [Tenable Research Special Operations](#) | [CISA KEV catalog](#).

## NEW Fragnesia (CVE-2026-46300) Linux kernel LPE; distro patches available.

[CYB-008 | FLASH | NEW | Score 22]

### DELTA SINCE YESTERDAY

+ **ADDED:** NEW THIS CYCLE: CVE-2026-46300 "Fragnesia"; Linux kernel XFRM ESP-in-TCP LPE disclosed 14-MAY by [Wiz](#) and V12 Security (William Bowling, V12). CVSS 7.8. Separate bug from Dirty Frag (CVE-2026-31431) with its own patch. Distribution security advisories shipped from AlmaLinux, Amazon Linux, CloudLinux, Debian, Gentoo, Red Hat Enterprise Linux, SUSE, Ubuntu.

### WHY THIS CYCLE

Per [Wiz](#) and [The Hacker News](#) 14-MAY disclosure: CVE-2026-46300 is a Linux kernel privilege-escalation rooted in the XFRM ESP-in-TCP subsystem. The vulnerability "allows unprivileged local attackers to modify read-only file contents in the kernel page cache and achieve root privileges through a deterministic page-cache corruption primitive" ([Wiz](#) characterization). V12 Security notes this is a "separate bug in the ESP/XFRM from Dirty Frag" with its own patch. Distribution advisories available; compounds the privilege-escalation surface alongside CVE-2026-31431 Linux Copy Fail.

### SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	All Linux systems running affected kernel versions where XFRM ESP-in-TCP is enabled. Broader Linux critical-infrastructure exposure (cloud, container hosts, network appliances parallel).
<b>ACTIVITY</b>	Public disclosure with technical detail 14-MAY; distro patches available same day. No active exploitation reported as of cycle close. Primitive (page-cache corruption for LPE) is deterministic and suitable for incorporation into existing privilege-escalation toolkits.
<b>LOCATION</b>	Linux kernel XFRM ESP-in-TCP subsystem; specific affected kernel versions per distro advisory.
<b>TIME</b>	Disclosure 14-MAY; distro patches shipped 14-MAY. No <a href="#">CISA KEV</a> addition yet (cycle close).
<b>EQUIPMENT</b>	CVSS 7.8 (local). Page-cache corruption LPE primitive. Local unprivileged access required.
<b>UNIT</b>	<a href="#">Wiz</a> (disclosure coordinator); V12 Security (researcher William Bowling); affected Linux distributions.

### DOWNSTREAM — CASCADE IMPLICATION

[CISA KEV](#) addition **likely** within 7-14 days pending exploitation telemetry. Ransomware-affiliate pickup **likely** within 14-30 days from disclosure. Compounds CVE-2026-31431 Linux Copy Fail in chained-exploitation toolkit per KJ-3.

### ANALYST ASSESSMENT

I assess this is the second-tier cyber decision-trigger of the cycle behind CYB-007 [Cisco](#) SD-WAN. The page-cache corruption primitive is the kind of deterministic LPE that gets weaponized rapidly once a public PoC ships. Distro patch availability is strong; the friction is patch deployment lag. I would change my mind on tier if [CISA](#) KEV-adds this within 72 hours (would elevate to URGENT) or if [Wiz](#) publishes evidence of active exploitation in the wild.

## ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (very unlikely):** Distro patches contain regression that introduces a second exploitable code path.

<b>WHAT WOULD SUPPORT</b>	Distro security advisory updates within 7 days correcting the patch; secondary CVE assignment.
<b>WHAT WOULD DISCONFIRM</b>	Clean post-patch telemetry through 21-MAY.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS — WHAT I CANNOT SEE

- No exploitation telemetry yet (disclosure +1 day at cycle close).
- Cannot measure patch deployment compliance across non-FCEB Linux infrastructure.
- V12 Security primary research disclosure not yet fully public; technical detail summary via [Wiz](#) / Hacker News.

## SOURCES

[Wiz](#) | [The Hacker News](#) | distro security bulletins (AlmaLinux, Amazon Linux, CloudLinux, Debian, Gentoo, RHEL, SUSE, Ubuntu).

## Lebanon CF Day 30: formal collapse likely this weekend.

[GEO-CF-LBN | FLASH | UPDATED | Score 24]

### DELTA SINCE YESTERDAY

~ **CHANGED:** Lebanon CF now at Day 30 (was Day 29). Weekend collapse window 16-17 MAY active. Per [CNN](#) reporting 10-MAY: collapse fears intensifying with deadly Israeli strikes and continued Hezbollah attacks.

= **NO MATERIAL CHANGE:** Strike pattern stable: 6-MAY Israeli airstrike on Majdelzoun village ([NPR/AFP](#)) remains anchor reference; IDF Beirut Dahieh strike-pattern resumption remains dominant collapse tripwire.

### WHY THIS CYCLE

Lebanon ceasefire is in Day 30 of the period that began 16-APR with a US-announced 10-day cessation (per [US Department of State](#)). Per [NPR](#) 6-MAY: Israeli airstrike targeted Majdelzoun village in southern Lebanon. Per [CNN](#) 10-MAY: collapse fears intensifying. Per [Security Council Report](#) May 2026 Monthly Forecast: Lebanese government has banned Hezbollah military activities and pursued direct diplomatic engagement; Hezbollah rejects.

### SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	All Eastern Mediterranean force posture affected; Lebanese Armed Forces (LAF) plus Hezbollah plus Israel Defense Forces (IDF) plus UNIFIL.
<b>ACTIVITY</b>	Israeli airstrikes continuing through 6-MAY (Majdelzoun village). Hezbollah cross-border activity continuing despite Lebanese government ban. Lebanese Army has so far failed to enforce Hezbollah disarmament per published reporting.
<b>LOCATION</b>	Southern Lebanon (Bint Jbeil, Marjayoun, Nabatieh districts); Beirut Dahieh remains the political-signal target. Majdelzoun village (6-MAY strike) anchors the current targeting pattern.
<b>TIME</b>	CF Day 30 today; weekend collapse window 16-17 MAY.

<b>EQUIPMENT</b>	IDF: precision air strikes. Hezbollah: cross-border kinetic per Lebanese government characterization.
<b>UNIT</b>	US-mediated diplomatic channel (Ambassador Karam track) active. Russia's public position focuses criticism on Israel and broader regional dynamics rather than Hezbollah.

### DOWNSTREAM — CASCADE IMPLICATION

If LBN CF formally collapses this weekend, IDF Beirut Dahieh targeting resumption **likely** within 48 hours per observed 06-MAY pattern. Lebanon-Israel kinetic resumption **likely** draws regional CF erosion; Hormuz oil pricing tail **likely** adds \$3-5/bbl on collapse-day Brent close.

### ANALYST ASSESSMENT

I assess (per KJ-1) that formal collapse this weekend is **likely** (55-80%). The combination of (a) continued IDF strike tempo through 6-MAY, (b) Lebanese Army enforcement failure, and (c) Hezbollah's rejection of direct engagement leaves no observable deescalation token. I would change my mind if a US-brokered extension is announced before Saturday evening UTC, or if a unilateral IDF withdrawal pause is announced.

### ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (roughly even chance):** A short-duration CF extension (7-14 days) is negotiated as a face-saving move via the Ambassador Karam diplomatic track ahead of weekend expiry.

<b>WHAT WOULD SUPPORT</b>	<a href="#">US State Department</a> briefing of constructive progress; Lebanese delegation public statement of CF mechanics; absence of IDF Beirut Dahieh targeting Sunday-Monday.
<b>WHAT WOULD DISCONFIRM</b>	IDF Beirut Dahieh strike Sunday or Monday; lapse of CF without joint US statement.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

**Alt-Hyp 2 (unlikely):** Hezbollah unilaterally de-escalates to avoid being blamed for collapse.

<b>WHAT WOULD SUPPORT</b>	Hezbollah public statement reaffirming CF terms; cross-border tempo drops to zero for 72 hours.
<b>WHAT WOULD DISCONFIRM</b>	Continued cross-border kinetic; Hezbollah public statement reaffirming kinetic posture.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS — WHAT I CANNOT SEE

- Ambassador Karam diplomatic-track readouts not directly observable; reporting via [Reuters/CNN](#) is filtered.
- IDF strike tempo data lags 6-12 hours behind real time.
- Hezbollah internal decision-making process is not observable.

### SOURCES

[NPR](#) | [CNN](#) | [Security Council Report](#) | [US Department of State](#).

**US-Iran negotiations active via Pakistan mediation; blockade Day 33.**

[GEO-001 | FLASH | UPDATED | Score 21]

**DELTA SINCE YESTERDAY**

~ **CHANGED:** Track framing shifted from "14-point MoU stalemate" to "Pakistan-mediated active negotiations." US naval blockade of Iran now Day 33 (was Day 32). Op Epic Fury Day 77 (was Day 76).

= **NO MATERIAL CHANGE:** Senate 52 / House 177 letter (14-MAY) rejecting any enrichment-allowing deal remains the domestic political floor. [CIA](#) leak: Iran can withstand blockade ~4 more months.

### WHY THIS CYCLE

US-Iran 14-point Memorandum-of-Understanding (MoU) framework awaiting Iran sign-off past T+9. Trump rejected Iran's counter-proposal Sunday-Monday 10-11 MAY as "totally unacceptable" per [Axios](#) (Ravid). 52 senators and 177 House members 14-MAY sent President Trump a letter rejecting any deal that allows Iran to continue uranium enrichment, setting a domestic political floor on any settlement. [CIA](#) leaked assessment: Iran can withstand the Hormuz blockade for approximately four more months.

### SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	US administration plus Iranian Supreme National Security Council plus US Congress plus regional intermediaries (Qatar, Oman, Russia).
<b>ACTIVITY</b>	Trump rejected counter-proposal 10-11 MAY; Ghalibaf insists 14-pt only path forward; Pezeshkian first reported in-person meeting with Mojtaba Khamenei; Witkoff/Rubio met Qatar PM in Miami 08-09 MAY; <a href="#">CIA</a> leak on Iran blockade endurance hit <a href="#">CNN</a> 12-MAY; Senate 52 / House 177 letter delivered 14-MAY.
<b>LOCATION</b>	Negotiation venues: Doha (proposed), Geneva (alternate), Islamabad (technical track per leaked framework).
<b>TIME</b>	Iran response window past T+9 with no sign-off; Trump-Xi summit Day 2 closure Friday 1 MAY is the next exogenous pressure point on the track.
<b>EQUIPMENT</b>	Diplomatic instruments only; no kinetic delivery directly on this track (separate from Op Epic Fury / Hormuz blockade tracks).
<b>UNIT</b>	US: Witkoff, Rubio, Kushner. Iran: Pezeshkian, Ghalibaf, Mojtaba Khamenei. Mediators: Qatar PM Sheikh Mohammed; Russian Foreign Ministry; Omani back-channel.

### ANALYST ASSESSMENT

I assess the Senate 52 / House 177 letter materially narrows the deal space. I judge it is **unlikely** (20-45%) that the 14-point MoU is signed in its current form because the enrichment provision is the central Iranian red-line and the domestic US opposition has now codified rejection. I would change my mind on signing probability if Pezeshkian publicly signals movement on enrichment before 17-MAY.

### ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (roughly even chance):** A modified framework with shorter-duration enrichment freeze (90-180 days) is acceptable to both sides as a face-saving interim.

<b>WHAT WOULD SUPPORT</b>	US administration phased-approach briefing; Witkoff or Bessent post-summit press readout language; Iran semi-official press signaling acceptance.
<b>WHAT WOULD DISCONFIRM</b>	Continued zero-enrichment public framing from US administration; Iran formal rejection without counter-proposal.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

**Alt-Hyp 2 (unlikely):** Iran walks away post-summit and resumes overt enrichment publicly.

<b>WHAT WOULD SUPPORT</b>	<a href="#">IAEA</a> monitoring activity statement; Iranian Foreign Ministry communique announcing resumption; Natanz or Fordow centrifuge cascade activity per <a href="#">IAEA</a> cameras.
<b>WHAT WOULD DISCONFIRM</b>	Iran continues to hold MoU framework as live; backchannel signals through Qatar or Oman of continued engagement.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

## COLLECTION GAPS — WHAT I CANNOT SEE

- Cannot see Mojtaba Khamenei's positions directly; Pezeshkian meeting readout is via Iranian state media.
- Cannot independently verify [CIA](#) &quot;4 more months&quot; endurance assessment.
- Senate-House letter language not publicly released; specific demands unclear.

## SOURCES

[Axios](#) (Ravid) | [CNN](#) (CIA leak) | [NPR](#) | [Washington Post](#) | [TIME](#) | [Tasnim](#) (Iranian state, Ghalibaf statement) | [Press TV](#) (Iranian state).

## Andes hantavirus surveillance Day 2 post first US-side case.

[HLTH-001 | FLASH | UPDATED | Score 22]

### DELTA SINCE YESTERDAY

~ **CHANGED:** Surveillance posture: Day 2 post first US-side case confirmation (Kornfeld at [UNMC](#)). Zero second-generation cases reported. KJ-4 (very unlikely sustained US community transmission) intact.

= **NO MATERIAL CHANGE:** CFR ~38% on Hondius cohort; 18 Americans in federal quarantine; [CDC](#) Level 3; 4-42 day incubation window active through ~21-JUN.

### WHY THIS CYCLE

[CDC](#) Health Alert Network notice 00528 was issued 08-MAY for an Andes hantavirus outbreak aboard M/V Hondius (Dutch-flagged Antarctic-expedition cruise that departed Argentina 1 April). 11 onboard cases (9 confirmed + 2 probable) with case fatality rate ~38% (3 dead) per [WHO](#) and [ECDC](#). 18 Americans were repatriated 11-MAY on a federal medical flight to Offutt Air Force Base, Nebraska, and are in federal quarantine at University of Nebraska Medical Center ([UNMC](#)) (16) and [Emory University Hospital](#) Atlanta (2). Dr Kornfeld confirmed positive 13-MAY at [UNMC](#) biocontainment unit (asymptomatic; was Hondius onboard medical responder). The principal escalation tripwire has fired.

### SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	11 onboard cases (9 confirmed + 2 probable); 3 dead; 18 Americans in US federal quarantine Day 3 today; 15 additional Americans monitored across 9 states (AZ/CA/GA/TX/VA/NJ/MD/KS/MN); 1 US confirmed case (Kornfeld); 1 separate Illinois Winnebago County domestic North American hantavirus strain case under <a href="#">CDC</a> investigation (unconnected to Hondius); 1 French passenger on life support.
<b>ACTIVITY</b>	Confirmed onboard person-to-person transmission per <a href="#">WHO</a> working hypothesis (operationally significant — Andes is normally a rodent-borne virus, ~2-5% historical person-to-person rate). Phylogenetic analysis per <a href="#">Pathoplexus</a> / <a href="#">virological.org</a> indicates a single zoonotic spill.
<b>LOCATION</b>	Origin: Antarctic expedition cruise route ex-Ushuaia, Argentina (departed 1-APR). US containment: <a href="#">UNMC</a> National Quarantine Unit, Omaha NE; <a href="#">Emory University Hospital</a> high containment, Atlanta GA. EU containment: per <a href="#">ECDC</a> tracking.
<b>TIME</b>	<a href="#">CDC HAN</a> 00528 issued 08-MAY; <a href="#">WHO</a> DON600 08-MAY; <a href="#">ECDC</a> 14-MAY surveillance update; federal repatriation 11-MAY; Kornfeld first US case 13-MAY (T-1); 4-42 day WHO confirmed incubation places US surveillance window through ~21-JUN per <a href="#">WHO</a> Tedros.
<b>EQUIPMENT</b>	Andes orthohantavirus; no specific antiviral; supportive care plus early ECMO raises survival to ~80% on severe presentation. CLIA assays via <a href="#">CDC</a> , state labs, <a href="#">Quest Diagnostics</a> . <a href="#">CDC</a> EOC 770-488-7100.

**UNIT**

[CDC](#) (Level 3 emergency response, HAN 00528); [WHO](#) (DON600 08-MAY); [ECDC](#) (surveillance update 14-MAY); University of Nebraska Medical Center (biocontainment); [Emory University Hospital](#) (high-containment).

**DOWNSTREAM — CASCADE IMPLICATION**

Second-generation transmission to [UNMC](#) or [Emory](#) staff would invert KJ-4 from **very unlikely** to **roughly even chance**. [CDC](#) Level 3 → Level 2 elevation **likely** if second case observed; [State Department](#) travel-advisory elevation on Antarctic expedition cruise travel **likely** within 7-14 days regardless.

**ANALYST ASSESSMENT**

I assess the US public-health response posture (Level 3, active quarantine, biocontainment for the first case) is appropriately calibrated. I judge the 4-42 day surveillance window through 21-JUN is the operationally significant horizon. I would change my mind on KJ-4 (**very unlikely** sustained community transmission) if any second-generation case is observed among [UNMC/Emory](#) staff or close contacts of the 15 additional monitored Americans.

**ALTERNATIVE HYPOTHESES**

**Alt-Hyp 1 (very unlikely):** The Hondius cluster is not Andes orthohantavirus but a related orthohantavirus species with different transmissibility characteristics.

<b>WHAT WOULD SUPPORT</b>	<a href="#">WHO</a> phylogenetic update reassigning species; <a href="#">Pathoplexus</a> or <a href="#">virological.org</a> consensus update; <a href="#">CDC HAN</a> supplemental.
<b>WHAT WOULD DISCONFIRM</b>	<a href="#">WHO</a> confirms Andes species; <a href="#">ECDC</a> consensus holds.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

**COLLECTION GAPS — WHAT I CANNOT SEE**

- Cannot observe [UNMC/Emory](#) staff health status directly; reporting lag 24-48 hours.
- French passenger outcome (life support 13-MAY) is not yet confirmed.
- Illinois Winnebago County separate domestic strain case investigation status not public.

**SOURCES**

[CDC](#) (HAN 00528 / EOC) | [WHO](#) (DON600) | [ECDC](#) (surveillance update) | [Pathoplexus](#) / [virological.org](#) (phylogenetic analysis).

**Brent ~\$107 / WTI ~\$102; [WASDE](#) wheat limit-up; Hormuz partial-reopening absorbed.**

[FIN-001 | FLASH | UPDATED | Score 20]

**DELTA SINCE YESTERDAY**

~ **CHANGED:** Hormuz partial-reopening framing absorbed by oil markets; Brent and WTI levels stable from yesterday's pricing. Lebanon collapse remains the dominant upside risk to Brent for Monday open.

= **NO MATERIAL CHANGE:** [AAA](#) pump \$4.511/gal; [WASDE](#) 12-MAY wheat (54-year-low US crop 1.561 bb) unchanged from Tuesday.

**WHY THIS CYCLE**

Brent crude ~\$107.05/bbl (-0.67% from Tuesday close \$107.77; 3-session rally +7.6% prior) per [Trading Economics](#). WTI ~\$102/bbl. [US Department of Agriculture \(USDA\)](#) World Agricultural Supply and Demand Estimates ([WASDE](#)) published 12-MAY (Tue) showed bullish wheat: 1.561 billion bushels US 2026-27 production — smallest crop in 54 years; KC and Chicago July wheat closed limit-up +45 cents. Corn neutral-bearish (15.995 bb, ending stocks 1.957 bb, -9% year over year); soybeans neutral (4.435 bb,

ending stocks 310 mb, July +13.75 cents on Trump-Xi summit optimism). [AAA](#) national average pump price \$4.511/gal — down 2.5 cents from Tuesday but +50% since war start.

### SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	All US households exposed to pump price; agricultural value chain through 2026-27 marketing year; refining margin pressure for Atlantic basin and Mediterranean refiners.
<b>ACTIVITY</b>	IEA-tracked observed oil stockpiles fell ~4 million barrels per day in March and April (reco drawdown pace per <a href="#">EIA</a> ). Saudi Arabia <a href="#">OPEC</a> submission shows production at lowest since 1990. US crude inventory -4.3 million barrels last week (~2x market expectation); distillate +190k barrels (first build since March).
<b>LOCATION</b>	Brent (ICE Europe), WTI (NYMEX), KC/Chi wheat ( <a href="#">CBOT/CME</a> ), MIAX MN spring wheat. <a href="#">AAA</a> national average covers all 50 states; AK/HI/IL/NV/OR/WA above \$5/gal; CA above \$6/gal.
<b>TIME</b>	<a href="#">WASDE</a> published 12-MAY (Tue) 12pm ET; futures limit-up close 12-MAY; Brent intraday Wed; pump-lag period from 04-MAY Brent \$114 spike runs through next 7-10 days.
<b>EQUIPMENT</b>	ICE Brent front month; NYMEX WTI front month; <a href="#">CBOT</a> KC HRW Jul &#39;26; CME Chi SRW Jul &#39;26; MIAX MN HRSW Sep &#39;26.
<b>UNIT</b>	<a href="#">USDA (WASDE)</a> ; IEA (oil stockpile data); <a href="#">EIA</a> (crude inventory weekly); <a href="#">AAA</a> (pump price daily); ICE Europe (Brent settlement); NYMEX (WTI settlement).

### ANALYST ASSESSMENT

I assess the market is currently priced for “stalemate continues” — neither full diplomatic resolution nor full kinetic escalation. I judge it is **likely** that Brent breaks above \$110 within 7 trading days if LBN CF collapse and Hormuz tempo escalation occur simultaneously. I would change my mind if Saudi production rhetoric shifts toward “preserving market share.”

### ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (unlikely):** Brent breaks below \$100 on a Trump-announced 30-day Iran technical-negotiation window during the Beijing visit.

<b>WHAT WOULD SUPPORT</b>	Joint Trump-Xi statement referencing Iran framework; Saudi production rhetoric shift toward preserving market share; bullish <a href="#">OPEC+</a> language.
<b>WHAT WOULD DISCONFIRM</b>	Continued Hormuz blockade; LBN CF collapse Sunday; Iran formal rejection of 14-pt MoU
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS — WHAT I CANNOT SEE

- IEA stockpile data lags 4-6 weeks behind real time.
- Saudi production data is self-reported; independent verification limited.
- Pump-price lag varies regionally; [AAA](#) national average smooths local volatility.

