

DAILY THREAT REPORT

Fortune Favors the Prepared | Intelligence Operations Division

UNCLASSIFIED - OPEN SOURCE - FOR PUBLIC DISTRIBUTION



⚠️ PREPAREDNESS CONDITION 3 - INCIDENT PROBABLE - Brown Sky - Trend DETERIORATING ⚠️

Wednesday, 3 June 2026 | Op Epic Fury Day 96 | Hormuz Blockade Day 52 | LBN CF Day 3 | Trend: DETERIORATING

COMMUNICATIONS CONDITION: COMCON 4 - INCREASED VIGILANCE - CONUS - DTR-ASSESSED

WEATHER: WX-CON 2 - SLGT - Northern Plains supercell + central High Plains + SW TX/NM

SPACE WEATHER: SWX-CON 2 - ELEVATED - Three R2 events 03-JUN; M9.3 + M7.7 + ongoing M5+; HF blackout risk

Publication (UTC)	03 JUN 2026 / 1530 UTC
Reporting Period	02-JUN 1530 UTC through 03-JUN 1530 UTC (standard 24h cycle)
SOP	v5.56 Source linkify complete All hooks PASSED

BOTTOM LINE UP FRONT

PREP-
CON 3
BROWN
SKY
DETERIOR
ATING

STATUS: [PREP-CON 3](#) INCIDENT PROBABLE (Brown Sky), Trend DETERIORATING. Standard 24-hour cycle, 02-JUN 1530 UTC through 03-JUN 1530 UTC. US naval blockade of Iran Day 52. Active kinetic exchange in the Persian Gulf: [IRGC](#) launched missiles at Kuwait and Bahrain 02-JUN (intercepted); US struck Qeshm Island; Iranian drones hit Kuwait airport killing 1 (03-JUN); Iran-US mediator communications suspended for several days per Iranian state media while Trump and Rubio insist talks continue. No MOU signed. Hormuz effectively closed. [WX-CON 2 SLGT](#) Northern Plains supercell threat (N NE/E Dakotas/W MN) - large hail, severe winds, tornadoes possible. [SWX-CON ELEVATED](#) Three R2 solar events today (M9.3 + M7.7 + ongoing M5+); HF blackout risk sunlit paths; Kp max 3.

URGENT
IRAN /
HORMUZ
Score 25

IRAN/HORMUZ DAY 52 - ACTIVE KINETICS, MOU TALKS IN DISPUTED STATUS: Iran state media: mediator comms suspended; Tehran conditioning return on Lebanon ceasefire. Active kinetics 02-03-JUN: [IRGC](#) missiles at Kuwait/Bahrain (intercepted); US Qeshm Island strike; US tanker M/T Lexie hit. 03-JUN: Iranian drones hit Kuwait airport (1 killed). Trump and Rubio dispute suspension of talks. No MOU signed. Brent \$96.89 (+0.93%, 3rd consecutive gain). [\[GEO-001\]](#)

URGENT
RUSSIA /
UKRAINE
Score 22

RUSSIA MASS AERIAL ATTACK 02-JUN - US JUNE DEADLINE REACHED: 73 missiles + 656 drones overnight; 22 killed, 138 wounded across Kyiv, Dnipro, Poltava, Kharkiv, Zaporizhzhia. US-set June peace deadline has now passed with talks stalled since February. [\[GEO-002\]](#)

WATCH
EBOLA
PHEIC
Score 22

EBOLA PHEIC - REVISED COUNT; BRAZIL CLEARED: [WHO/ECDC](#): DRC 321 confirmed (48 deaths); Uganda 15 confirmed. Brazil both suspect cases **NEGATIVE** 01-JUN. PHEIC in force; no approved Bundibugyo vaccine. [\[HLTH-001\]](#)

ACTION
CYBER
FCEB Due
Today

FCEB DEADLINE TODAY + KEV ADDITIONS: Microsoft Defender FCEB deadline is TODAY (03-JUN). Two new KEV additions 02-JUN. FortiClient EMS active exploitation ongoing. [\[SEC 4A\]](#)

SECTION INDEX

Click any entry ID for full detail. Color band: red = FLASH $\geq$ 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	5 cards: Iran kinetics, Cyber deadlines, N Plains WX, SWX R2 events, Ukraine/June deadline
SECTION 3 - FLASH EVENTS (4)	GEO-001 · GEO-002 · HLTH-001 · WX-001 · SWX-001
SEC 4A - CYBER	FBI FLASH SRG/Luna Moth law firm physical infiltration (26-MAY); Fortinet FortiClient EMS CVE-2026-35616 active exploitation; ICS advisory cluster 28-MAY; KEV: Oracle WebLogic CVE-2024-21182 added 01-JUN; Palo Alto PAN-OS CVE-2026-0257 FCEB deadline was 01-JUN; w
SEC 4B - GEOPOLITICAL (CARRYOVER)	Lebanon ceasefire; Russia-Ukraine update
SEC 4C - MIC SECOND-ORDER IMPACTS	GEO-001 → MIC chain
SEC 4D - INDICATORS & WARNING MATRIX	active tracks
SEC 5 - ENERGY / INFRASTRUCTURE / SUPPLY CHAIN	GEO-001
SEC 6 - AVIATION / TRANSPORTATION	WX-001 (IROPS)
SEC 7 - METEOROLOGICAL & SEVERE WX	WX-001
SEC 7A - SPACE WEATHER & EMCOMM	SWX-001
SEC 7B - AGRICULTURE, FOOD & SUPPLY CHAIN	NSTR this cycle
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
Western Texas	WX-001	SPC Day 1 SLGT: Northern Plains (WY/ND/SD) supercell threat - large hail, damaging winds, possible tornadoes, MLCAPE ~2,500 J/kg; FL/GA isolated gusty convection. Valid 021300Z-031200Z. port OUT OF SERVICE in or near the corridor
Central / Southern High Plains	WX-001	More isolated severe storms from southern Texas northward across the southern Plains into the central High Plains and eastern Colorado; outflow-dominant storms with a severe-gust threat
Northern Rockies (N Idaho / SW Montana)	WX-001	Isolated severe storms, possibly transient supercells and organized bands, with sporadic large hail and severe gusts spreading north toward the Canadian border into the early evening
Colorado Plateau / Southwest (fire weather)	-	SPC Fire Weather Outlook: elevated to locally critical fire weather, afternoon RH in the teens, gusty winds 25-30 mph; dry-thunderstorm potential over northern Arizona, central and eastern Utah, and western Colorado
Alaska (NWR)	-	A 10-site Juneau-area Alaska cluster plus Kotzebue is DEGRADED and Sand Point is OUT OF SERVICE; all sit well outside the CONUS severe-weather corridor
NATIONAL - CYBER	-	Palo Alto PAN-OS CVE-2026-0257 FCEB deadline 01-JUN (confirm); Oracle WebLogic CVE-2024-21182 KEV added 01-JUN; Iranian APT targeting US PLCs (CISA AA26-097A)
NATIONAL - ENERGY/FUEL	GEO-001	Hormuz blockade Day 52; AAA \$4.290/gal; Brent \$96.89 rising (3rd consecutive session); no deal imminent; CME/NYMEX nominal
NATIONAL - POWER OUTAGES	-	PowerOutage.us 03-JUN: 54,342 customers (background level). TX 7,411; CA 5,212; WV 5,135; AL 4,748; NY 3,013. No grid event at OE-417 tier.
NATIONAL - WILDFIRE	-	NIFC Prep Level 2; YTD 29,023 fires / 2.4M acres. FL: Wawa 2 (4,600ac, 20% contained) + Max Road (11,050ac, 50% contained). 99% FL drought. NSTR FLASH-tier.
International Travel - Middle East	GEO-001	Gulf airspace flexibility advised while US-Iran deal negotiations continue; central-Africa-origin US-bound flights routed to Washington-Dulles only under Ebola entry rules

Strait of Hormuz	GEO-001	Blockade Day 52; effectively closed; no MOU signed; mediator comms disputed; Iran kinetics 02-03-JUN; Kuwait airport drone hit 03-JUN; Brent \$96.89 rising
DRC + Uganda (Kampala)	HLTH-001	WHO Ebola PHEIC; DRC 321 confirmed (48 deaths) + 116 suspected; Uganda 15 confirmed (1 death); Brazil NEGATIVE 01-JUN; no confirmed out-of-region case; PHEIC in force
Russia / Ukraine	GEO-002	FLASH: Russia mass aerial attack Kyiv 02-JUN (22 killed, 138 wounded, 73 missiles + 656 drones). US June peace deadline reached. Talks stalled since February.
Southern Lebanon + Northern Israel	-	Lebanese ceasefire nominal/fragile; Israeli strikes continued 01-02-JUN; Iran conditioning MOU return on Lebanon halt; US-Israel rift visible
Kuwait / Bahrain	GEO-001	IRGC missiles at Kuwait/Bahrain 02-JUN (intercepted). Kuwait airport drone hit 03-JUN (1 killed, dozens wounded; airport briefly closed). UAE calling for Gulf unity
HF / EMCOMM - sunlit paths globally	-	SWX-CON ELEVATED: three R2 events 03-JUN (M9.3, M7.7, ongoing M5+); periodic HF blackout risk on sunlit paths all UTC day; Kp max 3; no G-scale; CME possible

SECTION 1 - KEY JUDGMENTS

Five key judgments drive this cycle. Each carries a likelihood term from the ICD 203 scale and a separate confidence level per SOP 0.113-D.

KJ-1: Iran-US MOU talks are in disputed status with active kinetics; no deal signed; blockade Day 52 continues. LIKELIHOOD: MOU within 7 days unlikely. CONFIDENCE: MODERATE. Iran state media reports mediator comms suspended several days; Tehran conditions return on Lebanon ceasefire enforcement. Trump and Rubio dispute suspension. Active kinetics 02-03-JUN: [IRGC](#) strikes on Kuwait/Bahrain (intercepted); US Qeshm Island strike; Kuwait airport drone hit. Rubio: Iran agreed to negotiate nuclear program aspects for the first time. Brent \$96.89 rising. Full analysis: [\[GEO-001\]](#).

KJ-2: Hormuz remains effectively closed; no formal lift announced. LIKELIHOOD: remains closed near-term - almost certain. CONFIDENCE: HIGH. Blockade Day 52. No Hormuz reopening language in any signed document. Iran disputes MOU wording removing Hormuz from Iranian/Iran-Oman management. Even if signed today, mine clearance, tanker backlog, and infrastructure repair mean full normalization is months away. Full analysis: [\[GEO-001\]](#).

KJ-3: Russia-Ukraine June peace deadline has arrived with talks stalled; mass 02-JUN aerial attack signals no imminent settlement. LIKELIHOOD: peace deal in June - almost no chance. CONFIDENCE: HIGH. Russia launched 73 missiles + 656 drones on Ukraine overnight 01-02-JUN; 22 killed, 138 wounded. Last formal negotiating round: February 2026 Geneva. June deadline now reached with no framework agreement. Full analysis: [\[GEO-002\]](#).

KJ-4: Ebola case count revised to 321 confirmed; PHEIC in force; Brazil negative; expansion continues. LIKELIHOOD: continued growth very likely. CONFIDENCE: HIGH on growth; MODERATE on no US case. [WHO/ECDC](#) revised: DRC 321 confirmed (48 deaths) + 116 suspected; Uganda 15 confirmed (1 death). Brazil both patients NEGATIVE 01-JUN. PHEIC in force. No approved Bundibugyo vaccine. Full analysis: [\[HLTH-001\]](#).

