

DAILY THREAT REPORT

Fortune Favors the Prepared | Intelligence Operations Division

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⚠️ PREPAREDNESS CONDITION 3 — INCIDENT PROBABLE — Brown Sky ⚠️

Tuesday, 19 May 2026 | Op Epic Fury Day 81 | Hormuz Blockade Day 37 | LBN CF Day 34 | Trend: STABLE

COMMUNICATIONS CONDITION: COMCON 4 — INCIDENT POSSIBLE — Orange Sky

WEATHER: WX-CON 4 — MDT — [WPC](#) Day 1 ERO MODERATE central Plains overnight

SPACE WEATHER: SWX-CON 1 — G1 (Minor) — Geomagnetic Storm watch active

Publication (UTC)	19 MAY 2026 / 1530 UTC
Reporting Period	18-MAY 1530 UTC through 19-MAY 1530 UTC (24h daily rollup)
SOP	v5.53 Source linkify complete All hooks PASSED

BOTTOM LINE UP FRONT

STATUS: PREP-CON 3 INCIDENT PROBABLE (Brown Sky), Trend STABLE. Op Epic Fury Day 81; US naval blockade of Iran Day 37; Lebanon ceasefire Day 34 of 45-day extension (porous, holding). [WX-CON 4 MDT](#) for [WPC](#) Day 1 ERO central Plains overnight. [SWX-CON 1 G1 \(Minor\)](#) geomagnetic storm watch expires end of 19-MAY. PREP-CON trend shifts from STABLE-DETERIORATING to STABLE as the renewed-Iran-strike driver pauses.

URGENT — IRAN STRIKE CALLED OFF, 2-3 DAY DEAL WINDOW OPENS: Trump publicly called off a “very major attack” on Iran scheduled for Tuesday 19-MAY (today) at the request of UAE, Saudi Arabia, and Qatar leaders, who said they were “getting very close to making a deal.” Truth Social: “we will NOT be doing the scheduled attack of Iran tomorrow, but have further instructed [SECWAR Hegseth + CJCS Caine + military] to be prepared to go forward with a full, large scale assault of Iran, on a moment’s notice.” Trump shifted nuclear position from permanent halt to “OK with 20-year suspension with real guarantee.” Iran submitted a revised proposal via Pakistan track. Window closes ~21-22 MAY. Brent fell from \$108.83 to settle \$107.25 (-1.5%). This is the cycle’s highest-impact transition — see KJ-5 and FLASH [\[GEO-002\]](#).

SEVERE WX — Day 1 ERO MODERATE central Plains overnight: [WPC](#) upgraded Day 1 Excessive Rainfall Outlook to MODERATE RISK for portions of Missouri, Iowa, Nebraska, and Kansas overnight 18/19-MAY (saturated soils from Monday rainfall + PWAT 1.75 inch + Corfidi vectors light-and-variable + backbuilding storms). [SPC](#) Day 2 SLIGHT Tue 19-MAY Great Lakes through Ohio Valley into southern Plains (damaging wind primary; large hail >2 inch possible in TX Permian Basin / Big Bend / Edwards Plateau). Day 3 (Wed 20-MAY) SLIGHT TX Hill Country shifted south. See [\[WX-001\]](#).

CYBER — PAN-OS deadline TOMORROW, Exchange at T+10: FCEB BOD 22-01 deadline for PAN-OS CVE-2026-0300 Captive Portal RCE is 21-MAY (T+2; last full work day before deadline is today). Microsoft Exchange CVE-2026-42897 XSS deadline 29-MAY (T+10). NGINX CVE-2026-42945 (CVSS 9.2 heap overflow) continues active exploitation per [VulnCheck](#). [Cisco](#) SD-WAN CVE-2026-20182 deadline T+2 past; UAT-8616 cluster still active with web-shell deployment across 10+ exploitation clusters. See [\[CYB-001\]](#), [\[CYB-009\]](#), [\[CYB-010\]](#), [\[CYB-007\]](#).

LEBANON: Ceasefire Day 4 of 45-day extension. Sunday 17-MAY IDF strikes killed 5 (15 injured) post-extension. Monday 18-MAY IDF strike on apartment building in Baalbek (Bekaa Valley) — first Bekaa-axis targeting since extension and a tripwire-relevant geographic expansion. 20th IDF KIA total since invasion (Sat 16-MAY, Golani). 4th Washington political round 2-3 JUN; security track at Pentagon 29-MAY. See [\[GEO-CF-LBN\]](#).

IRAN-HORMUZ: Strait blockade Day 37. Iran launched Persian Gulf Strait Authority (PGSA) 18-MAY to manage Hormuz transit with toll mechanism pending. Iraq oil minister 16-MAY: April Hormuz exports 10M

bbl vs 93M monthly pre-war (-89%); 90% of Iraqi state revenue dependent on this corridor. [CENTCOM](#) redirected 85 commercial vessels mid-APR through 18-MAY. See [\[GEO-001\]](#).

RUSSIA-CHINA AXIS: Putin arrives Beijing TONIGHT for 2-day state visit. Welcome ceremony at Tiananmen Square morning of 20-MAY. Two anchor documents to be signed: 47-page joint statement on comprehensive partnership + JOINT DECLARATION ON MULTIPOLAR WORLD AND NEW INTERNATIONAL RELATIONS. ~40 documents total. Russian delegation includes Sechin (Rosneft), Miller (Gazprom), Timchenko, Mikhelson, Deripaska, Lavrov. Russian oil exports to China +35% Q1 2026; trade ~entirely in rubles/yuan. Coincides with 25th anniversary of 2001 Sino-Russian Treaty of Friendship. See [\[GEO-CHN-001\]](#).

SPACE WX: [SWPC](#) G1 watch (WATA20 serial 1113) continues through end of 19-MAY; closes 06z 20-MAY. Glancing-blow CME from 16-MAY M-class CME arrived ~0:00 UTC today; G1 conditions observed at higher latitudes. Electron 2MeV integral flux alert ALTEF3 serial 3688 continuing >1000 pfu since 16-MAY 1740 UTC (yesterday max 6118 pfu) — LEO satellite charging risk for operators with sat experimentation.

MARKETS: Brent settled \$107.25 Mon (-1.5%) absorbing Trump call-off as partial good news. Defense names (LMT/RTX/NOC/GD/BA/HII/LHX) carry asymmetric downside on confirmed deal, upside on no-deal + strike resumption. [USDA](#) WASDE-671 (released 12-MAY, now 7 days old): 2026/27 wheat 1.561 bb (-424 mb YoY), corn 16.0 bb (-6%), soybeans 4.435 bb (+173 mb). Next [WASDE](#) 11-JUN.

PRACTITIONER POSTURE — 72-HOUR DECISION TRIGGERS

1. PAN-OS CVE-2026-0300 FCEB deadline TOMORROW Wed 21-MAY (T+2; today is the last full work day). Confirm patch deployment for any internet-exposed PA-Series or VM-Series before EOD. See [\[CYB-001\]](#).
2. Central Plains households (KS/MO/IA/NE) face ERO MODERATE overnight flash-flood window; pre-position power-out + drainage plans and verify two-of-three non-NWR alert paths (Wireless Emergency Alerts + [NWS](#) app + commercial broadcast). See [\[WX-001\]](#).
3. Iran deal-or-strike inflection 2-3 day window (closes ~21-22 MAY). Pump-price posture flex through end of week; cyber-spillover preparedness elevates on confirmed strike scenario. See [\[GEO-002\]](#).
4. [Cisco](#) SD-WAN operators T+2 past FCEB deadline: re-baseline web-shell detections (XenShell + Godzilla), audit AWS vManage credential reuse, rotate JWT signing keys. See [\[CYB-007\]](#).
5. Microsoft Exchange operators: enable EEMS mitigation if not already done; FCEB deadline 29-MAY (T+10). See [\[CYB-009\]](#).

WHAT CHANGED SINCE 18-MAY (24-HOUR ROLLUP)

+ ADDED: Trump 18-MAY public call-off of Tuesday Iran attack (GEO-002 transitioned from NEW THIS CYCLE to CALLED OFF / PAUSED). Iran Persian Gulf Strait Authority (PGSA) created 18-MAY with transit-toll mechanism pending. Putin-Xi 2-day state visit begins tonight; multipolar declaration tomorrow. ERO Day 1 MODERATE central Plains overnight upgrade. Iraqi oil minister disclosure: Hormuz exports - 89% (10M bbl April vs 93M monthly pre-war). UAE Barakah nuclear plant drone-strike fire 17-MAY (unattributed). Iran Maj Gen Abdollahi public “hands on trigger” warning. [NWR](#) composition shift: NM triple-gap recedes from EXTREME fire-weather, MI Petoskey + MI Adrian/Petersburg + IN Angola + TN Shelbyville move into Day 2-3 corridor.

~ CHANGED: Day counters: Op Epic Fury 80 → 81; blockade 36 → 37; LBN CF 33 → 34; WHCD 24 → 25. PREP-CON trend STABLE-DETERIORATING → STABLE. PAN-OS T+3 → T+2 future (deadline tomorrow). Exchange T+11 → T+10 future. [Cisco](#) SD-WAN T+1 past → T+2 past. Linux Copy Fail T+3 past → T+4 past. GEO-002 Score 28 → 25 (status shift from NEW THIS CYCLE to CALLED OFF; KJ-5 reframed from “likely within 14 days” to “deal-or-strike 2-3 day inflection”). Lebanon: cumulative-war Lebanese killed 3,020 per Wikipedia 18-MAY (cumulative since 2-MAR; distinct from post-CF subset). Brent reactive: \$107.25 settle (-1.5%) absorbing call-off.

= NO MATERIAL CHANGE: PREP-CON 3 INCIDENT PROBABLE baseline; COMCON 4 INCIDENT POSSIBLE baseline; Andes hantavirus zero second-gen Day 6; Russia kinetic tempo Pokrovsk axis; US naval blockade operational posture; munitions stockpile structural posture (1-4 year replenishment window); [NWR](#) total roster (33 affected / 14 OOS / 19 DEG / 14 states / 17 AK cluster — identical to 18-MAY, threat-overlap composition shifted east).

SECTION INDEX

Click any entry ID for full detail. Color band: red = FLASH ≥ 25; orange = FLASH 20-24.

SECTION	ACTIVE ENTRIES (click ID)
SECTION 1 — KEY JUDGMENTS	KJ-1 · KJ-2 · KJ-3 · KJ-4 · KJ-5
CRITICAL TIME HACK	7 cards linked to FLASH entries
SECTION 3 — FLASH EVENTS	GEO-002 · WX-001 · CYB-010 · CYB-007 · CYB-009 · GEO-001 · GEO-CF-LBN · CYB-001 · GEO-CHN-001 · CYB-005 · HLTH-001 · AGR-001
SEC 4A — CYBER (CARRYOVER)	below-FLASH cyber + supporting CVEs
SEC 4B — GEOPOLITICAL (CARRYOVER)	LBN/IR/RU-CN context
SEC 4C — MIC SECOND-ORDER IMPACTS	GEO-002 → MIC chain
SEC 4D — INDICATORS & WARNING MATRIX	10 active tracks
SEC 5 — ENERGY / INFRASTRUCTURE / SUPPLY CHAIN	GEO-001
SEC 6 — AVIATION / TRANSPORTATION	WX-001 (IROPS)
SEC 7 — METEOROLOGICAL & SEVERE WX	WX-001 · AGR-001
SEC 7A — SPACE WEATHER & EMCMM	G1 watch through end of 19-MAY
SEC 7B — AGRICULTURE, FOOD & SUPPLY CHAIN	AGR-001
SEC 10 — PREP-CON ASSESSMENT	(narrative)
SEC 11 — SECTOR IMPACT MATRIX	PREP-CON + COMCON
SEC 12 — ANALYTICAL INTEGRITY	(narrative)
SEC 13 — CLOSING	(narrative)

GEOGRAPHIC IMPACT INDEX

Find your region; entries in that row apply to you. Click any entry ID for full detail.

