

DAILY THREAT REPORT

Fortune Favors the Prepared | Intelligence Operations Division

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⚠️ PREPAREDNESS CONDITION 3 — INCIDENT PROBABLE — Brown Sky ⚠️

Wednesday, 20 May 2026 | Op Epic Fury Day 82 | Hormuz Blockade Day 38 | LBN CF Day 35 | Trend: STABLE

COMMUNICATIONS CONDITION: COMCON 4 — INCIDENT POSSIBLE — Orange Sky

WEATHER: WX-CON 2 — SLGT — Mid-Atlantic and Texas severe; Edwards Plateau flash-flood

SPACE WEATHER: SWX-CON 1 — R1 (Minor) — Radio Blackout impacts current

Publication (UTC)	20 MAY 2026 / 1530 UTC
Reporting Period	19-MAY 1530 UTC through 20-MAY 1530 UTC (24h daily rollup)
SOP	v5.54 Source linkify complete All hooks PASSED

BOTTOM LINE UP FRONT

STATUS: [PREP-CON 3](#) INCIDENT PROBABLE (Brown Sky), Trend STABLE. Op Epic Fury Day 82; US naval blockade of Iran Day 38; Lebanon ceasefire Day 5 of 45-day extension (porous, holding). [WX-CON 2 SLGT](#) for central Appalachians/Mid-Atlantic and Texas severe, plus Edwards Plateau flash-flood. [SWX-CON 1 R1 \(Minor\)](#) radio blackout impacts current; yesterday's G1 geomagnetic watch expired 06z today. PREP-CON holds STABLE as the Iran deal-or-strike window sits mid-point.

URGENT — IRAN DEAL-OR-STRIKE WINDOW AT MID-POINT: VP Vance said Tuesday the US remains “locked and loaded” to restart the military campaign if nuclear talks collapse, while still pursuing a diplomatic deal. Trump paused the planned strike Monday after Tehran sent a peace proposal via the Pakistan-mediated track; he called a deal a “very good chance” but earlier dismissed an Iranian proposal as “garbage.” Netanyahu held a near five-hour security consultation 18-MAY; Israeli media report the IDF at its highest alert for possible US action in the coming days. The window closes ~21-22 MAY. This remains the cycle's highest-stakes 72-hour inflection — see KJ-5 and FLASH [\[GEO-002\]](#).

RUSSIA-CHINA — PUTIN-XI SUMMIT CONCLUDED, MULTIPOLAR DECLARATION SIGNED: Putin and Xi signed a joint declaration on building a “multipolar world” and a “new type of international relations” at the Great Hall of the People this morning, among roughly 20 agreements signed in the leaders' presence with about 20 more expected separately. The two extended the 2001 Treaty of Good-Neighborliness, Friendship and Cooperation and issued a 47-page joint statement on their comprehensive partnership. Xi warned of “unilateral and hegemonic countercurrents running rampant” in a veiled swipe at Washington; Putin invited Xi to Moscow in 2027. The optics contrast sharply with Trump's Beijing visit a week earlier. See FLASH [\[GEO-CHN-001\]](#).

SEVERE WX — Mid-Atlantic and Texas severe, Edwards Plateau flash-flood: [SPC](#) Day 1 (issued 0730 CDT 20-MAY) carries a SLIGHT risk across the central Appalachians into the Mid-Atlantic and southern New England, where scattered damaging winds are the primary threat, and a separate SLIGHT risk across west and south-central Texas, where large hail is primary as supercells develop off the southern High Plains. [WPC](#) Day 2 Excessive Rainfall Outlook holds a SLIGHT risk for the Edwards Plateau region of southwest Texas (HREF neighborhood probabilities over 50 percent for rainfall exceeding 5 inches in 24 hours; PWAT approaching 1.75 inches). Day 3 SLIGHT covers much of the southern Plains through the Ozarks. See [\[WX-001\]](#).

CYBER — PAN-OS deadline TOMORROW, Exchange at T+9: FCEB BOD 22-01 deadline for PAN-OS CVE-2026-0300 Captive Portal RCE is tomorrow 21-MAY (T+1; today is the last full work day). Microsoft Exchange CVE-2026-42897 OWA XSS deadline 29-MAY (T+9). NGINX CVE-2026-42945 “NGINX Rift”

(CVSS 9.2 heap overflow in ngx_http_rewrite_module) continues active exploitation per [VulnCheck](#). [Cisco](#) SD-WAN CVE-2026-20182 deadline T+3 past; UAT-8616 cluster still active with web-shell deployment across 10-plus exploitation clusters. See [\[CYB-001\]](#), [\[CYB-009\]](#), [\[CYB-010\]](#), [\[CYB-007\]](#).

LEBANON: Ceasefire Day 5 of 45-day extension. The truce, in effect since 17-APR, has never been observed in practice; Lebanon's Health Ministry counts 380-plus killed by Israeli attacks since it took effect. The 18-MAY IDF strike on an apartment building in Baalbek (Bekaa Valley) was the first Bekaa-axis targeting since the extension and a tripwire-relevant geographic expansion. Next Washington political round 2-3 JUN; Pentagon security track 29-MAY. See [\[GEO-CF-LBN\]](#).

IRAN-HORMUZ: Strait blockade Day 38. Turkey's foreign minister framed the immediate negotiating concern as keeping the Strait of Hormuz open. The UAE is accelerating its Fujairah pipeline, which would roughly double export capacity bypassing Hormuz when operational in 2027. Pakistan secured the return of 11 Pakistani and 20 Iranian nationals from US-seized Gulf of Oman vessels. See [\[GEO-001\]](#).

SPACE WX: [SWPC](#) homepage shows R1 (Minor) radio blackout impacts current — weak or minor degradation of HF radio on the sunlit side, occasional loss of radio contact, brief low-frequency navigation degradation. Yesterday's G1 geomagnetic storm watch expired 06z today. [SWPC](#) notes its notifications timeline is unreliable due to ongoing upgrades (notice published 18-MAY).

MARKETS: Brent settled near \$107 absorbing the Trump call-off as partial good news. Defense names (LMT/RTX/NOC/GD/BA/HII/LHX) carry asymmetric downside on a confirmed deal, upside on no-deal plus strike resumption. [USDA](#) WASDE-671 (released 12-MAY): 2026/27 wheat 1.561 bb, corn 16.0 bb, soybeans 4.435 bb. Next [WASDE](#) 11-JUN.