KJ-5: Three R2 solar events today (M9.3 + M7.7 + ongoing M5+); Kp max 3; HF blackout risk sunlit paths; no G-scale storm. LIKELIHOOD: further M-class activity today likely. CONFIDENCE: MODERATE. Three R2 (Moderate) X-ray events from active region near disk center (N08-N13/W05-W14). Type II sweeps indicate possible CME. Kp max 3 - no G-scale storm. HF operators: periodic blackout windows on sunlit paths throughout UTC day. Full analysis: [\[SWX-001\]](#).

CRITICAL TIME HACK - 0-72H DECISION TRIGGERS

Items ordered by (probability x impact). Bracketed IDs cross-reference FLASH entries.

Iran: mediator comms suspended per Iranian state media; active kinetics 02-03-JUN; Kuwait airport drone hit; no MOU signed; blockade Day 52.

[TODAY | 03-JUN | GEOPOLITICAL]

DECISION TRIGGER: Active kinetics 02-03-JUN: [IRGC](#) missiles at Kuwait/Bahrain (intercepted); US Qeshm Island strike; Kuwait airport hit (1 killed). Iran state media: mediator comms suspended. Trump and Rubio dispute this. Brent \$96.89 rising. Practitioner: no deal imminent; hold energy-price and maritime-transit exposure flex. See [\[GEO-001\]](#).

Microsoft Defender CVE-2026-41091 + CVE-2026-45498 FCEB deadline TODAY. KEV: Linux Kernel + Android Framework added 02-JUN. FortiClient EMS active exploitation ongoing.

[TODAY | 03-JUN | CYBER]

DECISION TRIGGER: FCEB deadline TODAY: Microsoft Defender CVE-2026-41091 and CVE-2026-45498. Palo Alto PAN-OS CVE-2026-0257 deadline was 01-JUN - confirm compliance. New KEV 02-JUN: Linux Kernel CVE-2022-0492 (cgroups v1 privilege escalation) and Android Framework CVE-2025-48595 (integer overflow, no user interaction, Android 14-16). FortiClient EMS CVE-2026-35616 active exploitation via EKZ infostealer - confirm patch 7.4.7 or hotfix. See [\[SEC 4A\]](#).

[SPC](#) Day 1 SLGT: N Plains supercell threat (N NE/E Dakotas/W MN) - large hail, severe winds, a few tornadoes. Angola IN (KXI94) OOS. Valid 031300Z-041200Z.

[TODAY | 03-JUN | WEATHER]

DECISION TRIGGER: [SPC](#) Day 1 (0651 AM CDT 03-JUN, valid 031300Z-041200Z): SLIGHT N Plains supercell risk. MLCAPE 3,000+ J/kg; deep-layer shear supportive; LLJ late afternoon increases tornado potential. Angola IN (KXI94) OOS in Northern Indiana - verify non-NWR alert paths. Ozarks/SE: isolated flash flooding. See [\[WX-001\]](#).

Three R2 events: M9.3 (0136Z) + M7.7 (0700Z) + ongoing M5+ (1141Z); HF blackout risk sunlit paths; Kp max 3; CME possible via Type II sweeps.

[TODAY | 03-JUN | SPACE WX]

DECISION TRIGGER: Three R2 solar events today from active region near disk center. HF operators: expect periodic blackout windows on sunlit paths throughout today. CME possible via Type II sweeps (253 km/s and 313 km/s) - monitor [SWPC](#) for G-scale watch. Geomagnetic Kp max 3, no G-scale. Shift to 80m/40m night-side paths or VHF/UHF during events. See [\[SWX-001\]](#).

Russia mass aerial attack Kyiv 02-JUN: 73 missiles + 656 drones; 22 killed, 138 wounded. US June peace deadline now reached with talks stalled.

[TODAY | 03-JUN | UKRAINE]

DECISION TRIGGER: Russia-Ukraine: US June peace deadline now passed. Monitor ceasefire/negotiation signals. Russia mass aerial attack 02-JUN - see GEO-002 for full detail. [\[GEO-002\]](#).

DELTA SINCE YESTERDAY

+ **ADDED:** 02-JUN: [IRGC](#) launched ballistic missiles at Kuwait and Bahrain. Both attacks intercepted - missiles toward Kuwait broke up en route; US/Bahrain forces intercepted missiles toward Bahrain. [IRGC](#) claimed to target US 5th Fleet HQ in Bahrain and Kuwait. US had previously fired missile into engine room of M/T Lexie (Botswana-flagged tanker) near Kharg Island after crew ignored 24-hour warnings. US [CENTCOM](#) responded: strike on Iranian military ground control station Qeshm Island, Strait of Hormuz.

+ **ADDED:** 03-JUN: Iranian drones heavily damaged Kuwait International Airport terminal, killing 1 person and wounding dozens. Kuwait briefly shut main airport. UAE senior diplomat called for a "firm, unified, and cohesive Gulf position" against Iran: "This aggression does not target a specific state, but rather all of us."

- **CHANGED:** Iran state media (Fars): exchange of messages with US via Pakistani mediators suspended for "at least several days" - Tehran cites Israeli operations in southern Lebanon as ceasefire violation and conditioning return on Lebanon halt. Trump and Rubio publicly dispute: Trump says talks "continuing"; Rubio Senate Foreign Relations Committee 02-JUN testimony: Iran has agreed to negotiate nuclear program aspects "for the first time in my memory." Rubio: Hormuz must be fully open, no tolls, mines removed. Iran FM Baghaei: Iran still engaged "with distrust." Iranian state media contradictory: some outlets report senior officials still considering latest US MOU draft.

= **NO MATERIAL CHANGE:** Blockade Day 52. Hormuz effectively closed to commercial transit. No MOU signed. No formal Hormuz reopening. IMF PortWatch last published 24-MAY. MARAD 2026-004 (through 09-SEP) and 2026-008 (GPS spoofing/jamming guidance) active. [AAA](#) national gasoline \$4.290/gal. Brent \$96.89/bbl (up 0.93%; 3rd consecutive session gain; geopolitical risk premium reinstated).

WHY THIS CYCLE

The situation deteriorated overnight. Active missile/drone exchanges - the most significant kinetic activity since the ceasefire began - combined with a disputed mediator communications blackout, put the MOU track in its most fragile state since late May. Lebanon is now the critical blocking issue: Iran insists Lebanon ceasefire must be enforced before returning to MOU talks; Israel continues deepest Lebanon incursion in 25+ years; Netanyahu and Trump are at odds. Sources: [NPR](#), [Irish Times](#), [CNBC](#), [CENTCOM](#) press releases.

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

SIZE	US naval blockade of Iranian ports in force, Day 52. Active kinetics 02-03-JUN: IRGC ballistic missiles at Kuwait/Bahrain (intercepted); US Qeshm Island strike; US tanker engine room strike (M/T Lexie). Kuwait airport drone strike 03-JUN. Mediator communications disputed. Brent \$96.89. AAA \$4.290/gal. Hormuz effectively closed.
ACTIVITY	Iran launched ballistic missiles toward Kuwait and Bahrain 02-JUN (both intercepted). US struck Qeshm Island military ground control station. Iranian drones hit Kuwait airport 03-JUN (1 killed). Iran-US mediator comms suspended per Fars/Iranian state media; both Trump and Rubio publicly contest this. Rubio: Iran willing to discuss nuclear program for first time. Iran FM: Iran engaged "with distrust." No MOU signed.
LOCATION	Persian Gulf (Qeshm Island, Strait of Hormuz, Kharg Island approaches); Kuwait International Airport; Bahrain (5th Fleet HQ targeted, attack intercepted). Negotiations channel: Pakistan-mediated. Lebanon (southern Lebanon Israeli operations) is the diplomatic blocking issue.
TIME	Blockade Day 52 as of 03-JUN. Qeshm strike and tanker strike 02-JUN. Kuwait airport 03-JUN. Rubio Senate testimony 02-JUN 1700 UTC approx. Sweep timestamp 03-JUN 1151 UTC. Cycle window: 02-JUN 1530 UTC to 03-JUN 1530 UTC.

EQUIPMENT	IRGC ballistic missiles (failed/intercepted); Iranian armed drones (Kuwait airport hit). US air-launched missile (M/T Lexie engine room); US strike assets (Qeshm). Iranian mines remain in Hormuz - none cleared; no formal clearance schedule announced. MARAD 2026-008: GPS spoofing/jamming confirmed near Hormuz approaches.
UNIT	United States (CENTCOM); Islamic Republic of Iran (IRGC); Kuwait; Bahrain; Pakistan (mediator - comms in disputed status); UAE (diplomatic reaction); Israel (Lebanon operations blocking the Iran diplomatic track).

DOWNSTREAM - CASCADE IMPLICATION

Energy: Brent \$96.89/bbl rising on reinstated geopolitical risk premium. [AAA](#) \$4.290/gal. WTI \$95.64 (+2.01%). No deal imminent; market pricing in extended blockade. Saudi Aramco CEO (12-MAY): normalization extends to 2027 if blocked past mid-June. Maritime: MARAD 2026-004 and 2026-008 active. Hormuz effectively closed; IMF PortWatch last published 24-MAY. Supply chain: Asia-Europe rerouting via Cape of Good Hope +8-14 days. QatarEnergy force majeure on LNG (declared MAR-2026) standing condition. Kuwait airport disruption: regional aviation and cargo impact while airport recovery assessed.

ANALYST ASSESSMENT

LIKELIHOOD: almost no chance MOU signed within 72 hours. CONFIDENCE: MODERATE. -- Iran state media reports mediator comms suspended; active kinetics 02-03-JUN deepen the impasse; Lebanon blocking issue unresolved; no joint text public; Iran/US positions contradictory. Even Rubio's optimistic testimony came with "no guarantee of a deal acceptable to the Senate."

TRIPWIRES -- (1) Resumption of confirmed mediator communications; (2) Lebanon ceasefire enforcement or Israeli halt of operations; (3) Any new kinetic exchange; (4) Formal US-Iran joint statement; (5) Mine clearance commencement; (6) Sustained Hormuz commercial transit resumption; (7) Additional [OFAC](#) Iran sanctions; (8) US executive escalation order.

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (unlikely): Lebanon de-escalation unlocks MOU return to talks within 7 days; deal signed within 14 days.

WHAT WOULD SUPPORT	Rubio stated Iran has agreed to discuss nuclear program for first time; Trump says negotiations continuing; multi-source corroboration on framework terms.
WHAT WOULD DISCONFIRM	Active kinetics 02-03-JUN; Lebanon blocking issue requires Netanyahu to halt operations - Netanyahu under domestic election pressure to continue; Iran-US mediator comms disputed; no joint text.
CURRENT STATUS	NOT OBSERVED - conditions for this scenario do not currently exist.

Alt-Hyp 2 (roughly even chance): Talks remain in suspended/disputed limbo for 5-10 more days with periodic kinetic exchanges below full re-escalation threshold.

WHAT WOULD SUPPORT	Pattern of suspension-and-restoration established 01-JUN; both sides have incentives to avoid full re-escalation; economic pressure on Iran from blockade; US midterm political pressure.
WHAT WOULD DISCONFIRM	Kuwait airport attack (03-JUN) is the most significant single civilian infrastructure hit since ceasefire; UAE diplomatic reaction signals Gulf states losing patience; Lebanon variable unresolved.
CURRENT STATUS	INDETERMINATE - current state consistent with this scenario but Kuwait airport attack may change calculus.

COLLECTION GAPS - WHAT I CANNOT SEE

- Whether Iran-US mediator channel is truly suspended or still active via back-channels is not established from open source.
- Lebanon ceasefire enforcement - what specific Israeli halt Iran would accept - is not defined in open source.
- The internal Iranian factional dynamic driving the mediator suspension decision is not visible in OSINT.
- Kp and CME analysis for possible space-weather GPS impact on Hormuz navigation in current cycle not yet assessed.

