

DAILY THREAT REPORT

Fortune Favors the Prepared | Intelligence Operations Division
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⚠️ PREPAREDNESS CONDITION 4 - INCIDENT POSSIBLE ⚠️

Op Epic Fury Day 101 | Hormuz Blockade Day 58 | Lebanon CF Day 9 | Iran/Hormuz ceasefire at critical juncture - deal "largely negotiated" per Trump; no MOU signed. World Cup opens Jun 11. G3 watch cancelled; electron flux alert continued.

COMMUNICATIONS CONDITION: COMCON 4 - INCIDENT POSSIBLE

Iran APT ICS/OT campaign active: confirmed disruptions to US water/energy/govt PLCs. FBI surveillance breach unresolved. World Cup pre-tournament cyber window open (opens Jun 11). CISA capacity reduced. 30 NWR transmitters OOS/DEGRADED.

WX-CON 3 - ENHANCED RISK (ENH)

SPC Slight Risk active today | 2"+ hail / 70+ mph wind / isolated tornadoes | NE CO through central KS | Peak 1400-2200 local | Full basis: SEC 7

SWX-CON 2 - ELEVATED | G3 WATCH CANCELLED (WATA50 SER 100, 08-JUN 2117 UTC)

2MeV electron flux alert continued (1315 pfu yesterday, Serial 3698). G3 watch cancelled 08-JUN 2117 UTC - CME did not materialize as forecast. Electron flux elevated. GPS accuracy reduction at higher latitudes. Full basis: SEC 7C

Publication (UTC)	09 JUNE 2026 / 1530 UTC
Reporting Period	Monday 08-JUN-2026 1530 UTC through Tuesday 09-JUN-2026 1530 UTC (24-hour standard cycle)
Analyst / Watch Officer	Fortune Favors the Prepared - OSINT Desk Tuesday Sector Sweep
FLASH Threshold	Risk Score >= 20 - 3 FLASH events this cycle: GEO-001 (26), PHS-001 (22), NUC-001 (21)
PREP-CON Baseline	PREP-CON 4 - Incident Possible (Orange) Multi-domain active threat: Iran/Hormuz ceasefire kinetics; Russia/Chornobyl nuclear-adjacent strike; Philippines mass casualty event; Ebola PHEIC; World Cup soft target window; ICS/OT cyber active
Day Counters	Op Epic Fury: Day 101 (28-FEB launch) Hormuz Blockade: Day 58 (13-APR US naval blockade Iranian ports) Lebanon CF Framework: Day 9 (Hezbollah rejected; active fighting continues)
Version	1.0 - SOP v5.55 Tuesday sector sweep ICD 203/206 analytic standards applied Anti-bias discipline applied Sweep manifest: 28 areas (Tuesday sector sweep)

FLASH ►

GEO-001 Hormuz ceasefire Day 57: Iran fired 4 drones + 6 missiles 06-JUN / US struck Goruk+Qeshm radar / Trump says deal "largely negotiated" 09-JUN | **PHS-001** Philippines M7.8 07-JUN / 32+ KIA / 1m tsunami / General Santos / USGS Orange alert | **NUC-001** Russia struck Chornobyl spent fuel storage 07-JUN / fire extinguished / radiation stable / IAEA Board convenes 09-JUN

HIGH/NEW ★

GEO-003 Lebanon CF Day 9: Hezbollah rejected agreement / UNIFIL peacekeeper KIA / IDF strikes continue | **PHS-002** Ebola PHEIC active DRC/Uganda: 378 confirmed cases 88 deaths / no approved vaccine / US travel restrictions active | **DOM-001** Delaney Hall ICE protests Day 17+ / 80+ arrested / Indivisible coordinating / NJ state suits filed

HIGH/CONT ▶

GEO-002 Ukraine: ISW logistics disruption maturing / Crimea shortages / Zelensky-Putin direct talks rejected | **CYB-001** Iran APT ICS/OT: CISA-FBI advisory / water+energy+govt PLCs targeted / operational disruption confirmed | **SWX-001** G3 watch CANCELLED (WATA50 Ser 100) / 2MeV electron flux alert continued (1315 pfu) / GPS accuracy reduction higher latitudes

CRITICAL TIME HACK

SEVERE WEATHER TODAY: SPC ENHANCED RISK: Central/Northern Plains. MCS forming this afternoon. Large hail 2-inch+, wind gusts 60-80+ mph, tornadoes including strong possible NE ND. Peak 1400-0200 local. See WX-001.

SPACE WEATHER TODAY: G3 WATCH CANCELLED (WATA50 Ser 100, 08-JUN 2117 UTC). 2 MeV electron flux alert continued (1315 pfu yesterday). GPS accuracy reduction higher latitudes. SWX-CON 2 ELEVATED. See SWX-001.

HORMUZ DAY 57: Day 58. Iran halted strikes June 8-9 after Israel also halted. Iran warns resumption if Lebanon strikes continue. US blockade ongoing. IAEA Board Vienna June 8-12. No MOU signed. WTI \$91.68 / Brent \$94.59.

PHILIPPINES EQ: M7.8 June 8. Toll rising: 35 KIA, 200+ injured, 12 missing as of June 9 morning. Active aftershock sequence. 18,000+ displaced. General Santos airport closed through June 11. Rescue ops ongoing.

