

# DAILY THREAT REPORT

Fortune Favors the Prepared | Intelligence Operations Division

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## ⚠️ PREPAREDNESS CONDITION 3 - INCIDENT PROBABLE - Brown Sky ⚠️

Thursday, 21 May 2026 | Op Epic Fury Day 83 | Hormuz Blockade Day 39 | LBN CF Day 36 | Trend: STABLE

## COMMUNICATIONS CONDITION: COMCON 4 - INCIDENT POSSIBLE

## WEATHER: WX-CON 2 - SLGT - E Colorado convective + southern Plains flash-flood

## SPACE WEATHER: SWX-CON 1 - Minor - Elevated energetic-electron flux; geomagnetic/radio quiet

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## BOTTOM LINE UP FRONT

**STATUS:** [PREP-CON 3](#) INCIDENT PROBABLE (Brown Sky), Trend STABLE. US naval blockade of Iran Day 39; Lebanon ceasefire Day 36 of 45-day extension (porous, holding); Iran deal-or-strike window in its closing 48 hours. [WX-CON 2 SLGT](#) with flash flooding now the lead weather hazard across the southern Plains and southwest Texas; convective severe has largely passed. [SWX-CON 1 Minor](#) -- elevated energetic-electron flux (satellite-charging hazard) under an active SWPC alert; geomagnetic and HF-radio environment quiet. PREP-CON holds STABLE; the new driver this cycle is the WHO Ebola public health emergency.

**URGENT -- IRAN DEAL-OR-STRIKE WINDOW IN CLOSING 48 HOURS:** Trump said Tuesday he had been "an hour away" from ordering new strikes Monday evening before Gulf allies asked him to hold, citing progress in Pakistan-mediated peace talks. He has signalled a new attack would follow "in coming days" absent an agreement, framing the deadline as Sunday or early next week. Iran's IRGC threatened to push the war "beyond the region" with strikes "in places you cannot even imagine" if attacks resume. Pakistan's interior minister made a second Tehran visit in a week as Islamabad doubles its mediation effort. Israel's military was reportedly "surprised" by the "hour away" disclosure, with no advance coordination. This remains the cycle's highest-stakes inflection -- see KJ-5 and FLASH [\[GEO-002\]](#).

**PUBLIC HEALTH -- WHO EBOLA EMERGENCY, US ENTRY SCREENING ACTIVE:** WHO declared the DRC/Uganda Ebola outbreak a Public Health Emergency of International Concern on 17-MAY. The Bundibugyo strain -- which has no approved vaccine or treatment -- has driven 600-plus suspected cases and roughly 139 deaths per WHO figures, up sharply from CDC's 246 cases / 80 deaths on 16-MAY. An American doctor and missionary working in the DRC has tested positive. CDC and DHS implemented enhanced US entry screening, travel restrictions, and public health measures on 18-MAY; CDC assesses overall risk to the US public as low. No US cases. See FLASH [\[HLTH-002\]](#).

**AVIATION -- First US enforcement of Ebola entry rules; Air France flight refused landing, diverted to Canada:** On Wednesday 20-MAY, US Customs and Border Protection refused Air France Flight 378 (Paris CDG to Detroit, Boeing 777-200) permission to land at Detroit while in flight, after a Congolese passenger who had recently been in the DRC was found aboard inside the new 21-day Ebola entry-restriction window. The aircraft diverted to Montreal-Trudeau (landed approximately 1715 ET); the passenger was disembarked and the remaining passengers continued to Detroit on the same aircraft. CBP said the passenger had been boarded "in error" and stated there was no medical emergency on board -- this was a regulatory entry-restriction enforcement action, not a confirmed or suspected Ebola case. Separately, a CBP/DHS Federal Register notice published 21-MAY directs all US-bound flights carrying

passengers present in the DRC, Uganda, or South Sudan within the prior 21 days to land only at Washington-Dulles (IAD), the airport designated for enhanced public health measures; the restriction applies to non-US-passport holders and runs for 30 days. See FLASH [\[HLTH-002\]](#).

**WEATHER -- Dual hazard: eastern Colorado convective SLIGHT and southern Plains flash-flood:** [SPC](#) Day 1 (issued 1252 CDT 21-MAY) carries a SLIGHT risk across eastern Colorado, where a lee surface low and afternoon convection off the higher terrain near Denver and Colorado Springs support supercells with large hail, isolated severe gusts, and a possible tornado from mid-afternoon into early evening; isolated large hail is also possible across the southern High Plains and the west Texas Caprock. Separately, [WPC](#) carries a Day 2 Excessive Rainfall SLIGHT risk for the southern Plains and Piney Woods, valid 12Z 21-MAY through 12Z 22-MAY, with heavier totals signalled over eastern Oklahoma and Kansas, plus flash-flood concern for the Hill Country of southwest Texas and the Lower Mississippi and Ohio Valleys into Thursday. See [\[WX-001\]](#).

**CYBER -- PAN-OS FCEB deadline reached, Exchange at T+8, NGINX active exploitation:** The FCEB BOD 22-01 deadline for PAN-OS CVE-2026-0300 Captive Portal RCE has now been reached (T+0/just past). Microsoft Exchange CVE-2026-42897 OWA XSS carries a CISA KEV due date of 29-MAY (T+8). NGINX CVE-2026-42945 "NGINX Rift" (CVSS 9.2 heap overflow in ngx\_http\_rewrite\_module) continues active exploitation with worker-process crashes observed in the wild. CISA added seven KEV CVEs on 20-MAY, including two Microsoft Defender flaws. See [\[CYB-001\]](#), [\[CYB-009\]](#), [\[CYB-010\]](#), [\[CYB-007\]](#).

**LEBANON:** Ceasefire Day 36 of the 45-day extension. The truce, in effect since 17-APR, has never been observed in practice; Israeli airstrikes on south Lebanon continued through this cycle. The earlier Baalbek (Bekaa Valley) strike remains the marker for Bekaa-axis geographic expansion. Next Washington political round 2-3 JUN; Pentagon security track 29-MAY. See [\[GEO-CF-LBN\]](#).

**IRAN-HORMUZ:** Strait blockade Day 39. The JMIC maritime security threat level for the Strait of Hormuz remains CRITICAL; commercial traffic is significantly reduced, with mines reported in and near the Traffic Separation Scheme and sporadic GNSS interference in the approaches. UKMTO Warning 057/26 reported a vessel seized northeast of Fujairah and taken to Iranian waters. See [\[GEO-001\]](#).

**SPACE WX:** [SWPC](#) reports an active energetic-electron environment: alert ALTEF3 (issued 21-MAY 0509 UTC) shows the 2 MeV electron integral flux above 1000 pfu, a continued alert since 16-MAY, with yesterday's maximum at 1717 pfu -- a satellite-charging hazard for geostationary operators. The geomagnetic and HF-radio environment is quiet: no G-storm, no R or S storm, solar wind near 449 km/s. SWX-CON is set at 1 (Minor) on the electron-flux driver.

**MARKETS:** Brent absorbed the Trump strike 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. Two FFTP companion reports posted this week carry the Iran situation in depth: the [Iranian Blockade US Consumer Impact Analysis](#) (household cost cascade, see [\[GEO-001\]](#)) and [SUPINTEL-2026-001 Iranian Domestic Unrest](#) (regime-stability factor, see [\[GEO-002\]](#)).