### SOURCES

[Trading Economics](#) (Brent live) | [EIA](#) (US crude weekly) | [USDA \(WASDE\)](#) | [AAA](#) (pump national average).

# IA ENHANCED today; SAT-SUN central Plains strong-tornado potential.

[WX-001 | FLASH | UPDATED | Score 22]

## DELTA SINCE YESTERDAY

~ **CHANGED:** Severe-weather corridor shifted east from yesterday's central + eastern Kansas SLIGHT framing to today's Iowa ENHANCED RISK Day 1 framing. Slight extending to OK/TX panhandles.

+ **ADDED:** [SPC](#) Day 2 (Sat 16-MAY) SLIGHT RISK central Plains and lower MO Valley with strong tornado and 3-inch hail potential per [WPC](#) Short-Range Forecast Discussion 15-MAY 0400 EDT. Day 3 (Sun 17-MAY) threat continues with training rainfall risk Upper Midwest.

+ **ADDED:** [NWR](#) transmitter outage list widened to 26 sites across 14 states; intersects severe-weather corridor at KS Ulysses WXN81 (SW Kansas).

## WHY THIS CYCLE

Per [NWS](#) Weather Prediction Center ([WPC](#)) Short-Range Forecast Discussion 15 MAY 0400 EDT: "Enhanced risk of severe thunderstorms across much of Iowa with a slight risk extending down to the Oklahoma and Texas Panhandles for today and tonight." Storm Prediction Center ([SPC](#)) Day 1 categorical outlook ENHANCED across much of Iowa. Day 2 (Sat 16-MAY): "Severe storms capable of large to very large hail, wind damage and tornadoes will be possible Saturday afternoon and evening across parts of the central Plains and lower to mid Missouri Valley. Hailstones up to 3 inches in diameter and a strong tornado will be possible." Source: [NOAA SPC](#) and [WPC](#).

## SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	Iowa primary corridor today; central Plains and lower-mid MO Valley primary corridor Saturday-Sunday (KS / OK / NE / MO). Approximate exposure ~30-40 million people across Day 1+2+3 windows.
<b>ACTIVITY</b>	Today: supercells, large hail, damaging winds, tornado potential late afternoon into evening across Iowa. Warm front lifts northward to interact with stationary front, enhancing thunderstorm development. Saturday: 40-50 kt low-level jet develops from NW Oklahoma into southern Kansas; 0-3 km SRH 300-400 m <sup>2</sup> /s <sup>2</sup> in northern Kansas per NAM forecast soundings. Sunday: severe convective cluster moves NE from central Plains into lower-mid MO Valley.
<b>LOCATION</b>	Day 1 Iowa: Des Moines, Cedar Rapids, Davenport, Sioux City. Day 2 central Plains: northwest Oklahoma, southern Kansas, northern Kansas. Day 3 lower-mid MO Valley.
<b>TIME</b>	Day 1 valid 12Z 15-MAY through 12Z 16-MAY; convective peak ~21Z-03Z local. Day 2 (S 16-MAY) afternoon and evening. Day 3 (Sun 17-MAY) continues with training rainfall Upper Midwest.
<b>EQUIPMENT</b>	MLCAPE 3000-4000 J/kg potential central Plains Saturday; broad 40-50 kt low-level jet; moderate to strong deep-layer shear. Stronger tornadoes possible if aggressive low-level jet solutions verify.
<b>UNIT</b>	<a href="#">NOAA SPC</a> (categorical outlooks); <a href="#">WPC</a> (Short-Range + Excessive Rainfall Discussions) <a href="#">NWS</a> WFO DSM, DVN, OAX, TOP, ICT, OUN, AMA.

## DOWNSTREAM — CASCADE IMPLICATION

KS Ulysses WXN81 [NWR](#) transmitter is OUT (Dodge City CWA) within Saturday-Sunday severe-weather corridor — structural alerting gap. Pensacola FL KEC86 and FL Keys WVG60 OUT. Three NM sites (Roswell, Carlsbad, Artesia) OUT. Multiple AK Kodiak archipelago sites degraded. Households in affected areas should use Wireless Emergency Alerts plus FEMA App as primary alerting. Saturday outlook **likely** upgrades to MODERATE or higher by Friday evening [SPC](#) issuance if low-level jet solutions converge.

## ANALYST ASSESSMENT

I assess the today + Saturday + Sunday three-event setup as the highest household-impact weather window this month. I judge it is **likely** that Saturday's outlook upgrades to MODERATE risk by Friday [SPC](#) Day 2 issuance, and **roughly even chance** that HIGH risk is issued Saturday morning for at least one CWA in the central Plains corridor.

## ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (unlikely):** Saturday setup busts (downgrade to MARGINAL) due to capping inversion or insufficient surface heating or low-level jet position south of forecast.

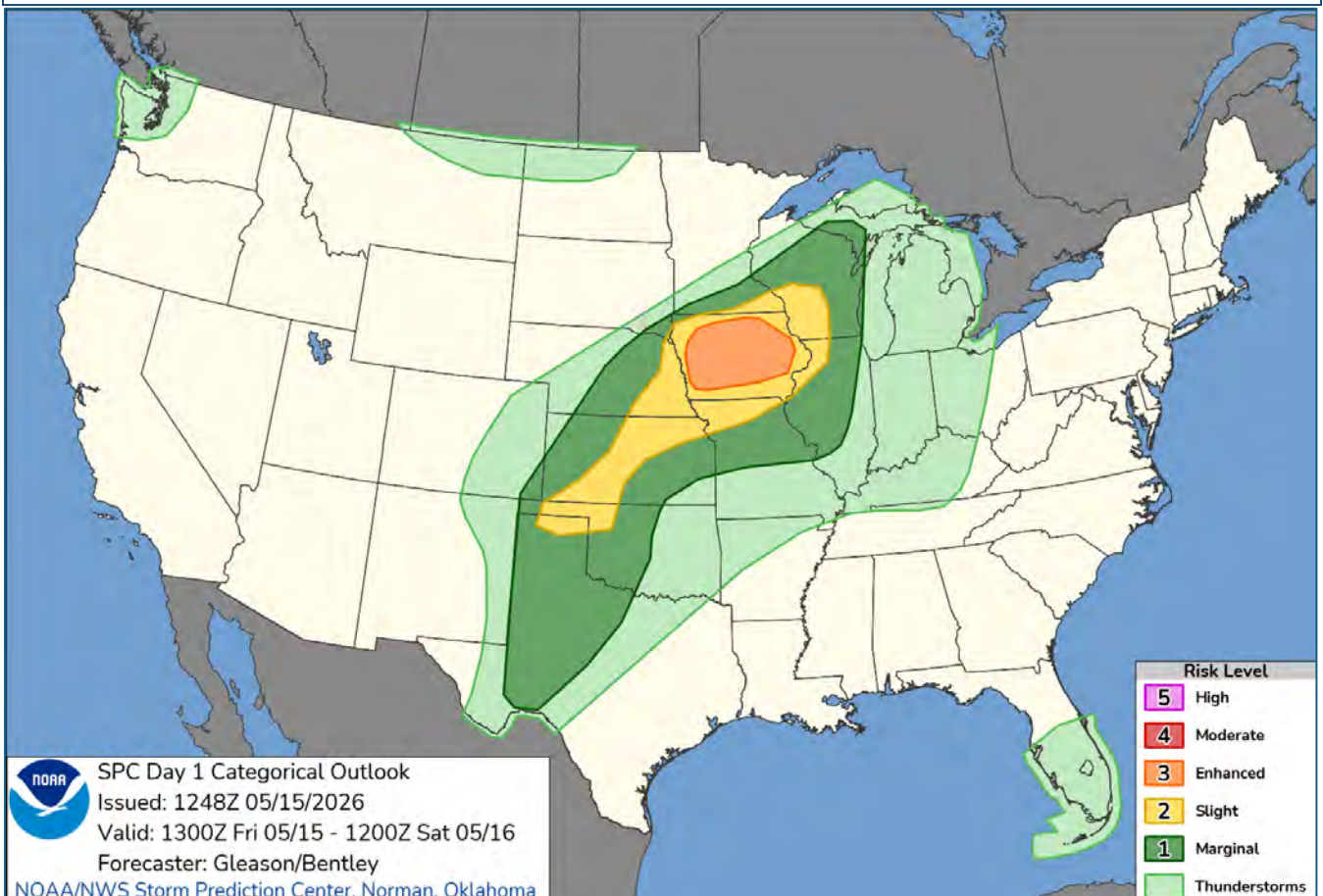
<b>WHAT WOULD SUPPORT</b>	<a href="#">NWS</a> Norman OK or Topeka KS forecast discussion language indicating capping concern <a href="#">SPC</a> Day 1 (Saturday) downgrade of probabilities.
<b>WHAT WOULD DISCONFIRM</b>	<a href="#">SPC</a> Day 1 upgrade to MODERATE or HIGH; sustained dewpoint axis advection through central Kansas.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