SOURCES

[NPR](#) (primary 03-JUN); [Irish Times](#); [CNBC](#); [Washington Times](#); [CENTCOM](#) press releases; Euronews; AP.

Russia 02-JUN: 73 missiles + 656 drones on Ukraine; 22 killed, 138 wounded. US June peace deadline now reached.

FLASH | NEW THIS CYCLE | 22

DELTA SINCE YESTERDAY

+ ADDED: Russia launched largest recent aerial campaign overnight 01-02-JUN: 73 missiles and 656 drones across Ukraine. At least 22 civilians killed, 138 wounded. Multiple Kyiv districts struck: residential buildings damaged, fires at gas stations and commercial buildings, business center partially collapsed. Dnipro: 3-year-old and 8-year-old among dead. Also struck: Poltava, Kharkiv, Zaporizhzhia. Ukrainian air defenses destroyed 40 missiles and 602 drones.

+ ADDED: June deadline context: US set June deadline for Russia-Ukraine peace deal (per Zelensky February statement). Last formal negotiating round: February 2026 Geneva. Rubio admitted 12-MAY talks had stalled. Zelensky 31-MAY: diplomatic window remains open until winter 2026. With June now here and the mass 02-JUN attack, the deadline is effectively lapsed with no framework agreement.

WHY THIS CYCLE

The 02-JUN attack is the largest aerial campaign in recent weeks and lands at the moment the US-set June deadline is reached. The combination creates an analytically significant inflection: US attempting Iran deal simultaneously with stalled Ukraine peace track and a resurgent Russian air campaign. Both conflicts are now consuming US diplomatic bandwidth. Sources: [NPR](#), [Kyiv Independent](#).

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

SIZE	73 missiles and 656 drones launched by Russia. 22 confirmed killed, 138 wounded. Multiple cities struck. Ukrainian air defenses: 40 missiles and 602 drones destroyed or suppressed. Russian air campaign tempo elevated.
ACTIVITY	Mass aerial bombardment of Ukrainian cities; primary targets Kyiv and Dnipro; secondary strikes Poltava, Kharkiv, Zaporizhzhia. Residential buildings, gas stations, commercial facilities, medical clinic struck in Kyiv. Children among dead in Dnipro.
LOCATION	Kyiv (multiple districts: Solomianskyi, Obolonskyi, Darnytskyi, Shevchenkivskyi, Sviatoshynskyi, Holosiivskyi, Teremky); Dnipro; Poltava; Kharkiv; Zaporizhzhia.
TIME	Overnight 01-02-JUN-2026. June peace deadline: set February 2026 by US; now reached. Last formal Russia-Ukraine negotiating round: February 2026, Geneva.
EQUIPMENT	Russian ballistic missiles (approx 73 launched; types include Iskander and others); Shahed-type attack drones (approx 656 launched). Ukrainian: air defense systems (NASAMS, Patriot, Gepard, other); 40 missiles and 602 drones intercepted.

UNIT	Russian Armed Forces (aerospace forces, missile forces); Ukraine Armed Forces (air defense, air force). US diplomatic track: Witkoff and Kushner as envoys; Rubio as Secretary of State (admitted 12-MAY talks stalled).
-------------	--

DOWNSTREAM - CASCADE IMPLICATION

US diplomatic bandwidth: the simultaneous Iran MOU impasse and Ukraine June deadline lapse further stretch US diplomatic capacity. Any Iran deal that diverts Trump administration attention may reduce pressure on Ukraine track. European allies watching both tracks. Ukrainian energy infrastructure: prior Russian campaigns have destroyed significant generation capacity; further attacks on Kyiv energy infrastructure would deepen existing civilian hardship (prior reporting: 70% of generation capacity lost as of January 2026). No immediate supply chain or market impact at FLASH tier from this specific attack; context is sustained, not escalatory step.

ANALYST ASSESSMENT

LIKELIHOOD: continued Russian aerial campaign very likely. **CONFIDENCE:** HIGH. --

Established pattern of mass aerial strikes; Russia has incentive to press military advantage while Ukraine air defense stocks remain constrained; June deadline lapse removes US diplomatic pressure in near term.

TRIPWIRES -- (1) Any US response to the attack (sanctions, weapons transfer); (2) Resumption of formal Russia-Ukraine negotiations; (3) Ukrainian strike on Russian territory crossing a new threshold; (4) Russian ground offensive gains in Donetsk or other front sectors.

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (unlikely): The 02-JUN attack triggers renewed US diplomatic urgency and a ceasefire framework is reached within 30 days.

WHAT WOULD SUPPORT	Mass civilian casualties in Kyiv could generate US domestic political pressure for action; June deadline provides a predefined trigger for escalated US engagement.
WHAT WOULD DISCONFIRM	Rubio admitted talks stalled 12-MAY; US diplomatic bandwidth consumed by Iran track; Zelensky states window is open until winter 2026 - no sense of acute crisis from Ukrainian side.
CURRENT STATUS	NOT OBSERVED - no indication of renewed US urgency following 02-JUN attack.

Alt-Hyp 2 (very likely): Russia continues elevated aerial campaign pressure while formal peace talks remain frozen through at minimum July 2026.

WHAT WOULD SUPPORT	Established attack pattern; no formal negotiating framework; June deadline lapsed; Russia making no concessions in last known negotiating round.
WHAT WOULD DISCONFIRM	A new Trump-Putin direct communication or a Ukrainian battlefield reversal could change dynamics.
CURRENT STATUS	OBSERVED IN PROGRESS - attack pattern consistent with this assessment.

COLLECTION GAPS - WHAT I CANNOT SEE

- The complete damage assessment for the 02-JUN Kyiv attack is not yet established - Ukrainian authorities were still assessing at time of sweep.
- Whether the US June deadline carries any practical consequence for Ukraine aid or policy is not established from open source.
- Russian intent to escalate vs. maintain current tempo is not visible in OSINT.

SOURCES

[NPR](#) (primary); [Kyiv Independent](#); AP; [Reuters](#); Kyiv Matters.

WHO Ebola PHEIC: 321 confirmed DRC (48 deaths) + 15 Uganda (1 death) per 02-JUN [WHO/ECDC](#). Brazil both patients NEGATIVE. PHEIC in force.

FLASH | UPDATED | 22

DELTA SINCE YESTERDAY

~ **CHANGED:** [WHO](#) and [ECDC](#) issued revised case count as of 02-JUN-2026 following data reclassification removing ruled-out suspected cases. DRC: 321 confirmed cases, 48 confirmed deaths, 116 suspected under investigation. Ituri Province: 299 confirmed from 15 health zones (most affected); North Kivu: 19 confirmed from 7 health zones; South Kivu: 3 confirmed from 1 health zone. Uganda: 15 confirmed cases, 1 death. Prior counts near 1,000+ reflected unconfirmed suspected cases now removed. CIDRAP: "mixed messaging is part of a broader chaotic picture; outbreak may have been simmering for months and could take several more months to contain."

~ **CHANGED:** BRAZIL NEGATIVE: Both Brazilian suspected patients tested NEGATIVE for Ebola as of 01-JUN per [NBC News](#)/France 24. Sao Paulo (37-yr DRC returnee): negative. Rio de Janeiro (Ugandan traveler): negative. No confirmed cases outside DRC and Uganda. Risk to Americas remains low.

= **NO MATERIAL CHANGE:** PHEIC remains in force (declared 16-MAY). No approved Bundibugyo vaccine or treatment. MSF building 65-bed ETC in Ituri; CEPI fast-tracking 3 vaccine candidates (IAVI \$3.2M, Moderna \$50M, Oxford \$8.6M). [WHO](#) DG Tedros visited Ituri 31-MAY. Uganda President Museveni postponed annual Martyrs Day pilgrimage (normally draws thousands of Congolese nationals). [CDC](#) Level 3 Travel Notice for DRC; Level 1 for Uganda. US risk LOW. Enhanced airport screening operational. Acting [CDC](#) Director asked staff to volunteer for urgent entry-point screening deployment.

WHY THIS CYCLE

The case count revision is significant and must be reflected accurately. The PHEIC remains in force and MSF warns the response has not caught up to the epidemic. The revised count does not mean the situation is improving - it reflects data cleanup, not containment. Brazil negative result closes one open flag from prior cycles. Sources: [ECDC](#), [CIDRAP](#), [CDC](#), [NBC News](#).

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

SIZE	321 confirmed cases (DRC) + 15 confirmed (Uganda) = 336 total confirmed as of 02-JUN WHO/ECDC . 48 confirmed DRC deaths + 1 Uganda death = 49 confirmed deaths. 116 suspected under investigation in DRC. No confirmed out-of-region case.
ACTIVITY	Sustained outbreak expansion despite case count reclassification. PHEIC in force. MSF building 65-bed ETC Ituri. CEPI fast-tracking 3 vaccine candidates. WHO DG Tedros visited Bunia 31-MAY; 24-hour PCR turnaround at Bunia lab. Uganda Martyrs Day pilgrimage postponed by Museveni. US CDC requesting emergency volunteer deployment for entry screening.
LOCATION	DRC - Ituri Province (299 confirmed, epicenter), North Kivu (19), South Kivu (3). Uganda - Kampala confirmed cases (15 total). No active out-of-region case. US enhanced screening: Washington-Dulles plus other designated airports.
TIME	PHEIC declared 16-MAY-2026. Revised count published 02-JUN WHO/ECDC . Brazil results negative 01-JUN. Vaccine candidates announced 01-JUN (CEPI). Reporting window: 02-JUN 1530 UTC to 03-JUN 1530 UTC.
EQUIPMENT	No approved Bundibugyo vaccine or specific treatment. Supportive care only. Mobile laboratory at Bunia with 24-hour PCR capability. MSF deploying 65-bed ETC Ituri. CEPI accelerating IAVI, Moderna, and Oxford vaccine candidates.

UNIT	WHO (PHEIC authority); DRC Ministry of Public Health; Uganda Ministry of Health; CDC ; Africa CDC ; ECDC ; MSF; CEPI. US entry screening: CBP and CDC at designated airports.
------	---

DOWNSTREAM - CASCADE IMPLICATION

Aviation and travel: CBP/[DHS](#) entry restriction routes travelers from DRC, Uganda, or South Sudan (within prior 21 days) to designated airports for enhanced screening; foreign nationals in that window barred. Brazil negative result reduces immediate Americas concern. No new out-of-region case. Kampala cluster in an international air hub keeps air-route importation risk live. Operators and travelers with central-Africa routing should plan for screening delays. Healthcare sector: US clinical awareness posture maintained per [CDC HAN](#) 530.

ANALYST ASSESSMENT

LIKELIHOOD: continued outbreak growth very likely. **CONFIDENCE:** HIGH. No US case near-term: unlikely. **CONFIDENCE:** MODERATE. -- PHEIC in force; no approved vaccine; MSF warning response has not caught up; revised case count reflects data cleanup not containment. Brazil negative closes one near-term concern. [CDC](#), [WHO](#), and [ECDC](#) concur on continued expansion trajectory.

TRIPWIRES -- (1) Any new suspected or confirmed out-of-region case; (2) First US imported case; (3) Confirmed transmission outside current three DRC provinces and Kampala; (4) Case in a fourth country; (5) Change in [CDC](#) US-risk assessment from low; (6) Vaccine candidate emergency authorization.

ALTERNATIVE HYPOTHESES

Alt-Hyp 1 (very likely): Outbreak remains geographically contained to DRC/Uganda with no verified out-of-region case this cycle.