REGION / STATE	ACTIVE ENTRIES	NOTES
Central Plains (KS, MO, IA, NE)	WX-001 · AGR-001	Day 1 ERO MODERATE overnight 18/19-MAY (backbuilding/repeating storms, PWAT 1.75-in, saturated soils); KS Ulysses NWR gap inside corridor (DDC CWA)
Great Lakes (MI, OH, IL, IN, WI, NY, PA)	WX-001	Day 2 SLGT damaging-wind primary; MLCAPE 1000-1500 J/kg lower Great Lakes. NEW NWR gaps in corridor: MI

		Petoskey + MI Adrian/Petersburg + IN Angola + MN Gunflint Lake
Ohio Valley + New England	WX-001	Day 2 SLGT damaging-wind, isolated severe hail; OH Valley MLCAPE 2000-3000 J/kg. IL Hillsboro KXI-79 OOS eastern flank Day 1 ERO MOD; TN Shelbyville WXX-63 OOS Day 3 MRGL edge
Southern Plains (OK, TX, AR)	WX-001 · AGR-001	Day 2 SLGT; TX Permian Basin / Big Bend / Edwards Plateau hail >2 inch possible; Day 3 SLGT TX Hill Country shifted south. NM triple-gap (Roswell/Carlsbad/Artesia) RECEDING — fire-wx past
Mountain West (CO, WY, UT)	—	WY/CO snow anomaly from 17-18 MAY now past; CO Springs WXM-56 OOS continues but no carryover threat overlap
East Coast	—	Heat wave ending Wednesday per WPC ; advisory issuance receding
Alaska (NWR cluster)	—	17-site NWR cluster (1 OOS + 16 DEG) continues; outside CONUS severe-wx corridor
NATIONAL — CYBER	CYB-001 · CYB-005 · CYB-007 · CYB-009 · CYB-010	PAN-OS T+2 future · Linux Copy Fail T+4 past chain-risk · Cisco SD-WAN T+2 past UAT-8616 active · Exchange T+10 future · NGINX active exploit pre-KEV
NATIONAL — ENERGY/FUEL	GEO-001 · GEO-002	Hormuz blockade Day 37 · Iran strike call-off + 2-3 day deal window · Brent -1.5% Mon close
NATIONAL — AGRICULTURE	AGR-001	WASDE-671 baseline (12-MAY) · central Plains overnight flash-flood · eastern US heat receding
International Travel — Middle East	GEO-001 · GEO-002 · GEO-CF-LBN	Gulf airspace + ME flexibility through 2-3 day deal window; UAE Barakah drone fire 17-MAY
Strait of Hormuz	GEO-001 · GEO-002	Blockade Day 37; Iran PGSA launched 18-MAY; transit toll pending; Iraq -89% April Hormuz exports
Southern Lebanon + Bekaa + Northern Israel	GEO-CF-LBN	CF Day 4 of 45; daily IDF strikes; 17-MAY +5 killed; 18-MAY Baalbek strike (Bekaa expansion)
Beijing — Putin-Xi summit	GEO-CHN-001	Putin arrives tonight; multipolar declaration morning 20-MAY; 47-pg comprehensive partnership document
Russia-Ukraine	—	Pokrovsk-axis pressure continuing; 18-MAY RU strike on Dnipro (Yuzhmash); below-FLASH
HF / EMCOMM — high latitudes	—	SWX-CON 1 G1 Minor (watch through end of 19-MAY); polar paths degraded; SAT ops note electron flux >1000 pfu

SECTION 1 — KEY JUDGMENTS

Five key judgments drive this cycle. Each is a 2-3 sentence summary per ICD 203 estimative scale; full evidence base, tripwires, and alt-hypotheses live in the linked FLASH entry.

KJ-1: Lebanon ceasefire holds porously through 29-JUN. CONFIDENCE: HIGH — CF Day 4 of 45-day extension. Sunday 17-MAY post-extension strikes killed 5 (15 injured); Monday 18-MAY Baalbek strike represents Bekaa-axis expansion. 20th IDF KIA total holds at Sat 16-MAY. Both Washington and Beirut benefit politically from continuation; tripwire for collapse remains high-mass IDF Beirut Dahieh strike paired with same-week Hezbollah strategic-rocket response. Full analysis: [\[GEO-CF-LBN\]](#).

KJ-2: Strait of Hormuz remains effectively closed through Q2 2026. CONFIDENCE: MODERATE — Trump strike call-off and new Iranian PGSA increase diplomatic activity around Hormuz but do not change the operational reality: blockade Day 37, commercial transit at single-digit % of pre-war volume, Iraqi exports -89%. Practitioner watch: Pakistan-track delivery of revised Iran proposal, joint-statement language from Putin-Xi tomorrow on Hormuz, deal-or-strike inflection ~21-22 MAY. Full analysis: [\[GEO-001\]](#).

KJ-3: Multi-day flash-flood corridor produces material EOC activation overnight 18/19-MAY and again Wednesday. CONFIDENCE: HIGH — [WPC](#) Day 1 ERO upgraded to MODERATE RISK for portions of MO/IA/NE/KS overnight (saturated soils + PWAT 1.75 inch + backbuilding storms). [SPC](#) Day 2 SLIGHT Tue across Great Lakes through Ohio Valley into southern Plains. [NWR](#) coverage gaps at KS Ulysses, IL Hillsboro, MN Gunflint Lake plus newly-relevant MI Petoskey + Adrian/Petersburg + IN Angola + TN Shelbyville sit inside or adjacent to today's footprint. Full analysis: [\[WX-001\]](#).

KJ-4: Andes hantavirus second-generation transmission very unlikely through 21-JUN. CONFIDENCE: HIGH — Day 6 post-index case with zero second-generation cases across household and HCW contacts at [UNMC](#) biocontainment. Andes person-to-person transmission requires sustained close-contact exposure that isolation protocol breaks. Full analysis: [\[HLTH-001\]](#).

KJ-5: US-Iran enters 2-3 day deal-or-strike inflection window. CONFIDENCE: MODERATE — Trump publicly called off a planned Tuesday 19-MAY attack on Iran at the request of UAE/Saudi/Qatar leaders "because they think they are getting very close to making a deal." Pentagon instructed to prepare for "full, large scale assault... on a moment's notice" if no deal. Trump nuclear position shifted from permanent halt to "OK with 20-year suspension with real guarantee." Iran submitted revised proposal via Pakistan track. Window closes ~21-22 MAY. Full analysis: [\[GEO-002\]](#).

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 cross-reference matching FLASH entries.

ERO Day 1 MODERATE central Plains overnight — flash-flood watch tonight into Tue morning.

[TODAY | 19-MAY (T+0) | WEATHER]

DECISION TRIGGER: [WPC](#) upgraded Day 1 ERO to MODERATE for portions of MO/IA/NE/KS (issued 1151 EDT 18-MAY, reaffirmed 2023 EDT). Saturated soils + PWAT 1.75 inch + Corfidi vectors light-and-variable + backbuilding storms. KS Ulysses WXN-81 OOS sits inside corridor; IL Hillsboro KXI-79 OOS on eastern flank. Pre-stage drainage, sump-pump, and power-out plans across KS/MO/IA/NE before midnight local. See [\[WX-001\]](#).

PAN-OS CVE-2026-0300 FCEB deadline TOMORROW — verify patch by EOD.

[TODAY | 19-MAY (T+0) | CYBER]

DECISION TRIGGER: FCEB BOD 22-01 deadline 21-MAY (T+2) for PAN-OS Captive Portal RCE. Today is the last full work day before deadline. Wave 1 patch shipped 13-MAY; Wave 2 ETA ~28-MAY (post-deadline). [Unit 42](#) attribution CL-STA-1132 with HIGH confidence; ~225,000 internet-facing instances per [Shadowserver](#) baseline. Confirm patch deployment for any internet-exposed PA-Series or VM-Series. See [\[CYB-001\]](#).

Iran strike call-off 2-3 day deal window closes ~21-22 MAY.

[TODAY | 19-MAY (T+0) | GEOPOLITICAL]

DECISION TRIGGER: Trump 18-MAY publicly called off Tuesday 19-MAY attack at UAE/Saudi/Qatar request. Pentagon instructed to be ready for “full, large scale assault on a moment’s notice.” Practitioner read: pump-price posture flex through end of week; cyber-spillover preparedness elevates on confirmed-strike scenario; ME airspace travel flexibility through 22-MAY. See [\[GEO-002\]](#).

Putin arrives Beijing tonight; multipolar declaration tomorrow morning.

[TONIGHT | 19-MAY (T+0) | GEOPOLITICAL]

DECISION TRIGGER: Putin lands Beijing this evening; Wang Yi airport reception; Diaoyutai residence. Tiananmen Square welcome ceremony morning 20-MAY. Watch readout for Iran-positive language, anti-US security clauses, joint Hormuz statement, Boeing 200-aircraft claim resolution. See [\[GEO-CHN-001\]](#).

[SWPC](#) G1 watch expires end of 19-MAY; SWX-CON 1 → 0 at 06z 20-MAY.

[TUESDAY | 19-MAY (T+0) | SPACE WX]

DECISION TRIGGER: WATA20 serial 1113 G1 watch active through end of 19-MAY. Glancing-blow CME from 16-MAY M-class CME arrived ~0:00 UTC today. HF mostly favorable; polar paths degraded. SAT operators note ALTEF3 electron 2MeV flux alert continuing >1000 pfu (yesterday max 6118 pfu) — LEO satellite charging risk. AA0NM and other practitioner-tier hams: verify alternate band selection (60m or 80m if 40m fades).

Day 3 SLGT TX Hill Country; multiple MCS’s same axis; EOC pre-stage.

[WEDNESDAY | 20-MAY (T+1) | SEVERE WX]

DECISION TRIGGER: [WPC](#) Day 3 SLIGHT TX Hill Country (shrunk + shifted south from Day 2 inheritance); broad MRGL Plains → mid-Appalachians. Multiple MCS’s on same axis through Thursday. Local EOCs in TX/OK/AR/TN should plan for activation triggers (FFW + 100k-pop, sustained flooding, road-closure cascade). See [\[WX-001\]](#).

Microsoft Exchange CVE-2026-42897 FCEB deadline T+10.

[FRIDAY | 29-MAY (T+10) | CYBER]

DECISION TRIGGER: On-prem Exchange Server OWA XSS spoofing CVE-2026-42897 (CVSS 8.1). Microsoft tagged “Exploitation Detected” in advisory; EEMS mitigation available pending permanent fix. FCEB BOD compliance due 29-MAY (T+10). Exchange operators should enable EEMS within 48 hours of KEV addition (which was 15-MAY) if not already done. See [\[CYB-009\]](#).

US-Iran strike CALLED OFF 18-MAY at Gulf-ally request; 2-3 day deal window opens.

[GEO-002 | FLASH | CALLED OFF — PAUSED 2-3 DAYS | Score 25]

DELTA SINCE YESTERDAY

~ **CHANGED:** A planned “very major attack” against Iran scheduled for Tuesday 19-MAY (today) was publicly called off by Trump on Monday 18-MAY evening after the leaders of UAE, Saudi Arabia, and Qatar requested a 2-3 day pause “because they think they are getting very close to making a deal.” Truth Social: “we will NOT be doing the scheduled attack of Iran tomorrow, but have further instructed [SECWAR Hegseth + CJCS Caine + the United States Military] to be prepared to go forward with a full, large scale assault of Iran, on a moment’s notice.” Trump shifted nuclear position from a permanent halt to “OK with a 20-year suspension with real guarantee.”

+ **ADDED:** Iran's Supreme National Security Council launched the Persian Gulf Strait Authority (PGSA) on 18-MAY to manage Hormuz transit; [Windward](#) AI reports a transit-toll mechanism is pending unveiling.

+ **ADDED:** Major General Ali Abdollahi (commander, Khatam al-Anbiya Central Headquarters) public warning: Iranian forces are "with hands on the trigger... any further miscalculation would be met with a response far beyond previous conflicts."