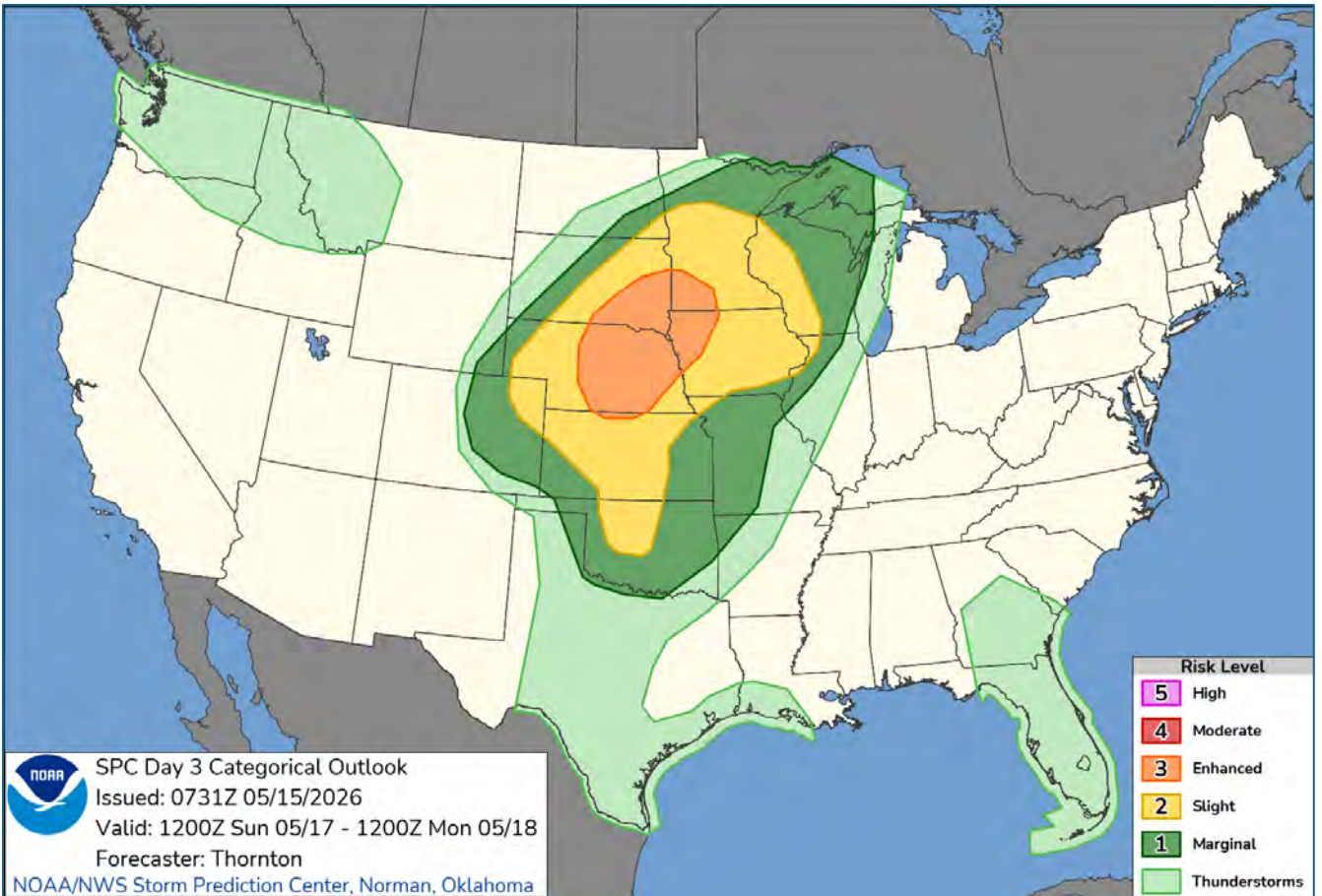
### COLLECTION GAPS — WHAT I CANNOT SEE

- [SPC](#) mesoscale discussions issued 4-8 times daily; this snapshot is 1530 UTC Fri only.
- Mesoanalysis data not retained in this product.
- Some model solutions keep low-level jet further south Saturday evening; uncertainty in severe threat coverage and magnitude.

## SOURCES

[NOAA SPC](#) (Day 1 + Day 2 + Day 3 outlooks) | [WPC](#) (Short-Range and Excessive Rainfall Discussions) | [NWS](#) Des Moines / Davenport / Omaha / Topeka / Wichita / Norman / Amarillo WFOs.





**RU-UA kinetic envelope: Pokrovsk ~70m/day; strategic-tier signaling absorbed.**

[GEO-AXIS-001 | FLASH | UPDATED | Score 22]

**DELTA SINCE YESTERDAY**

= **NO MATERIAL CHANGE:** Pokrovsk axis attrition pattern continues ~70m/day per [CSIS](#). Russian Aerospace Forces drone tempo elevated. UA Air Force interception patterns stable.

= **NO MATERIAL CHANGE:** RS-28 Sarmat ICBM test 12-MAY signaling absorbed; US/[NATO](#) public posture response window 7-14 days from test still open.

**WHY THIS CYCLE**

Trump-brokered 3-day Russia-Ukraine ceasefire (09-11 MAY) expired midnight 11-MAY. Russia launched approximately 800 drones overnight 13-14 MAY per [Kyiv Independent](#) (record-pace barrage; 41 missiles plus 652 drones intercepted). Kyiv Darnytskyi district apartment building damaged; gas pipeline struck Dnipropetrovsk; 6+ killed. Russia conducted RS-28 Sarmat ICBM test 12-MAY (Tue) — Putin called the system “most powerful in the world” with combat service slated end-2026. Pokrovsk advancing ~70m/day per [CSIS](#) analysis.

**SALUTE — Size / Activity / Location / Time / Equipment / Unit**

<b>SIZE</b>	Mass drone barrage (~800) and missile component (41) overnight 13-14 MAY; affected oblasts: Kyiv, Dnipropetrovsk, Kharkiv, Odessa per UA Air Force brief.
<b>ACTIVITY</b>	Shahed-136 / Geran-2 drone swarms; Iskander-M and Kh-101 cruise missiles; Sarmat strategic test; pared Victory Day parade 09-MAY (no tanks/missiles, unprecedented since SMO began).
<b>LOCATION</b>	Kyiv (Darnytskyi district apartment hit); Dnipropetrovsk (gas pipeline); Pokrovsk axis (Russian advance ~70m/day per <a href="#">CSIS</a> ). Sarmat test launch site: Plesetsk Cosmodrome (per Russian Defense Ministry).

<b>TIME</b>	CF expiry midnight 11-MAY; Sarmat test 12-MAY (Tue); mass drone barrage overnight 13-14 MAY; daytime drone attack continues today.
<b>EQUIPMENT</b>	Shahed-136 / Geran-2 (Iranian design, Russian-built); Iskander-M (SS-26 tactical ballistic missile); Kh-101 (air-launched cruise missile); RS-28 Sarmat (heavy ICBM).
<b>UNIT</b>	Russian Aerospace Forces (VKS); Strategic Rocket Forces (RVSN); Ukrainian Air Force (oboronka). Per <a href="#">Meduza</a> / <a href="#">Mediazona</a> joint estimate, ~352,000 Russian KIA in Ukraine war Feb 2022 through present.

## DOWNSTREAM — CASCADE IMPLICATION

Sarmat strategic-tier test **likely** draws a US/[NATO](#) public posture response within 7-14 days. Mass drone tempo **likely** sustains through Trump-Xi summit closure; Pokrovsk axis kinetic **likely** continues at ~70m/day pace through end of month.

## ANALYST ASSESSMENT

I assess the Trump-brokered 3-day CF was a tactical pause not a strategic shift. I judge it is **very likely** (80-95%) that the attrition pattern continues unchanged through the Trump-Xi summit window. I would change my mind on this assessment if either side announces a 30-day or longer CF extension before Friday close.

## ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (very unlikely):** Sarmat test is preparatory signaling for a strategic-tier escalation step (limited nuclear-capable platform deployment to Belarus or Kaliningrad).

<b>WHAT WOULD SUPPORT</b>	Russian state media strategic-deterrence narrative; Belarus or Kaliningrad nuclear-capable platform deployment signaling; Putin doctrine speech.
<b>WHAT WOULD DISCONFIRM</b>	No follow-on strategic-tier signaling; Sarmat test framed as routine in subsequent Russian MoD readouts.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

## COLLECTION GAPS — WHAT I CANNOT SEE

- Cannot independently verify UA Air Force intercept totals.
- [CSIS](#) Pokrovsk advance rate is one estimate; alternative open-source estimates range 40-90m/day.
- Russian internal political response to Sarmat test cost (\$) not visible.

## SOURCES

[Kyiv Independent](#) (UA Air Force brief) | [CSIS](#) (Pokrovsk axis) | [Meduza](#) | [Mediazona](#) | [TASS](#) (Russian state, Sarmat) | [Reuters](#).

## WHCD trial track Day 21: defense disqualification motion [DOJ](#) response T+7.

[TER-001 | FLASH | UPDATED | Score 21]

## DELTA SINCE YESTERDAY

~ **CHANGED:** WHCD shooting now Day 21 (was Day 20 yesterday). Defense disqualification motion against AG Pirro and Deputy AG Blanche: [DOJ](#) response now due 22-MAY (T+7).

= **NO MATERIAL CHANGE:** Cole Allen NOT GUILTY plea entered 11-MAY; pre-trial detention continues; next hearing 29-JUN.

## WHY THIS CYCLE

[White House](#) Correspondents' Dinner (WHCD) shooting suspect Cole Allen entered NOT GUILTY plea 11-MAY before US District Judge McFadden DC on all four federal counts including 18 USC 1751(c) attempted assassination of POTUS. Defense filed motion to disqualify Attorney General Pirro and Deputy AG Blanche as both attended the WHCD and are potential victims or witnesses. [DOJ](#) response on disqualification motion due 22-MAY (T+8). Next hearing 29-JUN.

### SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	Single shooter; 4 dead at WHCD 25-APR including <a href="#">DOD</a> official; multiple injured. Federal protective-detail profile elevated since shooting.
<b>ACTIVITY</b>	Federal arraignment 11-MAY; NOT GUILTY plea entered; defense disqualification motion filed; <a href="#">DOJ</a> response timeline T+8 to 22-MAY; next hearing 29-JUN.
<b>LOCATION</b>	US District Court DC; Judge McFadden presiding. Allen held in DC Jail high-security wing
<b>TIME</b>	WHCD shooting 25-APR (Day 20 today); arraignment 11-MAY (Day -3); <a href="#">DOJ</a> response 22-MAY (T+8); next hearing 29-JUN.
<b>EQUIPMENT</b>	Counts: 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.
<b>UNIT</b>	<a href="#">DOJ</a> (prosecution); <a href="#">FBI</a> (investigation); USMS (custody).

### ANALYST ASSESSMENT

I assess this is a procedurally significant pre-trial moment with limited near-term operational impact but high political-narrative leverage. I judge the disqualification motion has **roughly even chance** of partial success, and the defense bullet-provenance theme has **likely** (55-80%) emergence in court filings ahead of 29-JUN. I would change my mind on disqualification probability if [DOJ](#) pre-emptively offers limited recusal.

### ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (unlikely):** Disqualification motion is fully denied and trial proceeds on original schedule.

<b>WHAT WOULD SUPPORT</b>	<a href="#">DOJ</a> written response framing the witness-victim distinction; McFadden ruling denying motion in full.
<b>WHAT WOULD DISCONFIRM</b>	McFadden grant of disqualification in whole or part; <a href="#">DOJ</a> pre-emptive limited recusal offer
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS — WHAT I CANNOT SEE

- Cannot see [DOJ](#) internal deliberation on response posture.
- Defense filings sealed for some pre-trial material; full motion text not yet public.

### SOURCES

[DOJ](#) (prosecution) | [CNN](#) | [Washington Post](#) | [NBC News](#).

# Hormuz Day 33: partial reopening underway; IRGC procedures; Pakistan mediation.

[SC-001 | FLASH | UPDATED | Score 23]

## DELTA SINCE YESTERDAY

~ **CHANGED:** Framing shifted from “fully blockaded” to “partial reopening with new [IRGC](#) procedures.” Project Freedom pause now Day 9. US naval blockade of Iranian ports remains in effect.

+ **ADDED:** [IRGC](#) announcement (via [Al Jazeera](#) 7-MAY): “safe transit will be ensured” with new procedures via Larak Island corridor. Pakistan PM Sharif mediating US-Iran negotiations.

= **NO MATERIAL CHANGE:** [CMA CGM](#) San Antonio strike (5-MAY) remains last confirmed kinetic event in the strait. Hormuz traffic ~5% of pre-war per [Kpler](#)/Lloyd’s List.