PRACTITIONER POSTURE — 72-HOUR DECISION TRIGGERS

1. PAN-OS CVE-2026-0300 FCEB deadline TOMORROW Wed 21-MAY (T+1; 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. Iran deal-or-strike inflection window closes ~21-22 MAY; today is mid-point. Pump-price posture flex through end of week; cyber-spillover preparedness elevates on a confirmed strike scenario. See [\[GEO-002\]](#).
3. Southwest Texas / Edwards Plateau households face a Day 2 ERO SLIGHT flash-flood window; pre-position drainage and high-water route plans, verify two-of-three non-NWR alert paths (Wireless Emergency Alerts + [NWS](#) app + commercial broadcast). TX Rio Grande City [NWR](#) transmitter is OUT OF SERVICE in the downstream zone. See [\[WX-001\]](#).
4. [Cisco](#) SD-WAN operators T+3 past FCEB deadline: re-baseline web-shell detections (XenShell + Godzilla), audit AWS vManage credential reuse, rotate JWT signing keys. See [\[CYB-007\]](#).
5. Watch the Putin-Xi joint readout for Iran/Hormuz language, any anti-US security clauses, and Taiwan-position drift — a coordinated counter-pressure signal would feed back into the Iran inflection. See [\[GEO-CHN-001\]](#).

WHAT CHANGED SINCE 19-MAY (24-HOUR ROLLUP)

+ ADDED: Putin-Xi summit concluded 20-MAY — multipolar-world joint declaration signed, roughly 20 agreements in the leaders' presence, 2001 Treaty of Good-Neighborliness extended, 47-page comprehensive-partnership joint statement, Putin invited Xi to Moscow 2027. VP Vance "locked and loaded" framing 19-MAY. Turkey FM frames Hormuz-open as the immediate negotiating concern. UAE accelerating Fujairah bypass pipeline. Pakistan secured return of 11 Pakistani and 20 Iranian nationals from US-seized vessels.

~ CHANGED: Day counters: Op Epic Fury 81 to 82; blockade 37 to 38; LBN CF Day 4 to Day 5; WHCD 25 to 26. WX-CON 4 MDT to 2 SLGT (stepped down from the central-Plains MODERATE ERO; SLGT now over the central Appalachians/Mid-Atlantic and west/south-central Texas). SWX-CON reframed: G1 geomagnetic watch expired 06z 20-MAY, R1 radio blackout now the active driver. PAN-OS T+2 to T+1 future (deadline tomorrow). Exchange T+10 to T+9. [Cisco](#) SD-WAN T+2 past to T+3 past. Linux Copy Fail T+4 past to T+5 past. [NWR](#) roster 33 affected to 26 affected per operator snapshot.

= NO MATERIAL CHANGE: PREP-CON 3 INCIDENT PROBABLE baseline; COMCON 4 INCIDENT POSSIBLE baseline; Iran deal-or-strike window still open and unresolved; US naval blockade operational posture; munitions stockpile structural posture (1-4 year replenishment window); Lebanon ceasefire holding in name with daily strikes continuing.

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	R1 radio blackout impacts current
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 Appalachians / Mid-Atlantic / S. New England	WX-001	SPC Day 1 SLGT; scattered damaging winds as multicell clusters track east-northeast along a cold front this afternoon and evening
West / South-Central Texas	WX-001 · AGR-001	SPC Day 1 SLGT; large hail primary as supercells develop off the southern High Plains with 40-50 kt deep-layer shear

Southwest Texas / Edwards Plateau	WX-001 · AGR-001	WPC Day 2 ERO SLGT flash-flood; HREF over 50% probability of 5-plus inch rainfall in 24h. TX Rio Grande City NWR gap downstream
Southern Plains through Ozarks (Day 3)	WX-001	WPC Day 3 ERO SLGT much of the southern Plains through the Ozarks; IL Hillsboro and TN Shelbyville NWR gaps near this area
Mountain West (CO, NM)	—	NM triple-gap (Roswell/Carlsbad/Artesia) NWR transmitters OUT OF SERVICE; adjacent to the west Texas large-hail zone
East Coast	—	Early-season heatwave challenging records through Wednesday; below-normal temps overspreading the Northeast over the next couple of days
Alaska (NWR cluster)	—	9-site Kodiak/Anchorage/Fairbanks/Juneau NWR cluster (1 OOS + 8 DEG) continues; outside CONUS severe-wx corridor
NATIONAL — CYBER	CYB-001 · CYB-005 · CYB-007 · CYB-009 · CYB-010	PAN-OS T+1 future (deadline tomorrow) · Linux Copy Fail T+5 past chain-risk · Cisco SD-WAN T+3 past UAT-8616 active · Exchange T+9 future · NGINX active exploit pre-KEV
NATIONAL — ENERGY/FUEL	GEO-001 · GEO-002	Hormuz blockade Day 38 · Iran deal-or-strike window mid-point · Brent near \$107
NATIONAL — AGRICULTURE	AGR-001	WASDE-671 baseline (12-MAY) · SW Texas flash-flood risk to south Texas ag · next WASDE 11-JUN
International Travel — Middle East	GEO-001 · GEO-002 · GEO-CF-LBN	Gulf airspace + Middle East flexibility through the Iran deal-or-strike window (closes ~21-22 MAY); Turkey FM frames keeping Hormuz open as the immediate concern
Strait of Hormuz	GEO-001 · GEO-002	Blockade Day 38; Turkey FM frames keeping Hormuz open as the immediate concern; UAE accelerating Fujairah bypass pipeline (operational 2027)
Southern Lebanon + Bekaa + Northern Israel	GEO-CF-LBN	CF Day 5 of 45-day extension; 380-plus killed since the truce took effect 17-APR; 18-MAY Baalbek strike (first Bekaa-axis targeting since the extension)
Beijing — Putin-Xi summit	GEO-CHN-001	Summit concluded 20-MAY; joint multipolar-world declaration signed, 2001 Treaty of Good-Neighborliness extended, 47-page comprehensive-partnership statement
Russia-Ukraine	—	Pokrovsk-axis pressure continuing; below-FLASH this cycle
HF / EMCOMM — high latitudes	—	SWX-CON 1 R1 Minor radio blackout impacts current; weak HF degradation on the sunlit side; G1 geomagnetic watch expired 06z 20-MAY

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 5 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 — Diplomatic activity around Hormuz has increased — Turkey's foreign minister framed keeping the Strait open as the immediate concern, and the UAE is accelerating its Fujairah bypass pipeline — but the operational reality is unchanged: blockade Day 38, commercial transit at single-digit percent of pre-war volume. Practitioner watch: Hormuz language in any US-Iran negotiated text, and the deal-or-strike inflection closing ~21-22 MAY. Full analysis: [\[GEO-001\]](#).