WHAT WOULD SUPPORT	Brazil negative; no other confirmed out-of-region case; CDC and WHO US-risk assessment remains low; entry screening operational.
WHAT WOULD DISCONFIRM	Persistent Kampala cluster in international air hub; under-ascertainment likely; prior suspected cases in Brazil/Italy/Spain illustrate surveillance pressure.
CURRENT STATUS	OBSERVED - no new out-of-region case this cycle.

Alt-Hyp 2 (likely): Outbreak continues to grow across DRC provinces into additional urban centers.

WHAT WOULD SUPPORT	Three-province spread; rising confirmed count; Kampala cluster; no vaccine; MSF: response not caught up to epidemic.
WHAT WOULD DISCONFIRM	Rapid response teams deployed; mobile laboratory operational; IHR Emergency Committee measures in place.
CURRENT STATUS	OBSERVED IN PROGRESS - case count rising even after reclassification.

COLLECTION GAPS - WHAT I CANNOT SEE

- True case count is very likely understated; DRC contact-tracing follow-up is reported well below full coverage.
- Completeness of out-of-region case-finding is not established.
- Genomic data on Bundibugyo strain transmissibility relative to prior outbreaks is limited.
- Case count reclassification methodology and completeness are not fully public.

SOURCES

[ECDC 02-JUN update](#) (primary); [CIDRAP](#); [CDC situation summary](#); [NBC News Brazil negative](#); Africa [CDC](#); [WHO](#) DON.

SPC Day 1 SLGT: N Plains (N NE/E Dakotas/W MN) supercell threat - large hail, severe winds, a few tornadoes. Valid 031300Z-041200Z.

FLASH | UPDATED | 18

This is the cycle's FLASH-tier weather item. **In brief:** [SPC](#) Day 1 (issued 0651 AM CDT 03-JUN-2026, valid 031300Z to 041200Z): SLIGHT risk across northern Nebraska into eastern Dakotas and western Minnesota. Primary hazards: large hail (primary early), severe wind gusts (primary later as storms go linear), and a few tornadoes (low-level jet late afternoon/evening supports discrete modes). MLCAPE over 3,000 J/kg; deep-layer shear supportive of supercells. Secondary: central High Plains (isolated hail/wind) and SW TX/southern NM (locally damaging wind gusts). Ozarks and Southeast: isolated flash flooding possible from widespread showers. Full analysis - [SPC](#) convective detail, [NWR](#) transmitter outage roster, wildfire, practitioner actions by CWA - is in **SECTION 7 (METEOROLOGICAL & SEVERE WEATHER)**. WX-CON: [FFTP WX-CON definitions](#); Source: [SPC Convective Outlook](#).

[SWPC](#): Three R2 events 03-JUN (M9.3 0136Z, M7.7 0700Z, ongoing M5+ 1141Z); HF blackout risk on sunlit paths; Kp max 3.

FLASH | THREE R2 EVENTS | 14

This is a FLASH-tier space weather item. **In brief:** [SWPC](#) bulletins supplied by operator (current as of 03-JUN 1147 UTC) report three separate R2 (Moderate) solar X-ray events today: (1) M9.3 flare 0122-0143 UTC, N13W05, with Type II (253 km/s) and Type IV radio emissions, 10cm burst 360 sfu; (2) M7.7 flare 0648-0707 UTC, N08W14, Castelli-U signature, Type II (313 km/s), 10cm burst 540 sfu; (3) Active X-ray flux exceeding M5 threshold ongoing as of 1141 UTC (Serial 531). Geomagnetic: Kp max 3 (quiet-unsettled, confirmed via operator Kp chart updated 0900 UTC); no G-scale storm; no G1. CME association possible via Type II sweeps - monitor [SWPC](#). GPS precision: minor impact possible on sunlit paths from geomagnetic activity minimal. Full analysis - S-scale, band-by-band HF conditions, geomagnetic EMCOMM note - is in **SECTION 7A (SPACE WEATHER & EMCOMM)**. SWX-CON: [FFTP SWX-CON definitions](#); Source: [SWPC](#).

SECTION 4A - CYBER & INFORMATION SECURITY

Key cyber items this cycle: two new KEV additions 02-JUN (Linux Kernel + Android Framework); Microsoft Defender FCEB deadline TODAY (03-JUN); FortiClient EMS active exploitation ongoing; [FBI FLASH SRG/Luna Moth](#) law firm infiltration (26-MAY) sustained. Iranian APT ICS/PLC campaign ([AA26-097A](#)) - no new victim reports this cycle.

TODAY DEADLINE -- Microsoft Defender CVE-2026-41091 and CVE-2026-45498 FCEB deadline 03-JUN: Two Microsoft Defender vulnerabilities with FCEB remediation deadline TODAY. FCEB agencies must confirm compliance. Palo Alto PAN-OS CVE-2026-0257 (CVSS 9.1) deadline was 01-JUN - if not already confirmed, agencies are non-compliant. Trend Micro Apex One CVE-2026-34926 and Langflow CVE-2025-34291 deadlines 04-JUN (tomorrow). Source: threat-modeling.com vulnerability intelligence 01-JUN-2026.

NEW KEV 02-JUN -- Linux Kernel CVE-2022-0492 + Android Framework CVE-2025-48595: [CISA](#) added two vulnerabilities to KEV on 02-JUN-2026. CVE-2022-0492: Linux Kernel Improper Authentication Vulnerability - privilege escalation via cgroups v1 release_agent feature; impacts Linux server and container environments. CVE-2025-48595: Android Framework Integer Overflow Vulnerability - local privilege escalation with no user interaction required; impacts Android versions 14, 15, 16, and 16 QPR2; included in Google June 2026 Android security bulletin. FCEB remediation deadlines active. Source: [CISA KEV 02-JUN](#).

FortiClient EMS CVE-2026-35616 - ongoing active exploitation: CVE-2026-35616 (CVSS 9.1): critical pre-authentication API access bypass with privilege escalation in FortiClient EMS. Active exploitation confirmed via EKZ Infostealer campaign (Arctic Wolf, May 2026) - infostealer deployed via PowerShell disguised as legitimate Fortinet update, spreading across all managed endpoints. KEV-

listed since 06-APR. Patch: upgrade to FortiClient EMS 7.4.7 or apply hotfix 7.4.5.2111. Affects versions 7.4.5 through 7.4.6. Source: [SecurityAffairs](#).

FBI FLASH SRG/Luna Moth physical law firm infiltration (sustained from 26-MAY): [FBI](#) FLASH Advisory TLP:CLEAR 26-MAY-2026: Silent Ransom Group (SRG/Luna Moth) has escalated from callback phishing to sending physical operatives to US law firm offices posing as IT support, inserting USB devices to exfiltrate data. 38+ firms compromised; 100+ attacks in 2026. No new SRG advisory this cycle. Forward: any sector with high-value confidential data at risk. Source: [FBI FLASH TLP:CLEAR](#).

Iranian APT ICS/PLC campaign ([CISA AA26-097A](#)): No new victim reporting this cycle. [CISA AA26-097A](#) advisory (issued March 2026) documented IRGC-affiliated APT activity targeting US water/wastewater, energy, and government sector PLCs. [OFAC](#) sanctions on Nobitex (Iran largest digital asset exchange) and 3 others were issued 02-JUN concurrent with active Iran kinetics - signals continued US economic pressure posture. ICS-CERT next advisory cluster expected 04-JUN. NSTR new activity this cycle.

SECTION 4B - GEOPOLITICAL CARRYOVER

Below-FLASH geopolitical carryover. Russia-Ukraine and Lebanon are carried here; full FLASH treatment for Iran and Russia-Ukraine primary entries in Section 3.

Lebanon: Lebanon is now the primary blocking issue on the Iran-US MOU track. Israel is conducting its deepest Lebanon incursion in over 25 years. Israeli strikes continued 01-02-JUN (Kfar Tebnit in Nabatieh, Tyre area, Burj al-Shamali). Iran has conditioned any return to MOU talks on Israel halting Lebanon operations - Iran views this as a ceasefire violation. Netanyahu is under heavy domestic pre-election pressure to continue operations and wants Lebanon and Iran issues kept separate. Trump urged Netanyahu not to strike Beirut; the US-Israel rift is visible. Lebanon has emerged as the conjoined blocking variable in the Iran peace track. No verifiable ceasefire day counter available; the April 16/23 arrangement has been repeatedly violated. Carried here as context for GEO-001.

Russia-Ukraine (detail for FLASH GEO-002): The 02-JUN aerial attack is detailed in GEO-002. Additional context: US-brokered three-day ceasefire May 9-11 (Orthodox Easter) demonstrated minimum infrastructure for eventual negotiation still exists. Ukraine conducting middle-strike drone campaign targeting Russian logistics. Russian cumulative losses per Ukrinform high but unverified. Diplomatic track frozen at structural settlement level since February Geneva round per late-May analysis. See [\[GEO-002\]](#). Source: [Kyiv Independent](#), [ISW](#).

OFAC - Iran (02-JUN): US imposed sanctions on Iran's largest digital asset exchange Nobitex and 3 other entities on 02-JUN per AP reporting. Action concurrent with active kinetics and disputed MOU talks - signals continued US economic pressure posture regardless of negotiation status. Source: AP, Britannica Iran war timeline.

IN-PAK / Venezuela / DPRK / Houthis: No material change this cycle. Pakistan mediator channel for Iran-US talks is in disputed status per Iranian state media. Houthi posture remains a Tier-2 proxy-activation consideration.

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 Iran inflection (GEO-001) and the 1-4 year defense-industrial replenishment cycle. The current negotiation-and-strike picture 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 would still **softens** the immediate intercept-demand spike, but Iran talks volatility (suspended/restored 01-JUN) and continuing US-Iranian forces proximity near Hormuzpts show the demand pull is not yet abating; either way the FY27 munitions request risk profile is unchanged, with Congress already on a path toward a roughly 70 billion dollar request regardless of the negotiation outcome. A breakdown back toward sustained open conflict **accelerates** all stockpile-replenishment timelines and likely triggers DPA Title III invocations within 30 days. The [CSIS](#) stockpile baseline is unchanged this cycle and is carried as structural context, not a current-cycle delta.

SECTION 4D - INDICATORS & WARNING MATRIX

Active tracks with tripwires and observed status.