## PRACTITIONER POSTURE -- 72-HOUR DECISION TRIGGERS

1. PAN-OS CVE-2026-0300 FCEB deadline has been reached. Confirm patch deployment for any internet-exposed PA-Series or VM-Series immediately; any unpatched instance is now past-deadline exposure. See [\[CYB-001\]](#).
2. Iran deal-or-strike inflection window is in its closing 48 hours; Trump framing points to Sunday or early next week as the outer bound. Pump-price posture flex through the weekend; cyber-spillover preparedness elevates on a confirmed strike scenario. See [\[GEO-002\]](#).
3. Southern Plains and Hill Country households face a WPC Day 2 ERO SLIGHT flash-flood window 21-22 MAY; eastern Colorado faces an SPC Day 1 SLIGHT convective risk. Pre-position drainage and high-water route plans, verify two-of-three non-NWR alert paths (Wireless Emergency Alerts + [NWS](#) app + commercial broadcast). CO Colorado Springs NWR transmitter is OUT OF SERVICE inside the eastern-Colorado SLIGHT zone. See [\[WX-001\]](#).
4. Cisco SD-WAN operators past the FCEB deadline: re-baseline web-shell detections (XenShell + Godzilla), audit AWS vManage credential reuse, rotate JWT signing keys. See [\[CYB-007\]](#).
5. Travel/health: the new CBP/DHS entry restrictions route all US-bound flights carrying passengers recently in the DRC, Uganda, or South Sudan to Washington-Dulles only. Operators and travelers with central-Africa routing should expect diversions and screening. See [\[HLTH-002\]](#).

## WHAT CHANGED SINCE 20-MAY (24-HOUR ROLLUP)

**+ ADDED:** WHO Ebola PHEIC now the cycle's lead public-health driver (HLTH-002 new FLASH). Air France Flight 378 (Paris-Detroit) refused US landing 20-MAY and diverted to Montreal under the new Ebola

entry restrictions; CBP/DHS Federal Register notice routes central-Africa-origin flights to Washington-Dulles only, 30-day duration. NYT report on the failed US/Israel plan to install Ahmadinejad. SWPC ALTEF3 energetic-electron-flux alert active.

~ **CHANGED:** Day counters advanced one cycle: blockade to Day 39; LBN CF to Day 36; Op Epic Fury to Day 83; WHCD to Day 27. WX-CON reframed dual-hazard: SPC Day 1 SLIGHT eastern Colorado convective plus WPC Day 2 ERO SLIGHT southern Plains flash-flood (the prior cycle's Mid-Atlantic and southwest-Texas framing has passed). SWX-CON 1 driver shifted from the radio-blackout framing to the ALTEF3 electron-flux alert. Iran window advanced to its closing 48 hours. PAN-OS FCEB deadline reached. Exchange deadline now T+8. Cisco SD-WAN deadline now T+4 past. NWR roster updated to the operator 21-MAY 1125 UTC snapshot: 36 transmitters affected (16 OUT OF SERVICE, 20 DEGRADED).

= **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.

## 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	<a href="#">KJ-1</a> · <a href="#">KJ-2</a> · <a href="#">KJ-3</a> · <a href="#">KJ-4</a> · <a href="#">KJ-5</a>
CRITICAL TIME HACK	7 cards linked to FLASH entries
SECTION 3 - FLASH EVENTS	<a href="#">GEO-002</a> · <a href="#">WX-001</a> · <a href="#">CYB-010</a> · <a href="#">CYB-007</a> · <a href="#">CYB-009</a> · <a href="#">GEO-001</a> · <a href="#">GEO-CF-LBN</a> · <a href="#">CYB-001</a> · <a href="#">CYB-005</a> · <a href="#">HLTH-001</a> · <a href="#">AGR-001</a>
SEC 4A - CYBER (CARRYOVER)	below-FLASH cyber + supporting CVEs
SEC 4B - GEOPOLITICAL (CARRYOVER)	LBN/IR/RU-CN context
SEC 4C - MIC SECOND-ORDER IMPACTS	<a href="#">GEO-002</a> → <a href="#">MIC chain</a>
SEC 4D - INDICATORS & WARNING MATRIX	10 active tracks
SEC 5 - ENERGY / INFRASTRUCTURE / SUPPLY CHAIN	<a href="#">GEO-001</a>
SEC 6 - AVIATION / TRANSPORTATION	<a href="#">WX-001 (IROPS)</a>
SEC 7 - METEOROLOGICAL & SEVERE WX	<a href="#">WX-001</a> · <a href="#">AGR-001</a>
SEC 7A - SPACE WEATHER & EMCMM	ALTEF3 electron-flux alert active
SEC 7B - AGRICULTURE, FOOD & SUPPLY CHAIN	<a href="#">AGR-001</a>
SEC 10 - PREP-CON ASSESSMENT	(narrative)
SEC 11 - SECTOR IMPACT MATRIX	PREP-CON + COMCON
SEC 12 - ANALYTICAL INTEGRITY	(narrative)

## GEOGRAPHIC IMPACT INDEX

### DETERMINING YOUR POSTURE

This index and the Section 11 matrix are decision-support tools, not just data. Use them with this cycle's **PREP-CON**, **COMCON**, **WX-CON**, and **SWX-CON** to set your own **CONCON (Continuity Conditions)** -- your family's or MAG's operational posture. FFTP sets the four conditions; you set CONCON.

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

REGION / STATE	ACTIVE ENTRIES	NOTES
Eastern Colorado	<a href="#">WX-001</a>	SPC Day 1 SLGT; supercells with large hail, isolated severe gusts, and a possible tornado off the higher terrain near Denver and Colorado Springs. CO Colorado Springs NWR transmitter OUT OF SERVICE inside this zone
Southern Plains / Piney Woods	<a href="#">WX-001</a>	WPC Day 2 ERO SLGT excessive rainfall 12Z 21-MAY to 12Z 22-MAY; flash-flood concern. KS Ulysses, IL Hillsboro, TN Shelbyville NWR gaps near this corridor
Southwest Texas Hill Country	<a href="#">WX-001</a>	Flash-flood concern within the WPC Day 2 ERO SLGT area. TX Rio Grande City NWR transmitter OUT OF SERVICE adjacent
Southern High Plains / SE New Mexico	<a href="#">WX-001</a>	Isolated large hail possible. NM triple-gap (Roswell/Carlsbad/Artesia) NWR transmitters OUT OF SERVICE adjacent
Alaska (NWR cluster)	-	18-site Kodiak/Anchorage/Juneau/Fairbanks NWR cluster (1 OOS Sand Point + 17 DEG) continues; outside CONUS severe-wx corridor
NATIONAL - CYBER	<a href="#">CYB-001</a> · <a href="#">CYB-005</a> · <a href="#">CYB-007</a> · <a href="#">CYB-009</a> · <a href="#">CYB-010</a>	PAN-OS FCEB deadline reached · Linux Copy Fail T+6 past chain-risk · Cisco SD-WAN T+4 past UAT-8616 active · Exchange T+8 future · NGINX active exploitation
NATIONAL - ENERGY/FUEL	<a href="#">GEO-001</a> · <a href="#">GEO-002</a>	Hormuz blockade Day 39 · Iran deal-or-strike window in closing 48 hours · JMIC threat level CRITICAL
NATIONAL - AGRICULTURE	<a href="#">AGR-001</a>	WASDE-671 baseline (12-MAY) · SW Texas flash-flood risk to south Texas ag · next WASDE 11-JUN
International Travel - Middle East	<a href="#">GEO-001</a> · <a href="#">GEO-002</a> · <a href="#">GEO-CF-LBN</a>	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	<a href="#">GEO-001</a> · <a href="#">GEO-002</a>	Blockade Day 38; Turkey FM frames keeping Hormuz open as the immediate concern; UAE accelerating Fujairah bypass pipeline (operational 2027)

<b>Southern Lebanon + Bekaa + Northern Israel</b>	<a href="#">GEO-CF-LBN</a>	CF Day 36 of 45-day extension; daily IDF strikes on south Lebanon continue; Bekaa-axis expansion precedent holds
<b>Beijing - Putin-Xi summit</b>	-	Summit concluded 20-MAY; declaration signed, 2001 Treaty extended. Carryover in SEC 4B; no current-cycle delta
<b>Russia-Ukraine</b>	-	Pokrovsk-axis pressure continuing; below-FLASH this cycle
<b>HF / EMCOMM - high latitudes</b>	-	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 36 of the 45-day extension. Israeli airstrikes on south Lebanon continued through this cycle; the Baalbek strike remains the marker for Bekaa-axis geographic expansion. Both Washington and Beirut benefit politically from continuation; the tripwire for collapse remains a high-mass IDF Beirut Dahieh strike paired with a same-week Hezbollah strategic-rocket response. Full analysis: [\[GEO-CF-LBN\]](#).