KJ-3: Southwest Texas / Edwards Plateau flash-flood corridor produces material EOC activation Wednesday into Thursday. CONFIDENCE: MODERATE — [WPC](#) Day 2 ERO holds a SLIGHT risk for the Edwards Plateau region of southwest Texas, with HREF neighborhood probabilities over 50 percent for rainfall exceeding 5 inches in 24 hours and CAPE at or above 3000 J/kg. [SPC](#) Day 1 carries a separate SLIGHT risk across west and south-central Texas (large hail primary). The TX Rio Grande City [NWR](#) transmitter is OUT OF SERVICE downstream of the Edwards Plateau. Full analysis: [\[WX-001\]](#).

KJ-4: Andes hantavirus second-generation transmission very unlikely through 21-JUN. CONFIDENCE: HIGH — Day 7 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.

Iran deal-or-strike window at mid-point; closes ~21-22 MAY.

[TODAY | 20-MAY (T+0) | GEOPOLITICAL]

DECISION TRIGGER: The window opened by Trump's 18-MAY strike call-off sits at mid-point. VP Vance 19-MAY: US still pursuing a deal but "locked and loaded" to restart the campaign if talks collapse. Practitioner read: pump-price posture flex through end of week; cyber-spillover preparedness elevates on a confirmed-strike scenario; Middle East airspace travel flexibility through 22-MAY. See [\[GEO-002\]](#).

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

[TOMORROW | 21-MAY (T+1) | CYBER]

DECISION TRIGGER: FCEB BOD 22-01 deadline 21-MAY for PAN-OS Captive Portal RCE. Today is the last full work day before deadline. Patch release window 15-28 MAY per Palo Alto. [Unit 42](#) has published indicators of compromise including post-compromise log cleanup. Confirm patch deployment or Captive Portal restriction for any internet-exposed PA-Series or VM-Series before EOD. See [\[CYB-001\]](#).

Putin-Xi summit concluded; multipolar-world declaration signed in Beijing.

[TODAY | 20-MAY (T+0) | GEOPOLITICAL]

DECISION TRIGGER: Putin and Xi signed a joint declaration on building a multipolar world and extended the 2001 Treaty of Good-Neighborliness at the Great Hall of the People. Practitioner read: monitor the joint readout for Iran/Hormuz language, anti-US security clauses, and Taiwan-position drift — a coordinated counter-pressure signal would feed the Iran inflection. See [\[GEO-CHN-001\]](#).

[WPC](#) Day 2 ERO SLGT Edwards Plateau SW Texas; flash-flood watch window.

[TODAY-THU | 20-22 MAY | SEVERE WX]

DECISION TRIGGER: [WPC](#) Day 2 ERO holds a SLIGHT risk for the Edwards Plateau region of southwest Texas, with HREF neighborhood probabilities over 50 percent for rainfall exceeding 5 inches in 24 hours and roughly 40 percent for rates exceeding 2 inches per hour overnight. [SPC](#) Day 1 carries a SLIGHT risk across west and south-central Texas with large hail primary. TX Rio Grande City [NWR](#) transmitter is OUT OF SERVICE downstream. Local EOCs in TX should plan activation triggers. See [\[WX-001\]](#).

[SWPC](#) R1 radio blackout impacts current; G1 geomagnetic watch expired 06z today.

[TODAY | 20-MAY (T+0) | SPACE WX]

DECISION TRIGGER: [SWPC](#) homepage shows R1 (Minor) radio blackout impacts current — weak or minor HF degradation on the sunlit side, occasional loss of radio contact, brief low-frequency navigation degradation. Yesterday's G1 geomagnetic watch expired 06z. Practitioner-tier hams: minor daytime HF impact on the sunlit side; verify alternate band selection if a circuit fades. [SWPC](#) notes its notifications timeline is unreliable due to ongoing upgrades.

Microsoft Exchange CVE-2026-42897 FCEB deadline T+9.

[FRIDAY | 29-MAY (T+9) | 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+9). Exchange operators should enable EEMS now if not already done. See [\[CYB-009\]](#).

US-Iran deal-or-strike window at mid-point; Vance says US "locked and loaded" if talks fail.

[GEO-002 | FLASH | UPDATED — DEAL WINDOW MID-POINT | Score 25]

DELTA SINCE YESTERDAY

~ **CHANGED:** The deal-or-strike window opened by Trump's 18-MAY call-off of the planned Tuesday strike now sits at mid-point; it closes ~21-22 MAY. VP Vance said Tuesday 19-MAY that the US is still pursuing a diplomatic deal but remains "locked and loaded" to restart the military campaign if nuclear talks collapse.

~ **CHANGED:** Trump described a deal as a "very good chance" after Tehran sent a peace proposal via the Pakistan-mediated track, but earlier dismissed an Iranian proposal as "garbage." He has declined to set a firm public deadline, saying he wants a better proposal than an earlier offer.

+ **ADDED:** Netanyahu held a near five-hour security consultation 18-MAY with the IDF chief of staff, air force commander, head of military intelligence, and head of the Operations Directorate; Israeli media (Channel 12, Iran International) report the IDF at its highest alert for possible US action in the coming days, with Israel expected to coordinate closely on any operation.

+ **ADDED:** Turkey FM Hakan Fidan, speaking in Berlin, framed the immediate negotiating concern as keeping the Strait of Hormuz open, while noting Iran's nuclear program remains a central issue.

= **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 remains the cycle's highest-impact transition. Trump called off the Tuesday strike on 18-MAY at the request of UAE/Saudi/Qatar leaders; the window is 2-3 days and closes ~21-22 MAY. Today is mid-point with the outcome still open and unresolved. Lebanon fighting remains a complicating factor — Tehran has refused a wider peace deal that does not include a halt to Israel's fight with Hezbollah. Sources: [PBS News](#), [Fox News](#), [NBC News](#).