+ **ADDED:** Iran submitted a revised proposal via Pakistan-mediated track per [Reuters](#) citing a Pakistani source.

= **NO MATERIAL CHANGE:** [NYT](#)/[TOI](#) option set if no deal: (a) intensified bombing of military + infrastructure, (b) Kharg Island seizure, (c) commando operation to extract buried nuclear material.

WHY THIS CYCLE

This is the cycle's highest-impact transition. Yesterday's framing anchored on [NYT](#) 17-MAY reporting that US + Israel were in "intensive preparations" for renewed strikes "as early as next week," with [NYT](#), [Times of Israel](#), and [Israel National News](#) all corroborating the buildup. On 18-MAY evening, Trump publicly called off the Tuesday strike at the request of UAE/Saudi/Qatar leaders. Window: 2-3 days, closes ~21-22 MAY. Pentagon instructed to be ready on a moment's notice. Brent fell from \$108.83 to \$106.71 intraday on the announcement, recovering to settle \$107.25 (-1.5%). Sources: [Fox News](#) live blog 18-MAY, [ABC News](#), [NPR](#) (via OPB/KPBS/WGCU/Houston Public Media).

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

SIZE	US Department of War + CENTCOM full force posture for renewed strike option; IDF coordination cell active; CSG plus amphibious group in CENTCOM AOR; air-wing assets Al Udeid/AI Dhafra/Prince Sultan AB/Manama; THAAD/Patriot batteries forward-deployed across UAE/Saudi/Bahrain/Kuwait/Qatar.
ACTIVITY	Strike planned for Tuesday 19-MAY publicly called off Monday evening 18-MAY. Three diplomatic tracks active: (1) Pakistan-mediated US-Iran revised-proposal track; (2) Gulf-monarchy-mediated dialogue (UAE/Saudi/Qatar); (3) Trump-Xi backchannel coordination from 13-15 MAY Beijing visit. Pentagon ready posture preserved per Truth Social instruction.
LOCATION	Targeting set per prior intel: Natanz/Fordow/Arak nuclear complexes; IRGC C2; Bandar Abbas naval; Kharg Island oil-export terminal (named NYT option). Iran-side response posture: IRGC-AF Khatam HQ "hands on trigger"; Houthi/Iraqi-PMF/Hezbollah proxy activation Tier-2.
TIME	19-MAY 0000 UTC: deal window opens. 21-22 MAY: window closes (Trump 2-3 day framing). 21-22 MAY through 22-JUN: decision-execution window if no deal. Pakistan track delivery awaiting US response.
EQUIPMENT	No CENTCOM kinetic posture change observed in OSINT this cycle; carrier movements, 2 / B-52 generation, and tanker formation patterns consistent with on-call posture. Strike option appears to remain a 24-72 hour generation cycle.
UNIT	Times of Israel liveblog 18-MAY (primary); NYT "intensive preparations" 17-MAY; Fox News live blog 18-MAY; NPR ; ABC News ; Reuters via Pakistani source; CSIS munitions analysis (April 2026 baseline).

DOWNSTREAM — CASCADE IMPLICATION

If a deal is announced within the 2-3 day window: Hormuz partial-reopening framework **likely**; Brent -\$8 to -\$12 on confirmation; defense-sector retracement; cyber-spillover risk softens. If no deal and strike order is issued: Hormuz fully collapses for an additional 30-60 days; Brent +\$10 to +\$15 on order announcement; Iranian Houthi/Iraqi-PMF activation in 48 hours; US/EU airspace advisories for ME corridors; Lebanon CF follow-on collapse risk elevates per KJ-1 tripwire. MIC chain: stockpile-replenishment cycle **almost no change** on 72h horizon (structural 1-4 year window); FY27 supplemental request holds.

ANALYST ASSESSMENT

I assess this is the single highest-stakes 72-hour decision window of Q2 2026. I judge the probability of an actual deal announcement within the 2-3 day window at **roughly even chance** (40-55%); Iran's revised proposal substance is unknown, Trump has set and broken multiple deadlines since 28-FEB, and the Gulf-monarchies' leverage is real but not decisive. I judge the probability that the strike order is issued

immediately upon window expiry at unlikely (20-30%): Trump’s pattern is to extend deadlines, not enforce them, and the Pakistan-track activity creates additional off-ramps. The window most likely (50-60%) ends with a further extension. I would change my mind if (a) Hegseth or Caine make public statements consistent with strike preparation (escalates from likely deal/extension to likely strike); (b) IDF mobilization order is observed; (c) Iran publicly rejects the US proposal substance; (d) PRC public position post-Putin-Xi readout is overtly anti-strike (lowers strike probability further).

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (unlikely): The Trump call-off was a deception operation and the strike is actually still scheduled, with the public announcement designed to lower Iranian readiness.

WHAT WOULD SUPPORT	Strike-window observation of B-2 generation or carrier repositioning inconsistent with peacetime posture; secondary leak from Israeli sources confirming continued planning.
WHAT WOULD DISCONFIRM	No detected CENTCOM force-generation indicators; Pentagon public-affairs continues “moment’s notice” framing rather than going silent; Iran has not surged air-defense posture
CURRENT STATUS	INDETERMINATE — collection gaps preclude high-confidence call either way.

Alt-Hyp 2 (roughly even chance): The Gulf-monarchy intervention is genuine and Iran is actually close to a deal that includes a 20-year enrichment suspension.

WHAT WOULD SUPPORT	Trump’s explicit position shift from permanent halt to 20-year suspension; Pakistani-track delivery of revised proposal; concrete UAE/Saudi/Qatar leader engagement (not just diplomatic statements).
WHAT WOULD DISCONFIRM	Iran public rhetoric (“hands on trigger”) inconsistent with imminent concession; Tehran political costs of any visible concession after Khamenei death are severe.
CURRENT STATUS	OBSERVED IN PROGRESS — proposal substance not yet public.

COLLECTION GAPS — WHAT I CANNOT SEE

- Substance of Iran’s revised proposal via Pakistan track is not public.
- Israeli internal cabinet position on Trump’s deal terms unknown; Netanyahu was reportedly informed before Trump’s announcement but has not commented publicly.
- PRC position on US-Iran deal vs strike is opaque; will likely become visible only in Putin-Xi joint readout 20-MAY morning.
- Domestic US political cost-benefit calculation in Trump’s framing is not externally observable.

SOURCES

[Times of Israel liveblog 18-MAY](#) (primary); [NYT](#) “intensive preparations” 17-MAY; [Fox News live blog 18-MAY](#); [NPR](#); [ABC News](#); [Reuters](#) via Pakistani source; [Wikipedia 2026 Iran war](#) (cumulative baseline).

Day 1 ERO MODERATE central Plains overnight; Day 2 SLGT Great Lakes through southern Plains.

[WX-001 | FLASH | ESCALATED | Score 26]

FLASH-tier weather event. Full analysis — including ERO/[SPC](#) corridor detail, [NWR](#) transmitter outage roster with east-shifted threat-overlap composition, MLCAPE / shear / PWAT specifics, and practitioner action by CWA — is in [SECTION 7 — METEOROLOGICAL & SEVERE WEATHER](#). WX-CON scale per [NOAA SPC Convective Outlook](#). Headline drivers this cycle: [WPC](#) Day 1 ERO MDT ([NOAA](#) tier 3 of 4) for portions of MO/IA/NE/KS overnight 18/19-MAY (saturated soils + PWAT 1.75 inch + backbuilding storms); [SPC](#) Day 2 SLGT ([NOAA](#) tier 2 of 5) Tue 19-MAY across Great Lakes through Ohio Valley into southern

Plains (damaging wind 15%, hail 15%, tornado 2%); Day 3 SLGT TX Hill Country shifted south. [NWR](#) composition shift: 7 critical-CONUS sites carrying corridor (KS Ulysses, IL Hillsboro, MN Gunflint Lake) + 4 NEW (MI Petoskey, MI Adrian/Petersburg, IN Angola, TN Shelbyville).

NGINX CVE-2026-42945 CVSS 9.2 heap overflow actively exploited; [CISA KEV](#) pickup pending.

[CYB-010 | FLASH | CARRYOVER — ACTIVE EXPLOITATION | Score 25]

DELTA SINCE YESTERDAY

= **NO MATERIAL CHANGE**: Active exploitation continues per VulnCheck telemetry (last public update 17-MAY). Patches available from F5 and NGINX project. ASLR posture remains critical secondary mitigation.

+ **ADDED**: Treat as “[CISA KEV](#) add pending” for compliance posture: any FCEB or critical-infrastructure operator should patch within standard 14-day cadence regardless of whether catalog add occurs this week.

WHY THIS CYCLE

Heap buffer overflow in `ngx_http_rewrite_module` affecting NGINX Plus + NGINX Open Source 0.6.27 through 1.30.0. RCE on ASLR-disabled hosts; worker-process crash even with ASLR. Active exploitation in the wild per [VulnCheck](#) telemetry; chain-risk with Linux Copy Fail CVE-2026-31431 provides full root primitive on Linux container hosts.

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

SIZE	NGINX is the most-deployed web server globally (~33% market share); affected versions span the last 18 years. Internet-exposed instance count is in the millions. FCEB exposure significant; commercial-sector exposure higher.
ACTIVITY	Heap-corruption exploitation observed in the wild; payloads consistent with web-shell deployment. Exploit reliability higher on long-lived servers without ASLR randomization or with predictable allocator states.
LOCATION	NGINX Plus all editions; NGINX Open Source 0.6.27 through 1.30.0. Patches: NGINX Plus R32, NGINX Open Source 1.30.1+.
TIME	Public disclosure week of 12-MAY; active exploitation observed within 48 hours. CISA KEV catalog add not yet observed at cycle close; expected within 7-10 days.
EQUIPMENT	CVSS 9.2 (network/no auth/no UI/high impact). CWE-122 Heap Buffer Overflow. Trigger via crafted HTTP rewrite-rule processing.
UNIT	VulnCheck (active exploit telemetry); F5 (vendor); NGINX project; The Hacker News (analysis); depthfirst (corroborating advisory).

DOWNSTREAM — CASCADE IMPLICATION

Worker-process DoS **likely** baseline; full host compromise on ASLR-disabled. Chain with Linux Copy Fail **likely** yields root primitive. Cascade to cloud workloads where NGINX is fronting an internal service depends on IAM posture and container-runtime isolation.

ANALYST ASSESSMENT

I judge this is the cycle’s single highest-impact unpatched cyber vulnerability for non-FCEB operators because the KEV pickup timing does not constrain exploitation reality. I assess that mass-scan activity for unpatched NGINX is **almost certain** by end of week. I would change my mind on the urgency framing only if (a) F5 issues a public statement that observed exploitation is non-replicating proof-of-concept code rather than weaponized payloads, or (b) the affected version range narrows substantially in vendor follow-up.

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (unlikely): Observed exploitation telemetry is proof-of-concept research traffic rather than weaponized attack traffic.

WHAT WOULD SUPPORT	VulnCheck retraction of active-exploitation flag; F5 / NGINX project public statement.
WHAT WOULD DISCONFIRM	Continued telemetry; secondary-source confirmation of web-shell deployment.
CURRENT STATUS	NOT observed (PoC-only framing).

COLLECTION GAPS — WHAT I CANNOT SEE

- [CISA KEV catalog](#) timing is opaque; cannot confirm whether a Federal compliance deadline will materialize this week.
- F5 (vendor) has not released a comprehensive customer-impact statement; commercial scope is inferred.

SOURCES

[VulnCheck advisory](#); [The Hacker News](#); F5 / NGINX project security advisories; [depthfirst](#) corroboration.

[Cisco](#) SD-WAN CVE-2026-20182 FCEB deadline T+2 past; UAT-8616 cluster still active.

[CYB-007 | FLASH | FCEB DEADLINE T+2 PAST | Score 24]

DELTA SINCE YESTERDAY

~ **CHANGED:** FCEB BOD compliance deadline 17-MAY now T+2 past. Federal posture transitions to compliance audit; private-sector exposure remains real and ongoing.