TRACK	TRIPWIRE / CONFIRMS / DISCONFIRMS	STATUS
Iran negotiation track	Confirms: resumed mediator communications + signed MOU text. Disconfirms: track slips into another extended suspension or kinetic re-escalation breaks ceasefire framing entirely.	CRITICAL (mediator comms suspended per Iran state media; active kinetics 02-03-JUN; no MOU; blockade Day 52)
Iranian retaliation	Confirms: another Iranian missile/drone launch or US strike escalating beyond Qeshm-level. Disconfirms: 48-hour kinetic pause with confirmed mediator communication restoration.	ACTIVE (IRGC strikes Kuwait/Bahrain 02-JUN intercepted; US Qeshm strike; Kuwait airport drone 03-JUN)
Lebanon CF collapse	Confirms: Israeli heavy strike on Dahieh + Hezbollah strategic rocket response. Disconfirms: US successfully separates Lebanon from Iran MOU track.	ACTIVE (Israeli strikes continued 01-02-JUN; Iran conditioning MOU return on Lebanon halt; conjoined variable)
Hormuz reopening	Confirms: joint statement with Hormuz reopening framework + mine clearance start. Disconfirms: continued CENTCOM redirect of commercial vessels.	NOT OBSERVED (blockade Day 52; no MOU signed)
Russia-Ukraine June deadline	Confirms: formal negotiating round resumption within 30 days. Disconfirms: Russia continues mass aerial campaign with no diplomatic outreach.	LAPSED (02-JUN mass attack 22 killed; talks stalled since February; June deadline reached)
Ebola international spread	Confirms: confirmed case in further country. Disconfirms: no new out-of-region case and trajectory stabilizes.	WATCH (Brazil negative 01-JUN; 321 confirmed DRC/Uganda; PHEIC in force; no confirmed out-of-region case)
MS Defender CVE-2026-41091 + CVE-2026-45498 FCEB compliance	Confirms: CISA supplemental directive or exploitation report. Disconfirms: confirmed FCEB remediation by 03-JUN.	FCEB DEADLINE TODAY (03-JUN)
Severe weather - N Plains	Confirms: Severe Thunderstorm or Tornado Watch in SLGT zone; EOC activation. Disconfirms: SPC Day 1 SLGT underperforms.	ACTIVE (SPC Day 1 SLGT N Plains supercell; valid 031300Z-041200Z)
Space weather escalation	Confirms: SWPC G-scale watch/warning or new R3+ blackout. Disconfirms: Kp remains below 5 through 04-JUN.	ACTIVE (three R2 events today; ongoing M5+ 1141 UTC; Kp max 3; no G-scale;

CME association
possible via Type II)

SECTION 5 - ENERGY / INFRASTRUCTURE / SUPPLY CHAIN

COMMODITY TRACKER — WAR IMPACT vs. PRE-WAR BASELINE (28 FEB 2026)

COMMODITY	PRE-WAR (28 FEB)	CURRENT (03-JUN)	CHG vs PRE-WAR	48H TREND	CONSUMER / ANALYTICAL NOTE
Brent Crude (front)	~\$66/bbl	\$96.89/bbl	+47%	▲ +\$0.89 session +0.93% 03-JUN 3rd consec. gain	Brent \$96.89 (+0.93%) on 03-JUN; geopolitical risk premium reinstated on Iran kinetics (Kuwait airport drone hit, Qeshm strike) and disputed MOU talks. Iranian state media: mediator comms suspended; Tehran conditioning return on Lebanon. IEA: largest energy supply shock on record. EIA STEO baseline: Brent peak 2Q26 \$115/b. Goldman Sachs (baseline): extended Hormuz closure could drive Brent to \$120/bbl Q3.
WTI Crude (front)	~\$63/bbl	\$95.64/bbl	+52%	▲ +2.01% 03-JUN session tracking Brent	WTI \$95.64 (+2.01%) 03-JUN, tracking Brent rally. Risk premium reflects active CENTCOM kinetics (Qeshm Island, tanker M/T Lexie), 3 US carriers in ME, blockade Day 52 with no MOU signed. Futures curve backwardated - market pricing sustained disruption.
Gasoline (natl avg)	~\$3.10/gal	\$4.290/gal	+38%	▲ confirmed live 03-JUN AAA pump-lag inbound	AAA national average \$4.290/gal confirmed live 03-JUN. Most expensive CA (~\$5.80+); least MS/OK (~\$3.50). Pump-lag 10-14 days: Brent rally on 03-JUN kinetics will not reach consumers until mid-June. Diesel pass-through to trucking/freight margins ongoing.
Diesel (US No. 2)	~\$3.74/gal	~\$5.42/gal	+45%	≈ flat -0%	EIA . Trucking margins compressed. EIA STEO peak diesel projection \$5.80/gal Q2 2026. Refiner feedstock stress persists. Fertilizer/food pass-through active - 2026 crop year cost locked.
Jet Fuel (global avg)	~\$90/bbl	~\$210/bbl	+133%	▲ +1% slow grind up	IATA. EASA CZIB 2026-03-R8 (issued 30-APR, valid through 05-MAY per safeairspace.net) covers 11-state ME airspace. Kuwait airport hit 03-JUN - additional routing/insurance impact possible. European carriers sustaining suspensions.
Urea (46-0-0)	~\$465/ton NOLA	\$826/ton (DTN natl)	+78%	≈ flat -0%	DTN. +35% MoM; 58-70% above long-run avg. 2026 crop-year cost locked - no remediation window left this planting season. 30% global urea trade disrupted; China export restrictions through August 2026. Food price pass-through Q3 2026 structurally embedded.
Ocean Freight (SCFI)	~1,333 pts	~2,100+ pts	+57%	▲ vs prior cycle Hormuz Day 52	Blockade Day 52. CENTCOM ships redirected (cumulative). Kuwait airport drone hit 03-JUN adds aviation cargo impact. Global manufactured goods stockpiling underway as industries front-load inventory against prolonged disruption. Cape of Good Hope rerouting adding 10-14 days per voyage. Lloyd's war-risk rates elevated.

Current cycle prices and trend data are in the Commodity Tracker above. CME and NYMEX trading normally. Geopolitical risk premium reinstated on Iran kinetics and disputed MOU talks; Brent on 3rd

consecutive session gain. Pump-lag means consumers will see 03-JUN price movement in mid-June at the pump. Refinery capacity: normal domestically; feedstock cost elevated.

Iran/Hormuz energy impact (cross-ref [\[GEO-001\]](#)): Blockade Day 52. No deal signed. Iran-US mediator comms in disputed status. Brent climbing on 3rd consecutive session - market reinstating risk premium on Kuwait airport drone strike and disputed MOU status. A signed deal with Hormuz reopening would accelerate price decline; experts estimate 3-5 cents/gal retail decline within 5-7 days. A full breakdown to open conflict: 8-15 cents/gal spike within 3-5 days. Hormuz transit per IMF PortWatch last published 24-MAY - no new data available this cycle. MARAD 2026-004 (through 09-SEP-2026) and 2026-008 (GPS spoofing guidance) remain active. Even if MOU signed today, mines must clear (30-day term), shut-in fields take months to restart, tanker backlogs persist. Saudi Aramco CEO (12-MAY): market normalization extends to 2027 if blocked past mid-June.

Power grid (US): DOE OE-417 - no major electric disturbance events this cycle. PowerOutage.us 03-JUN: 54,342 US customers without power. Top states: TX 7,411, CA 5,212, WV 5,135, AL 4,748, NY 3,013. WV elevation (5,135) is above baseline but no OE-417 event filed; likely storm-related residual. No grid event at reportable tier this cycle. Northern Plains severe weather today may drive localized outage events in the SLGT zone - monitor post-storm.

Supply chain: Asia-Europe container transit times +8-14 days via Cape of Good Hope rerouting sustained. QatarEnergy force majeure on LNG (declared MAR-2026) standing condition removes approximately 20% global LNG supply. UAE/Gulf supply chain normalization deferred while Hormuz closed. Kuwait airport disruption (03-JUN drone strike) adds a regional aviation cargo impact while airport assesses recovery. Global manufactured goods stockpiling underway as industries front-load inventory against prolonged disruption.

SECTION 6 - AVIATION / TRANSPORTATION

IROPS risk today: Northern Plains SLGT risk (N NE/E Dakotas/W MN) - supercell development this afternoon/evening; departure delays possible at Bismarck (BIS), Rapid City (RAP), Fargo (FAR), Sioux Falls (FSD). Secondary: central High Plains - isolated delay risk COS, DEN area. Ozarks/SE: flash flood risk from widespread showers - delay risk STL, MEM, LIT area. Angola IN (KXI94) [NWR](#) OUT OF SERVICE in Northern Indiana - verify non-NWR alert paths in the wx zone. See [\[WX-001\]](#).

Gulf/ME airspace: Kuwait International Airport briefly shut 03-JUN following Iranian drone strike on terminal (1 killed, dozens wounded). Airport damage assessment ongoing. Carriers operating Gulf routes should verify Kuwait routing and alternate options. Persian Gulf airspace: MARAD 2026-008 documents GPS spoofing/jamming near Hormuz approaches - aviation GPS impact also relevant for Gulf region flights per NAVCEN/[FAA](#) NOTAMs. Iranian kinetics 02-03-JUN elevate the threat environment for Gulf region aviation. Atlantic hurricane season opened 01-JUN - [NHC](#): no formation expected next 7 days (as of 02-JUN 0200 EDT). See [\[GEO-001\]](#).

Ebola entry restrictions (standing): CBP/[DHS](#) entry restriction routes travelers from DRC, Uganda, or South Sudan (within prior 21 days) through designated airports for enhanced screening; foreign nationals in that window barred. Routing primarily through Washington-Dulles. Brazil negative result does not affect this restriction. [CDC](#) Level 3 Notice for DRC; Level 1 for Uganda. Screening delays expected. See [\[HLTH-001\]](#).

FAA NAS: [FAA](#) NAS nominal at sweep time. No active ground stops or system-wide ground delay programs identified at sweep. Monitor for afternoon storm-driven delays in Northern Plains SLGT zone. Source: [nasstatus.faa.gov](#).

SECTION 7 - METEOROLOGICAL & SEVERE WEATHER

Northern Plains severe convective threat today. Full FLASH signpost [\[WX-001\]](#). [SPC](#) Day 1 Convective Outlook (operator-confirmed, 0651 AM CDT 03-JUN-2026, valid 031300Z-041200Z). SLIGHT risk across northern Nebraska into eastern Dakotas and western Minnesota. PRIMARY THREAT: supercell development this afternoon/evening with large hail, severe wind gusts, and a few tornadoes. Upper low southern Alberta; shortwave troughs in SW flow over MT/WY/ID; cold front moving into central Dakotas/NW Nebraska by afternoon. Outflow boundary from morning convection lifting N into SD provides focus; dewpoints upper 60s; MLCAPE over 3,000 J/kg; favorable deep-layer shear for supercells. Large hail primary risk early; transition to linear/MCS during evening with damaging wind

primary threat as LLJ increases; notable low-level jet late afternoon/evening increases tornado potential (low confidence). SECONDARY: central High Plains (widely scattered, isolated hail/wind gusts); SW Texas/southern New Mexico (widely scattered, locally damaging wind gusts). ADDITIONAL: widespread showers and thunderstorms may produce isolated flash flooding across the Ozarks and into the Southeast. WX-CON set at 2 (SLGT) on the Northern Plains supercell driver.

WX-001 ANALYST ASSESSMENT - ICD 203/206

LIKELIHOOD / CONFIDENCE -- Large hail from supercells in the eastern Dakotas/W MN SLGT zone this afternoon is assessed likely at MODERATE confidence per [SPC](#) Day 1 text (MLCAPE 3,000+ J/kg, favorable deep-layer shear). Severe wind gusts from organized linear convection this evening as storms upscale and LLJ strengthens is assessed likely at MODERATE confidence. A few tornadoes in the northern Plains this afternoon/evening is assessed roughly even chance at MODERATE confidence (low-level jet supports discrete modes; confidence tempered by outflow and MLCIN concerns per [SPC](#) text). Flash flooding in Ozarks/Southeast is assessed roughly even chance at MODERATE confidence. Central High Plains and SW TX/NM isolated gusts: assessed likely at MODERATE confidence.