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 at Al Udeid/Al Dhafra/Prince Sultan AB/Manama; THAAD/Patriot batteries forward-deployed across UAE/Saudi/Bahrain/Kuwait/Qatar.
ACTIVITY	Trump called off the planned Tuesday strike on 18-MAY at the request of UAE, Saudi, and Qatar. VP Vance 19-MAY: the US is still pursuing a deal but is "locked and loaded" to restart the campaign if talks collapse. Diplomatic tracks active: Pakistan-mediated US-Iran proposal exchange and Gulf-monarchy-mediated dialogue. Netanyahu held a near five-hour security consultation 18-MAY.
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	Deal-or-strike window at mid-point as of 20-MAY; it closes ~21-22 MAY (Trump 2-3 day framing). If no deal, the decision-execution window runs from ~21-22 MAY. Outcome remains open and unresolved.
EQUIPMENT	No CENTCOM kinetic posture change observed in OSINT this cycle; carrier movements, B-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).

SEVERE WEATHER: [SPC](#) Day 1 SLGT central Appalachians/Mid-Atlantic and west/south-central Texas.

[WX-001 | FLASH | UPDATED — SEVERE WEATHER | Score 23]

This is the cycle’s FLASH-tier severe-weather and flash-flood item. **In brief:** [SPC](#) Day 1 (issued 0730 CDT 20-MAY) carries a SLIGHT risk across the central Appalachians into the Mid-Atlantic and southern New England (scattered damaging winds), and a separate SLIGHT risk across west and south-central Texas (large hail primary, supercells off the southern High Plains). [WPC](#) Day 2 holds a flash-flood (ERO SLIGHT) risk for the Edwards Plateau of southwest Texas. Full analysis — ERO/[SPC](#) corridor detail, the [NWR](#) transmitter outage roster, instability/shear/PWAT specifics, and practitioner action by County Warning Area — is in [SECTION 7 — METEOROLOGICAL & SEVERE WEATHER](#). WX-CON scale: [FFTP WX-CON definitions](#); [NOAA](#) source: [SPC Convective Outlook](#).

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+3 past; UAT-8616 cluster still active.

[CYB-007 | FLASH | FCEB DEADLINE T+3 PAST | Score 24]

DELTA SINCE YESTERDAY

~ **CHANGED:** FCEB BOD compliance deadline 17-MAY now T+3 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. [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+3 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.

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+9 (29-MAY).

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

DELTA SINCE YESTERDAY

~ **CHANGED:** Days-to-deadline 10 → 9 (T+9 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+5 past) with FCEB compliance due 29-MAY (T+9). 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+9).
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 38; Turkey FM frames keeping Hormuz open as the immediate concern.

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

DELTA SINCE YESTERDAY

~ **CHANGED:** Day counter 37 → 38.

+ **ADDED:** Turkey’s foreign minister publicly framed keeping the Strait of Hormuz open as the immediate negotiating concern, tying it to the broader US-Iran diplomatic track.

+ **ADDED:** The UAE is accelerating its Fujairah bypass pipeline; when operational in 2027 it would roughly double the export capacity that can bypass Hormuz.

+ ADDED: Pakistan secured the return of 11 Pakistani and 20 Iranian nationals previously held from US-seized Gulf of Oman vessels.

= **NO MATERIAL CHANGE:** Strait effectively closed since 28-FEB; US naval blockade since 13-APR; commercial transit remains at single-digit percent of pre-war volume.

WHY THIS CYCLE

Strait effectively closed since 28-FEB. US naval blockade since 13-APR. The blockade now sits inside the active US-Iran deal-or-strike window (see [\[GEO-002\]](#)); Hormuz transit terms are a likely component of any negotiated outcome, which is why the Turkish framing and the UAE bypass-pipeline acceleration matter as forward indicators.

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

SIZE	Global oil markets (Brent near \$107); Asia LNG buyers (Japan, South Korea, India) sourcing alternates; Iraqi state budget under acute stress given heavy revenue dependency on Hormuz-routed exports.
ACTIVITY	US naval blockade since 13-APR continues. Turkey's foreign minister framed keeping Hormuz open as the immediate concern. The UAE is accelerating its Fujairah bypass pipeline. Pakistan secured the return of 11 Pakistani and 20 Iranian nationals from US-seized vessels.
LOCATION	Strait of Hormuz; Persian Gulf; Iraqi exports via Basra terminals; UAE Fujairah bypass (capacity expansion underway, operational 2027); Saudi Arabia East-West Pipeline (Red Sea) alternative carrying limited capacity.
TIME	Blockade Day 38 (since 13-APR). The blockade now sits inside the US-Iran deal-or-strike window, which is at mid-point and 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 2026 Iran war ; Reuters (Turkey FM framing, Pakistan national return); regional maritime reporting.

DOWNSTREAM — CASCADE IMPLICATION

Global oil and LNG supply remains tight; Iraqi state budget under severe stress; Asia LNG buyers continue alternates. A negotiated US-Iran outcome could shift Hormuz transit terms, but the current blockade operational reality is unchanged this cycle.

ANALYST ASSESSMENT

I judge that the blockade operational posture is **very unlikely** to change before the deal-or-strike window closes, even if a partial framework is announced. I assess that any near-term partial reopening would be a limited "humanitarian corridor" framing rather than a full restoration of pre-war commercial transit. I would change my mind if (a) a joint US-Iran statement explicitly references a Hormuz reopening framework, or (b) a transit mechanism is published with terms consistent with prior commercial volumes, signaling de facto reopening.

ALTERNATIVE HYPOTHESES

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

WHAT WOULD SUPPORT	Joint US-Iran statement language explicitly addressing Hormuz; a published transit mechanism with terms consistent with pre-war commercial volume; a CENTCOM blockade lift order.
WHAT WOULD DISCONFIRM	Continued blockade operations; Hormuz language absent from any negotiated text.
CURRENT STATUS	NOT observed.

COLLECTION GAPS — WHAT I CANNOT SEE

- Hormuz transit terms within the US-Iran negotiating track not public.
- UAE Fujairah bypass-pipeline capacity timeline not independently confirmed.
- [CENTCOM](#) commercial-vessel-redirect detailed scope (origin/cargo) not externally observable.

SOURCES

[Wikipedia 2026 Iran war](#); [Reuters](#) (Turkey FM framing, Pakistan national return); regional maritime reporting.

Lebanon CF Day 5 of 45-day extension; daily IDF strikes; 18-MAY Baalbek (Bekaa expansion).

[GEO-CF-LBN | FLASH | EXTENDED — DAY 5 OF 45 | Score 22]

DELTA SINCE YESTERDAY

~ **CHANGED:** Day counter 34 → 35 (Day 5 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-Litani 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.

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+1 future).