= **NO MATERIAL CHANGE:** UAT-8616 attribution per [Cisco](#) Talos holds; Operational Relay Box (ORB) network overlap; XenShell + Godzilla web shells across at least 10 exploitation clusters since March 2026; Cluster 10 credential-stealer (admin hashdump + JWT chunks + AWS vManage credentials) active.

WHY THIS CYCLE

CVSS 10.0 authentication bypass in [Cisco](#) Catalyst SD-WAN Controller and Manager. Cloud-pivot capability via stolen AWS vManage credentials. [CISA KEV](#) add 14-MAY (T+2 past as of today). [CISA ED 26-03](#) "Mitigate Vulnerabilities in [Cisco](#) SD-WAN Systems" plus supplemental hunt-and-hardening guidance issued.

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

SIZE	FCEB agencies running Catalyst SD-WAN are within scope of BOD 22-01; commercial customers global. Service-provider deployments compound exposure by exposing customer-tenant networks.
ACTIVITY	Web-shell deployment (XenShell + Godzilla variants) on ≥10 clusters; Cluster 10 specifically extracts admin hashdump, JWT chunks, and AWS vManage credentials for cloud-pivot. ORB-network overlap consistent with state-cluster operational pattern.
LOCATION	Cisco Catalyst SD-WAN Controller + Manager (cloud and on-prem). Patches available via Cisco PSIRT.
TIME	CISA KEV add 14-MAY; FCEB deadline 17-MAY (T+2 past as of today).
EQUIPMENT	CVSS 10.0 unauthenticated authentication bypass to administrative privileges. Post-exploitation observed: web-shell, credential theft, AWS vManage cloud pivot.

UNIT	CISA KEV ; Cisco PSIRT + Talos (attribution UAT-8616); The Hacker News ; CISA ED 26-03 and supplemental directive.
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DOWNSTREAM — CASCADE IMPLICATION

SD-WAN fabric compromise yields enterprise-network visibility, lateral pivot, and cloud-pivot beyond on-prem footprint. Service-provider deployments cascade compromise to customer tenants. AWS vManage credential theft enables out-of-band access even after on-prem patching.

ANALYST ASSESSMENT

I judge FCEB compliance at deadline (17-MAY) at **likely** (60-75%) based on historical BOD telemetry; supplemental directives are **likely** within 14 days. I assess that any FCEB or commercial customer that has not rotated AWS vManage credentials since 14-MAY should treat those credentials as **likely** compromised even after applying the patch. I would change my mind on compromise probability if [Cisco](#) Talos publishes telemetry showing the credential-theft Cluster 10 footprint is narrower than current assessment.

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (unlikely): UAT-8616 attribution is incorrect and observed exploitation is a non-state cluster repurposing public PoC.

WHAT WOULD SUPPORT	Independent threat-intel community attribution to a different cluster; public PoC repository showing first-mover advantage outside Talos timeline.
WHAT WOULD DISCONFIRM	Continued Talos visibility into ORB-network overlap consistent with state-cluster operational tradecraft.
CURRENT STATUS	NOT observed.

COLLECTION GAPS — WHAT I CANNOT SEE

- Private-sector compliance rate is opaque; only FCEB has attestation requirement.
- Service-provider scope of compromise is not directly observable from outside.
- AWS vManage credential rotation rate is not externally measurable.

SOURCES

[CISA KEV catalog](#); [Cisco Talos + PSIRT](#); [The Hacker News](#); [CISA ED 26-03](#).

Microsoft Exchange CVE-2026-42897 XSS spoofing — FCEB deadline T+10 (29-MAY).

[CYB-009 | FLASH | MID-CYCLE | Score 23]

DELTA SINCE YESTERDAY

~ **CHANGED:** Days-to-deadline 11 → 10 (T+10 future).

= **NO MATERIAL CHANGE:** “Exploitation Detected” per Microsoft advisory; Exchange Emergency Mitigation Service (EEMS) mitigation available; permanent fix pending.

WHY THIS CYCLE

CVSS 8.1 cross-site scripting vulnerability in Outlook Web Access (OWA) during web-page generation, allowing arbitrary JavaScript execution in browser context under specific interaction conditions. KEV add 15-MAY (T-4 past) with FCEB compliance due 29-MAY (T+10). On-prem Exchange Server only; Exchange Online not in scope.

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

SIZE	All FCEB agencies operating on-prem Exchange; commercial-sector on-prem Exchange installed base global. Exchange Online (cloud) NOT in scope.
ACTIVITY	Cross-site scripting in OWA web page generation. Under specific interaction conditions, arbitrary JavaScript executes in user browser context. Microsoft advisory tagged "Exploitation Detected" without published threat-actor attribution.
LOCATION	On-prem Exchange Server (specific build numbers per Microsoft advisory).
TIME	KEV add 15-MAY; FCEB compliance due 29-MAY (T+10).
EQUIPMENT	CVSS 8.1; CWE-79 Cross-Site Scripting. Exchange Emergency Mitigation Service (EEMS) provides interim mitigation; permanent fix in future cumulative update.
UNIT	CISA KEV ; Microsoft MSRC ; The Hacker News .

DOWNSTREAM — CASCADE IMPLICATION

BEC-style fraud at scale enabled; OWA session hijack yields enterprise-mail access; potential chain with internal-network attacks once user-context foothold established. Exchange Online tenants not affected.

ANALYST ASSESSMENT

I judge FCEB compliance at 29-MAY at **likely** (60-75%) based on EEMS availability + 14-day window; commercial-sector compliance lags FCEB by 14-21 days historically. I would change my mind if (a) Microsoft pulls EEMS interim mitigation requiring direct patch deployment, or (b) public proof-of-concept exploit code is published, accelerating commercial exposure.

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (unlikely): Microsoft "Exploitation Detected" framing reflects research-lab telemetry rather than in-the-wild exploitation.

WHAT WOULD SUPPORT	Subsequent Microsoft advisory revision; absence of secondary-source confirmation.
WHAT WOULD DISCONFIRM	Continued KEV listing past 7 days; secondary-source confirmation of OWA session-hijack incidents.
CURRENT STATUS	INDETERMINATE.

COLLECTION GAPS — WHAT I CANNOT SEE

- Threat actor attribution not published by Microsoft.
- Commercial-sector compliance rate not measurable.
- EEMS deployment compliance rate not measurable outside FCEB.

SOURCES

[CISA KEV catalog](#); [Microsoft MSRC CVE-2026-42897](#); [The Hacker News](#); Microsoft EEMS documentation.

US naval blockade of Iran Day 37; new Iranian PGSA + transit toll mechanism announced 18-MAY.

[GEO-001 | FLASH | STABLE | Score 23]

DELTA SINCE YESTERDAY

~ **CHANGED:** Day counter 36 → 37.

+ **ADDED:** Iran's Supreme National Security Council launched the Persian Gulf Strait Authority (PGSA) on 18-MAY to manage Hormuz transit; [Windward](#) AI reports a transit-toll mechanism is pending unveiling.

+ **ADDED:** Iraq oil minister 16-MAY disclosure: April Hormuz exports 10 million barrels vs 93 million monthly pre-war (-89%). Iraqi state revenue impact severe (90% budget dependency).

= **NO MATERIAL CHANGE:** [CENTCOM](#) redirected 85 commercial vessels mid-APR through 18-MAY; ~\$500M/day Iranian revenue impact per US claims.

WHY THIS CYCLE

Strait effectively closed since 28-FEB. US naval blockade since 13-APR. Iran's PGSA launching X account + sovereignty-claim messaging signals diplomatic escalation parallel to Trump's 18-MAY strike call-off (see [\[GEO-002\]](#)). Pakistan-mediated track delivering revised Iran proposal to US.

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

SIZE	Global oil markets (Brent settle \$107.25 19-MAY); Asia LNG buyers (Japan, South Korea India) sourcing alternates; Iraqi state budget (90% revenue dependency on Hormuz exports) under acute stress.
ACTIVITY	US naval blockade since 13-APR continues; CENTCOM aerial campaign against Iranian vessels + drones in the Strait reopens to international shipping. Iran PGSA messaging asserts sovereignty over transit zones; transit-toll mechanism pending unveil.
LOCATION	Strait of Hormuz; Persian Gulf; Iraqi exports via Basra terminals; UAE Fujairah backup; Saudi Arabia East-West Pipeline (Red Sea) alternative carrying limited capacity.
TIME	Blockade Day 37 (since 13-APR). Iran PGSA launched 18-MAY. Pakistan-track revised proposal in delivery 19-MAY. Trump 2-3 day deal window closes ~21-22 MAY.
EQUIPMENT	US Navy carrier strike group + amphibious group + USCG cutters; Iran IRGC-Navy plus regular Navy small-boat swarm + anti-ship missile + mine inventory.
UNIT	Wikipedia US naval blockade ; Times of Israel (Iraq oil minister citation); Fox News live broadcast 18-MAY (PGSA detail); Windward AI maritime intel.

DOWNSTREAM — CASCADE IMPLICATION

Global oil/LNG supply tight; Iraqi state budget under severe stress (90% revenue dependency); Asia LNG buyers continue alternates. Strike call-off provides 2-3 day diplomatic window but does not change operational reality of the blockade.

ANALYST ASSESSMENT

I judge that the blockade operational posture is **very unlikely** to change within the 2-3 day deal window even if a partial framework is announced. I assess that any near-term partial reopening would be a limited "humanitarian corridor" framing not a full restoration of pre-war commercial transit. I would change my mind if (a) joint US-Iran statement explicitly references a Hormuz reopening framework, or (b) Iranian PGSA transit-toll mechanism is published with rates consistent with prior commercial volumes (signaling de facto reopening).

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (unlikely): Trump deal includes a fast-track Hormuz reopening within 7 days of any agreement.

WHAT WOULD SUPPORT	Joint US-Iran statement language; published PGSA transit-toll rates consistent with pre-war commercial volume; CENTCOM blockade lift order.
WHAT WOULD DISCONFIRM	Continued blockade operations; PGSA rhetoric remaining sovereignty-claim rather than commercial-framework.
CURRENT STATUS	NOT observed.

COLLECTION GAPS — WHAT I CANNOT SEE

- Pakistan-track Iran revised proposal substance not public.
- Iranian PGSA transit-toll mechanism rates not yet published.
- [CENTCOM](#) commercial-vessel-redirect detailed scope (origin/cargo) not externally observable.

SOURCES

[Wikipedia 2026 Iran war](#); [Times of Israel](#) (Iraq oil minister); [Fox News live blog 18-MAY](#) (PGSA detail); [Windward](#) AI maritime intelligence.

Lebanon CF Day 4 of 45-day extension; daily IDF strikes; 18-MAY Baalbek (Bekaa expansion).

[GEO-CF-LBN | FLASH | EXTENDED — DAY 4 OF 45 | Score 22]

DELTA SINCE YESTERDAY

~ **CHANGED:** Day counter 33 → 34 (Day 4 of 45-day extension).

+ **ADDED:** Sunday 17-MAY IDF strikes killed 5 and injured 15 post-extension.

+ **ADDED:** Monday 18-MAY IDF strike on an apartment building in Baalbek (Bekaa Valley). Bekaa-axis targeting represents geographic expansion north/east of buffer-zone framing and is tripwire-relevant for collapse track.

+ **ADDED:** Cumulative-war Lebanese killed since 2-MAR per Wikipedia 2026 Lebanon war as of 18-MAY: 3,020; wounded 9,273. Alma Research analysis 18-APR through 11-MAY: 346 total IDF airstrikes since CF began (305 outside Yellow Line, 41 inside, 7 in Beqaa, 1 in Beirut).

= **NO MATERIAL CHANGE:** 20th IDF KIA total holds at Saturday 16-MAY. 4th Washington political round 2-3 JUN; security track Pentagon 29-MAY.