**KJ-2: Strait of Hormuz remains effectively closed through Q2 2026. CONFIDENCE: MODERATE --** The JMIC maritime threat level for the Strait of Hormuz remains CRITICAL, with mines reported in and near the Traffic Separation Scheme and a UKMTO-reported vessel seizure northeast of Fujairah. The operational reality is unchanged: blockade Day 39, 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 in its closing 48 hours. Full analysis: [\[GEO-001\]](#).

**KJ-3: Dual-hazard weather produces EOC activation in eastern Colorado and the southern Plains 21-22 MAY. CONFIDENCE: MODERATE --** [SPC](#) Day 1 carries a SLIGHT risk across eastern Colorado for supercells with large hail and a possible tornado. [WPC](#) Day 2 ERO holds a separate SLIGHT excessive-rainfall risk for the southern Plains and Piney Woods, with flash-flood concern for the Hill Country of southwest Texas. The CO Colorado Springs NWR transmitter is OUT OF SERVICE inside the eastern-Colorado SLIGHT zone. Full analysis: [\[WX-001\]](#).

**KJ-4: WHO Ebola PHEIC; no US Ebola cases assessed as very likely through 21-JUN. CONFIDENCE: HIGH --** WHO declared the DRC/Uganda Ebola outbreak a PHEIC on 17-MAY; the Bundibugyo strain has no approved vaccine. CDC and DHS implemented enhanced US entry screening and restrictions from 18-MAY, and the first enforcement diversion (Air France 378) occurred 20-MAY. CDC assesses overall US public risk as low. Full analysis: [\[HLTH-002\]](#).

**KJ-5: US-Iran deal-or-strike inflection window in its closing 48 hours. CONFIDENCE: MODERATE --** Trump said Tuesday 19-MAY he had been "an hour away" from ordering new strikes before Gulf allies asked him to hold, citing progress in Pakistan-mediated talks. The IRGC has threatened to take the war "beyond the region" if attacks resume; the NYT reported a failed US/Israel plan to install former president Ahmadinejad. Trump framing points to Sunday or early next week as the outer bound. 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 in its closing 48 hours.

[TODAY | 21-MAY (T+0) | GEOPOLITICAL]

**DECISION TRIGGER:** The window opened by Trump's 18-MAY strike call-off is in its closing 48 hours; Trump framing points to Sunday or early next week as the outer bound, and the IRGC has threatened to take the war "beyond the region" if attacks resume. Practitioner read: pump-price posture flex through the weekend; cyber-spillover preparedness elevates on a confirmed-strike scenario; Middle East airspace travel flexibility through the window. See [\[GEO-002\]](#).

### PAN-OS CVE-2026-0300 FCEB deadline reached -- verify patch now.

[TODAY | 21-MAY (T+0) | CYBER]

**DECISION TRIGGER:** The FCEB BOD 22-01 deadline for PAN-OS Captive Portal RCE has been reached. [Unit 42](#) has published indicators of compromise including post-compromise log cleanup. Any internet-exposed PA-Series or VM-Series not yet patched or Captive-Portal-restricted is now past-deadline exposure -- remediate immediately. See [\[CYB-001\]](#).

### WHO Ebola PHEIC; US entry restrictions enforced -- first flight diversion 20-MAY.

[TODAY | 21-MAY (T+0) | PUBLIC HEALTH]

**DECISION TRIGGER:** The WHO Ebola PHEIC and the new CBP/DHS entry restrictions are now operationally active: Air France Flight 378 was refused US landing 20-MAY and diverted to Montreal, and a Federal Register notice routes all central-Africa-origin US-bound flights to Washington-Dulles only. Practitioner read: travelers and operators with DRC/Uganda/South Sudan routing should expect diversion and screening; no US Ebola cases and CDC assesses public risk as low. See [\[HLTH-002\]](#).

### SPC Day 1 SLGT eastern Colorado convective; WPC Day 2 ERO SLGT southern Plains flash flood.

[TODAY-FRI | 21-22 MAY | WEATHER]

**DECISION TRIGGER:** [SPC](#) Day 1 carries a SLIGHT risk across eastern Colorado for supercells with large hail, isolated severe gusts, and a possible tornado from mid-afternoon into early evening. [WPC](#) Day 2 ERO holds a SLIGHT excessive-rainfall risk for the southern Plains and Piney Woods, with flash-flood concern for the Hill Country of southwest Texas. CO Colorado Springs NWR transmitter is OUT OF SERVICE inside the eastern-Colorado SLIGHT zone. Local EOCs in CO and the southern Plains should plan activation triggers. See [\[WX-001\]](#).

### SWPC ALTEF3 alert -- 2 MeV electron flux above 1000 pfu; satellite-charging hazard.

[TODAY | 21-MAY (T+0) | SPACE WX]

**DECISION TRIGGER:** SWPC alert ALTEF3 (issued 21-MAY 0509 UTC) shows the 2 MeV electron integral flux above 1000 pfu, a continued alert since 16-MAY with yesterday's maximum at 1717 pfu. This is a satellite-charging hazard for geostationary operators. The geomagnetic and HF-radio environment is quiet -- no G-storm, no R or S storm. Practitioner-tier hams: HF conditions are normal this cycle; the watch item is GEO satellite charging, not radio blackout.

### Microsoft Exchange CVE-2026-42897 FCEB deadline T+8.

[FRIDAY | 29-MAY (T+8) | 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+8). Exchange operators should enable EEMS now if not already done. See [\[CYB-009\]](#).

## US-Iran deal-or-strike window in its closing 48 hours; Trump signals new strikes "in coming days" absent a deal.

[GEO-002 | FLASH | UPDATED - DEAL WINDOW CLOSING 48H | Score 25]

### DELTA SINCE YESTERDAY

~ **CHANGED:** The deal-or-strike window is now in its closing 48 hours. Trump said Tuesday 19-MAY he had been "an hour away" from ordering new strikes Monday evening before Gulf allies asked him to hold, citing progress in Pakistan-mediated talks; he framed the remaining runway as Sunday or early next week.

+ **ADDED:** Iran's IRGC threatened to push the war "beyond the region" with "crushing blows in places you cannot even imagine" if the US or Israel resume attacks.

+ **ADDED:** Pakistan's interior minister made a second Tehran visit in a week; diplomatic sources describe a doubling of Pakistani mediation effort, characterizing a return to fighting as "a total disaster for everyone."

+ **ADDED:** Israeli media (Haaretz) report the IDF was "surprised" by Trump's "hour away" disclosure, having expected any resumption to be closely coordinated with Israel in advance; Israeli officials believe renewed US strikes could draw Israel into direct fighting almost immediately.