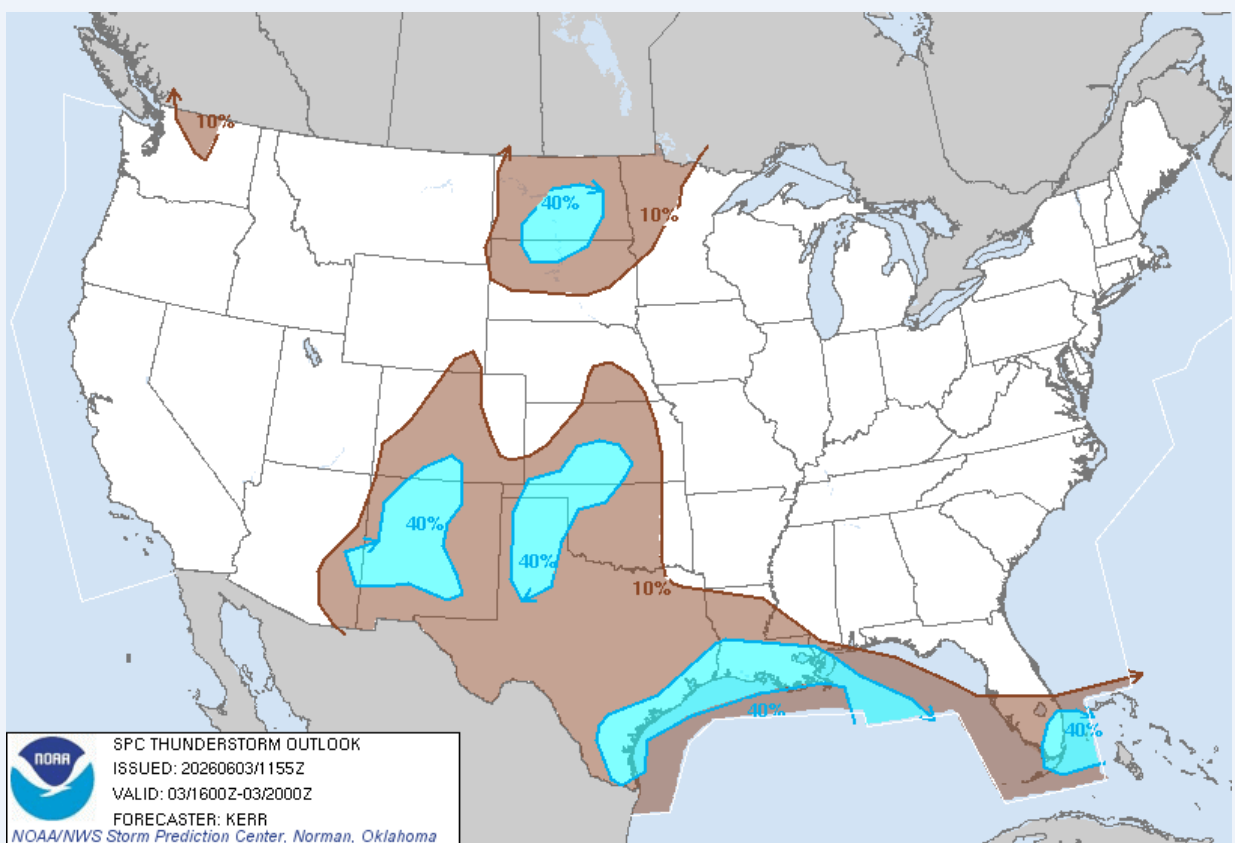
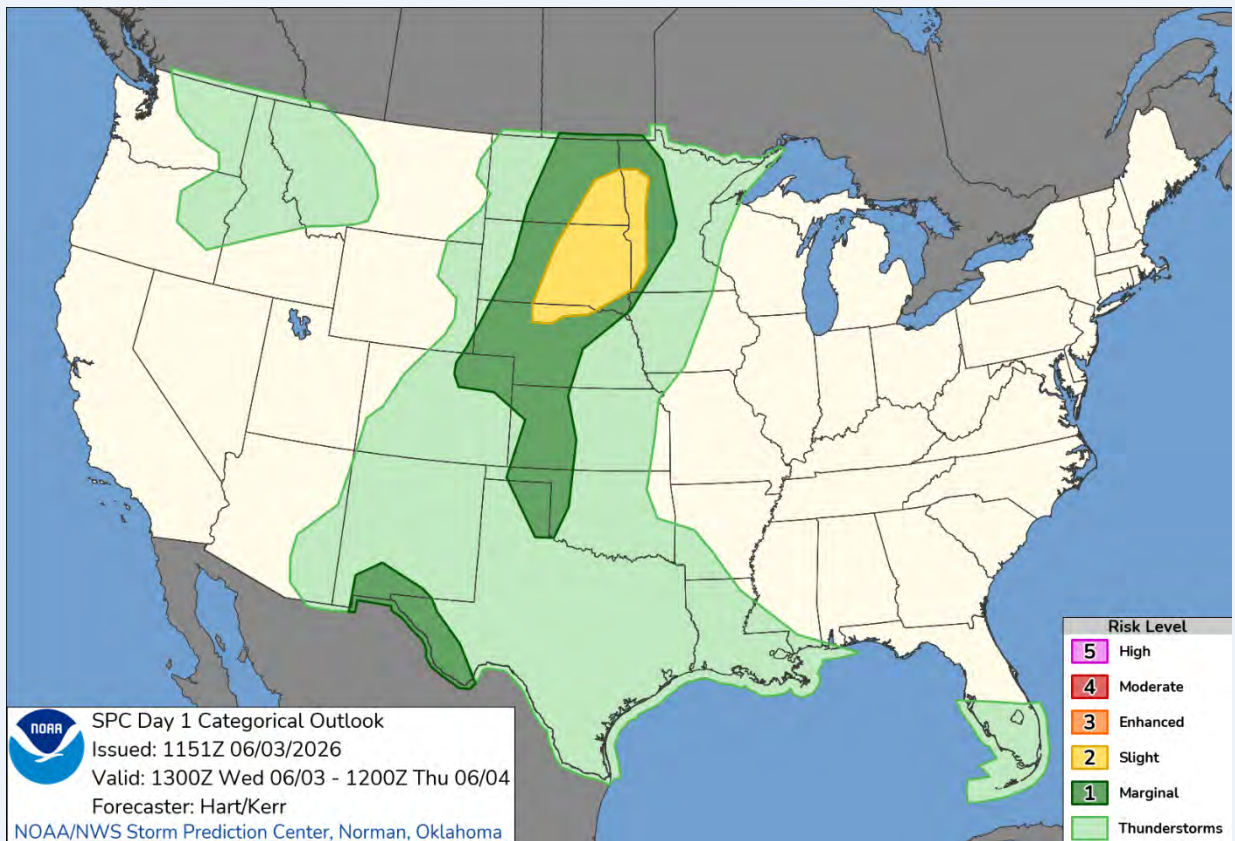
TRIPWIRES -- (1) [SPC](#) upgrade of N Plains area to ENHANCED or higher; (2) a Tornado Watch issued for the E Dakotas/W MN corridor; (3) a confirmed tornado report in the SLGT zone; (4) MCS organization producing widespread damaging winds (derecho potential) after 2100 UTC; (5) WEA-level warning issued in Northern Indiana (Angola KXI94 OOS) or any other NWR-gap CWA in the storm corridor; (6) flash flood warning in the Ozarks or SE corridor; (7) [SPC](#) upgrade of SW TX/NM or central High Plains area.

Alt-Hyp 1 (roughly even chance): Northern Plains convection grows upscale into an organized MCS by early evening, shifting the primary threat from large hail to widespread damaging winds across eastern SD/SE ND/W MN.

WHAT WOULD SUPPORT	SPC notes LLJ development increasing evening wind threat; outflow boundary lifting into SD creates a focus for storm organization; morning convective cluster provides outflow for afternoon surface boundary interactions.
WHAT WOULD DISCONFIRM	Morning cluster may stabilize the boundary layer; outflow undercuts can prevent discrete supercell modes; SPC noted outflow and gradual MLCIN increase as factors limiting tornado confidence.
CURRENT STATUS	INDETERMINATE -- storm mode transition timing not yet verifiable at 0651 CDT issue time; cold front progress determines MCS timing.

Alt-Hyp 2 (unlikely): N Plains convection remains sub-severe (marginal or no SLGT verification) as outflow domination and MLCIN suppress supercell development.

WHAT WOULD SUPPORT	Morning cluster has produced significant outflow; MLCIN increase noted in SPC text; outflow-dominant storm structures could suppress supercell modes; a slow-moving cold front may not arrive until after peak instability window.
WHAT WOULD DISCONFIRM	MLCAPE over 3,000 J/kg and favorable deep-layer shear are clearly supportive of supercells per SPC Day 1 text; SPC issued SLIGHT rather than MARGINAL, indicating material confidence in at least some severe development.
CURRENT STATUS	NOT OBSERVED -- no suppression evident at 0651 CDT issue time; morning convective cluster is a watch item.



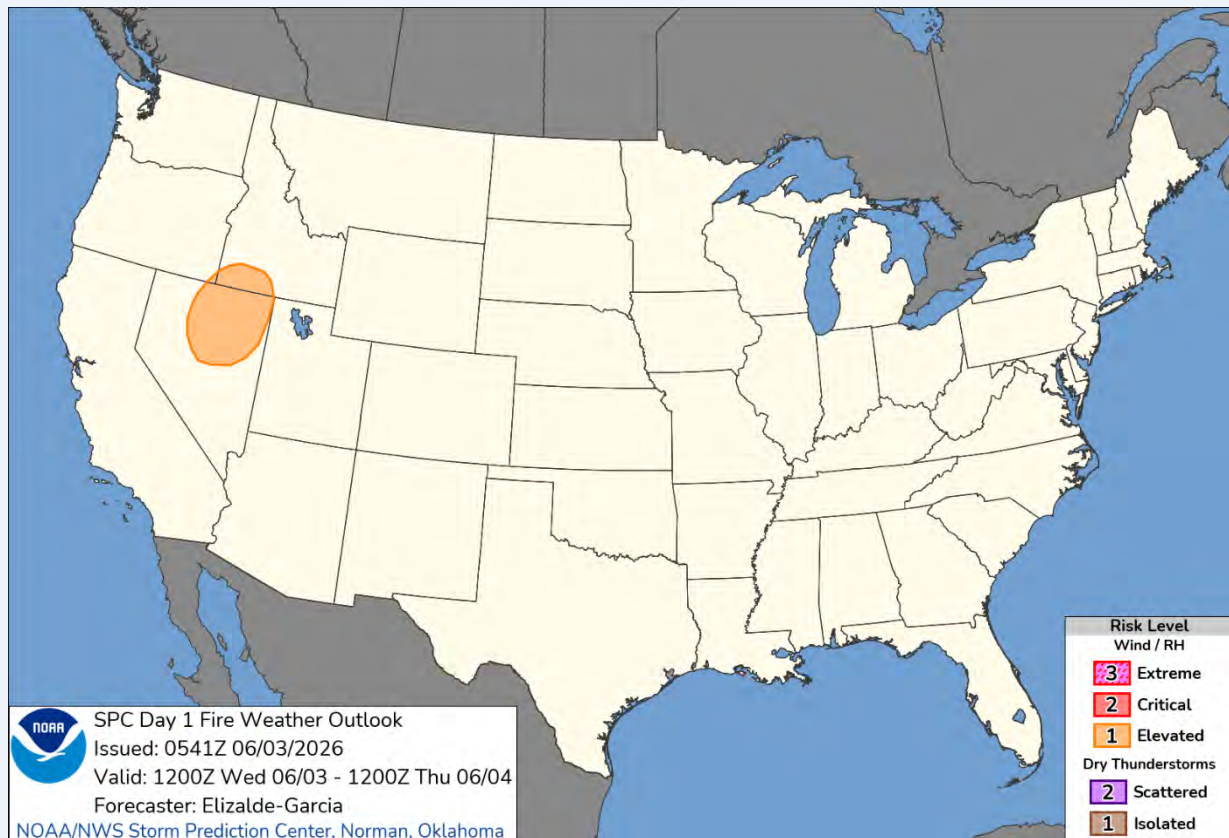
NWR transmitter outage list - operator roster 03-JUN (timestamp 1143 UTC)