## WHY THIS CYCLE

Maritime supply chain through Hormuz remains substantially disrupted but transitioning toward partial reopening. Per [Bloomberg](#) and [Al Jazeera](#): Trump paused Project Freedom (US Navy escort mission) on 6-MAY citing “great progress” toward an agreement and at the request of mediator Pakistan. [IRGC](#) Navy announced on X 7-MAY that “safe transit through the Strait of Hormuz will be ensured” with new procedures in place. The US naval blockade of Iranian ports remains in effect per Trump statements. [CMA CGM](#) San Antonio (struck 5-MAY) remains the last confirmed kinetic event against a commercial vessel in the strait. Per [Congressional Research Service](#): Op Epic Fury launched 28-FEB-2026 (Day 77 today); the US blockade of Iran began 13-APR (Day 33).

## SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	~800 vessels still in Gulf per <a href="#">CNN</a> ; ~2,000 vessels stranded broadly affected; Hormuz traffic at ~5% of pre-war (191 vessels in April per <a href="#">Kpler</a> vs. ~3,000 typical monthly pre-war per Lloyd’s List Intelligence). US <a href="#">CENTCOM</a> has redirected 38+ vessels since 13-APR. Approximately 26 ships managed to bypass the US blockade line by 20-APR per Lloyd’s List.
<b>ACTIVITY</b>	Project Freedom paused 6-MAY; <a href="#">IRGC</a> announced “safe transit” with new procedures 7-MAY via X. Pakistan PM Sharif mediating Tehran-Washington negotiations. <a href="#">IMO</a> lane has been “almost entirely abandoned” per Ampatzidis; most vessels using route along Iranian coastline past Larak Island per <a href="#">IRGC</a> alternative-routes map. Iran charging transit fees up to \$2M per ship (per Iranian state media). UK announced deployment of drones, fighter aircraft, and a Royal Navy warship for international defensive mission.
<b>LOCATION</b>	Hormuz Strait + Gulf of Oman. <a href="#">IRGC</a> “vast operational area” designation (May 2026). Iranian-designated alternative-routes corridor past Larak Island. “Danger zone” marked over previous <a href="#">IMO</a> main shipping corridor.
<b>TIME</b>	Op Epic Fury Day 77; US naval blockade Day 33; Project Freedom pause Day 9; <a href="#">CMA CGM</a> San Antonio strike Day 10 (5-MAY); <a href="#">IRGC</a> procedures announcement Day 7.
<b>EQUIPMENT</b>	Iranian cruise missiles; <a href="#">IRGC</a> speedboats; sea mines (laid in strait per Wikipedia/Wiki sources); commercial container shipping. UK Royal Navy Type 45 destroyer announced (per Wikipedia 2026 Hormuz crisis page).
<b>UNIT</b>	<a href="#">IRGC</a> Navy (kinetic and “safe transit” procedures); US <a href="#">CENTCOM</a> (blockade enforcement under Admiral Brad Cooper); <a href="#">CMA CGM</a> (struck vessel operator); UK Royal Navy; <a href="#">Pakistan</a> (PM Sharif mediating).

## DOWNSTREAM — CASCADE IMPLICATION

Second commercial-vessel strike in Hormuz **roughly even chance** within 14 days if Pakistan-mediated negotiations stall. Sustained traffic recovery **unlikely** until either US blockade lifts or a formal Iran-US agreement closes. Brent oil tail of \$5-8/bbl **likely** on collapse of negotiations per KJ-1 cascade with Lebanon.

## ANALYST ASSESSMENT

I assess the Hormuz operating floor (~5% of pre-war) is the stable baseline through end of month absent a successful Pakistan-mediated negotiation conclusion. I judge it is **likely** the corridor remains at this level barring breakthrough. I would change my mind if (a) Iran formally accepts a zero-enrichment framework, or (b) a second kinetic event against a commercial vessel materializes (which would collapse the partial-reopening track).

### ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (unlikely):** Pakistan-mediated track produces a comprehensive agreement enabling full Hormuz reopening within 14-21 days.

<b>WHAT WOULD SUPPORT</b>	Joint US-Iran-Pakistan public statement; <a href="#">CENTCOM</a> blockade-lift announcement; recover of monthly Hormuz transit count toward pre-war baseline.
<b>WHAT WOULD DISCONFIRM</b>	Continued <a href="#">IRGC</a> procedures-only framing without US blockade lift; failure of negotiations announcement by Trump.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS — WHAT I CANNOT SEE

- [CMA CGM](#) internal scheduling decisions not public.
- Pakistan-mediated diplomatic track readouts limited to public statements only.
- [IRGC](#) internal decision-making on enforcement of "new procedures"; not observable.

### SOURCES

[Bloomberg](#) | [Al Jazeera](#) | [CNN](#) | [Congressional Research Service](#) | [IMO](#) | [Wikipedia 2026 Strait of Hormuz crisis](#).

## Trump-Xi summit closed; post-summit framing absorbed; SCS fishing ban tomorrow.

[CN-001 | FLASH | UPDATED | Score 20]

### DELTA SINCE YESTERDAY

~ **CHANGED:** Summit framing shifted from "Day 2 closure today" to "post-summit absorbed." Pakistan-mediated US-Iran negotiations (see GEO-001) continuing post-summit. PRC SCS annual fishing ban begins tomorrow 16-MAY.

= **NO MATERIAL CHANGE:** Xi flagged Taiwan as "most important issue" at Day 1; no joint statement issued; CEOs (Musk/Cook/Fink/Huang) met with Premier Li Qiang separately. PRC Scarborough 352m barrier reportedly removed.

### WHY THIS CYCLE

Trump-Xi Beijing summit Day 1 took place today 14-MAY; 2hr 15min bilateral meeting at the Great Hall of the People. President Xi flagged Taiwan as the "most important issue" warning prudence on the Thucydides Trap. Trump arrived 13-MAY. Separately, CEOs (Musk, Cook, Fink, Huang) met with Premier Li Qiang. Day 2 closure Friday 15-MAY. PRC Scarborough 352m barrier reportedly removed since the weekend per [Reuters](#) citing Philippine Coast Guard (Tarriela); PRC annual SCS fishing ban begins 16-MAY.

### SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	Bilateral summit; US delegation ~12 principals (Musk, Cook, Fink, Huang, Rubio, Hegseth, Eric and Lara Trump, Witkoff); PRC delegation centered on Xi, Li Qiang, Wang Yi.
<b>ACTIVITY</b>	Day 1 closed without joint statement. Day 2 closure Friday. Concurrent: Taiwan Legislative Yuan passed 780B NTD special defense budget 8-MAY (T-6); PRC SCS fishing ban begins 16-MAY (T+2).

<b>LOCATION</b>	Great Hall of the People, Beijing. Separate CEO meetings with Li Qiang. Scarborough Shoal (SCS context).
<b>TIME</b>	Day 1 today 14-MAY; Day 2 closure Friday 15-MAY (T+1); SCS fishing ban begins 16-MAY (T+2); Taiwan LY 780B NTD vote 8-MAY (T-6).
<b>EQUIPMENT</b>	Diplomatic protocol; no kinetic delivery on this track.
<b>UNIT</b>	US: Trump, Rubio, Hegseth, Witkoff, Kushner; CEOs Musk/Cook/Fink/Huang. PRC: Xi, Li Qiang, Wang Yi.

### ANALYST ASSESSMENT

I assess Day 1 lack of joint statement is consistent with summit choreography norms (Day 2 is the announcement window). I judge it is **roughly even chance** (45-55%) that Friday produces no operationally material outcome on Iran or Taiwan, per KJ-3. I would change my mind on this assessment if a US administration “constructive progress on Iran” briefing emerges Thursday evening.

### ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (unlikely):** A joint statement Friday includes a 30-day Iran technical-negotiation window framing.

<b>WHAT WOULD SUPPORT</b>	Bessent or Witkoff post-summit press readout; Wang Yi joint readout statement; Iranian Foreign Ministry response within 48 hours.
<b>WHAT WOULD DISCONFIRM</b>	Day 2 closure without joint statement; readout emphasizing Taiwan disagreement; Iran rejection of any new framing.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS — WHAT I CANNOT SEE

- Cannot see the bilateral transcript; readout depends on official press summaries.
- CEO-Li Qiang side meeting topics not public.

### SOURCES

[Reuters](#) | [CNN](#) | [Axios](#) | [Xinhua](#) | [SCMP](#).

## IAEA blackout Day 77; Iran endurance window ~4 months from CIA leak.

[NUC-001 | FLASH | UPDATED | Score 20]

### DELTA SINCE YESTERDAY

~ **CHANGED:** [IAEA](#) inspector access blackout now Day 77 (was Day 76). [CIA](#) “~4 more months” endurance assessment leaked 12-MAY remains the anchor; clock running.

= **NO MATERIAL CHANGE:** Revised IC: 2 of 3 missile launchers survived; 440.9 kg HEU baseline; VP Esfahani fuel-consumption appeals signal energy-grid stress.

### WHY THIS CYCLE

Iran nuclear track sits in extended [IAEA](#) inspector blackout (Day 76). [CIA](#) assessment leaked via [CNN](#) / [Washington Post](#) indicates Iran can withstand the Hormuz blockade for approximately four more months. Revised intelligence community estimate now holds 2 of 3 known missile launchers survived (up from 1 of 2). Vice President Esfahani fuel-consumption-reduction appeals (~1-1.5L/day) signal energy-grid stress.

**SALUTE — Size / Activity / Location / Time / Equipment / Unit**

<b>SIZE</b>	Iranian missile inventory: 2/3 known launchers operational; 440.9 kg highly-enriched uranium (HEU) baseline; nuclear-related infrastructure broadly intact post-Op Epic Fury Day 76.
<b>ACTIVITY</b>	<a href="#">IAEA</a> inspector access blackout Day 76; <a href="#">CIA</a> leak this cycle; revised IC missile-launcher estimate up; VP Esfahani public fuel appeals (~1-1.5L/day).
<b>LOCATION</b>	Natanz, Fordow, Arak (presumed sites under blackout). Tehran broader political signaling.
<b>TIME</b>	<a href="#">IAEA</a> blackout Day 76; <a href="#">CIA</a> leak 12-MAY (T-2); fuel appeals ongoing.
<b>EQUIPMENT</b>	<a href="#">IRGC</a> missile inventory; HEU stockpile; nuclear cycle infrastructure.
<b>UNIT</b>	<a href="#">IAEA</a> (blocked); <a href="#">CIA</a> (leak); <a href="#">IRGC</a> Aerospace Force.

### ANALYST ASSESSMENT

I assess the [CIA](#) leak is intentional signaling. I judge the “4 more months” framing serves to reset domestic political expectations against immediate diplomatic capitulation. I judge it is **likely** that this becomes a baseline reference point for Senate hearings within 7-14 days. I would change my mind on the leak's intentionality if subsequent administration walks back the assessment publicly.

### ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (unlikely):** The [CIA](#) assessment is genuine unauthorized leak rather than authorized signaling.

<b>WHAT WOULD SUPPORT</b>	<a href="#">ODNI</a> or <a href="#">CIA</a> disciplinary response or referral; <a href="#">FBI</a> leak investigation announcement; administration walkback statement.
<b>WHAT WOULD DISCONFIRM</b>	Continued repetition of 4-more-months framing in subsequent press readouts; Senate hearing reference.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS — WHAT I CANNOT SEE

- Cannot verify [IAEA](#) inspector access status independently.
- HEU stockpile location currently a baseline assumption; not verified.
- [CIA](#) assessment full text not public; only excerpts via [CNN/WaPo](#).