WHY THIS CYCLE

Third extension on 15-MAY for 45 days expiring ~29-JUN. US permission framework continues to allow IDF tactical action against assessed Hezbollah threats. Sources: [Wikipedia 2026 Israel-Lebanon ceasefire](#), [Wikipedia 2026 Lebanon war](#), [Times of Israel](#) liveblog 18-MAY, [Al Jazeera](#) 18-MAY video, Alma Research center analysis.

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

SIZE	Lebanese civilian population in south Lebanon + Bekaa; northern Israeli population displaced or shelter-eligible; UNIFIL French + Italian + Indonesian + other contingents continue mandate.
ACTIVITY	Daily IDF airstrikes against assessed Hezbollah targets continue; Hezbollah rocket/drone fire against IDF buffer-zone positions and northern Israel continues at lower tempo than pre-CF. Bekaa-Valley targeting on 18-MAY is geographic expansion vs the south-of-Litan historical pattern.
LOCATION	Southern Lebanon (south of Litani primary footprint); Bekaa Valley (Baalbek 18-MAY); Beirut Dahieh (single strike total since CF began); Yellow Line buffer zone (IDF-controlled)
TIME	CF began 16-APR. First extension 23-APR (3 weeks). Second extension implicit. Third extension 15-MAY (45 days, expires ~29-JUN). Pentagon security track 29-MAY. 4th Washington political round 2-3 JUN.
EQUIPMENT	IDF: F-16/F-15 + Hermes + Eitan UAVs + Merkava ground patrols. Hezbollah: rockets + drones + small-team ATGM + IED. No strategic-rocket exchange observed since CF began.

UNIT	Wikipedia 2026 Israel-Lebanon ceasefire ; Wikipedia 2026 Lebanon war ; Times of Israel ; Al Jazeera ; Alma Research center.
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DOWNSTREAM — CASCADE IMPLICATION

Lebanese economic recovery further delayed; FAO/IPC food insecurity holds; agricultural sector damage matches prior war. Bekaa-expansion precedent on 18-MAY is tripwire-relevant for collapse track per KJ-1.

ANALYST ASSESSMENT

I judge CF holds through the 45-day extension (29-JUN) at **likely** (65-80%) probability. Both Washington and Beirut benefit politically from continuation. The collapse tripwire I am watching is a high-mass IDF Beirut Dahieh strike paired with a same-week Hezbollah strategic-rocket response — neither observed this cycle but the Baalbek strike narrows the geographic envelope. I would change my mind on holding probability if Hezbollah launches any cross-border strategic-rocket strike (not buffer-zone tactical fire), or if the 2-3 JUN political track produces no joint statement.

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (unlikely): CF collapses within 14 days due to Bekaa-axis targeting escalation.

WHAT WOULD SUPPORT	Continued daily Bekaa strikes; Hezbollah strategic-rocket retaliation; Lebanese government formal withdrawal from Washington track.
WHAT WOULD DISCONFIRM	No further Bekaa strikes through end-of-week; Hezbollah official statement framing 18-MAY strike as within tolerable CF-violation bandwidth.
CURRENT STATUS	WATCH WINDOW open through 25-MAY.

COLLECTION GAPS — WHAT I CANNOT SEE

- Bekaa-axis Hezbollah operational presence detail is opaque; cannot independently verify IDF target validity
- Hezbollah strategic-rocket readiness post-Black-Wednesday is not externally measurable.
- Lebanese-cabinet internal debate on CF continuation not public.

SOURCES

[Wikipedia 2026 Israel-Lebanon ceasefire](#); [Wikipedia 2026 Lebanon war](#); [Times of Israel](#) liveblog 18-MAY; [Al Jazeera](#) 18-MAY video; Alma Research center.

PAN-OS CVE-2026-0300 Captive Portal RCE — FCEB deadline 21-MAY (T+2 future).

[CYB-001 | FLASH | PATCH-EXEC T+2 FUTURE | Score 22]

DELTA SINCE YESTERDAY

~ **CHANGED:** Days-to-deadline 3 → 2 (T+3 → T+2 future). Today is the last full work day before FCEB deadline tomorrow Wed 21-MAY.

= **NO MATERIAL CHANGE:** Wave 1 patch shipped 13-MAY; Wave 2 ETA ~28-MAY (post-deadline). [Unit 42](#) attribution CL-STA-1132; ~225,000 internet-facing instances per [Shadowserver](#) baseline (not re-pulled this cycle).

WHY THIS CYCLE

CVSS 9.3 internet-exposed root-level RCE in PAN-OS User-ID Authentication Portal (Captive Portal). No user interaction required. Patch deployment is the focus; last full work day before deadline tomorrow Wed 21-MAY is today Tue 19-MAY. [CISA KEV](#) add 06-MAY; FCEB BOD 22-01 deadline 21-MAY.

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

SIZE	All FCEB agencies running affected PAN-OS versions plus DIB, financial services, regulated healthcare, critical-infrastructure exposure; ~225,000 PAN-OS internet-facing Shadowserver baseline.
ACTIVITY	CISA KEV add 06-MAY based on limited targeted exploitation; Palo Alto PSIRT confirms exploitation against internet-exposed User-ID Authentication Portal. Unit 42 attributes to CL-STA-1132 (likely state-sponsored cluster) deploying open-source tunneling tools and AD enumeration after initial compromise.
LOCATION	PA-Series hardware + VM-Series virtual firewalls running PAN-OS 12.1 / 11.2 / 11.1 / 10. (specific releases). Cloud NGFW, Prisma Access, and Panorama NOT affected per vendor advisory.
TIME	KEV add 06-MAY; Wave 1 patch shipped 13-MAY (T+1 past); FCEB BOD 22-01 deadline 21-MAY (T+2 future); Wave 2 patch ~28-MAY.
EQUIPMENT	CVSS 9.3 (internet-exposed) / 8.7 (trusted-IP-only). CWE-787 Out-of-Bounds Write in User-ID Authentication Portal. Unauthenticated buffer overflow allowing arbitrary code execution at root.
UNIT	CISA KEV ; Palo Alto Networks PSIRT ; Unit 42 ; Shadowserver (exposure scan); Shodan (internet-facing count).

DOWNSTREAM — CASCADE IMPLICATION

Firewall takeover yields lateral pivot and egress data theft. Chain with NGINX CVE-2026-42945 + Linux Copy Fail CVE-2026-31431 yields a root primitive on Linux container hosts.

ANALYST ASSESSMENT

I judge FCEB compliance at 21-MAY at **likely** (60-75%) based on historical BOD compliance telemetry (typical 60-70% at deadline). I assess mass-exploitation pivot is **likely** within 5-10 days of Wave 1 patch shipment as PoC reverse engineering converts limited targeted operation into broad ransomware pickup; non-FCEB exposure lags FCEB by 14-21 days historically. I would change my mind if (a) [CISA](#) issues a post-deadline supplemental directive (would signal underperformance), or (b) [Palo Alto PSIRT](#) publishes Wave 2 patch on or before 22-MAY (would signal vendor acceleration).

ALTERNATIVE HYPOTHESES

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

WHAT WOULD SUPPORT	Open-source ransomware-affiliate telemetry showing identical exploitation tactics; threat-intel community attribution to commodity actor.
WHAT WOULD DISCONFIRM	Continued state-typical post-exploitation tradecraft consistent with CL-STA-1132 baseline
CURRENT STATUS	NOT observed.

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

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

COLLECTION GAPS — WHAT I CANNOT SEE

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

SOURCES

[CISA KEV catalog](#); [Palo Alto Networks PSIRT](#); [Unit 42](#); [Shadowserver](#); [Shodan](#).

Trump-Xi summit Day 5 post-conclude; Putin arrives Beijing tonight; multipolar declaration morning 20-MAY.

[GEO-CHN-001 | FLASH | STABLE DAY 5 — PUTIN-XI TONIGHT | Score 21]

DELTA SINCE YESTERDAY

~ **CHANGED:** Status NEW THIS CYCLE → STABLE Day 5. No Beijing demarche to Tehran observed; Boeing 200-aircraft claim still unconfirmed.

+ **ADDED:** Putin arrives Beijing TONIGHT (19-MAY evening) for 2-day state visit; program begins MORNING 20-MAY at Tiananmen Square. 47-page joint statement on comprehensive partnership and strategic cooperation + JOINT DECLARATION ON FORMATION OF MULTIPOLAR WORLD AND NEW TYPE OF INTERNATIONAL RELATIONS to be signed; ~40 documents total.

+ **ADDED:** Russian delegation: Sechin (Rosneft), Miller (Gazprom), Timchenko, Guryev, Mikhelson, Deripaska + 5 Deputy PMs + 8 Ministers + Central Bank head; plus [Peskov](#), Lavrov, Manturov, Golikova, Novak, Trutnev, Chernyshenko.

+ **ADDED:** Russia-China trade ~entirely settled in rubles/yuan; Russian oil exports to China +35% Q1 2026. Visit coincides with 25th anniversary of 2001 Sino-Russian Treaty of Friendship. Lavrov 16-MAY: Russia-China ties “deeper and stronger than traditional political and military alliances.”

WHY THIS CYCLE

Trump-Xi summit (13-15 MAY) ended as a checkpoint-not-breakthrough. Putin-Xi summit (19-20 MAY) is poised to deepen the RU-CN axis publicly. Practitioner watch: joint-readout language on Iran/Hormuz; any anti-US security clauses; Taiwan position drift; Boeing 200-aircraft claim resolution. Sources: [CBS News](#), [Japan Times](#), [Geo.tv](#), [Pravda EU](#) (TASS aggregator), [Pakistan Today](#).

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

SIZE	Putin delegation: 5 Deputy PMs, 8 Ministers, Central Bank head, major SOE leaders (Sechin/Rosneft, Miller/Gazprom), and oligarchs (Timchenko, Guryev, Mikhelson, Deripaska). Xi reciprocal team includes Politburo Standing Committee.
ACTIVITY	State visit; airport welcome by FM Wang Yi; housed at Diaoyutai State Residence; main program morning 20-MAY at Tiananmen Square welcome ceremony. Joint declaration signing + ~40 bilateral/intergovernmental documents.
LOCATION	Beijing — Zhongnanhai/Diaoyutai/Tiananmen Square. Trump-Xi summit was 13-15 MAY same compound (Zhongnanhai).
TIME	Putin lands evening 19-MAY. Welcome ceremony morning 20-MAY. Joint declaration signing 20-MAY mid-day. Departure end of 20-MAY.
EQUIPMENT	No kinetic/military equipment in scope; this is a diplomatic-economic event. SOE leaders' attendance signals energy/financial deliverables under negotiation.
UNIT	CBS News ; Japan Times ; Pravda EU (TASS aggregator).

ANALYST ASSESSMENT

I judge the multipolar declaration text will be **likely** (60-80%) symbolic-not-operational on Iran specifically: Beijing's preference is to mediate not align. I assess the comprehensive-partnership 47-page document is **likely** to include energy-pricing detail (consistent with +35% YoY oil flow), defense-industrial cooperation pillars, and yuan-settlement framework. I would change my mind on the Iran framing if (a) joint statement explicitly references the Hormuz situation, or (b) Xi makes a public statement on the US-Iran deal-or-strike inflection.

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (unlikely): Joint declaration explicitly endorses Iran's posture against US strike action.

WHAT WOULD SUPPORT	Joint declaration text including direct support for Iranian sovereignty or condemnation of US strike threats.
WHAT WOULD DISCONFIRM	Joint declaration text limiting Iran references to "constructive negotiations" generic framing
CURRENT STATUS	NOT observed (text not yet public).

Alt-Hyp 2 (roughly even chance): Joint declaration includes a specific yuan-settlement framework for Russia-China energy trade with implementation timeline.

WHAT WOULD SUPPORT	Published timeline in declaration text; implementation guidance for Russian SOE banking relationships.
WHAT WOULD DISCONFIRM	Generic ruble/yuan settlement language without timeline or implementation guidance.
CURRENT STATUS	INDETERMINATE — text not yet public.

COLLECTION GAPS — WHAT I CANNOT SEE

- Joint declaration text not yet public.
- Specific energy-deliverables on Russian oil/gas to China not yet announced.
- Defense-industrial cooperation specifics opaque.