[CYB-001 | FLASH | PATCH-EXEC T+1 FUTURE | Score 22]

DELTA SINCE YESTERDAY

~ **CHANGED:** Days-to-deadline 2 → 1 (T+2 → T+1 future). Today is the last full work day before the 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; today Wed 20-MAY is the last full work day before the FCEB deadline tomorrow Thu 21-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 per 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 / 10.2 (specific releases). Cloud NGFW, Prisma Access, and Panorama NOT affected per vendor advisory.
TIME	KEV add 06-MAY; Wave 1 patch shipped 13-MAY; Wave 2 ETA ~28-MAY (post-deadline); FCEB BOD 22-01 deadline 21-MAY (T+1 future).
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](#).

Putin-Xi summit concluded 20-MAY; multipolar-world declaration signed; 2001 friendship treaty extended.

[GEO-CHN-001 | FLASH | UPDATED — SUMMIT CONCLUDED | Score 21]

DELTA SINCE YESTERDAY

~ **CHANGED:** Putin-Xi summit CONCLUDED 20-MAY. Welcome ceremony at the Great Hall of the People; the two leaders signed a joint declaration on building a multipolar world and a new type of international relations, among roughly 20 agreements signed in their presence with about 20 more expected separately.

+ **ADDED:** The two extended the Russian-Chinese Treaty of Good-Neighborliness, Friendship and Cooperation, originally signed July 2001, and issued a 47-page joint statement on the comprehensive partnership. Putin invited Xi to visit Moscow in 2027.

+ **ADDED:** Xi warned of unilateral and hegemonic countercurrents running rampant, a veiled swipe at Washington, and held Russian-Chinese relations up as a model for major-power relations. Named agreements include Technology Cooperation, Sustainable Trade and Urban Cooperation, Anti-Monopoly Cadre Training, Media Cooperation, Film IP Cooperation, Talent Development, and a Joint Innovation Institute.

+ **ADDED:** Optics contrast with Trump's Beijing visit a week earlier: Trump was met by VP Han Zheng and flanked by Apple/Tesla/Nvidia executives, securing a belated 200-Boeing-jet deal plus roughly 17 billion dollars in annual US agricultural products through 2028; Putin was greeted by FM Wang Yi and arrived with an entourage of cabinet ministers and state-corporation chiefs.

WHY THIS CYCLE

The Putin-Xi summit publicly deepened the Russia-China axis days after Trump's checkpoint-not-breakthrough Beijing visit. Practitioner watch now shifts to joint-readout follow-through: any Iran/Hormuz language, anti-US security clauses, Taiwan-position drift, and Power of Siberia 2 pipeline progress. Sources: [The Moscow Times](#), [TIME](#), [WION](#), [The New Voice of Ukraine](#).

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	Two-day state visit concluded 20-MAY. Welcome ceremony at the Great Hall of the People; smaller leaders' meeting followed by delegation talks; joint declaration and roughly 20 agreements signed in the leaders' presence, with about 20 more expected separately.

LOCATION	Beijing — Zhongnanhai/Diaoyutai/Tiananmen Square. Trump-Xi summit was 13-15 MAY in same compound (Zhongnanhai).
TIME	Putin arrived Beijing late 19-MAY; summit held and concluded 20-MAY. Putin invited Xi to visit Moscow in 2027.
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+5 past.

[CYB-005 | FLASH | CHAIN-RISK T+5 PAST | Score 21]

DELTA SINCE YESTERDAY

~ **CHANGED:** Days-since-deadline 4 → 5 (T+4 past → T+5 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+5 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+5 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** (over 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 7; zero second-generation cases.

[HLTH-001 | FLASH | STABLE DAY 7 | Score 20]

DELTA SINCE YESTERDAY

~ **CHANGED:** Surveillance Day 6 → Day 7 post-index case; zero second-generation cases through Day 7.
= **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 7; 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 7 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** (under 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.

SW Texas ag producers in [WPC](#) Day 2 ERO SLGT corridor; Texas severe storms overlap ranchland.

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

DELTA SINCE YESTERDAY

~ **CHANGED:** [WPC](#) Day 2 ERO SLGT for the Edwards Plateau of southwest Texas adds flash-flood and standing-water risk to south Texas ag; [SPC](#) Day 1 SLGT severe over west and south-central Texas overlaps ranchland; the prior cycle's central-Plains overnight threat has cleared.

~ **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 8 days old): 2026/27 wheat 1.561 bb, corn 16.0 bb, soybeans 4.435 bb; next [WASDE](#) 11-JUN.

WHY THIS CYCLE

[SPC](#) Day 1 SLGT west/south-central Texas severe; [WPC](#) Day 2 ERO SLGT Edwards Plateau SW Texas; Day 3 ERO SLGT southern Plains through the Ozarks. 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	Texas cattle and ranchland producers in the Edwards Plateau and Hill Country; south Texas row-crop ground exposed to flash-flood standing water; southern Plains wheat belt under the Day 3 ERO.
ACTIVITY	Flash-flood standing-water risk on the Edwards Plateau through Thursday; field-access disruption could delay south Texas field operations; large hail a threat to crops and equipment in west and south-central Texas.
LOCATION	Southwest Texas / Edwards Plateau (WPC Day 2 ERO SLGT); west/south-central Texas severe; Day 3 ERO SLGT southern Plains through the Ozarks.
TIME	WPC Day 2 ERO SLGT Edwards Plateau 20-21 MAY; Day 3 southern Plains through Ozarks 21-22 MAY. 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 agricultural impact concentrated in Texas this cycle at **roughly even chance** of producing measurable field-access disruption in southwest Texas, with the Edwards Plateau flash-flood risk the primary driver. I would change my mind if (a) Edwards Plateau rainfall stays under the 5-inch ERO threshold, or (b) the Day 3 ERO over the southern Plains and Ozarks does not develop.

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (unlikely): The Edwards Plateau flash-flood corridor produces material livestock loss (over 1000 head).

WHAT WOULD SUPPORT	A subsequent USDA livestock-loss report; a Texas Department of Agriculture emergency declaration.
WHAT WOULD DISCONFIRM	Edwards Plateau rainfall stays below the ERO threshold; storm motion stays fast enough to limit standing-water exposure.
CURRENT STATUS	NOT observed.

COLLECTION GAPS — WHAT I CANNOT SEE

- Real-time field-access conditions in southwest Texas not centrally measured.
- Livestock heat-stress mortality reporting lags by 3-7 days.
- [WASDE](#) next release (11-JUN) is more than three weeks out; the supply/demand picture between now and then may shift.