= **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 planned Tuesday strike on 18-MAY at the request of UAE/Saudi/Qatar leaders; he has since indicated a new attack would follow "in coming days" absent an agreement, framing the deadline as Sunday or early next week. The window is now in its closing 48 hours with the outcome still open. 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: [CBS News](#), [Arab News](#), [CNBC](#).

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

<b>SIZE</b>	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.
<b>ACTIVITY</b>	Trump called off the planned Tuesday strike on 18-MAY at the request of UAE, Saudi, and Qatar, and was reportedly "an hour away" from ordering new strikes Monday before Gulf allies asked him to hold. He has signalled a new attack would follow in coming days absent a deal. Diplomatic tracks active: Pakistan-mediated proposal exchange (interior minister second Tehran visit in a week) and Gulf-monarchy dialogue. Iran IRGC threatened strikes "beyond the region."
<b>LOCATION</b>	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.
<b>TIME</b>	Deal-or-strike window in its closing 48 hours as of 21-MAY; Trump framing points to Sunday or early next week as the outer bound. If no deal, the decision-execution window is imminent. Outcome remains open and unresolved.
<b>EQUIPMENT</b>	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.

<b>UNIT</b>	<a href="#">CBS News liveblog 20-MAY</a> (primary); <a href="#">Arab News</a> ; <a href="#">CNBC</a> ; <a href="#">Reuters</a> via Pakistani source; CSIS munitions analysis (April 2026 baseline).
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**DOWNSTREAM - CASCADE IMPLICATION**

If a deal is announced within the closing 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. Domestic-stability factor: Iran entered the war already in the largest anti-government uprising since 1979, and the war froze that unrest rather than resolving it; regime stability is a second-order driver of Tehran's negotiating incentives and post-conflict continuity risk. Full standalone analysis is in the FFTP companion report [SUPINTEL-2026-001: Iranian Domestic Unrest](#).

**ANALYST ASSESSMENT**

I assess this is the single highest-stakes 48-hour decision window of Q2 2026. I judge the probability of an actual deal announcement within the closing 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 doubled 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; (b) IDF mobilization order is observed; (c) Iran publicly rejects the US proposal substance; (d) the IRGC "beyond the region" threat is paired with observed proxy force-generation.

**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.

<b>WHAT WOULD SUPPORT</b>	Strike-window observation of B-2 generation or carrier repositioning inconsistent with peacetime posture; secondary leak from Israeli sources confirming continued planning.
<b>WHAT WOULD DISCONFIRM</b>	No detected CENTCOM force-generation indicators; Israeli military reportedly surprised by the "hour away" disclosure, inconsistent with a coordinated deception; Iran has not surged air-defense posture.
<b>CURRENT STATUS</b>	<b>INDETERMINATE -- collection gaps preclude high-confidence call either way.</b>

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

<b>WHAT WOULD SUPPORT</b>	Trump's explicit position shift from permanent halt to multi-year suspension; doubled Pakistani-track mediation; concrete UAE/Saudi/Qatar leader engagement.
<b>WHAT WOULD DISCONFIRM</b>	Iran IRGC public rhetoric ("beyond the region") inconsistent with imminent concession; Tehran political costs of any visible concession after Khamenei death are severe.
<b>CURRENT STATUS</b>	<b>OBSERVED IN PROGRESS -- proposal substance not yet public.</b>

**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; the IDF was reportedly not coordinated with on the "hour away" decision.

- Whether the IRGC "beyond the region" threat is backed by observable proxy force-generation is not yet established.
- Domestic US political cost-benefit calculation in Trump's framing is not externally observable.

## SOURCES

[CBS News liveblog 20-MAY](#) (primary); [Arab News](#); [CNBC](#); [NYT via Times of Israel](#) (Ahmadinejad plan, context); [UK Commons Library briefing CBP-10637](#) (cumulative baseline).

## SPC Day 1 SLGT eastern Colorado; WPC Day 2 SLGT southern Plains.

[WX-001 | FLASH | UPDATED - DUAL-HAZARD WEATHER | Score 21]

This is the cycle's FLASH-tier weather item, a dual-hazard cycle. **In brief:** [SPC](#) Day 1 (issued 0552 UTC 21-MAY, operator-confirmed) carries a SLIGHT risk across eastern Colorado, where afternoon convection off the higher terrain near Denver and Colorado Springs supports supercells with large hail, isolated severe gusts, and a possible tornado; isolated large hail is also possible across the southern High Plains and west Texas Caprock. [WPC](#) Day 2 holds a flash-flood (ERO SLIGHT) risk for the southern Plains and Piney Woods, with flash-flood concern for the Hill Country of southwest Texas. Full analysis -- SPC/WPC 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

~ **CHANGED:** Active exploitation continues with worker-process crashes observed in the wild; CISA added seven KEV CVEs on 20-MAY (including two Microsoft Defender flaws) but CVE-2026-42945 was not among them, so it remains a KEV-pending item.

= **NO MATERIAL CHANGE:** Patches available from F5 and the NGINX project. ASLR posture remains the critical secondary mitigation; any FCEB or critical-infrastructure operator should patch within standard 14-day cadence regardless of catalog status.

### 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.

<b>ACTIVITY</b>	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.
<b>LOCATION</b>	NGINX Plus all editions; NGINX Open Source 0.6.27 through 1.30.0. Patches: NGINX Plus R32, NGINX Open Source 1.30.1+.
<b>TIME</b>	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.
<b>EQUIPMENT</b>	CVSS 9.2 (network/no auth/no UI/high impact). CWE-122 Heap Buffer Overflow. Trigger via crafted HTTP rewrite-rule processing.
<b>UNIT</b>	<a href="#">VulnCheck</a> (active exploit telemetry); F5 (vendor); NGINX project; <a href="#">The Hacker News</a> (analysis); <a href="#">depthfirst</a> (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.

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

### 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.

# WHO declares Ebola PHEIC for DRC/Uganda; US entry restrictions now enforced.

[HLTH-002 | FLASH | NEW - WHO PHEIC DECLARED | Score 22]

## DELTA SINCE YESTERDAY

+ **ADDED:** WHO declared the DRC/Uganda Ebola outbreak a Public Health Emergency of International Concern on 17-MAY. The Bundibugyo strain has no approved vaccine or treatment; WHO figures cite roughly 600-plus suspected cases and about 139 deaths, up from CDC's 246 cases / 80 deaths on 16-MAY.

+ **ADDED:** CDC and DHS implemented enhanced US entry screening and travel restrictions from 18-MAY for non-US-passport holders present in the DRC, Uganda, or South Sudan within the prior 21 days. CDC assesses overall US public risk as low; no US cases.

+ **ADDED:** FIRST ENFORCEMENT: Air France Flight 378 (Paris CDG to Detroit, Boeing 777-200) was refused US landing in flight on 20-MAY and diverted to Montreal-Trudeau after a Congolese passenger inside the 21-day window was found aboard. CBP said the passenger was boarded "in error" and confirmed no medical emergency; the remaining passengers continued to Detroit on the same aircraft.

+ **ADDED:** A CBP/DHS Federal Register notice published 21-MAY routes all US-bound flights carrying passengers recently in the DRC, Uganda, or South Sudan to Washington-Dulles (IAD) only, the airport designated for enhanced public health measures; 30-day duration.

## WHY THIS CYCLE

The WHO PHEIC and the US entry-restriction regime are the cycle's lead public-health driver. The Air France diversion is the first real-world enforcement and demonstrates the restrictions actively touching US air operations. Sources: [WHO](#), [CDC](#), [CBS News](#), [Federal Register](#).