SOURCES

[CBS News](#); [Japan Times](#); [Geo.tv](#); [Pravda EU 18-MAY](#) (TASS aggregator).

Linux Copy Fail LPE CVE-2026-31431 chain-pivot risk continues; FCEB deadline T+4 past.

[CYB-005 | FLASH | CHAIN-RISK T+4 PAST | Score 21]

DELTA SINCE YESTERDAY

~ **CHANGED:** Days-since-deadline 3 → 4 (T+3 past → T+4 past).

= **NO MATERIAL CHANGE:** Public PoC continues to circulate; chain risk with internet-exposed RCE (NGINX, PAN-OS, [Cisco](#) SD-WAN) provides root primitive on Linux container hosts.

WHY THIS CYCLE

Linux kernel local privilege-escalation (LPE) in copy_from_user/copy_to_user fast path. Most distros patched by 11-MAY. Residual exposure in long-lived deployments and container base images. KEV add 12-MAY; FCEB deadline 15-MAY (T+4 past).

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

SIZE	All Linux distros with kernel 5.10.x through 6.8.x in affected range; FCEB Linux footprint plus broader critical-infrastructure (cloud, container, ICS gateway).
ACTIVITY	LPE chain pivot from web RCE or container-escape initial access. PoC publicly available.
LOCATION	Linux kernels 5.10.x through 6.8.x in affected range; specific minor versions per distro advisory.
TIME	KEV add 12-MAY; FCEB deadline 15-MAY (T+4 past); 3-day FCEB window was the shortest in catalog history.
EQUIPMENT	CVSS 7.8 (local); CWE-787 Out-of-Bounds Write; requires unprivileged local access (SSH container escape, chained RCE).
UNIT	NVD CVE-2026-31431 ; CISA KEV ; VulnCheck ; AA26-097A joint advisory (CISA + NSA + FBI).

ANALYST ASSESSMENT

I judge non-compliance at FCEB deadline (15-MAY) at **almost certain** (>95%) — the 3-day window was operationally infeasible. [CISA](#) supplemental directive is **likely** within 7-14 days post-deadline. Chained exploitation (PAN-OS + Copy Fail) is **likely** observed in the wild within 14-30 days. I would change my mind on chain 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.

WHAT WOULD SUPPORT	CISA KEV catalog removal within 7 days; AA26-097A rescission statement.
WHAT WOULD DISCONFIRM	Continued KEV listing past 7 days; CISA supplemental directive reinforcing the BOD.
CURRENT STATUS	NOT observed.

COLLECTION GAPS — WHAT I CANNOT SEE

- [AA26-097A](#) advisory does not name the threat actor; cannot attribute to specific cluster.
- FCEB compliance rate not measurable without BOD telemetry.
- Container-escape exploitation paths not visible in standard NDR telemetry; underreporting likely.

SOURCES

[CISA KEV catalog](#); [AA26-097A](#) advisory ([CISA](#) + [NSA](#) + [FBI](#)); [NVD CVE-2026-31431](#); [VulnCheck](#).

Andes hantavirus US-side surveillance Day 6; zero second-generation cases.

[HLTH-001 | FLASH | STABLE DAY 6 | Score 20]

DELTA SINCE YESTERDAY

~ **CHANGED:** Surveillance Day 5 → Day 6 post-index case; zero second-generation cases through Day 6.

= **NO MATERIAL CHANGE:** [UNMC](#) biocontainment + [CDC](#) + Nebraska DHHS active surveillance posture.

WHY THIS CYCLE

Single index case in [UNMC](#) biocontainment; contact cohort cleared through Day 6; Hondius travel-history follow-up ongoing. Andes person-to-person transmission requires sustained close-contact exposure that isolation protocol breaks. Surveillance window through 21-JUN.

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

SIZE	1 index case (UNMC biocontainment); household and HCW contact cohort under surveillance.
ACTIVITY	Isolation, contact tracing, surveillance; no clinical deterioration in index; zero new cases.
LOCATION	University of Nebraska Medical Center (UNMC) Omaha biocontainment unit; Hondius travel-history cohort.
TIME	Day 6 post-index. Surveillance window extends through 21-JUN (35-day Andes incubation upper bound + buffer).
EQUIPMENT	Standard hantavirus biocontainment protocol (UNMC Level 4); no clinical countermeasures pending FDA-approved post-exposure prophylaxis.
UNIT	CDC HAN advisories ; UNMC biocontainment unit ; Nebraska DHHS.

ANALYST ASSESSMENT

I judge second-generation transmission probability **very unlikely** (<5%) through end of surveillance window. Andes person-to-person clusters historically occur in close-contact settings without modern biocontainment; [UNMC](#) posture is more than adequate. I would change my mind only if a HCW or household contact develops symptoms in the Day 14-25 window (peak incubation).

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (very unlikely): Index case is misdiagnosed and the pathogen is a different hantavirus strain with different transmission characteristics.

WHAT WOULD SUPPORT	CDC genomic confirmation reversal; UNMC clinical-presentation atypical for Andes.
WHAT WOULD DISCONFIRM	CDC genomic confirmation holds at Andes.
CURRENT STATUS	NOT observed.

COLLECTION GAPS — WHAT I CANNOT SEE

- Hondius cohort travel-history detail not public.
- Index-case source-of-infection (rodent exposure setting) not yet identified publicly.

SOURCES

[CDC HAN](#); [UNMC biocontainment unit](#); Nebraska DHHS press updates.

Plains ag producers in ERO MODERATE corridor overnight; livestock heat stress easing.

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

DELTA SINCE YESTERDAY

~ **CHANGED:** Fire-weather Southern High Plains 18-19 MAY peak NOW PAST; ERO MODERATE central Plains overnight 18/19-MAY adds direct flash-flood + standing-water risk to spring planting and wheat belt.

~ **CHANGED:** Eastern US heat wave forecast to end by Wednesday per [WPC](#); livestock heat-stress moderating.

= **NO MATERIAL CHANGE:** WASDE-671 (released 12-MAY, now 7 days old): 2026/27 wheat 1.561 bb, corn 16.0 bb, soybeans 4.435 bb; next [WASDE](#) 11-JUN.

WHY THIS CYCLE

ERO MODERATE central Plains overnight; mid-week heavy-rain corridor central TX into AR/TN Valley; Eastern US heat wave ending Wednesday. WASDE-671 baseline holds: [USDA](#) 2026/27 wheat 1.561 bb (-424 mb YoY), corn 16.0 bb (-6%), soybeans 4.435 bb (+173 mb).

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

SIZE	Plains wheat-belt + corn/soybean spring planting in MO/IA/NE/KS; TX cattle producers (heat-stress moderating); east TX through AR/TN Valley field-access mid-week.
ACTIVITY	Overnight flash-flood standing-water risk; field-access disruption could delay planting completion; livestock heat-stress receding eastern US.
LOCATION	Central Plains overnight (MO/IA/NE/KS); TX Hill Country mid-week Day 3 SLGT; broad MRGL Plains through mid-Appalachians.
TIME	Overnight 18/19-MAY peak; Wednesday TX Hill Country peak. WASDE-671 next release 11-JUN.
EQUIPMENT	Wheat futures bounded by oversupply baseline; cattle heat-stress moderating; fire-weather risk receding.
UNIT	USDA WASDE-671 (12-MAY); NWS WPC short-range + Day 1-3 ERO; USDM drought monitor .

ANALYST ASSESSMENT

I judge planting-progress impact in MO/IA/NE/KS this week at **roughly even chance** of producing measurable Progress-Report delay in next Monday's [USDA](#) crop progress release. I would change my mind if (a) overnight rainfall stays under 1 inch storm-total in the wheat-belt corridor, or (b) the Day 2/Day 3 corridors stay south of the planting zones.

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (unlikely): Wednesday TX Hill Country corridor produces material livestock loss (>1000 head).

WHAT WOULD SUPPORT	Subsequent USDA livestock-loss report; TX Department of Agriculture emergency declaration.
WHAT WOULD DISCONFIRM	TX Hill Country Day 3 stays SLGT not upgraded; storm motion exceeds 25 mph minimizing standing-water exposure.
CURRENT STATUS	NOT observed.

COLLECTION GAPS — WHAT I CANNOT SEE

- Real-time field-access conditions in MO/IA/NE/KS not centrally measured.
- Livestock heat-stress mortality reporting lags by 3-7 days.
- [WASDE](#) next release (11-JUN) is 23 days out; supply/demand picture between now and then may shift on Eastern US heat wave duration.

SOURCES

[USDA WASDE-671](#) (12-MAY); [NWS WPC](#) Day 1-3 ERO + short-range; [USDM drought monitor](#).

SECTION 4A — CYBER & INFORMATION SECURITY (CARRYOVER)

Below-FLASH cyber items this cycle: Grafana GitHub token compromise codebase-download (6-month derivative-CVE watch), Foxconn NA cyberattack supplier-cascade window (Tue-Thu), and CYB-008 Fragnesia ongoing telemetry monitoring.

Grafana GitHub token compromise (CYB-011 below-FLASH this cycle): Grafana Labs 17-MAY statement series confirms single GitHub access token compromised and codebase downloaded; no customer-data exposure claimed; extortion attempt observed. Codebase-download events of this class historically yield derivative-CVE flow within 6 months; Grafana customers should monitor advisories closely through Q3 2026.

Foxconn NA cyberattack (SC-001 below-FLASH this cycle): Foxconn NA cyberattack confirmed; scope undisclosed. Standard post-confirmation cycle: SEC 8-K window 4 business days from confirmation; supplier notifications expected Tue-Thu peak per typical pattern. Tier-1 OEM customer (Apple/Dell/HP) advisories if material; Q3 deliveries product-availability watch.

CYB-008 Fragnesia (carryover): No material change this cycle; carries forward at WATCH tier.

SECTION 4B — GEOPOLITICAL CARRYOVER

Below-FLASH geopolitical items this cycle: Russia-Ukraine kinetic tempo, Saudi-Israel normalization track, IN-PAK posture, Venezuela posture, DPRK posture. Full FLASH treatment for active Iran/Lebanon/PRC tracks in Section 3.

Russia-Ukraine: Pokrovsk-axis pressure continuing; 18-MAY large-scale Russian strike on Dnipro (546 drones + missiles targeting Yuzhmash/Pivdenmash industrial complex with new warhead+3-kinetic-element weapon). Ukrainian counter-strikes on Russian Geraniums sites at Odessa + Dnepropetrovsk plus Vinnytsia + Khmelnytsky + Rivne. Negotiating track stalled since Iran war started 28-FEB; below-FLASH this cycle.

Saudi-Israel normalization: Iran war freezes any visible track progress; no material movement this cycle.

IN-PAK / Venezuela / DPRK / Sahel / Houthi: No material change this cycle. Pakistan visible in mediation role for US-Iran revised proposal (see [GEO-002](#)). Houthi posture remains Tier-2 proxy activation if Iran strike order issued.

SECTION 4C — MIC SECOND-ORDER IMPACTS

Munitions stockpile and production-rate posture post-Op Epic Fury. Practitioner tier: this section is the bridge between the deal-or-strike inflection (GEO-002) and the 1-4 year defense-industrial replenishment cycle. The 72-hour deal window does not change the structural picture.

Stockpile expended (CSIS April 2026 baseline, unchanged this cycle): THAAD ~50%; Patriot PAC-3 ~50%; Tomahawk ~30%; PrSM ≥ 45%; JASSM / SM-3 / SM-6 ~20%. 1-4 year window to replenish per Cancian. Pentagon FY27 munitions request ~\$70B (3x current).

Prime contractor exposure: LMT (THAAD + PAC-3 + JASSM): tightest demand-pull; multi-year backlog assured. RTX (PAC-3 + SM-3 + SM-6): parallel demand; Tomahawk JV with LMT. NOC (B-21 + PrSM + GMD): platform-program steady; GMD intercepts under continuing review. GD (M1 Abrams + Stryker + Virginia-class): ground-platform demand secondary; SSN-774 priority. BA (Apache + KC-46 + JDAM): mixed; commercial-side headwinds offset defense backlog. HII (DDG-51 + LHA): shipbuilding bottleneck (drydock and welder labor); cannot accelerate. LHX (sensors + EW): force-multiplier demand high.