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.	DEAL-OR-STRIKE WINDOW AT MID-POINT; closes ~21-22 MAY
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-axis targeting on 18-MAY narrowed the envelope)
Hormuz reopening	Confirms: joint US-Iran statement with a Hormuz reopening framework; a published transit mechanism with terms consistent with pre-war volumes. Disconfirms: continued CENTCOM redirect of commercial vessels.	NOT observed (blockade Day 38)
Putin-Xi summit readout	Confirms: joint declaration text includes specific Iran/Hormuz language or anti-US security clauses. Disconfirms: generic multipolar language only.	SUMMIT CONCLUDED 20-MAY; readout under review
PAN-OS FCEB compliance	Confirms: CISA supplemental directive within 14 days of 21-MAY. Disconfirms: clean attestation telemetry pass.	PRE-DEADLINE T+1 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 7
Severe weather / flash-flood	Confirms: county EOC activation + Flash Flood Warning issuance. Disconfirms: WPC Day 2 ERO QPF underperforms forecast.	ACTIVE (WPC Day 2 ERO SLGT, Edwards Plateau)
Space weather escalation	Confirms: SWPC issues a fresh geomagnetic storm watch or R-scale escalates above R1. Disconfirms: R1 radio blackout clears and conditions return to quiet.	R1 Minor radio blackout impacts current; G1 watch expired 06z 20-MAY

SECTION 5 — ENERGY / INFRASTRUCTURE / SUPPLY CHAIN

Brent is trading near \$107, having absorbed Trump's strike call-off as partial good news; WTI is proportional. [AAA](#) national average gasoline is about \$4.36/gal. Energy markets are watching the deal-or-strike window closely — a confirmed deal would ease prices, a strike resumption would spike them.

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).

Hormuz transit terms (cross-ref [\[GEO-001\]](#)): Hormuz transit terms are a likely component of any negotiated US-Iran outcome. Turkey's foreign minister has framed keeping the Strait open as the immediate concern, and the UAE is accelerating its Fujairah bypass pipeline. Watch for explicit Hormuz language in any negotiated text as the forward indicator of a reopening framework.

Iraqi export impact: Iraq's oil minister has disclosed that April Hormuz-routed exports ran roughly 89 percent below the pre-war monthly baseline. With the Iraqi state budget heavily dependent on this revenue, the budget is under acute stress. Practitioner read: Iraqi government stability is at risk while exports remain at single-digit percent of pre-war volume; military-faction posture and US embassy security posture are worth monitoring.

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 through the deal-or-strike window (closes ~21-22 MAY). [FAA](#) NOTAMs unchanged from prior cycle; no new advisories issued for Iran proximity. 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

Two separate severe-weather areas plus a Texas flash-flood threat this cycle. Full FLASH signpost [\[WX-001\]](#). [SPC](#) Day 1 (issued 0730 CDT 20-MAY) carries a SLIGHT risk across the central Appalachians into the Mid-Atlantic and southern New England, where scattered damaging winds are the primary threat as multicell clusters track east-northeast along a cold front, and a separate SLIGHT risk across west and south-central Texas, where large hail is the primary threat as supercells develop off the southern High Plains with 40-50 kt of deep-layer shear. [WPC](#) Day 2 holds an Excessive Rainfall (ERO SLIGHT) risk for the Edwards Plateau of southwest Texas; Day 3 ERO SLIGHT covers much of the southern Plains through the Ozarks.

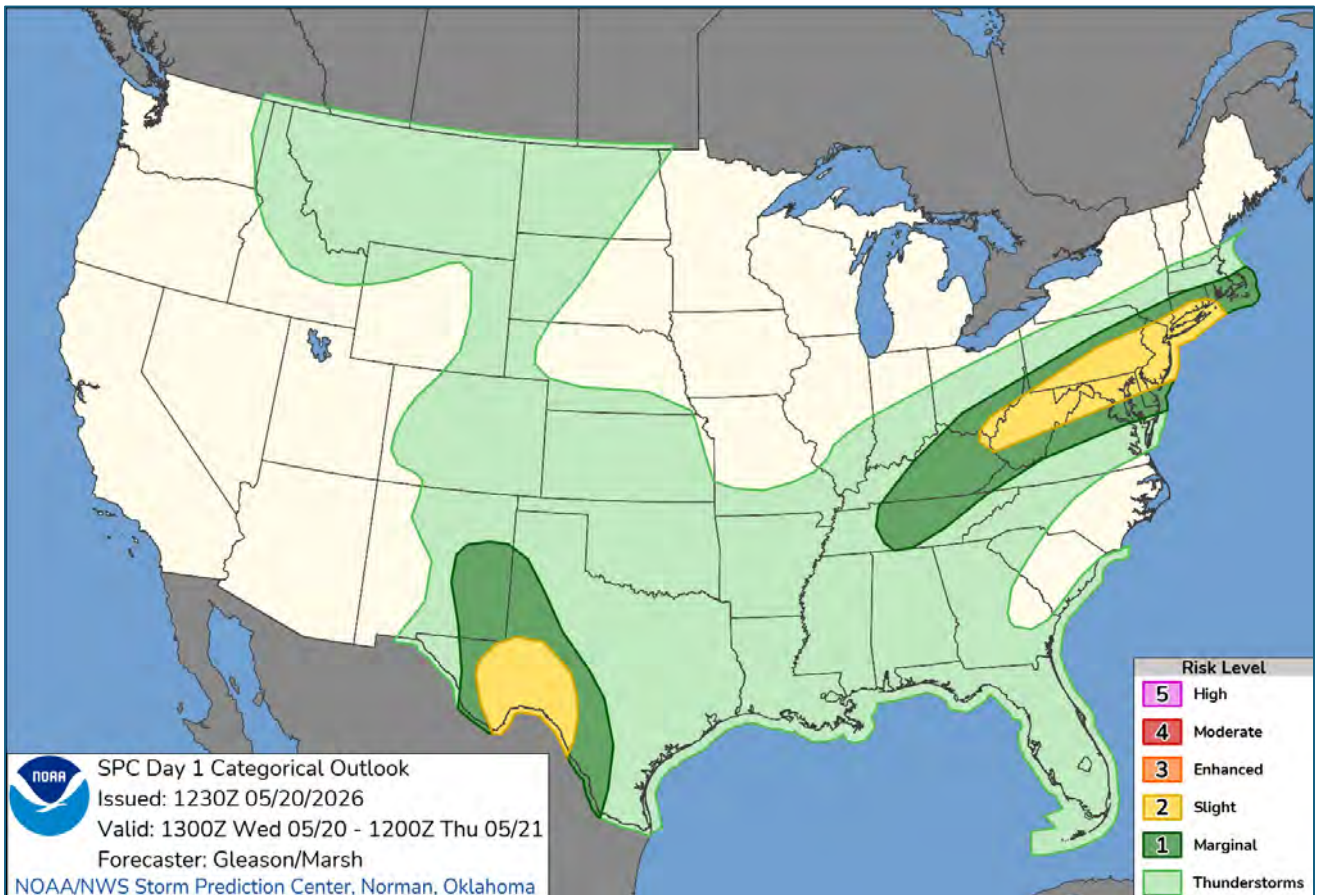
[NWR](#) transmitter outage list — 20-MAY operator snapshot