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

<b>SIZE</b>	Outbreak population in the DRC and Uganda; US-bound travelers and air carriers serving central-Africa routes; US ports of entry, with public-health resources concentrated at Washington-Dulles.
<b>ACTIVITY</b>	WHO PHEIC declared 17-MAY. CDC/DHS enhanced entry screening and restrictions from 18-MAY. First enforcement diversion (Air France 378) 20-MAY. Federal Register single-port-of-entry notice published 21-MAY.
<b>LOCATION</b>	Source region: DRC and Uganda (Bundibugyo strain). US enforcement: all ports of entry for screening; Washington-Dulles (IAD) as the sole permitted port for central-Africa-origin flights.
<b>TIME</b>	PHEIC 17-MAY; US screening 18-MAY; first diversion 20-MAY; Federal Register notice 21-MAY; single-port restriction runs 30 days.
<b>EQUIPMENT</b>	CDC/DHS HHS order; CBP enforcement authority; Federal Register rule. No approved Bundibugyo-strain vaccine or therapeutic.
<b>UNIT</b>	<a href="#">WHO</a> ; <a href="#">CDC</a> ; <a href="#">CBS News</a> ; <a href="#">Federal Register</a> .

## DOWNSTREAM - CASCADE IMPLICATION

Air carriers serving central-Africa routes face diversion and rebooking exposure; travelers with recent DRC/Uganda/South Sudan presence should expect screening and Dulles-only routing. The diversion was a regulatory enforcement action, not a confirmed or suspected Ebola case; no US cases and CDC assesses public risk as low.

## ANALYST ASSESSMENT

I judge that further flight diversions or boarding refusals under the new entry rules are **likely** over the 30-day restriction window as carriers adjust to the Dulles-only routing. I assess introduction of an Ebola case into the US remains **unlikely** given the screening regime and the absence of a US case to date. I would change my mind if (a) a symptomatic case is confirmed at a US port of entry, or (b) WHO revises the outbreak's geographic spread to include a major international transit hub.

## ALTERNATIVE HYPOTHESES

**Alt-Hyp 1 (unlikely):** The Air France diversion reflects an actual symptomatic Ebola case rather than a travel-history enforcement action.

<b>WHAT WOULD SUPPORT</b>	A CDC or CBP statement confirming infection or symptoms; a public-health case report tied to the passenger.
<b>WHAT WOULD DISCONFIRM</b>	CBP and Air France statements that there was no medical emergency; the diversion framed solely as entry-restriction enforcement.
<b>CURRENT STATUS</b>	<b>NOT observed - official statements indicate enforcement, not a medical case.</b>

### COLLECTION GAPS - WHAT I CANNOT SEE

- Status of the Air France 378 passenger after disembarkation in Montreal not public.
- WHO and CDC case/death figures diverge; true case count not independently reconciled.
- Carrier-level compliance with the Dulles-only routing not yet observable.

## SOURCES

[WHO](#); [CDC](#); [CBS News](#); [NBC News](#); [Federal Register](#).

## Cisco SD-WAN CVE-2026-20182 FCEB deadline T+4 past; UAT-8616 cluster still active.

[CYB-007 | FLASH | FCEB DEADLINE T+4 PAST | Score 24]

## DELTA SINCE YESTERDAY

~ **CHANGED:** FCEB BOD compliance deadline 17-MAY now T+4 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

<b>SIZE</b>	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.
<b>ACTIVITY</b>	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.
<b>LOCATION</b>	Cisco Catalyst SD-WAN Controller + Manager (cloud and on-prem). Patches available via Cisco PSIRT.
<b>TIME</b>	CISA KEV add 14-MAY; FCEB deadline 17-MAY (T+4 past as of today).

<b>EQUIPMENT</b>	CVSS 10.0 unauthenticated authentication bypass to administrative privileges. Post-exploitation observed: web-shell, credential theft, AWS vManage cloud pivot.
<b>UNIT</b>	<a href="#">CISA KEV</a> ; Cisco PSIRT + Talos (attribution UAT-8616); <a href="#">The Hacker News</a> ; <a href="#">CISA ED 26-03</a> 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.

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

### 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+8 (29-MAY).

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

### DELTA SINCE YESTERDAY

~ **CHANGED:** Days-to-deadline 9 → 8 (T+8 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 with FCEB compliance due 29-MAY (T+8). On-prem Exchange Server only; Exchange Online not in scope.

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

<b>SIZE</b>	All FCEB agencies operating on-prem Exchange; commercial-sector on-prem Exchange installed base global. Exchange Online (cloud) NOT in scope.
<b>ACTIVITY</b>	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.
<b>LOCATION</b>	On-prem Exchange Server (specific build numbers per Microsoft advisory).
<b>TIME</b>	KEV add 15-MAY; FCEB compliance due 29-MAY (T+8).
<b>EQUIPMENT</b>	CVSS 8.1; CWE-79 Cross-Site Scripting. Exchange Emergency Mitigation Service (EEMS) provides interim mitigation; permanent fix in future cumulative update.
<b>UNIT</b>	<a href="#">CISA KEV</a> ; <a href="#">Microsoft MSRC</a> ; <a href="#">The Hacker News</a> .

### 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.

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

### 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 blockade of Iran Day 39; JMIC Hormuz threat level CRITICAL.

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

## DELTA SINCE YESTERDAY

~ **CHANGED:** Day counter 38 → 39.

+ **ADDED:** The JMIC maritime security threat level for the Strait of Hormuz remains CRITICAL; mines have been reported in and near the Traffic Separation Scheme, with sporadic GNSS/GPS interference in the approaches.

+ **ADDED:** UKMTO Warning 057/26 reported a merchant vessel seized northeast of Fujairah and taken into Iranian territorial waters.

= **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 JMIC threat level and the UKMTO seizure reporting matter as forward indicators.

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

<b>SIZE</b>	Global oil markets; Asia LNG buyers (Japan, South Korea, India) sourcing alternates; Iraqi state budget under acute stress given heavy revenue dependency on Hormuz-routed exports.
<b>ACTIVITY</b>	US naval blockade since 13-APR continues. JMIC holds the Hormuz maritime threat level at CRITICAL with mines reported near the Traffic Separation Scheme. UKMTO Warning 057/26 reported a vessel seizure northeast of Fujairah.
<b>LOCATION</b>	Strait of Hormuz; Persian Gulf; Iraqi exports via Basra terminals; UAE Fujairah bypass; Saudi Arabia East-West Pipeline (Red Sea) alternative carrying limited capacity.
<b>TIME</b>	Blockade Day 39 (since 13-APR). The blockade now sits inside the US-Iran deal-or-strike window, which is in its closing 48 hours.
<b>EQUIPMENT</b>	US Navy carrier strike group + amphibious group + USCG cutters; Iran IRGC-Navy plus regular Navy small-boat swarm + anti-ship missile + mine inventory.
<b>UNIT</b>	<a href="#">JMIC</a> and <a href="#">UKMTO</a> advisories; <a href="#">Reuters</a> 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. US household downstream: the blockade's 2nd-through-8th-order consumer cost cascade (fuel, grocery, pharma, electronics, durable goods) is analyzed in depth in the FFTP companion report [Iranian Blockade: US Consumer Impact Analysis](#), which estimates a 24-month median household impact in the \$1,860 to \$9,380 range with the action window for most cost-avoidance closing inside 90 days.

## 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.

<b>WHAT WOULD SUPPORT</b>	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.
<b>WHAT WOULD DISCONFIRM</b>	Continued blockade operations; Hormuz language absent from any negotiated text.
<b>CURRENT STATUS</b>	<b>NOT observed.</b>

### COLLECTION GAPS - WHAT I CANNOT SEE

- Hormuz transit terms within the US-Iran negotiating track not public.
- Extent and emplacement pattern of reported mines near the Traffic Separation Scheme not independently confirmed.
- CENTCOM commercial-vessel-redirect detailed scope (origin/cargo) not externally observable.