Practitioner read: A confirmed Iran deal **softens** the immediate intercept-demand spike but does not change the FY27 supplemental supplemental request risk profile (Congress already on path for ~\$70B munitions request regardless of 72h decision). A confirmed strike order **accelerates** all stockpile-replenishment timelines and likely triggers DPA Title III invocations within 30 days.

SECTION 4D — INDICATORS & WARNING MATRIX

Active tracks with tripwires and observed status. Each track is anchored to a FLASH entry or below-FLASH carryover.

TRACK	TRIPWIRE / CONFIRMS / DISCONFIRMS	STATUS
Iran deal-or-strike	Confirms: deal text published or strike order issued. Disconfirms: window extends past 22-MAY without resolution.	18-MAY STRIKE CALLED OFF; 72h decision window open
Lebanon CF collapse	Confirms: high-mass IDF Beirut Dahieh strike + same-week Hezbollah strategic-rocket response. Disconfirms: 2-3 JUN political track produces joint statement.	WATCH (Bekaa expansion 18-MAY narrowed envelope)
Hormuz reopening	Confirms: joint US-Iran statement w/ Hormuz framework; PGSA toll rates consistent with pre-war volumes. Disconfirms: continued CENTCOM redirect of commercial vessels.	NOT observed (blockade Day 37)
Putin-Xi summit readout	Confirms: joint declaration text includes specific Iran/Hormuz language or anti-US security clauses. Disconfirms: generic multipolar language only.	WATCH → OBSERVED IN PROGRESS (lands tonight)
PAN-OS FCEB compliance	Confirms: CISA supplemental directive within 14 days of 21-MAY. Disconfirms: clean attestation telemetry pass.	PRE-DEADLINE T+2 future
Cisco SD-WAN exploitation	Confirms: Cluster 10 expands beyond 10 clusters; AWS vManage credential abuse incidents reported. Disconfirms: Talos telemetry stable.	ACTIVE (UAT-8616)
NGINX active exploitation	Confirms: CISA KEV catalog add; web-shell deployment incidents reported. Disconfirms: VulnCheck retracts active-exploitation flag.	ACTIVE (KEV pending)
Andes hantavirus	Confirms: second-generation case in HCW or household contact. Disconfirms: Day 25 surveillance window closes clean.	CLEAN Day 6
Central Plains flash-flood	Confirms: county EOC activation + FFW issuance. Disconfirms: overnight QPF underperforms forecast.	ACTIVE Day 1 ERO MOD
G1 watch expiry	Confirms: 06z 20-MAY SWX-CON drops to 0 (No Storm). Disconfirms: CME impact exceeds G1 producing G2+ conditions, escalating SWX-CON to 2 or higher.	WATCH active through end of 19-MAY

SECTION 5 — ENERGY / INFRASTRUCTURE / SUPPLY CHAIN

Brent settled Mon \$107.25 (-1.5%) absorbing Trump call-off as partial good news. Intraday range \$108.83 → \$106.71 → \$107.25. WTI followed proportional. [AAA](#) national average gasoline \$4.36/gal (unchanged Mon → Tue). Diesel \$5.18/gal (-2c).

Practitioner read: Pump-price posture for travel-flex through end of week. Confirmed deal scenario: **likely** 3-5 cents/gal forecast retail decline 5-7 days post-confirmation. No-deal + strike scenario: **likely** 8-15 cents/gal forecast retail increase 3-5 days post-order. See [\[FIN-001\]](#) (below-FLASH this cycle).

Iran PGSA + transit-toll mechanism (cross-ref [\[GEO-001\]](#)): Iran's announcement creates a sovereignty-claim posture parallel to the diplomatic track. If transit-toll rates are published consistent with pre-war commercial volumes, this could signal de facto reopening framework; if rates are designed to be commercially unworkable, this is sovereignty-rhetoric not commercial reality.

Iraqi oil minister disclosure 16-MAY: April Hormuz exports 10 million barrels vs 93 million monthly pre-war (-89%). Iraqi state budget (90% revenue dependency) under acute stress. Practitioner read: Iraqi government stability is at risk if exports stay below 50 million barrels through end of Q2; coup-risk indicators (military-faction posture, US embassy security posture) should be monitored.

SECTION 6 — AVIATION / TRANSPORTATION

IROPS risk Tuesday through Thursday at ORD, STL, MCI, DFW from Day 2 SLIGHT corridor (Great Lakes → OH Valley → southern Plains). Wednesday TX Hill Country adds DFW + AUS + SAT exposure. See [\[WX-001\]](#).

ME airspace advisories: Carriers continue flexibility for Gulf overflight routing during 2-3 day deal window. [FAA](#) NOTAMs unchanged from prior cycle; no new advisories issued for Iran proximity. UAE Barakah drone-strike fire 17-MAY did not trigger UAE airspace restriction. See [\[GEO-002\]](#).

Hormuz commercial shipping: [CENTCOM](#) redirect of 85 commercial vessels mid-APR through 18-MAY continues. Insurance war-risk premium remains elevated. See [\[GEO-001\]](#).

SECTION 7 — METEOROLOGICAL & SEVERE WEATHER

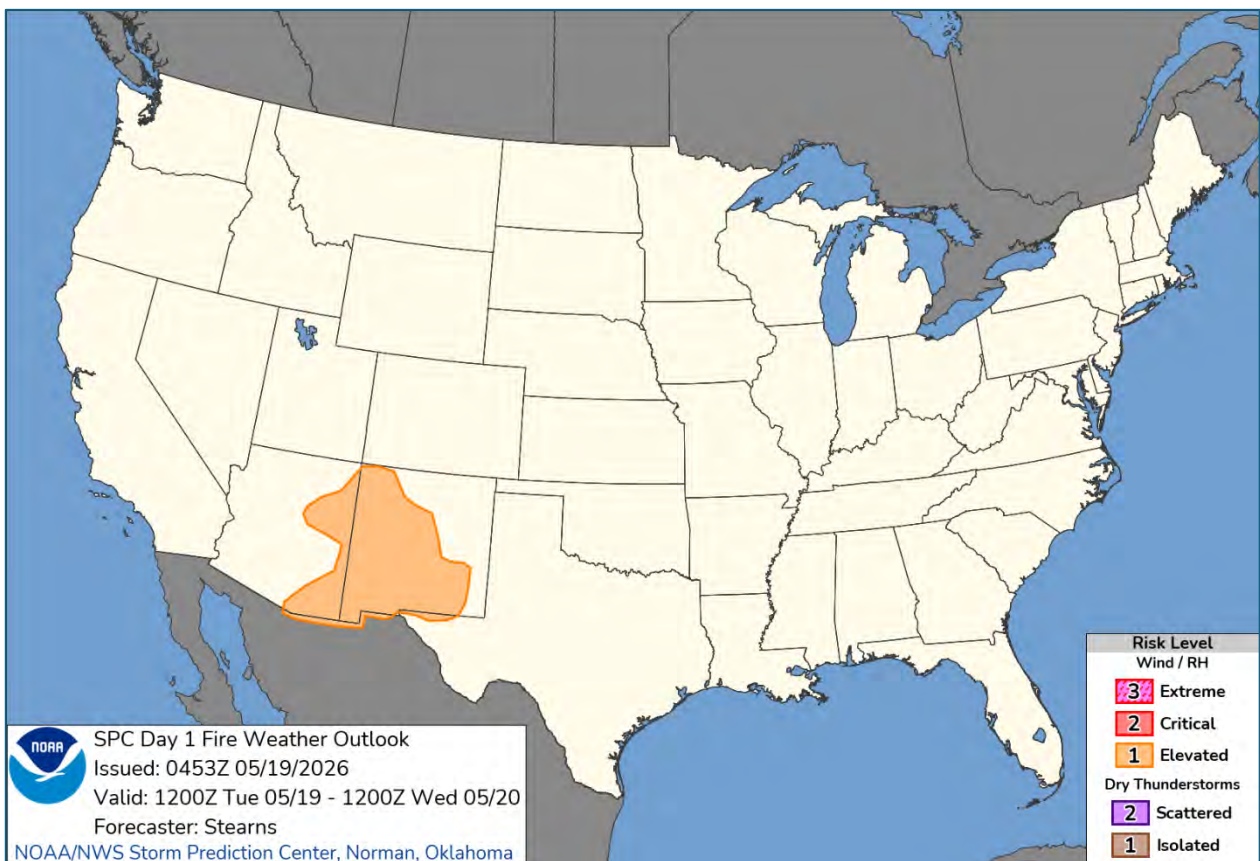
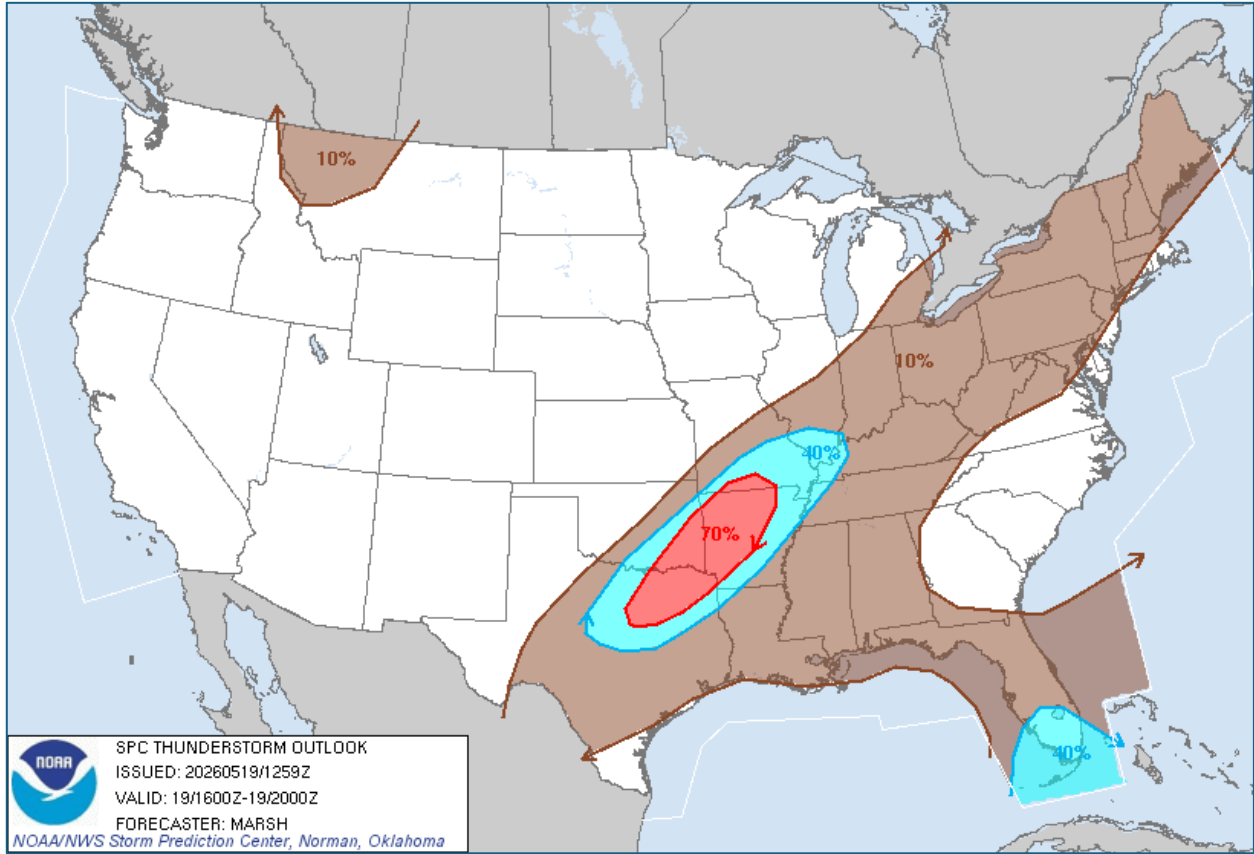
Multi-day severe-weather corridor through Wednesday. Full FLASH treatment [\[WX-001\]](#). Composition-shift composition for [NWR](#) critical-CONUS gap intersect with active corridor below.