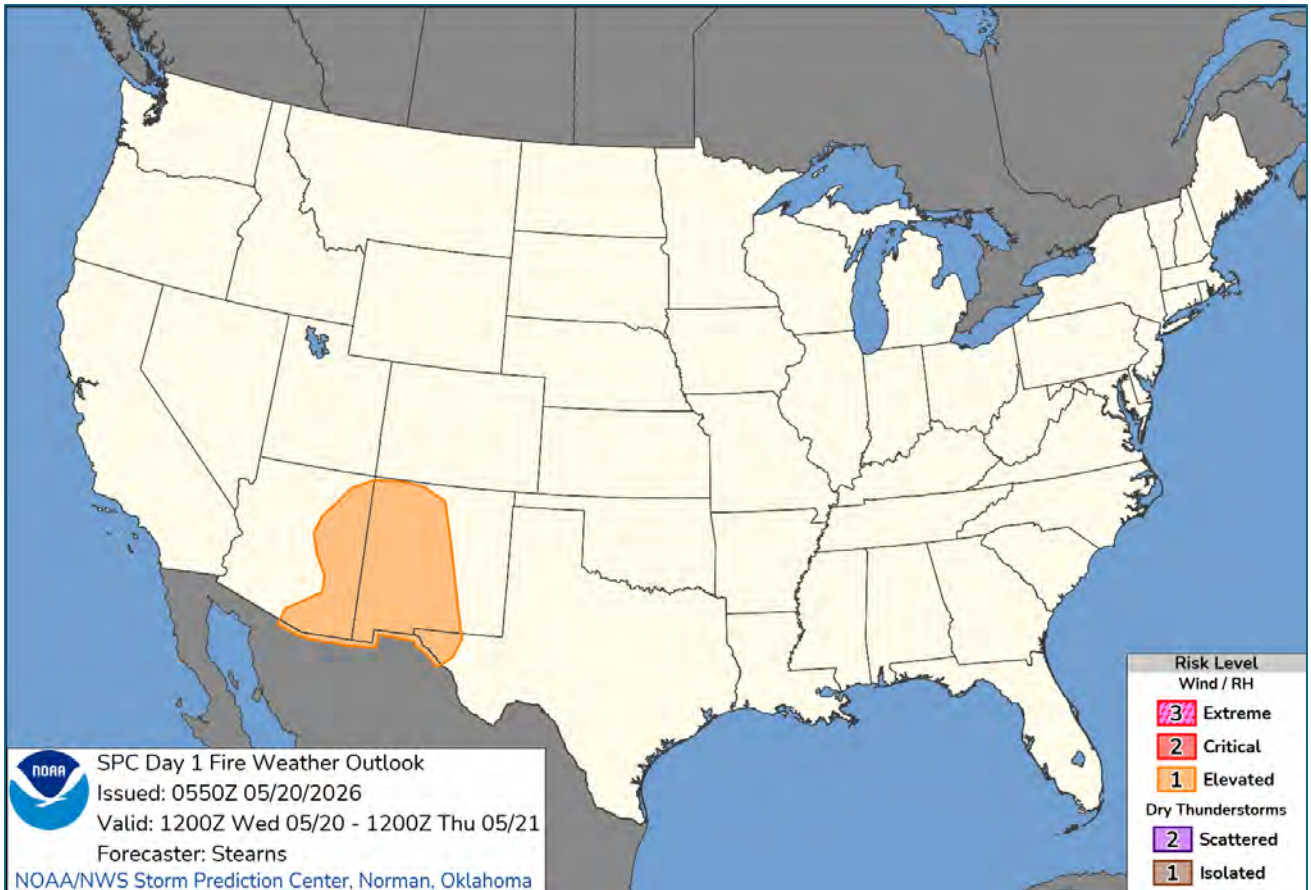
Total: 26 affected (15 OOS + 11 DEG) across 15 states (AK AL CO GA IL IN KS ME MI MN NM NV OR TN TX), with a 9-site Alaska cluster. Critical-corridor intersect with the active weather footprint: TX Rio Grande City (OOS, downstream of the Edwards Plateau ERO area) and the NM triple-gap at Carlsbad, Roswell, and Artesia (OOS, adjacent to the west Texas large-hail zone). KS Ulysses, IL Hillsboro, and TN Shelbyville remain OOS but are outside today's primary [SPC](#) SLIGHT areas.

ST	CITY	FREQ	CWA / SOURCE WFO	CALLSIGN	STATUS	THREAT OVERLAP TODAY
KS	Ulysses	162.450	Dodge City KS (DDC)	WXN-81	OOS	Coverage gap; near Day 3 ERO SLGT southern Plains
IL	Hillsboro	162.425	St. Louis MO (LSX)	KXI-79	OOS	Coverage gap; near Day 3 ERO SLGT southern Plains/Ozarks

TN	Shelbyville	162.475	Nashville TN (OHX)	WXK-63	OOS	Coverage gap; near Day 3 ERO SLGT Ozarks edge
TX	Rio Grande City	162.425	Brownsville/RGV TX (BRO)	WNG-601	OOS	DOWNSTREAM — WPC Day 2 ERO SLGT Edwards Plateau drains toward RGV
NM	Roswell	162.450	Albuquerque NM (ABQ)	WWG-36	OOS	ADJACENT — SPC Day 1 large-hail threat SW Texas / SE New Mexico
NM	Carlsbad	162.475	Midland/Odessa TX (MAF)	WWF-37	OOS	ADJACENT — SPC Day 1 large-hail threat SW Texas / SE New Mexico
NM	Artesia	162.425	Midland/Odessa TX (MAF)	WXN-24	OOS	ADJACENT — SPC Day 1 large-hail threat SW Texas / SE New Mexico
IN	Angola	162.425	Northern Indiana (IWX)	KXI-94	DEG	EDGE — SPC Day 1 SLGT lower Great Lakes periphery
IL/MI/MN/etc	Other CONUS OOS/DEG	multiple	multiple	multiple	mixed	AL Columbus, CO Colorado Springs, GA Baxley, ME Sugarloaf, MI Adrian/Petersburg, MI Petoskey, MN Gunflint Lake, NV Elko, OR Portland — no direct corridor overlap
AK	9-site cluster	multiple	JNU/AFC/AFG	multiple	1 OOS + 8 DEG	Outside CONUS severe-wx corridor