## SOURCES

[JMIC](#); [UKMTO](#); [Reuters](#) regional maritime reporting.

## Lebanon CF Day 36 of 45; daily IDF strikes on south Lebanon.

[GEO-CF-LBN | FLASH | EXTENDED - DAY 36 OF 45 | Score 22]

### DELTA SINCE YESTERDAY

~ **CHANGED:** Day counter 35 → 36 (Day 36 of the 45-day extension, expiring ~29-JUN).

+ **ADDED:** Israeli airstrikes on south Lebanon continued through this cycle against assessed Hezbollah targets; no strategic-rocket exchange observed.

= **NO MATERIAL CHANGE:** The earlier Baalbek (Bekaa Valley) strike remains the marker for Bekaa-axis geographic expansion. 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: [Times of Israel](#) liveblog, [Al Jazeera](#), Alma Research center analysis.

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

<b>SIZE</b>	Lebanese civilian population in south Lebanon + Bekaa; northern Israeli population displaced or shelter-eligible; UNIFIL French + Italian + Indonesian + other contingents continue mandate.
<b>ACTIVITY</b>	Daily IDF airstrikes against assessed Hezbollah targets continue; Hezbollah rocket/drone fire against IDF buffer-zone positions continues at lower tempo than pre-CF. The earlier Bekaa-Valley targeting marks geographic expansion vs the south-of-Litani historical pattern.
<b>LOCATION</b>	Southern Lebanon (south of Litani primary footprint); Bekaa Valley (Baalbek, earlier in extension); Beirut Dahieh (single strike total since CF began); Yellow Line buffer zone (IDF-controlled).

<b>TIME</b>	CF began 16-APR. First extension 23-APR. Third extension 15-MAY (45 days, expires ~29-JUN). Pentagon security track 29-MAY. 4th Washington political round 2-3 JUN.
<b>EQUIPMENT</b>	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.
<b>UNIT</b>	<a href="#">Times of Israel</a> ; <a href="#">Al Jazeera</a> ; Alma Research center.

### DOWNSTREAM - CASCADE IMPLICATION

Lebanese economic recovery further delayed; FAO/IPC food insecurity holds; agricultural sector damage matches prior war. The Bekaa-expansion precedent remains tripwire-relevant for the 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. 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 before the 29-JUN extension expiry due to Bekaa-axis targeting escalation.

<b>WHAT WOULD SUPPORT</b>	Renewed daily Bekaa strikes; Hezbollah strategic-rocket retaliation; Lebanese government formal withdrawal from Washington track.
<b>WHAT WOULD DISCONFIRM</b>	No further Bekaa strikes; Hezbollah statement framing strikes as within tolerable CF-violation bandwidth.
<b>CURRENT STATUS</b>	<b>WATCH WINDOW open through the 2-3 JUN political round.</b>

### COLLECTION GAPS - WHAT I CANNOT SEE

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

### SOURCES

[Times of Israel](#) liveblog; [Al Jazeera](#); 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

<b>SIZE</b>	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.
<b>ACTIVITY</b>	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.
<b>LOCATION</b>	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.
<b>TIME</b>	KEV add 06-MAY; Wave 1 patch shipped 13-MAY; Wave 2 ETA ~28-MAY (post-deadline); FCEB BOD 22-01 deadline 21-MAY reached (T+0 today).
<b>EQUIPMENT</b>	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.
<b>UNIT</b>	<a href="#">CISA KEV</a> ; Palo Alto Networks PSIRT; <a href="#">Unit 42</a> ; <a href="#">Shadowserver</a> (exposure scan); <a href="#">Shodan</a> (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 as of the 21-MAY deadline 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.

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

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

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

### COLLECTION GAPS - WHAT I CANNOT SEE

- 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](#).

## Linux Copy Fail LPE CVE-2026-31431 chain-pivot risk continues; FCEB deadline T+6 past.

[CYB-005 | FLASH | CHAIN-RISK T+6 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+6 past).

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

<b>SIZE</b>	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).
<b>ACTIVITY</b>	LPE chain pivot from web RCE or container-escape initial access. PoC publicly available.
<b>LOCATION</b>	Linux kernels 5.10.x through 6.8.x in affected range; specific minor versions per distro advisory.
<b>TIME</b>	KEV add 12-MAY; FCEB deadline 15-MAY (T+6 past); 3-day FCEB window was the shortest in catalog history.
<b>EQUIPMENT</b>	CVSS 7.8 (local); CWE-787 Out-of-Bounds Write; requires unprivileged local access (SSH, container escape, chained RCE).
<b>UNIT</b>	<a href="#">NVD CVE-2026-31431</a> ; <a href="#">CISA KEV</a> ; <a href="#">VulnCheck</a> ; 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.

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

#### COLLECTION GAPS - WHAT I CANNOT SEE

- AA26-097A advisory does not name the threat actor; cannot attribute to 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](#).

## 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 + Khmel'nitsky + 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
<b>Iran deal-or-strike</b>	Confirms: deal text published or strike order issued. Disconfirms: window extends past 22-MAY without resolution.	<b>DEAL-OR-STRIKE WINDOW IN CLOSING 48 HOURS</b>
<b>Lebanon CF collapse</b>	Confirms: high-mass IDF Beirut Dahieh strike + same-week Hezbollah strategic-rocket response. Disconfirms: 2-3 JUN political track produces joint statement.	<b>WATCH (Bekaa-axis expansion precedent holds; 2-3 JUN political round pending)</b>
<b>Hormuz reopening</b>	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.	<b>NOT observed (blockade Day 39)</b>
<b>Ebola US entry enforcement</b>	Confirms: additional flight diversions or boarding refusals; a symptomatic case at a US port of entry. Disconfirms: 30-day restriction window closes with no US case.	<b>ACTIVE (first diversion 20-MAY; Dulles single-port rule)</b>
<b>PAN-OS FCEB compliance</b>	Confirms: CISA supplemental directive within 14 days of 21-MAY. Disconfirms: clean attestation telemetry pass.	<b>FCEB DEADLINE REACHED 21-MAY</b>
<b>Cisco SD-WAN exploitation</b>	Confirms: Cluster 10 expands beyond 10 clusters; AWS vManage credential abuse incidents reported. Disconfirms: Talos telemetry stable.	<b>ACTIVE (UAT-8616)</b>
<b>NGINX active exploitation</b>	Confirms: CISA KEV catalog add; web-shell deployment incidents reported. Disconfirms: VulnCheck retracts active-exploitation flag.	<b>ACTIVE (KEV pending)</b>

<b>Andes hantavirus (winding down)</b>	Confirms: second-generation case in HCW or household contact. Disconfirms: surveillance window closes clean.	<b>CLEAN; winding down (demoted from FLASH)</b>
<b>Severe weather / flash-flood</b>	Confirms: county EOC activation + Flash Flood Warning issuance. Disconfirms: WPC Day 2 ERO QPF underperforms forecast.	<b>ACTIVE (SPC Day 1 SLGT E Colorado; WPC Day 2 ERO SLGT S Plains)</b>
<b>Space weather escalation</b>	Confirms: SWPC issues a geomagnetic storm watch or an R/S-scale event begins. Disconfirms: electron flux subsides below 1000 pfu and conditions stay quiet.	<b>ALTEF3 electron-flux alert active since 16-MAY; geomagnetic/radio quiet</b>

## 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 hazards this cycle: an eastern Colorado convective threat and a southern Plains flash-flood threat. Full FLASH signpost [\[WX-001\]](#). SPC Day 1 (issued 0552 UTC 21-MAY, operator-confirmed) carries a SLIGHT risk across eastern Colorado, where afternoon convection off the higher terrain near Denver and Colorado Springs supports supercells with large hail, isolated severe gusts, and a possible tornado; isolated large hail is also possible across the southern High Plains and the west Texas Caprock. WPC Day 2 holds an Excessive Rainfall (ERO SLIGHT) risk for the southern Plains and Piney Woods, valid 12Z 21-MAY through 12Z 22-MAY, with flash-flood concern for the Hill Country of southwest Texas and the Lower Mississippi and Ohio Valleys.