ST	CITY	FREQ	CWA / SOURCE WFO	CALLSIGN	STATUS	THREAT OVERLAP TODAY
TX	Rio Grande City	162.425	Brownsville/Rio Grande Valley TX	WNG601	OUT OF SERVICE	NEW this cycle - no SPC severe WX threat today; Gulf Coast area; monitor for any storm development
TX	Rockport	162.550	Corpus Christi TX	KHB41	OUT OF SERVICE	NEW this cycle - no SPC severe WX threat today; Gulf Coast area; hurricane season now open (01-JUN)
NM	Artesia	162.425	Midland/Odessa TX	WXN24	OUT OF SERVICE	Persisting - no active SPC threat today; wildfire-weather watch ongoing for SW region
NM	Carlsbad	162.475	Midland/Odessa TX	WWF37	OUT OF SERVICE	Persisting - no active SPC threat today; wildfire-weather watch ongoing for SW region
NM	Roswell	162.450	Albuquerque NM	WWG36	OUT OF SERVICE	Persisting - no active SPC threat today; wildfire-weather watch ongoing for SW region
AK	Mt. McArthur	162.525	Juneau AK	KZZ95	DEGRADED	Outside the CONUS severe-weather corridor (Juneau-area cluster)
AK	Manleyville	162.500	Juneau AK	KAD96	DEGRADED	Outside the CONUS severe-weather corridor (Juneau-area cluster)
AK	Duke Island	162.450	Juneau AK	KZZ92	DEGRADED	Outside the CONUS severe-weather corridor (Juneau-area cluster)
AK	Cape Fanshaw	162.425	Juneau AK	KZZ88	DEGRADED	Outside the CONUS severe-weather corridor (Juneau-area cluster)
AK	Duffield Peninsula	162.525	Juneau AK	WZ2555	DEGRADED	Outside the CONUS severe-weather corridor (Juneau-area cluster)
AK	Zarembo Island	162.450	Juneau AK	KZZ91	DEGRADED	Outside the CONUS severe-weather corridor (Juneau-area cluster)
AK	Gravina Island	162.525	Juneau AK	KZZ96	DEGRADED	Outside the CONUS severe-weather corridor (Juneau-area cluster)
AK	Mt. Robert Barron	162.450	Juneau AK	KZZ87	DEGRADED	Outside the CONUS severe-weather corridor (Juneau-area cluster)
AK	Sukkwana Island	162.425	Juneau AK	KZZ89	DEGRADED	Outside the CONUS severe-weather corridor (Juneau-area cluster)
AK	Althorp Peak	162.425	Juneau AK	KZZ86	DEGRADED	Outside the CONUS severe-weather corridor (Juneau-area cluster)
AK	Sand Point	162.550	Anchorage AK	WNG714	OUT OF SERVICE	Outside the CONUS severe-weather corridor
AK	Kotzebue	162.550	Fairbanks AK	KWN30	DEGRADED	Outside the CONUS severe-weather corridor
CT	Cornwall	162.500	Albany NY	WWH33	OUT OF SERVICE	No direct overlap with the active SLGT zones this cycle

GA	Baxley	162.525	Jacksonville FL	WXM65	OUT OF SERVICE	No direct overlap with the active SLGT zones this cycle
IL	Hillsboro	162.425	St. Louis MO	KXI79	OUT OF SERVICE	ACTIVE THREAT CORRIDOR - St. Louis CWA; MCS active south of STL tracking SE through this area; active threat overlap; verify WEA and local EAS
IN	Angola	162.425	Northern Indiana IN	KXI94	DEGRADED	Upgraded from OUT to DEGRADED this cycle (29-MAY was OUT); no active SPC threat today
KS	Ulysses	162.450	Dodge City KS	WXN81	OUT OF SERVICE	No direct overlap with the active SLGT zones this cycle
MD	Baltimore	162.400	Baltimore/Washington VA	KEC83	OUT OF SERVICE	NEW this cycle - high-population area; no active SPC threat today; verify WEA paths
ME	Sugarloaf Mtn	162.450	Gray/Portland ME	WNG547	OUT OF SERVICE	No direct overlap with the active SLGT zones this cycle
MI	Petoskey	162.475	Gaylord MI	WNG572	OUT OF SERVICE	No direct overlap with the active SLGT zones this cycle
MN	Gunflint Lake	162.525	Duluth MN	KXI45	OUT OF SERVICE	No direct overlap with the active SLGT zones this cycle
NV	Owyhee	162.450	Elko NV	WNG731	DEGRADED	No direct overlap with the active SLGT zones this cycle
OR	Portland	162.550	Portland OR	KIG98	DEGRADED	No direct overlap with the active SLGT zones this cycle
TN	Shelbyville	162.475	Nashville TN	WXK63	OUT OF SERVICE	ACTIVE THREAT CORRIDOR - in Nashville CWA; SE corridor MCS tracking into western KY/TN today; afternoon severe development AR/TN/MS/AL; verify WEA and local EAS

WILDFIRE ACTIVITY - [NIFC](#), 30-MAY (weekly update)

[NIFC](#) 02-JUN: active season ongoing. Florida: Max Road Fire 11,090 acres 60% contained (Broward/Everglades), Wawa 2 Fire 4,600 acres 20% contained (Highlands County). 2026 YTD nationally: 15,436 fires / 1,510,973 acres. Florida severe drought (99% of state; 75% extreme/exceptional). Above-normal fire potential SE through June per [NIFC](#) seasonal outlook. Year to date: 29,023 fires have burned more than 2.3 million acres nationwide. (The 18 figure is a fire count, not acres burned.) NOTABLE ACTIVE: Santa Rosa Island Fire, Channel Islands National Park, Southern California - 18,379 acres, evacuations in effect as of cycle close. A second California fire: 17,116 acres active. Weather note: Northern Plains receiving wetting rainfall (0.25 to 2 inches) beneficial for northern tier; stalled frontal boundary in SE corridor is an adverse fire-weather indicator where it intersects fire-prone areas. No new FLASH-tier fire event this cycle. PRACTITIONER ACTION: wildfire is carried as the standing every-cycle section per SOP 0.112; households in Southern California, fire-prone Southwest, and SE states under active frontal boundary should maintain readiness; monitor [InciWeb](#) for any incident-specific perimeter and evacuation detail.



SECTION 7A - SPACE WEATHER & EMCOMM

[SWPC](#) bulletins (operator-supplied, current as of 03-JUN 1147 UTC) report three separate R2 (Moderate) solar X-ray events today - an unusually active day from a region near solar disk center (N08-N13/W05-W14). Event 1: M9.3 flare 0122-0143 UTC, N13W05, with Type II radio sweep (253 km/s) and Type IV radio emission beginning 0122 UTC, 10cm burst 360 sfu (5-minute duration). Event 2: M7.7 flare 0648-0707 UTC, N08W14, Castelli-U signature, Type II (313 km/s), 10cm burst 540 sfu (3-minute duration). Event 3: Active X-ray flux exceeding M5 threshold ongoing as of 1141 UTC (ALTXMF Serial 531, still in progress at sweep time). Penticton noon flux: 146 sfu (elevated). Geomagnetic: Kp max 3 (confirmed via operator Kp chart updated 0900 UTC 03-JUN); all readings 01-JUN through 03-JUN 0900 UTC solidly Kp less than 5; no G-scale storm; no G1 or above. SWX-CON scale: [FFTP](#) [SWX-CON definitions](#); [NOAA](#) source: [NOAA Space Weather Scales](#).

R2 radio-blackout impact: Each R2 event produces: area of impact centered on sub-solar point on sunlit side of Earth; limited HF radio blackout for tens of minutes per event; extent of blackout dependent on X-ray flux intensity (see [SWPC](#) D-RAP product for real-time affected area). With three R2 events across a 10-hour window, HF operators should expect multiple periodic blackout windows throughout the UTC day. High-frequency communication on sunlit paths is the affected medium. LF/VLF communications may also be degraded on sunlit paths during events.

CME association: Type II radio sweeps accompanied both the M9.3 (0057 UTC sweep, 253 km/s) and M7.7 (0657 UTC sweep, 313 km/s) events. Type II sweeps indicate a coronal mass ejection (CME) launch associated with the flare. CME analysis from [SWPC](#) is pending - no formal [SWPC](#) CME impact bulletin was in the operator-supplied data at sweep time. With Type II velocities in the 250-315 km/s range, any associated CME would have an Earth-arrival window of approximately 3-5 days if Earth-directed. Monitor [SWPC](#) for any CME advisory and geomagnetic storm watch. At this time no G-scale storm watch is in effect.

Geomagnetic environment: Kp maximum 3 through 0900 UTC 03-JUN per operator Kp chart. Three R2 X-ray events with Type II sweeps but Kp held well below G1 threshold (Kp 5+). The active region is near disk center which maximizes potential Earth-directed CME geometry, but the geomagnetic field has remained quiet despite the X-ray activity. EMCOMM operators at mid-latitudes are unaffected geomagnetically; HF blackout impact is the operational concern.

HF Band Conditions (03-JUN-2026 - elevated solar activity)

BAND	DAY	NIGHT	POLAR	MID-LAT	EMCOMM NOTE
80m	Poor (blackout)	Good	Poor	Poor (blackout)	Avoid daytime; night OK
40m	Degraded	Good	Degraded	Degraded	Expect interruptions during events
20m	Degraded	Fair	Poor	Degraded	Periodic blackout; monitor D-RAP
15m	Poor	Poor	Poor	Poor	Avoid; severely degraded
10m	Very Poor	Poor	Very Poor	Very Poor	Not recommended today

Practitioner note: Three R2 events in 11 hours is an active solar day. HF operators should monitor [SWPC](#) D-RAP product for real-time affected area and duration of each blackout. Night-side paths and lower-frequency bands (80m/40m) are the recommended fallback during events. The third event (ongoing at 1141 UTC) may extend into the afternoon UTC window. If [SWPC](#) issues a CME impact advisory following analysis of the Type II sweeps, upgrade potential to G-scale storm watch should be monitored. EMCOMM nets: check in during blackout-free windows; maintain fallback to VHF/UHF or Winlink if 20m/40m primary paths degrade.

SWX-001 ANALYST ASSESSMENT - ICD 203/206

LIKELIHOOD: continued M-class activity today likely. **CONFIDENCE:** MODERATE. -- Active region near disk center (N08-N13/W05-W14) has produced three M-class events already today; active regions at or near disk center typically remain productive through the disk transit. Further M-class activity today or tomorrow assessed likely at MODERATE confidence. X-class event upgrade: roughly even chance given region productivity. Geomagnetic storm from CME association: unlikely (Kp max 3 despite three R2 events; CME velocities moderate 250-315 km/s).

TRIPWIRES -- (1) [SWPC](#) issues X-class flare warning or X-class event confirmed; (2) [SWPC](#) issues CME impact advisory or G-scale watch following CME analysis; (3) Kp rises to G1 (Kp 5) or above; (4) R3 or higher radio-blackout event; (5) S-scale proton event begins.

Alt-Hyp 1 (roughly even chance): Active region produces an X-class event before exiting the disk, escalating to R3 and potential CME with geomagnetic impact.

WHAT WOULD SUPPORT	Three M-class events in 11 hours signals a highly productive and unstable region; active regions near disk center that produce multiple M-class events frequently escalate to X-class; Type II/IV signatures indicate energetic particle and CME-producing potential.
WHAT WOULD DISCONFIRM	All three events were M-class not X-class; Kp remained at 3 despite the activity; the region may decay as it transits; not all productive regions escalate to X-class.
CURRENT STATUS	WATCH - region active and productive; third event ongoing at sweep time; region near disk center maximizes risk window.

Alt-Hyp 2 (unlikely): CME association from Type II sweeps results in G1 or higher geomagnetic storm within 3-5 days.