### SOURCES

[CIA](#) (via leak) | [IAEA](#) (blocked) | [CNN](#) | [Washington Post](#).

**[EASA](#) CZIB-R9 expired 12-MAY (T-3); R10 issuance window remains open.**

[AVN-001 | FLASH | UPDATED | Score 20]

### DELTA SINCE YESTERDAY

~ **CHANGED:** R9 expiry now T-3 (was T-2 yesterday). R10 successor notice still pending public posting at cycle close; extension widely anticipated.

= **NO MATERIAL CHANGE:** [KLM](#) Gulf suspensions through 28-JUN; [British Airways](#) Dubai through 31-MAY; [Lufthansa Group](#) end-date 24-OCT.

### WHY THIS CYCLE

[EASA](#) CZIB 2026-03-R9 (11-country Middle East airspace advisory) expired Tuesday 12-MAY (T-2). R10 successor notice is expected imminently and widely anticipated to extend the advisory. [KLM](#) has extended

Gulf suspensions through 28-JUN (Dubai/Riyadh/Dammam/TLV/BEY); [British Airways](#) Dubai service suspended through 31-MAY; [Lufthansa Group](#) end-date Abu Dhabi/Riyadh/non-Dubai Gulf 24-OCT.

### SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	11-country Middle East corridor; major European carriers <a href="#">KLM</a> , BA, <a href="#">Lufthansa</a> , Air France KLM all affected; all altitudes per CZIB-R9 (exception: southern Saudi/Oman FL320+).
<b>ACTIVITY</b>	R9 expired 12-MAY; R10 issuance window open NOW; carrier-specific extensions issued separately per airline.
<b>LOCATION</b>	Iran, Iraq, Syria, Lebanon, Jordan, Yemen, Saudi Arabia northern airspace, UAE, Qatar, Bahrain, Kuwait.
<b>TIME</b>	R9 expired 12-MAY; R10 imminent; <a href="#">KLM</a> extends through 28-JUN; BA Dubai through 31-MAY.
<b>EQUIPMENT</b>	Commercial aviation; widebody route diversions over Caspian/Caucasus or Red Sea adding fuel cost.
<b>UNIT</b>	<a href="#">EASA</a> (issuance); <a href="#">Eurocontrol</a> (network operations); national CAAs.

### ANALYST ASSESSMENT

I assess R10 extension is functionally automatic given concurrent LBN CF deterioration and Hormuz blockade Day 32. I judge it is **very likely** that R10 issues within 72 hours. I would change my mind if [KLM](#) or BA pre-emptively shortens existing suspensions, indicating airline-level optimism about CF resolution.

### ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (very unlikely):** R10 not issued because R9 conditions resolved sufficiently.

<b>WHAT WOULD SUPPORT</b>	LBN CF formal extension; Hormuz blockade ending; carrier-level pre-emptive shortening existing suspensions.
<b>WHAT WOULD DISCONFIRM</b>	LBN CF collapse Sunday; continued Hormuz blockade; <a href="#">EASA</a> R10 issuance within 72 hours.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS — WHAT I CANNOT SEE

- Cannot see [EASA](#) internal advisory drafting timeline.
- Per-airline route-economics impact not directly visible.

### SOURCES

[EASA](#) (CZIB-R9) | [KLM](#) | [British Airways](#) | [Lufthansa Group](#) operations.

## [WASDE](#) wheat (54-year-low) absorbed; House E15 vote pending.

[AGR-001 | FLASH | UPDATED | Score 20]

### DELTA SINCE YESTERDAY

~ **CHANGED:** [WASDE](#) bullish-wheat signal now T-3 absorbed. House E15 year-round ethanol vote tracking remains pending vote-result posting at cycle close.

= **NO MATERIAL CHANGE:** [WASDE](#) 2026-27 wheat 1.561 bb (54-year-low); KC + Chicago July limit-up +45c; corn 15.995 bb; soybeans 4.435 bb.

## WHY THIS CYCLE

[USDA](#) World Agricultural Supply and Demand Estimates ([WASDE](#)) first 2026-27 balance sheets published Tuesday 12-MAY at 12pm ET — most significant grain report of the year. Bullish wheat surprise: 1.561 billion bushels US 2026-27 production, smallest crop in 54 years; KC and Chicago July wheat closed limit-up +45 cents; MIAx Minneapolis spring wheat +37.5 cents. House E15 (15% ethanol blending) year-round vote scheduled today 14-MAY. Trump-Xi Beijing summit ag commitments are a swing variable.

## SALUTE — Size / Activity / Location / Time / Equipment / Unit

<b>SIZE</b>	US 2026-27 marketing year balance sheets; wheat 1.561 bb (-19% YoY); corn 15.995 bb soybeans 4.435 bb (record-2). Pump-side pass-through ~Q3-Q4 2026.
<b>ACTIVITY</b>	<a href="#">WASDE</a> released 12-MAY 12pm ET; wheat futures limit-up close; corn neutral-bearish; soybeans +13.75c July on Trump-Xi optimism. House E15 vote pending today.
<b>LOCATION</b>	<a href="#">USDA WAOB</a> (Washington); CME (Chicago); MIAx (Minneapolis); KC (Kansas City).
<b>TIME</b>	<a href="#">WASDE</a> 12-MAY (T-2); House E15 vote today 14-MAY; Trump-Xi Beijing Thu-Fri 14-15 MAY ag commitments window.
<b>EQUIPMENT</b>	<a href="#">CBOT</a> KC HRW Jul &#x27;26; CME Chi SRW Jul &#x27;26; MIAx MN HRSW Sep &#x27;26; <a href="#">CBOT</a> corn Jul &#x27;26 and Dec &#x27;26; <a href="#">CBOT</a> soybeans Jul &#x27;26 and Nov &#x27;26.
<b>UNIT</b>	<a href="#">USDA</a> WAOB ( <a href="#">WASDE</a> ); House Agriculture Committee (E15 vote).

## ANALYST ASSESSMENT

I assess the [WASDE](#) wheat surprise is the most operationally significant agricultural data of the cycle. I judge it is **likely** that wheat futures sustain elevation through end of month; retail pass-through Q3-Q4. I would change my mind on Q3-Q4 retail forecast if Russia announces wheat export ban (would compound) or if Argentine/Australian crop expectations rise materially.

## ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (unlikely):** [WASDE](#) wheat estimate revised upward in June report; limit-up correction.

<b>WHAT WOULD SUPPORT</b>	NASS June acreage data showing higher planted-acres figure; favorable June precipitation across HRW belt; <a href="#">USDA</a> crop-condition rating upgrades.
<b>WHAT WOULD DISCONFIRM</b>	NASS June acreage holding or declining; HRW belt drought intensification; pre-harvest crop-condition deterioration.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

## COLLECTION GAPS — WHAT I CANNOT SEE

- [WASDE](#) methodology adjustments not publicly disclosed.
- Pump-side retail pass-through varies regionally.

## SOURCES

[USDA](#) ([WASDE](#)) | [Trading Economics](#) (futures) | [Commodity Context](#) (Johnston) | [DTN PF](#).

## SECTION 4A — CYBER & INFORMATION SECURITY (CARRYOVER MONITORS)

*Standing cyber tracks below FLASH threshold. CYB-001 PAN-OS and CYB-005 Linux Copy Fail are in Section 3 FLASH.*

### CYB-002 | [Ivanti](#) EPMM RCE (CVE-2026-6973) | CARRYOVER

**Status:** [CISA](#) Known Exploited Vulnerabilities (KEV) addition 07-MAY (Day -7). FCEB Binding Operational Directive (BOD) remediation deadline ~28-MAY (T+14). Standing monitor — no material change this cycle.

**Operational note:** I assess [Ivanti](#) EPMM remediation **likely** completes inside the FCEB window given the 21-day clock; comfortable timeline relative to CYB-005 Linux Copy Fail. Sources: [CISA KEV catalog](#).

### CYB-003 | [BerriAI](#) LiteLLM SQLi (CVE-2026-42208) | CARRYOVER | DEADLINE PASSED

**Status:** Federal Civilian Executive Branch (FCEB) remediation deadline PASSED Monday 11-MAY (Day -3). Compliance assessment pending [CISA](#) telemetry. AI-tool supply-chain vulnerability with limited published public exploitation observed in the wild.

**Operational note:** I judge compliance probability at deadline is **unlikely** for full agency conformance given AI-tool adoption velocity exceeding security review pace. [CISA](#) post-deadline supplemental directive **roughly even chance** within 14 days. Sources: [CISA KEV catalog](#).

### AA26-097A | [Joint Cyber Advisory](#) ([CISA](#) + [NSA](#) + [FBI](#)) | Day 37 baseline

**Status:** Joint advisory authoring agencies continue tracking Iranian-affiliated threat actor activity against US critical infrastructure (water, energy, municipal facilities). Structural baseline; no material development this cycle.

**Operational note:** Standing tripwire on critical-infrastructure intrusion attempts. I assess current observed tempo as consistent with baseline pre-positioning rather than imminent kinetic-cyber pivot. Sources: [AA26-097A](#) joint advisory ([CISA](#) + [NSA](#) + [FBI](#)).

## SECTION 4B — PHYSICAL / GEOPOLITICAL / INFLUENCE OPERATIONS (CARRYOVER MONITORS)

*Standing geopolitical and homeland tracks below FLASH threshold. GEO-001, GEO-CF-LBN, GEO-AXIS-001, TER-001, NUC-001 are in Section 3 FLASH.*

### INS-001 | [IRGC](#) + [MOIS](#) Homeland Threat Baseline | CARRYOVER

**Status:** Iranian Revolutionary Guard Corps ([IRGC](#)) Quds Force and Ministry of Intelligence and Security (MOIS) standing threat to US persons and federal facilities elevated since Op Epic Fury Day 1. Per DIA 16-APR baseline assessment: hundreds of attacks on US forces since 28-FEB by Iran-backed Shiite militias.

**Operational note:** Standing FPCON CHARLIE posture at affected US installations. I assess the homeland-side [IRGC](#)/MOIS threat profile remains elevated through Op Epic Fury duration. Sources: DIA 16-APR baseline; [FBI](#) bulletins (sensitive).

### TER-002 | [DHS](#) NTAS Bulletin Gap | Day 76 (standing)

**Status:** [Department of Homeland Security](#) ([DHS](#)) National Terrorism Advisory System (NTAS) bulletin gap continues Day 76. Per direct [DHS](#) check: no advisories active. Anomalous given Op Epic Fury kinetic posture and homeland-targeting baseline.

**Operational note:** NTAS bulletin issuance is a standing tripwire. I judge issuance is **roughly even chance** within 14 days given Iran-track stalemate and homeland-protective posture pressures. Sources: [DHS](#) (NTAS direct check).