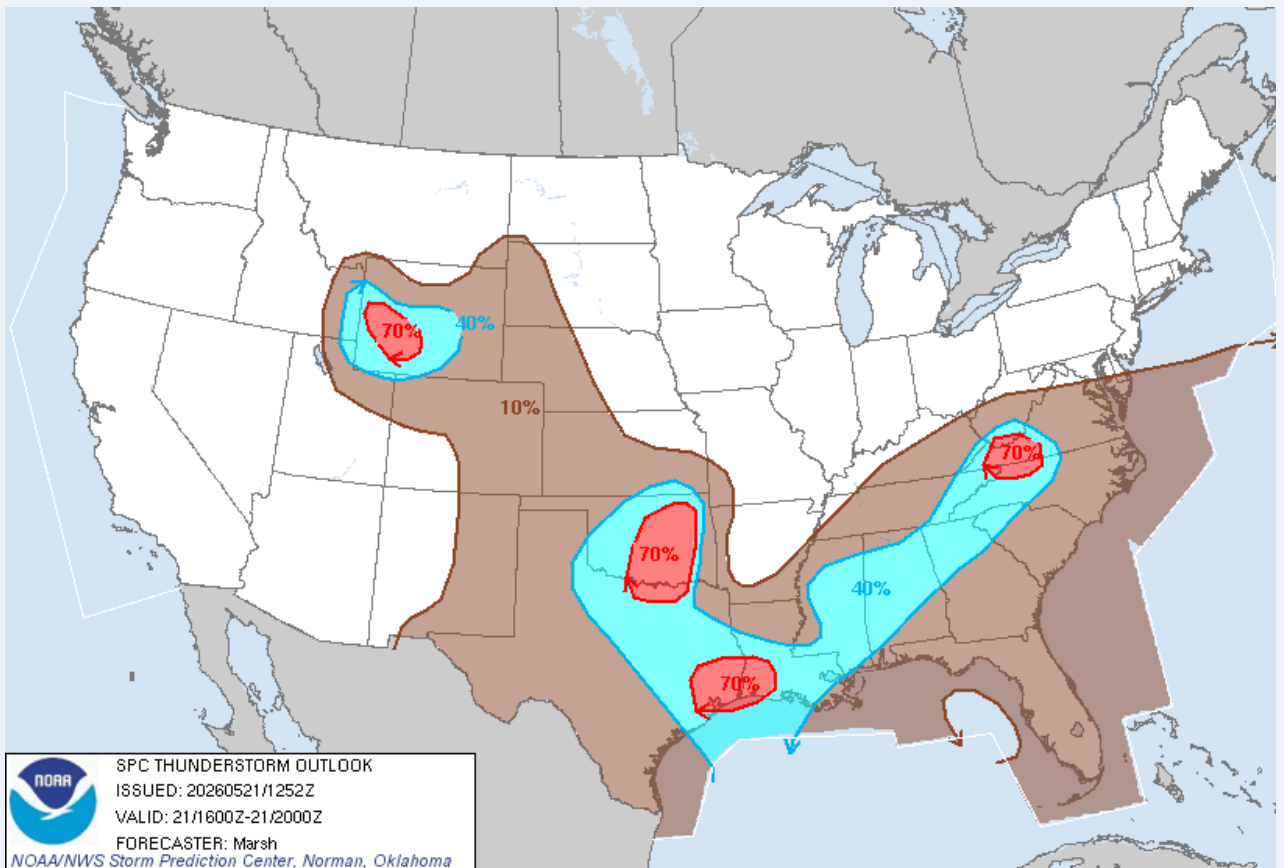
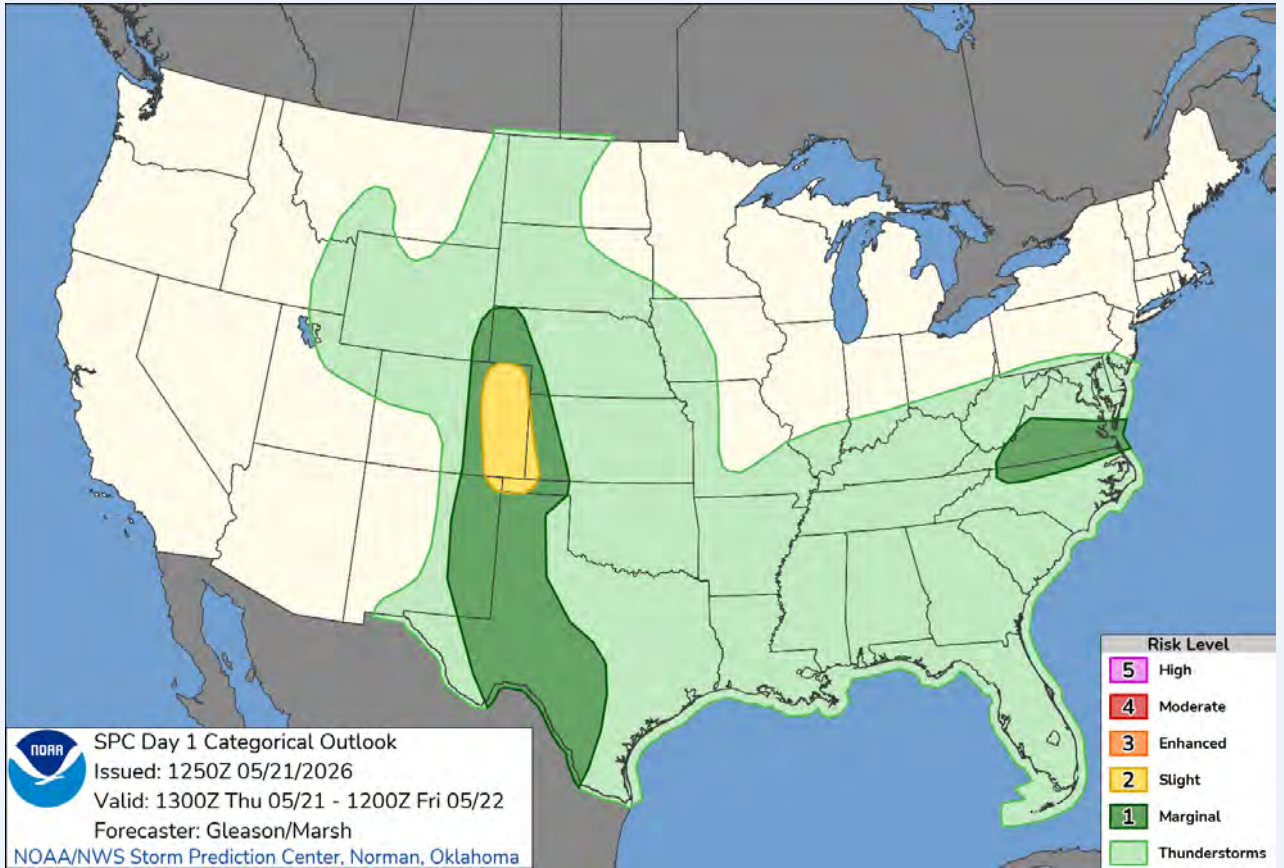
**NWR transmitter outage list - 21-MAY 1125 UTC operator snapshot**

*Total: 36 affected (16 OUT OF SERVICE + 20 DEGRADED) across 17 states (AK AL CO GA IA IL IN KS MD ME MI MN NM NV OR TN TX), including an 18-site Alaska cluster. Critical-corridor intersect with the*

active weather footprint: CO Colorado Springs (OOS) sits inside the SPC Day 1 eastern-Colorado SLIGHT zone; KS Ulysses, IL Hillsboro, and TN Shelbyville (OOS) sit near the WPC southern-Plains excessive-rainfall corridor; TX Rio Grande City and the NM triple-gap at Carlsbad, Roswell, and Artesia (OOS) are adjacent to the southwest Texas threat area.