PRACTITIONER ACTION: Operator [NWR](#) snapshot 20-MAY: 26 transmitters affected (15 OUT OF SERVICE + 11 DEGRADED) across 15 states, 9-site Alaska cluster. The most operationally relevant gap is TX Rio Grande City (OOS, BRO CWA), downstream of the Edwards Plateau ERO area, with the NM triple-gap at Carlsbad, Roswell, and Artesia (OOS) adjacent to the west Texas large-hail zone. Households in or near these areas should verify two-of-three non-NWR alert paths: Wireless Emergency Alerts on cellular handset + [NWS](#) app push notifications + commercial-broadcast (radio or TV) coverage. The NM triple-gap (Roswell, Carlsbad, Artesia) is adjacent to the southwest Texas large-hail threat. Cross-check county SAME location code against backup [NWR](#) transmitter via [NWR Station Search](#).





SECTION 7A — SPACE WEATHER & EMCMM

[SWPC](#) homepage shows R1 (Minor) radio blackout impacts current — weak or minor degradation of HF radio on the sunlit side, occasional loss of radio contact, and brief low-frequency navigation degradation. Yesterday’s G1 (Minor) geomagnetic storm watch expired 06z 20-MAY; SWX-CON is set at 1 (R1 Minor) on the [NOAA](#) R-scale. [SWPC](#) notes its notifications timeline is unreliable due to ongoing upgrades (notice published 18-MAY). SWX-CON scale: [FFTP space-weather conditions](#); [NOAA](#) source: [NOAA Space Weather Scales](#).

Geomagnetic status: Yesterday’s G1 (Minor) geomagnetic storm watch expired 06z 20-MAY; conditions have returned below G1. The current driver is the R1 (Minor) radio blackout shown on the [SWPC](#) homepage — weak HF degradation on the sunlit side. [SWPC](#) notes its notifications timeline is unreliable due to ongoing upgrades.

Far-side outlook (3-5 day flare watch): The Earth-facing solar disk currently lacks impressive sunspot groups, which is consistent with the present quiet-to-minor posture. However, [SWPC](#) near/far-side imagery (SDO Earth-facing plus Solar Orbiter far-side, 18-MAY) shows a large, magnetically complex group south of center on the far side that will rotate toward the east limb over the next several days. [SWPC](#) notes this group could change the solar flare forecast in the coming days, though its magnetic structure appears to be spreading out with some signs of decay. Practitioner read: the current quiet posture is **unlikely** to hold steady through the week; EMCMM operators should expect the flare and radio-blackout outlook to be revised as the group rotates into an Earth-facing position. Watch the east limb.

Electron flux: Elevated electron flux in the outer radiation belt continues to pose a low-level LEO satellite charging risk for operators running satellite experimentation. Below-FLASH but a practitioner-tier signal for SAT operators; verify spacecraft charging mitigations are current.

HF Band Conditions (Wednesday 20-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 8 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: [WPC](#) Day 2 ERO SLGT for the Edwards Plateau region of southwest Texas adds flash-flood and standing-water risk to south Texas ag; the southern Plains severe corridor also overlaps 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 holds STABLE as the Iran deal-or-strike window sits at mid-point. PREP-CON 3 INCIDENT PROBABLE (Brown Sky) baseline holds because Op Epic Fury Day 82 + US naval blockade Day 38 + Lebanon CF Day 5 of 45 (porous) maintain the elevated-but-stable backdrop. Severe weather ([SPC](#) Day 1 SLGT central Appalachians/Mid-Atlantic and west/south-central Texas, plus [WPC](#) Day 2 ERO SLGT Edwards Plateau flash-flood) and the cyber-deadline stack (PAN-OS T+1 future, [Cisco](#) SD-WAN T+3 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. Southwest Texas / Edwards Plateau households: [WPC](#) Day 2 ERO SLGT flash-flood window 20-22 MAY — pre-position drainage and high-water route plans; verify two-of-three non-NWR alert paths.
3. [Cisco](#) SD-WAN operators T+3 past deadline: re-baseline web-shell detections (XenShell + Godzilla); audit AWS vManage credential reuse; rotate JWT signing keys.
4. Iran deal-or-strike inflection: window closes ~21-22 MAY. Hold pump-price and travel-flex posture through end of week; elevate cyber-spillover preparedness on a confirmed-strike scenario.
5. Microsoft Exchange operators: enable EEMS mitigation if not already done; prepare for permanent patch; FCEB deadline T+9 (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: [NWR](#) posture this cycle: operator snapshot 20-MAY shows 26 transmitters affected (15 OUT OF SERVICE + 11 DEGRADED) across 15 states with a 9-site Alaska cluster. The most operationally relevant gaps are TX Rio Grande City (downstream of the Edwards Plateau ERO) and the NM triple-gap at Carlsbad, Roswell, and Artesia (adjacent to the west Texas large-hail zone). HouseHold = HIGH where any NWR-gap household sits in an active-threat County Warning Area.

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: v5.54 (15 amendments §§0.90-0.104 active: hardened artifact handoff, Section Index + Geographic Impact Index permanent, operator-snapshot beats web re-scrape, filename simplification, WX-CON banner mandatory, Analytical Standards link, FFTP 5-level condition colors, watch_desk four-peer schema, NOAA-native WX-CON and SWX-CON scales, FFTP logo top-right on all products, and the §0.104-C1 logo media-type and package-hygiene fix).

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 20-MAY), Russia-China summit readout (The Moscow Times / TIME / WION / New Voice of Ukraine).

Gaps acknowledged: Detailed terms within the US-Iran negotiating track not public; full text of the Putin-Xi joint declaration and the second tranche of agreements still being released; [Shadowserver](#) telemetry not re-pulled this cycle (~225K PAN-OS baseline carried); Israel internal cabinet position on the deal terms unknown.

Date coherence: All T+N values computed against 20-MAY-2026 base date. Cycle window 19-MAY 1530 UTC through 20-MAY 1530 UTC (24h daily rollup, not 72h weekend).

END

END OF REPORT

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