WHAT WOULD SUPPORT	Type II sweeps from both M9.3 and M7.7 events indicate CME launch; region is near disk center maximizing Earth-directed geometry; multiple CMEs can interact en route (halo CME reinforcement).
WHAT WOULD DISCONFIRM	Kp held at 3 despite three R2 events - geomagnetic coupling is minimal; CME velocities are moderate (250-315 km/s) not fast; SWPC has not issued a G-scale watch; prior Type II sweeps at these velocities frequently produce sub-G1 impacts.
CURRENT STATUS	INDETERMINATE - CME analysis from SWPC not yet published at sweep time; geomagnetic environment currently quiet.

SECTION 7B - AGRICULTURE, FOOD & SUPPLY CHAIN

NSTR this cycle. No agriculture, food, or agricultural-supply-chain development rose to reportable threat level this cycle. The section is retained per standing structure with the current standing baseline below.

[USDA](#) WASDE-671, released 12-MAY, remains the current report with no current-cycle delta: 2026/27 wheat 1.561 bb, corn 16.0 bb, soybeans 4.435 bb. The next [WASDE](#) release is 11-JUN. [USDA](#) market-data sources were swept this cycle with no reportable agricultural delta.

Weather-to-agriculture note: The [SPC](#) Day 1 SLIGHT convective areas this cycle are Northern Plains (WY/ND/SD supercell threat) and FL/GA (isolated gusty convection). The Northern Plains supercell risk carries an isolated risk to winter wheat and early cotton in the southern High Plains. The Colorado Plateau and Southwest critical fire-weather threat adds a rangeland and early-ignition concern. Neither rises to a reportable agricultural threat this cycle. See [\[WX-001\]](#).

SECTION 10 - PREPAREDNESS CONDITION ASSESSMENT

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

Why this condition: PREP-CON 3 INCIDENT PROBABLE (Brown Sky) set. Trend DETERIORATING. Three active trigger clusters per PREP-CON v1.1: (1) WAR POWERS/[CENTCOM](#) indicator - active US military kinetics in Persian Gulf (Qeshm Island strike 02-JUN, tanker engine room strike, Kuwait airport Iranian drone hit 03-JUN); Operation Epic Fury Day 96; (2) PANDEMIC indicator - [WHO](#) PHEIC Ebola (Bundibugyo, DRC/Uganda, 321 confirmed, PHEIC in force, no approved vaccine); (3) CYBER indicator - KEV surge with active exploitation (FortiClient EMS, Android Framework, Linux Kernel, Microsoft Defender deadline today). Trend is DETERIORATING: Iran-US mediator communications suspended; Lebanon blocking MOU; Kuwait airport hit 03-JUN is the most significant civilian infrastructure strike since ceasefire; UAE calling for Gulf unity against Iran aggression. The aggregate picture is active and worsening.

COMCON 4 INCREASED VIGILANCE (CONUS, DTR-assessed): Public Safety/Alerting domain is the driver: 32 [NWR](#) transmitters OOS/DEGRADED (19 OOS, 13 DEGRADED) across 13 states + AK on an active severe weather day (SLIGHT N Plains). Angola IN (KXI94) upgraded to OOS. EW domain elevated regionally in Persian Gulf. No CONUS backbone failure or domestic communications infrastructure event at this cycle.

What would move PREP-CON up to 2: Full Iran ceasefire collapse with sustained open kinetics; a first US Ebola case; a major domestic cyber attack on critical infrastructure with confirmed operational impact; a formal Lebanon ceasefire collapse driving Iranian proxy activation on US interests.

What would move PREP-CON down to 4: Confirmed Iran MOU signed with Hormuz reopening language and kinetics halt; Ebola outbreak trajectory turning toward containment with trajectory plateauing; severe-weather and active cyber-deadline windows closing benignly.

Top 5 practitioner actions this cycle:

1. Microsoft Defender CVE-2026-41091 and CVE-2026-45498 FCEB deadline is TODAY (03-JUN). Confirm patch status. Palo Alto PAN-OS CVE-2026-0257 deadline was 01-JUN - confirm compliance or report non-compliance. FortiClient EMS CVE-2026-35616 active exploitation ongoing - confirm 7.4.7 or hotfix applied.
2. Northern Plains (N NE/E Dakotas/W MN) [SPC](#) Day 1 SLIGHT severe weather today: supercell threat with large hail, severe winds, a few tornadoes. Angola IN (KXI94) is OUT OF SERVICE in Northern Indiana on a severe weather day - residents in that CWA must verify non-NWR alert paths (WEA, local EAS, apps). Review two-of-three alert paths across all NWR-gap areas.
3. Iran-US kinetics have escalated 02-03-JUN (Kuwait airport drone hit, Qeshm Island US strike, tanker engine room strike). No MOU signed. Brent \$96.89 rising. Hold energy-price posture flex; no relief imminent from Hormuz closure. Elevate cyber-spillover preparedness for any Iranian APT targeting your sector.
4. Space weather: three R2 events today. HF operators expect periodic blackout windows on sunlit paths throughout the UTC day. Monitor [SWPC](#) D-RAP for real-time affected area. CME association possible via Type II sweeps - monitor for any [SWPC](#) G-scale watch. Shift HF to 80m/40m night-side paths or VHF/UHF/Winlink during events.

5. Travelers and operators with DRC, Uganda, or South Sudan routing: expect screening delays at designated airports. Brazil NEGATIVE for Ebola (01-JUN) - no change to US entry restriction protocol. [CDC](#) risk assessment remains LOW. Watch for any new out-of-region case.

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 - DETERIORATING	MED	MED	MED	HIGH	HIGH	HIGH	HIGH
COMCON 4 INCREASED VIGILANCE - CONUS	LOW	LOW	LOW	MED	LOW	MED	HIGH

PREP-CON commentary (Trend DETERIORATING): Energy, Transportation, PubSec, and Household carry HIGH this cycle. Energy HIGH: Brent \$96.89 rising on reinstated geopolitical risk premium; Hormuz Day 52 closed; Kuwait airport hit; no deal imminent. Transportation HIGH: Kuwait airport shut (03-JUN), Gulf airspace elevated, Northern Plains severe weather IROPS risk. PubSec and Household HIGH: Iran kinetics 02-03-JUN, [NWR](#) 32 transmitters OOS/DEGRADED on active severe wx day, Russia mass Kyiv attack 02-JUN. Healthcare/Bank-Fin/Manuf at MED: Microsoft Defender deadline today; FortiClient EMS active exploitation; Ebola PHEIC clinical awareness.

COMCON commentary (COMCON 4 INCREASED VIGILANCE - CONUS): [NWR](#) posture 03-JUN (roster timestamp 1143 UTC): 32 transmitters affected (19 OOS + 13 DEGRADED) across 13 states + AK. Angola IN (KXI94) upgraded to OOS this cycle - Northern Indiana on a severe weather day. 10-site Juneau AK cluster all DEGRADED (new this cycle). EW domain elevated regionally: active Iranian drone/missile exchanges in Persian Gulf, Qeshm Island US strike, Kuwait airport hit. No CONUS backbone failure. COMCON 4 (Increased Vigilance) reflects [NWR](#) Public Safety/Alerting degradation on an active severe weather day plus EW elevation in theater. Household = HIGH where any NWR-gap household sits in an active-threat CWA.

SECTION 12 - ANALYTICAL INTEGRITY & METHODOLOGY

Full methodology: Complete Analytical Standards and Tradecraft (sourcing standards, estimative-language scale, risk-score formula, alternative-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: v5.56 (effective 01-JUN-2026; supersedes v5.55). This cycle applies the SOP 0.113 ICD 203/206 standard: likelihood and confidence are stated as separate dimensions on every forward judgment and never collapsed; likelihood uses only the 0.55 ladder; confidence is HIGH, MODERATE, or LOW; every scored entry carries at least two alternative hypotheses with supporting and disconfirming evidence; and changed judgments carry a CHANGE FROM PRIOR line. The SOP 0.38 pre-build padding cut and the 0.110-B dead-carryover audit were run before build.

Estimative language: Likelihood uses the ICD 203 ladder only: almost no chance, very unlikely, unlikely, roughly even chance, likely, very likely, almost certain. Confidence is stated separately as HIGH, MODERATE, or LOW. Forbidden hedges: might, maybe, possibly, perhaps.

Risk score (Impact + Imminence + OpFriction): Impact 1-10; Imminence 1-10; OpFriction 1-10 (inverse, where high friction reduces actionability). FLASH band: Score 20 or above enters Section 3; below-FLASH items are addressed in the Section 4A through 7B narrative.

Sourcing this cycle: This is a standard 24-hour cycle, 02-JUN 1530 UTC through 03-JUN 1530 UTC. The 49 mandatory DTR sources were swept and individually reconciled against Master Source Registry

v2.21 (dated 2026-06-03); each source was either freshly pulled or dispositioned on an actual check. PREP-CON assessed per PREP-CON v1.1 JSON. COMCON assessed per COMCON v3.0 JSON (COMCON uses blue/green/gold/orange/red ramp - distinct from PREP-CON scheme). SWX supplied by operator (three R2 bulletins + Kp chart). [SPC](#) Day 1 supplied by operator (1300Z 03-JUN text). [NWR](#) roster supplied by operator (timestamp 1143 UTC 03-JUN). PowerOutage.us supplied by operator (image, 54,342 customers). Primary sources: [SPC Day 1](#), [CISA KEV catalog](#), [SWPC bulletins](#), [NWR transmitter outage list](#) (operator snapshot 02-JUN); [WHO](#) Disease Outbreak News, [CDC](#), Africa [CDC](#), and [ECDC](#) Ebola reporting; [CNN](#), [Reuters](#), AP, the Washington Times, and CBS News for the Iran negotiating track; the [Kyiv Independent](#) for the Russia-Ukraine items; [NIFC](#) for wildfire; [NHC](#) for tropics.

TOTAL SOURCES	TIER 1	TIER 2	TIER 3
629	367	253	9
MANDATORY	FRAMING CAVEAT	NEW v2.21	REGISTRY DATE
49	21	40	2026-06-02

Operator cross-check (0.105): WX-CON is set against the operator-supplied [SPC](#) Day 1 Convective Outlook text (0651 AM CDT 03-JUN-2026, valid 031300Z to 041200Z). SWX-CON is set against operator-supplied [SWPC](#) bulletins (current 03-JUN 1147 UTC: three R2 events - M9.3, M7.7, ongoing M5+) and operator-supplied Kp chart (updated 0900 UTC, Kp max 3, no G-scale). [NWR](#) roster: operator snapshot 03-JUN timestamp 1143 UTC, 32 transmitters (19 OOS + 13 DEGRADED) across 13 states + AK. PowerOutage.us: operator image, 54,342 US customers, background level. Market data: [AAA](#) \$4.290/gal (live), Brent \$96.89/bbl (03-JUN). PREP-CON v1.1 / COMCON v3.0 JSON files supplied by operator.

Gaps acknowledged: Whether Iran-US mediator channel is truly suspended or still active via back-channels is not established from open source. Lebanon ceasefire enforcement terms Iran would accept to return to MOU talks are not defined publicly. True Ebola case count is understated - DRC contact-tracing below full coverage. CME analysis for Type II sweeps from 03-JUN R2 events not yet published by [SWPC](#) at sweep time. Per-entry collection gaps are stated in each FLASH entry.

Date coherence: All T+N and T-N values are computed against the 03-JUN-2026 base date. Cycle window 02-JUN 1530 UTC through 03-JUN 1530 UTC, a standard 24-hour cycle. Op Epic Fury Day 96. Blockade Day 52.

END

END OF REPORT

Fortune Favors the Prepared | Daily Threat Report

Semper Paratus, Semper Gumby.

THE CONTINUITY CHRONICLES

Same operational world. Different lens.

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

thecontinuitychronicles.net