ST	CITY	FREQ	CWA / SOURCE WFO	CALLSIGN	STATUS	THREAT OVERLAP TODAY
CO	Colorado Springs	162.475	Pueblo CO	WXM56	OOS	INSIDE - SPC Day 1 eastern-Colorado SLGT convective zone
KS	Ulysses	162.450	Dodge City KS	WXN81	OOS	NEAR - WPC southern-Plains excessive-rainfall corridor
IL	Hillsboro	162.425	St. Louis MO	KXI79	OOS	NEAR - WPC southern-Plains/Ozarks excessive-rainfall corridor
TN	Shelbyville	162.475	Nashville TN	WXK63	OOS	NEAR - WPC Ozarks/Lower OH Valley excessive-rainfall edge
TX	Rio Grande City	162.425	Brownsville/RGV TX	WNG601	OOS	ADJACENT - southwest Texas Hill Country flash-flood concern
NM	Roswell	162.450	Albuquerque NM	WWG36	OOS	ADJACENT - southern High Plains / SE New Mexico hail threat
NM	Carlsbad	162.475	Midland/Odessa TX	WWF37	OOS	ADJACENT - southern High Plains / SE New Mexico hail threat
NM	Artesia	162.425	Midland/Odessa TX	WXN24	OOS	ADJACENT - southern High Plains / SE New Mexico hail threat
AL/GA/IA/MD/ME/MI/MN	Other CONUS OOS	multiple	multiple	multiple	OOS	AL Columbus, GA Baxley, IA Cedar Rapids, MD Baltimore, ME Sugarloaf Mtn, MI Petoskey, MN Gunflint Lake - no direct corridor overlap
Multi	CONUS DEGRADED sites	multiple	multiple	multiple	DEG	20 DEGRADED transmitters across the listed states; reduced range/audio, not full outage
AK	18-site cluster	multiple	JNU/AFC/AFG	multiple	1 OOS + 17 DEG	Sand Point OOS; remainder DEGRADED. Outside CONUS severe-wx corridor

**PRACTITIONER ACTION:** Operator NWR snapshot 21-MAY 1125 UTC: 36 transmitters affected (16 OUT OF SERVICE + 20 DEGRADED) across 17 states, including an 18-site Alaska cluster. The most operationally relevant gap is CO Colorado Springs (OOS, Pueblo CWA), which sits inside today's SPC Day 1 eastern-Colorado SLIGHT zone; KS Ulysses, IL Hillsboro, and TN Shelbyville (OOS) sit near the WPC southern-Plains excessive-rainfall corridor. 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. Cross-check county SAME location code against a backup NWR transmitter via [NWR Station Search](#).



## SECTION 7A - SPACE WEATHER & EMCOMM

[SWPC](#) reports a quiet geomagnetic and HF-radio environment this cycle: no G-storm, no R or S storm, solar wind near 449 km/s. The active driver is energetic-electron flux: alert ALTEF3 (issued 21-MAY 0509 UTC) shows the 2 MeV electron integral flux above 1000 pfu, a continued alert since 16-MAY with yesterday's maximum at 1717 pfu. SWX-CON is set at 1 (Minor) on the electron-flux driver. SWX-CON scale: [FFTP space-weather conditions](#); NOAA source: [NOAA Space Weather Scales](#).

**Geomagnetic status:** Quiet. No geomagnetic storm watch or warning is active; conditions are below G1 with solar wind near 449 km/s. The HF-radio environment is quiet with no R-scale blackout in progress.

**Far-side outlook (3-5 day flare watch):** The Earth-facing solar disk lacks impressive sunspot groups, consistent with the present quiet posture. Practitioner read: the quiet flare posture is **likely** to hold over the near term; EMCOMM operators should monitor SWPC for any revision as new active regions rotate into an Earth-facing position.

**Electron flux:** SWPC alert ALTEF3 (21-MAY 0509 UTC) reports the 2 MeV electron integral flux above 1000 pfu, continued since 16-MAY, with yesterday's maximum at 1717 pfu. This is a satellite-charging hazard for geostationary operators; SAT operators should verify spacecraft charging mitigations are current. This is the cycle's SWX-CON driver.

### HF Band Conditions (Thursday 21-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 southern Plains and Piney Woods adds flash-flood and standing-water risk, with Hill Country flash-flood concern; the eastern Colorado convective threat overlaps High Plains rangeland. 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 enters its closing 48 hours. PREP-CON 3 INCIDENT PROBABLE (Brown Sky) baseline holds because Op Epic Fury Day 83 + US naval blockade Day 39 + Lebanon CF Day 36 of 45 (porous) maintain the elevated-but-stable backdrop. The WHO Ebola PHEIC, the dual-hazard weather (SPC Day 1 SLGT eastern Colorado plus WPC Day 2 ERO SLGT southern Plains flash-flood), and the cyber-deadline stack (PAN-OS deadline reached, Cisco SD-WAN T+4 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 has been reached; confirm patch deployment fleet-wide immediately. Any unpatched internet-exposed instance is now past-deadline exposure.
2. Southern Plains and Hill Country households: WPC Day 2 ERO SLGT flash-flood window 21-22 MAY; eastern Colorado faces an SPC Day 1 SLGT convective risk. Pre-position drainage and high-water route plans; verify two-of-three non-NWR alert paths.
3. Cisco SD-WAN operators T+4 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 in its closing 48 hours. Hold pump-price and travel-flex posture through the weekend; 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+8 (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.

Use this matrix with the Geographic Impact Index to set your own CONCON (Continuity Conditions) posture -- see the "Determining Your Posture" note under the Geographic Impact Index.

CONDITION	Healthcare	Bank/Fin	Manuf	Transp	Energy	PubSec	HouseHold
PREP-CON 3 BROWN SKY	MED	MED	MED	MED	HIGH	HIGH	HIGH
COMCON 4 INCIDENT POSSIBLE	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 21-MAY 1125 UTC shows 36 transmitters affected (16 OUT OF SERVICE + 20 DEGRADED) across 17 states with an 18-site Alaska cluster. The most operationally relevant gap is CO Colorado Springs (OOS), inside the SPC Day 1 eastern-CO SLIGHT zone; KS Ulysses, IL Hillsboro, and TN Shelbyville (OOS) sit near the WPC southern-Plains excessive-rainfall corridor. 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](https://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  $\geq$  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 21-MAY 1125 UTC); WHO/CDC Ebola reporting; CBS News / NBC News / Federal Register (Air France diversion and entry restrictions).

**Gaps acknowledged:** Detailed terms within the US-Iran negotiating track not public; 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 21-MAY-2026 base date. Cycle window 20-MAY 1530 UTC through 21-MAY 1530 UTC (24h daily rollup).

**END**

## END OF REPORT

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

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