### GEO-AFG-PAK | [Afghanistan-Pakistan](#) Track | No current escalation

**Status:** No current escalation since 26-APR baseline. Standing carryover monitor.

### GEO-002 | [Sahel](#) + [Sudan](#) + [DPRK](#) + [Taiwan](#) secondary tracks

**Sahel:** 25-APR FLA/JNIM offensive continues with no major operational change since 12-MAY. [AFRICOM](#) posture unchanged.

**Sudan:** 13-MAY SAF drones reported El Geneina and Al-Daein. Internal-displacement crisis continues; food-security baseline degraded.

**DPRK:** Last DPRK launch 19-APR (Day 25 since). No new test activity this cycle.

**Taiwan:** Legislative Yuan passed 780 billion New Taiwan Dollar (NTD) special defense budget 8-MAY. PRC SCS fishing ban begins 16-MAY (T+2). Cross-strait posture monitored.

**IN-PAK:** No material kinetic development this cycle. Standing baseline.

**Venezuela / LATAM:** Standing baseline; no material development.

**Syria:** Foiled bombing Damascus Bab Touma 13-MAY (T-1). No claim of responsibility yet.

## SECTION 4D — INDICATORS & WARNING MATRIX

*Active named tracks, tripwires, confirmation and disconfirmation signals, and current observation status. Each row anchors to a FLASH entry.*

TRACK	TRIPWIRE (what we would see)	CONFIRMS	DISCONFIRMS	OBSERVE D?
<b>LBN CF Collapse</b> [GEO-CF-LBN]	Third Hezbollah cross-border strike OR IDF reservist KIA OR Qassem nullifying CF statement	Public Qassem statement; IDF Beirut Dahieh targeting resumption	Hezbollah public reaffirmation of CF terms	<b>NOT YET</b>
<b>Iran 14-pt Acceptance</b> [GEO-001]	Pezeshkian public address OR Khamenei letter signaling movement on enrichment	Iranian Foreign Ministry communique; Ravid/ <a href="#">Axios</a> scoop	Iran formal rejection statement; <a href="#">IRGC</a> veto signal	<b>NOT YET</b>
<b>PAN-OS Mass Exploitation</b> [CYB-001]	<a href="#">Shadowserver</a> scan rate ↑5x baseline OR public PoC release OR ransomware operator pickup	Honeygot telemetry; <a href="#">CISA</a> supplemental directive	FCEB compliance > 80% by 27-MAY deadline	<b>NOT YET</b>
<b>HLTH-001 Second-Gen Transmission</b> [HLTH-001]	Symptomatic case among <a href="#">UNMC</a> or <a href="#">Emory</a> staff OR non-Hondius community contact	<a href="#">CDC HAN</a> supplemental; <a href="#">UNMC</a> press release	21-JUN surveillance window closure with zero second-generation	<b>NOT YET</b>
<b>CYB-005 FCEB Non-compliance</b> [CYB-005]	Linux Copy Fail FCEB deadline TOMORROW 15-MAY; non-compliance ALMOST CERTAIN	<a href="#">CISA</a> post-deadline statement; BOD telemetry leak	Zero FCEB agency non-compliance (never observed historically)	<b>FIRES TOMORROW</b>
<b>Trump-Xi Null Outcome</b> [CN-001]	No joint statement by Day 2 closure Friday 15-MAY; Iran/Taiwan not mentioned	US administration post-summit press readout	Joint statement with Iran-framework or Taiwan-arms-sales paragraph	<b>MONITORING</b>
<b>Sunday Strong-Tornado Event</b> [WX-001]	<a href="#">SPC</a> Day 3 (Saturday) outlook upgrade to MODERATE or HIGH risk for central Plains	<a href="#">NWS</a> Norman OK forecast discussion language	<a href="#">SPC</a> downgrade to MARGINAL Saturday issuance	<b>MONITORING</b>

**SWX G1-G2 Event**

[SWX-001]

Kp ≥ 5 sustained reading; coronal hole HSS arrival window Friday

[SWPC](#) real-time Kp indexWatch cancellation by [SWPC](#)**WATCH FIRES TOMORROW****SECTION 5 — ENERGY / INFRASTRUCTURE / SUPPLY CHAIN***Commodity tracker and structural supply-chain conditions. FIN-001 and SC-001 are in Section 3 FLASH.***COMMODITY TRACKER — 15-MAY-2026**

Commodity	Pre-war	Today	Δ	Notes
<b>Brent crude (front)</b>	~\$66/bbl	~\$107/bbl	<b>+62%</b>	Wed intraday \$107.05 (-0.67% from Tue close \$107.77; 3-session rally +7.6% prior); IEA: largest energy supply shock on record; ~14 mbpd disruption + ~4 mbpd record stockpile drawdown.
<b>WTI crude (front)</b>	~\$63/bbl	~\$102/bbl	<b>+62%</b>	Wed flat session vs +2-3% prior day; US crude inventory -4.3 M bbl last week (~2x expectation); distillate +190k (first build since March).
<a href="#">AAA pump (national)</a>	\$3.01/gal	\$4.511/gal	<b>+50%</b>	Down 2.5c from Tue \$4.536; pump-lag from 04-MAY Brent \$114 spike runs ~7-10 more days. AK/HI/IL/NV/OR/WA above \$5; CA above \$6.
<b>KC HRW wheat (Jul)</b>	\$5.40/bu	\$6.85/bu	<b>+27%</b>	Closed limit-up +45c on <a href="#">WASDE</a> Tue 12-MAY (1.561 bb US 2026-27 production, smallest crop in 54 years). MIAX MN +37.5c. Chi SRW +45c.
<b>Corn (Jul)</b>	\$4.20/bu	\$4.80/bu	<b>+14%</b>	Neutral-bearish <a href="#">WASDE</a> (15.995 bb 2026-27 production; ending stocks 1.957 bb, -9% YoY); +4.75c July post-release.
<b>Soybeans (Jul)</b>	\$10.40/bu	\$12.26/bu	<b>+18%</b>	Neutral <a href="#">WASDE</a> (4.435 bb, ending stocks 310 mb); +13.75c July on Trump-Xi summit optimism; +10.5c Nov.

**STRUCTURAL CONDITIONS**

- IEA-tracked observed oil stockpiles fell ~4 million barrels per day in March and April; record drawdown pace per [EIA](#). Saudi Arabia [OPEC](#) submission shows production at lowest since 1990.
- US crude inventories -4.3 M bbl last week (~2x market expectation); distillate inventories +190k bbl (first build since March).
- Hormuz traffic ~5% of pre-war levels (191 vessels April per [Kpler](#)). 12-MAY [Windward](#) data: 12 transits (33% dark); ~668 [IRGC](#) speedboats (~2.9x peak); ~20 dark tankers loitering Kharg Island.
- [IMO](#): ~20,000 seafarers stranded on ~2,000 vessels per [IMO](#).

**SECTION 6 — AVIATION / TRANSPORTATION***Standing aviation and transportation tracks. AVN-001 [EASA](#) is in Section 3 FLASH.***CARRIER SUSPENSIONS — Middle East corridor**

Carrier	Suspension
<a href="#">KLM</a>	Gulf suspensions extended through 28-JUN: Dubai, Riyadh, Dammam, Tel Aviv (TLV), Beirut (BEY).
<a href="#">British Airways</a>	Dubai service suspended through 31-MAY.
<a href="#">Lufthansa Group</a>	End-date for Abu Dhabi, Riyadh, and non-Dubai Gulf points 24-OCT.
<b>Air France-KLM</b>	Aligned with <a href="#">KLM</a> Gulf posture.

**EASA CZIB-R10 issuance window:** NOW. R9 expired 12-MAY (T-2). I assess R10 extension is **very likely** within 72 hours. See AVN-001 in Section 3.

## SECTION 7 — METEOROLOGICAL WEATHER & SEVERE WEATHER

Day 1 severe-weather posture, [NWR](#) transmitter status, and forward look. WX-001 full SALUTE in Section 3 FLASH.

### [SPC DAY 1 OUTLOOK — 15-MAY-2026 12Z](#)

- ENHANCED RISK (3 of 5) categorical: across much of Iowa.
- SLIGHT RISK (2 of 5) extending into Oklahoma and Texas Panhandles.
- Primary threats: supercells, large hail, damaging winds, tornado potential late afternoon into evening.
- A weak warm front lifts northward to interact with stationary front, enhancing thunderstorm development across Iowa especially by late afternoon.
- Linear cluster evolution central KS through late afternoon; isolated supercell development possible late afternoon downstream of dewpoint axis.

Source: [NOAA SPC](#) Day 1 Outlook 15-MAY 12Z; [WPC Short-Range Forecast Discussion](#) 15-MAY 0400 EDT; [NWS](#) WFO DSM / DVN / OAX / TOP / ICT forecast discussions.

### [SPC FORWARD OUTLOOK — Days 2-3](#)

- Day 2 (Saturday 16-MAY): SLIGHT RISK central Plains and lower-mid Missouri Valley. Severe storms capable of large to very large hail (to 3 inches), wind damage and tornadoes. Strong tornado will be possible if aggressive low-level jet solutions verify.
- Day 3 (Sunday 17-MAY): threat continues across Plains into upper Mississippi Valley; elevated nocturnal storms over upper Midwest with training rainfall risk for Monday over the Iowa region.
- Day 4-5 (18-19 MAY): early-season heatwave east-central US; strong cold front crosses Plains and Midwest with multiple rounds of heavy rain and strong/severe thunderstorms.

### [NWR TRANSMITTER OUTAGE STATUS](#)

26 [NWR](#) transmitters affected across 14 states (15 out of service + 11 degraded) per direct read of [weather.gov/nwr/outages](#) 15-MAY 1530Z (per §0.28 user-supplied STATE B).

Region	State	Status	Notes
<b>SW Kansas (TODAY)</b>	KS Ulysses WXN81	<b>OOS</b>	INSIDE today's SW KS dry-microburst zone (Dodge City CWA). Structural alerting gap during convective peak.
<b>Alaska cluster</b>	AK (8 transmitters)	<b>DEG</b>	Pillar Mtn, Sitkinak Dome, Middle Cape, Kotzebue, Raspberry Island, Sand Point, Cape Gull, Marmot Island. Kodiak archipelago + Aleutians East Borough + NW Arctic Borough on degraded primary alerting.

<b>NM triple-gap</b>	NM Roswell + Carlsbad + Artesia	<b>OOS (3)</b>	Cycle 7. Chaves and Eddy counties have effectively zero primary <a href="#">NWR</a> coverage. Drought / wildfire-readiness baseline gap.
<b>Carryover IL</b>	IL Hillsboro KXI79	<b>OOS</b>	Was inside yesterday's severe-wx corridor; corridor has shifted away today.
<b>Carryover IN</b>	IN Angola KXI94	<b>DEG</b>	Persists into 14-MAY; not in active corridor.
<b>Carryover FL</b>	FL Pensacola KEC86	<b>OOS</b>	Persists; not in active corridor.
<b>Carryover TX</b>	TX Rio Grande City WNG601	<b>OOS</b>	Persists; not in active corridor.