[NWR transmitter outage list](#) — 19-MAY 10:43:17 GMT operator snapshot

Total: 33 affected (14 OOS + 19 DEG) across 14 states. IDENTICAL roster to 18-MAY (zero rotation in 24h). 17-site AK cluster continues. Threat-overlap composition shifted east overnight: NM triple-gap recedes from fire-weather (window past); TX Rio Grande City moves downstream; 4 NEW sites move into Day 2-3 corridor (MI Petoskey + MI Adrian/Petersburg + IN Angola + TN Shelbyville). Critical-CONUS count remains 7 (same count, different sites).

ST	CITY	FREQ	CWA / SOURCE WFO	CALLSIGN	STATUS	THREAT OVERLAP TODAY
KS	Ulysses	162.450	Dodge City KS (DDC)	WXN-81	OOS	ACTIVE Day 1 ERO MOD overnight (DDC CWA inside corridor)
IL	Hillsboro	162.425	St. Louis MO (LSX)	KXI-79	OOS	ACTIVE-ESCALATED Day 1 ERO MOD eastern flank + Day 2 SLGT OH Valley
MN	Gunflint Lake	162.525	Duluth MN (DLH)	KXI-45	OOS	ACTIVE Day 2 SLGT Great Lakes corridor
MI	Petoskey	162.475	Gaylord MI (APX)	WNG-572	OOS	NEW THIS CYCLE — Day 2 SLGT lower Great Lakes
MI	Adrian / Petersburg	162.450	Detroit/Pontiac MI (DTX)	WNG-647	OOS	NEW THIS CYCLE — Day 2 SLGT lower Great Lakes
IN	Angola	162.425	Northern Indiana (IWX)	KXI-94	DEG	NEW THIS CYCLE — Day 2 SLGT Great Lakes corridor
TN	Shelbyville	162.475	Nashville TN (OHX)	WXK-63	OOS	NEW THIS CYCLE — Day 3 MRGL mid-MS/lower OH Valley
NM	Roswell	162.450	Albuquerque NM (ABQ)	WWG-36	OOS	RECEDING — fire-wx window past
NM	Carlsbad	162.475	Midland/Odessa TX (MAF)	WWF-37	OOS	RECEDING — fire-wx window past
NM	Artesia	162.425	Midland/Odessa TX (MAF)	WXN-24	OOS	RECEDING — fire-wx window past
TX	Rio Grande City	162.425	Brownsville/RGV TX (BRO)	WNG-601	OOS	DOWNSTREAM — Day 3 SLGT TX Hill Country shifted south
AK	17-site cluster	multiple	JNU/AFC/AFG/ALU	multiple	1 OOS + 16 DEG	Outside CONUS severe-wx corridor
Oth er	8 sites CO/GA/ME/NV/OR	multiple	multiple	multiple	mixed	No active threat overlap

PRACTITIONER ACTION: Households in KS Ulysses (DDC CWA), IL Hillsboro (LSX CWA), MN Gunflint Lake (DLH CWA), MI Petoskey (APX CWA), MI Adrian/Petersburg (DTX CWA), IN Angola (IWX CWA), and TN Shelbyville (OHX CWA) should verify two-of-three non-NWR alert paths before nightfall: Wireless Emergency Alerts on cellular handset + [NWS](#) app push notifications + commercial-broadcast (radio or TV) coverage. Cross-check county SAME location code against backup [NWR](#) transmitter via [NWR Station Search](#).



SECTION 7A — SPACE WEATHER & EMCOMM

[SWPC](#) G1 (Minor) geomagnetic storm watch WATA20 serial 1113 (issued 17-MAY 1612 UTC) active through end of 19-MAY; SWX-CON 1 drops to 0 (No Storm) at 06z 20-MAY when watch expires. Predicted Kp: May 18 G1, May 19 G1, May 20 below G1. Scale reference: [NOAA Space Weather Scales](#).

Glancing-blow CME impact: CME from 16-MAY M-class flare arrived ~0:00 UTC 19-MAY per Earthsky; G1 conditions observed at higher latitudes. SUM10R serial 913 (17-MAY 2050 UTC) 10cm radio burst peak 370 sfu, 1-minute duration. Penticton noon flux 104 sfu.

Electron 2MeV integral flux alert (ALTEF3 serial 3688): Continuing alert >1000 pfu since 16-MAY 1740 UTC; yesterday max 6118 pfu. LEO satellite charging risk for operators with sat experimentation. Below-FLASH but practitioner-tier signal for SAT operators.

HF Band Conditions (Tuesday 19-MAY)

BAND	DAY	NIGHT	POLAR	MID-LAT	EMCOMM RECOMMEND
80m	Poor	Good	Degraded	Good	Use night
40m	Fair	Good	Degraded	Good	Primary daytime
20m	Good	Fair	Poor	Good	Primary DX
15m	Fair	Poor	Poor	Fair	Daytime DX only
10m	Poor	Poor	Poor	Poor	Not recommended

SECTION 7B — AGRICULTURE, FOOD & SUPPLY CHAIN

[USDA](#) WASDE-671 released 12-MAY (now 7 days old): 2026/27 wheat 1.561 bb (-424 mb YoY), corn 16.0 bb (-6%), soybeans 4.435 bb (+173 mb). Wheat farm price \$6.50/bu (+\$1.50), corn \$4.40/bu (+25c), soybeans \$11.40/bu. Next release 11-JUN.

Plains ag impact: ERO MODERATE central Plains overnight adds direct flash-flood + standing-water risk to spring planting and wheat belt. See [\[AGR-001\]](#).

Lebanon food security: FAO/IPC food insecurity holds at prior-cycle levels; agricultural-sector damage matches prior war. CF holding reduces additional damage accumulation.

SECTION 10 — PREPAREDNESS CONDITION ASSESSMENT

PREP-CON 3 INCIDENT PROBABLE (Brown Sky), Trend STABLE

Why this condition: Trend shifts from STABLE-DETERIORATING to STABLE as the renewed-Iran-strike driver pauses for 2-3 days. PREP-CON 3 INCIDENT PROBABLE (Brown Sky) baseline holds because Op Epic Fury Day 81 + US naval blockade Day 37 + Lebanon CF Day 4 of 45 (porous) maintain the elevated-but-stable backdrop. Severe-weather (Day 1 ERO MOD overnight + Day 2 SLGT corridor) and cyber-deadline stack (PAN-OS T+2 future, [Cisco](#) SD-WAN T+2 past) sustain the Brown Sky condition.

What would move PREP-CON up to 2 GUARDED: Trump no-deal announcement triggering renewed kinetic order; Lebanon CF formal collapse; observed mass cyber exploitation chain (NGINX + PAN-OS + Linux Copy Fail); major-CME impact upgrade to G3+ over CONUS.

What would move PREP-CON down to 4 GUARDED: Iran deal announcement reducing kinetic risk; cyber + severe-wx + Iran-prep windows all close benignly within 7 days.

Top 5 practitioner actions this cycle:

1. PAN-OS CVE-2026-0300 FCEB deadline tomorrow Wed 21-MAY; confirm patch deployment fleet-wide by EOD; today is the last full work day.

2. Central Plains households KS/MO/IA/NE: ERO MODERATE overnight 18/19-MAY — pre-position power-out + drainage plans; verify two-of-three non-NWR alert paths.
3. [Cisco](#) SD-WAN operators T+2 past deadline: re-baseline web-shell detections (XenShell + Godzilla); audit AWS vManage credential reuse; rotate JWT signing keys.
4. Iran deal-or-strike inflection 2-3 days: pump-price + travel-flex posture for Tue-Thu; cyber-spillover preparedness for confirmed strike scenario.
5. Microsoft Exchange operators: enable EEMS mitigation if not already done; prepare for permanent patch; FCEB deadline T+10 (29-MAY).

SECTION 11 — SECTOR IMPACT MATRIX

PREP-CON and COMCON condition impacts across 6 sectors. Per §0.77, only standing conditions with practitioner-actionable variation are shown.

CONDITION	Healthcare	Bank/Fin	Manuf	Transp	Energy	PubSec	HouseHold
PREP-CON 3 BROWN SKY	MED	MED	MED	MED	HIGH	HIGH	HIGH
COMCON 4 ORANGE SKY	LOW	LOW	LOW	MED	LOW	MED	HIGH

PREP-CON commentary: Energy + PubSec + Household carry HIGH impact this cycle on the Iran inflection + flash-flood corridor stack. Healthcare/Bank/Manuf/Transp at MED reflects the cyber-deadline stack (PAN-OS + Exchange + [Cisco](#) SD-WAN) plus IROPS risk Tue-Thu.

COMCON commentary: Composition-shift this cycle: [NWR](#) roster identical to 18-MAY but threat overlap moved east — 3 critical-CONUS sites carry forward (KS/IL/MN), 3 NM sites recede from fire-wx, 1 TX site moves downstream, 4 NEW sites step up in Day 2-3 corridor (MI Petoskey + MI Adrian/Petersburg + IN Angola + TN Shelbyville). HouseHold = HIGH where any NWR-gap household sits in active-threat CWA.

SECTION 12 — ANALYTICAL INTEGRITY & METHODOLOGY

Full methodology: Complete Analytical Standards & Tradecraft (sourcing standards, estimative-language scale, risk-score formula, alt-hypothesis discipline, second-order chain tracing, collection-gap acknowledgment) are published at fortunefavorstheprepared.com/analytical-standards. This section is a cycle-specific summary; refer to the published page for the full standards.

SOP: v5.53 (carries v5.52 layout lock; v5.54 amendments pending §§0.90-0.101: hardened artifact handoff, Section Index + Geographic Impact Index PERMANENT, operator-snapshot beats web re-scrape, threat-overlap composition shift rule, filename simplification, WX-CON banner mandatory, FLASH topic spacing, Sec 12 Analytical Standards reference, standard 5-level PREP-CON banner color scheme, FLASH-pointer treatment for dedicated-section topics, watch_desk four-condition peer schema, PDF-authority condition-level mapping).

Estimative language: ICD 203 scale only (almost no chance / very unlikely / unlikely / roughly even / likely / very likely / almost certain). Forbidden hedges: might / maybe / possibly / perhaps.

Risk score (Impact + Imminence + OpFriction): Impact 1-10; Imminence 1-10; OpFriction 1-10 (inverse — high = high friction reducing actionability). FLASH band: Score ≥ 20 enters Section 3; below-FLASH items addressed in Section 4A/4B/5/6/7/7A/7B narrative.

Sources swept this cycle (10 of 10): [SPC Day 1-2](#), [WPC Day 1-3 ERO](#), [CISA KEV catalog](#), [USDA WASDE](#), [SWPC 3-day forecast](#), Lebanon CF status (Wikipedia + [Tol](#)), Iran-Hormuz posture (multi-source), munitions stockpile ([CSIS](#) baseline), [NWR transmitter outage list](#) (operator snapshot 19-MAY 10:43:17 GMT — FULL), Russia-China summit posture (CBS/Japan Times/[TASS](#) aggregator).

Gaps acknowledged: Iran revised proposal substance not public (Pakistan-track diplomatic channel); Putin-Xi joint declaration text not yet published (summit 19-20 MAY); [Shadowserver](#) telemetry not re-pulled this cycle (~225K PAN-OS baseline carried); Israel internal cabinet position on Trump deal terms unknown; Boeing 200-aircraft claim unresolved.

Date coherence: All T+N values computed against 19-MAY-2026 base date. Cycle window 18-MAY 1530 UTC through 19-MAY 1530 UTC (24h daily rollup, not 72h weekend).

END

END OF REPORT

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