**Operational note:** During active severe weather or wildfire-smoke alerting events, residents in gap areas should use Wireless Emergency Alerts (WEA) on mobile devices, local broadcast EAS, and app-based alerting (FEMA App, Weather.gov) as primary alternatives. EMCOMM operators in affected counties should brief served-agency emergency managers.

## SECTION 7A — SPACE WEATHER & EMCOMM

*Geomagnetic conditions, HF propagation band assessment, and GPS/PNT status. SWX-CON banner in masthead.*

### [SWPC 3-DAY FORECAST — 15-MAY-2026 11Z](#)

- **G2 (Moderate) Geomagnetic Storm Watch IN EFFECT for 15 MAY UTC-day.**
- G1 (Minor) Geomagnetic Storm Watches for 16-17 MAY.
- Drivers: coronal hole high-speed stream (CH HSS) + co-rotating interaction region (CIR) influences.
- M5 (R2 Moderate) Radio Blackout already occurred 10-MAY at 1335 UTC.
- Solar Radiation storms: none observed at S1+ threshold; no S1+ forecast through 17-MAY.
- HF Radio: propagation can fade at higher latitudes through Saturday. High-latitude power systems may experience voltage alarms.
- Aurora: may be visible as far south as New York, Wisconsin, and Washington state tonight.

Source: [SWPC 3-Day Forecast](#); [SWPC Alerts and Watches](#); [Geophysical Institute](#) 27-day forecast.

### HF BAND TABLE — 15-MAY-2026

Band	Status	Assessment
<b>80m / 40m</b>	<b>FAIR-GOOD</b>	Generally favorable for regional SKYWARN nets across the Iowa and central Plains corridors today; brief fades possible during G2 onset.
<b>20m / 17m</b>	<b>FAIR</b>	Variable during daylight; G2 conditions may attenuate longer paths. Use 40m as alternate.
<b>15m / 10m</b>	<b>FAIR-POOR</b>	Solar flux supports openings but G2 absorption may suppress DX. Check PSKReporter; expect variability.
<b>Polar / Trans-polar</b>	<b>DEGRADED</b>	G2 polar absorption likely degrades polar/trans-polar paths through Saturday.
<b>GPS / PNT</b>	<b>NOMINAL-DEGRADED</b>	Brief positional dips of meters possible at high latitudes. No reported jamming or spoofing across CONUS today.

**Operational note:** G2 IN EFFECT today + G1 16-17 MAY watches mean HF/GPS environment is degraded into the severe-weather operational window. SKYWARN nets supporting the Saturday-Sunday

central Plains setup should pre-coordinate alternate band selection (40m primary) and have non-HF backups (Wireless Emergency Alerts, FEMA App, broadcast EAS) ready.

## SECTION 7B — AGRICULTURE, FOOD & SUPPLY CHAIN

*Standing agricultural tracks. AGR-001 [WASDE](#) in Section 3 FLASH; FIN-001 commodity tracker in Section 5.*

### [WASDE 12-MAY HEADLINES \(2026-27 first balance sheets\)](#)

- Wheat: 1.561 billion bushels US 2026-27 production — smallest crop in 54 years. -424 mb year over year. HRW down 25-36%. Limit-up close +45c KC and Chicago.
- Corn: 15.995 bb 2026-27 production (-6%); ending stocks 1.957 bb (-9% YoY); \$4.20/bu +10c.
- Soybeans: 4.435 bb (record-2); ending stocks 310 mb; \$11.40/bu vs \$10.40 prior; July +13.75c on Trump-Xi optimism.

Source: [USDA](#) WAOB / [WASDE](#).

### CONGRESSIONAL

- House E15 year-round ethanol blending vote scheduled today 14-MAY.
- Trump-Xi Beijing summit Day 1 today / Day 2 closure Friday — ag commitments (soybean, sorghum) are a swing variable.

### FERTILIZER / INPUTS

Fertilizer markets remain structurally tight. Urea, DAP, potash all above 5-year average. Russia/Belarus export tempo monitored. Standing baseline.

### RETAIL PASS-THROUGH

- Wheat retail (bread, baked goods, pasta) Q3-Q4 2026 pass-through; +3-5% likely.
- Pump-side gasoline pass-through 10-14 days from underlying crude movement.
- Soybean / livestock-feed pass-through Q4 2026 if Trump-Xi outcome supportive.

## SECTION 10 — PREPAREDNESS CONDITION ASSESSMENT

### PREP-CON 3 — ELEVATED | Assessed 14 May 2026 | Trend: DETERIORATING

**COMCON 4 — PARTIALLY DEGRADED (CONUS):** 24 [NWR](#) transmitters affected, 14 states (15 OOS + 9 DEG). KS Ulysses WXN81 OOS sits inside today's SW Kansas dry-microburst zone (Dodge City CWA). AK 8-transmitter Kodiak/Anchorage cluster degraded. NM triple-gap (Roswell + Carlsbad + Artesia) continues cycle 7.

**WX-CON 4 — ELEVATED:** [SPC](#) SLIGHT RISK central + eastern Kansas today (HAIL 15% hatched / WIND 15% / TORN 2%); dry-microburst threat S. High Plains / TX Panhandle / SW KS. [SPC](#) Day 4 (Sunday 17-MAY) signals strong-tornado potential central Plains.

**SWX-CON 1 — QUIET / FAVORABLE:** Kp 2-3 quiet/unsettled; greatest expected Kp 4.33 (below G-scale); 10.7 cm flux 126 sfu; HF favorable for emergency comms. [SWPC](#) G1-G2 watch issued for Friday 15-MAY (T+1) coronal hole HSS arrival.

**ASSESSED LEVEL:** PREP-CON 3 — ELEVATED. Trend: DETERIORATING. Multiple decision-trigger events stacked in the 0-72h window; LBN CF expires Sunday 17-MAY (T-3); CYB-005 Linux Copy Fail FCEB deadline tomorrow 15-MAY.

#### OPERATIONAL BASIS (top 5 drivers):

- ▶ Lebanon CF Day 29 EXTENDED DETERIORATING; 3rd round US-mediated talks open today (Aoun delegation, Ambassador Karam lead); CF formal expiry T-3 to Sunday 17-MAY.
- ▶ [CISA KEV](#) CVE-2026-31431 Linux Copy Fail privilege-escalation FCEB BOD deadline TOMORROW 15-MAY (URGENT). CVE-2026-0300 PAN-OS Wave 1 patch shipped 13-MAY (T+1); FCEB BOD T-13 to 27-MAY.

- ▶ Op Epic Fury Day 76 plus Hormuz blockade Day 32; US-Iran 14-point MoU stalemate; Senate 52 plus House 177 letter 14-MAY rejects any enrichment-allowing deal; [CIA](#) leak: Iran can withstand blockade ~4 more months.
- ▶ Trump-Xi Beijing summit Day 1 today (2hr 15min meeting at Great Hall of the People; Xi flagged Taiwan as “most important issue”); Russia Sarmat ICBM test 12-MAY plus ~800-drone barrage overnight 13-14 MAY signal strategic escalation tail.
- ▶ HLTH-001 Andes hantavirus M/V Hondius: principal tripwire fired 13-MAY (Kornfeld first US case at [UNMC](#) biocontainment); 18 Americans in US federal quarantine; surveillance window through ~21-JUN.

**Full PREP-CON framework reference:** [fortunefavorstheprepared.com / Preparedness Book of Knowledge / PREP-CON](http://fortunefavorstheprepared.com / Preparedness Book of Knowledge / PREP-CON)

## SECTION 11 — SECTOR IMPACT MATRIX

*Threats × Sectors. Scan your sector column. HIGH = direct decision/response required; MED = monitor and prepare; LOW = situational awareness only.*

THREAT	Healthcare	Bank/Fin	Manuf.	Transport	Energy	Pub. Sec
CYB-001 PAN-OS RCE	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH
CYB-005 Linux Copy Fail	MED	MED	MED	MED	MED	HIGH
GEO-CF-LBN Collapse Risk	LOW	MED	MED	HIGH	HIGH	LOW
GEO-001 Iran 14-pt Stalemate	LOW	MED	MED	MED	HIGH	LOW
GEO-AXIS-001 RU-UA Escalation	LOW	MED	MED	MED	HIGH	LOW
HLTH-001 Andes Hantavirus	HIGH	LOW	LOW	MED	LOW	MED
WX-001 KS Slight + Sunday	LOW	LOW	MED	MED	LOW	HIGH
FIN-001 Brent / <a href="#">WASDE</a>	LOW	HIGH	MED	MED	HIGH	LOW

*Business Edition subscribers receive a sector-specific deep dive of all HIGH and MED items above. See [fortunefavorstheprepared.com/dtr/](http://fortunefavorstheprepared.com/dtr/)*

## SECTION 12 — ANALYTICAL INTEGRITY & METHODOLOGY

### ANALYTICAL INTEGRITY STANDARD

Every DTR is produced under three prohibited failure modes:

**No Epistemic Cowardice.** When evidence supports a finding, we state the finding. We do not substitute hedges, attribution-laundering, or filler phrasing for assessments the evidence justifies.

**No Gatekeeping.** Our readers get the same operational picture a federal practitioner would see. PREP-CON assessment is not softened for reader comfort.

**No Dunning-Kruger Enablement.** We do not publish confidence our sources cannot sustain. Every confidence level is auditable against cited sources.

## RISK SCORE METHODOLOGY (§0.60)

**Risk Score = (Impact 1-10) + (Imminence 1-10) + (Operational Friction 1-5). FLASH threshold ≥ 20.**

- Impact: severity if event materializes (mass casualty, regional kinetic escalation, or critical-infrastructure outage = 8-10; sector-level disruption = 5-7; localized = 1-4).
- Imminence: how soon. T-0 to T+72h = 10; T+3-7d = 6-8; T+7-14d = 3-5; T+14d+ = 1-2.
- Operational Friction: degree to which event forces practitioner decision changes (1 = monitor; 3 = adjust posture; 5 = active response required).

## ESTIMATIVE LANGUAGE — ICD 203 SCALE (§0.55)

Term	Probability	Use when...
Almost no chance	1-5%	Event is theoretically possible but supporting evidence is absent.
Very unlikely	5-20%	Some indicators present but they are weak or contradicted.
Unlikely	20-45%	Evidence is mixed but leans against the event.
Roughly even chance	45-55%	Evidence is genuinely balanced.
Likely	55-80%	Multiple corroborating indicators; some uncertainty remains.
Very likely	80-95%	Strong corroboration; only specific exogenous factors could prevent the event.
Almost certain	95-99%	Event is observed or its inputs are observed and the chain is well-established.

**FORBIDDEN HEDGES:** “might,” “maybe,” “possibly,” “perhaps,” and “somewhat possible” are NOT estimative — they are evasive. Postbuild Hook 15 enforces.

## SECTION 13 — CLOSING

### END OF REPORT

*Fortune Favors the Prepared | Daily Threat Report | 15 May 2026*

***Semper Paratus, Semper Gumby.***

#### THE CONTINUITY CHRONICLES

*Same operational world as the DTR. Different lens.*

Book 1: The Meadow Protocol | Book 2: The Brush | Book 3: Unassigned Authority | Book 4: in development

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