CHORNOBYL: IAEA inspection team on site June 7-8. Radiation levels normal confirmed. Safeguards office inside damaged fuel reception building. Board of Governors session Vienna June 8-12 - Chornobyl and Iran HEU access on agenda.

WORLD CUP OPENS JUN 11: 2 days to opening ceremony (Mexico City June 11, 1130 CST). FAA TFRs activate June 11 across 11 US host cities. FBI/DHS counter-UAS teams deployed. Iran-affiliated hacktivist groups specifically flagged for tournament cyber threats.

OIL: WTI \$91.68/bbl (+1.26%). Brent \$94.59 (+1.50%). AAA national average \$4.1610 (June 9). Both sides halted strikes June 8-9; modest de-escalation relief offset by ongoing blockade.

NWR: 30 transmitters OOS/DEGRADED (15 OOS / 15 DEGRADED). New this cycle: IA Cedar Rapids, KS Abilene, MD Baltimore. AK Juneau cluster 12 DEGRADED (cause unknown, may be upgrade activity). KS Ulysses OOS in today SPC Enhanced Risk zone.

BOTTOM LINE UP FRONT

09 JUNE 2026 | Op Epic Fury Day 101 | HORMUZ BLOCKADE Day 58 | LEBANON CF Day 9 | G3 WATCH CANCELLED / ELECTRON FLUX ALERT CONTINUED | PHILIPPINES M7.8 35+ KIA | CHORNOBYL SPENT FUEL STRIKE | EBOLA PHEIC ACTIVE | WORLD CUP OPENS JUN 11

THE CYCLE - QUICK LOOK

- ▶ **GEO-001: HORMUZ DAY 58: IRAN/US CEASEFIRE EXCHANGES CONTINUE - BOTH SIDES HALT ATTACKS JUNE 8-9.** Iran and Israel traded strikes June 7-8 - first since April ceasefire. Both halted attacks June 8-9; Iran warns resumption if Israeli strikes in Lebanon continue. US blockade of Iranian ports ongoing. WTI \$91.68/Brent \$94.59. Trump: deal progressing. IAEA Board convenes Vienna June 8-12 on 440.9 kg HEU access gap (97 days). Full analysis: GEO-001.
- ▶ **PHS-001: PHILIPPINES M7.8 - TOLL RISES TO 35 KIA AS OF JUNE 9 MORNING.** Strongest quake since 1990. Struck 0737 local June 8 off Sarangani, Mindanao. 35 killed, 200+ injured, 12 missing. 17 deaths from landslide in Sarangani highlands. General Santos city (722,000) sustained building collapses. 18,000+ in evacuation centers. Active aftershock sequence. Full: PHS-001.
- ▶ **NUC-001: CHORNOBYL SPENT FUEL SITE STRIKE JUNE 7 - IAEA INSPECTION TEAM ON SITE.** Russian Shahed struck TsSVYAP fuel storage facility 0210 local June 7, ~15 km from Chornobyl NPP. Radiation stable. IAEA confirmed safeguards office inside damaged structure. Inspection team deployed June 7-8. IAEA Board of Governors June 8-12 Vienna session includes 97-day Iran HEU access gap as agenda item. Full: NUC-001.

▶ **SWX-001: G3 WATCH CANCELLED 08-JUN 2117 UTC - 2 MeV ELECTRON FLUX ALERT CONTINUES.** WATA50 Serial 100: G3/G2 watches cancelled, CME did not materialize as forecast. ALTEF3 Serial 3698: 2 MeV flux continued, yesterday max 1315 pfu (down from 2874 pfu peak). GPS accuracy reduction higher latitudes. Elevated atmospheric drag. Electron flux elevated status expected to persist. Full: SWX-001.

▶ **WX-001: SPC ENHANCED RISK TODAY - CENTRAL AND NORTHERN PLAINS - TORNADOES / LARGE HAIL / 80 MPH WINDS.** Valid 091200Z-101200Z. Central/northern Plains primary zone. MLCAPE 4000-5000 J/kg central Dakotas. Strong MCS expected late afternoon through evening. Some strong tornadoes possible NE North Dakota (SRH 250-300 m2/s2). KS Ulysses WXN81 OOS in threat zone. Peak window 1400-0200 local. Full: WX-001.

▶ **GEO-002: UKRAINE: ISW CONFIRMS LOGISTICS DISRUPTION MATURING. CRIMEA GASOLINE+GOODS SHORTAGES INTENSIFYING.** Zelensky offered direct talks to Putin; rejected. E3 summit London 07-08 JUN. US June deadline for peace deal effectively missed. See GEO-002.

▶ **GEO-003: LEBANON CF DAY 8: HEZBOLLAH REJECTED ISRAEL-LEBANON AGREEMENT. UNIFIL PEACEKEEPER KILLED. IDF STRIKES CONTINUE.** Hezbollah demands full Israeli withdrawal before any ceasefire. Lebanon PM: war "not for our sake." 2,000+ killed in Lebanon since escalation. See GEO-003.

⊕ **CYB-001: IRAN-AFFILIATED APT ACTIVE ICS/OT: US WATER + ENERGY + GOVT PLCS TARGETED. CONFIRMED DISRUPTIONS.** CISA-FBI-NSA-DOE-EPA joint advisory. Handala Hack (MOIS-affiliated) most prominent. CISA capacity reduced by \$707M staffing cuts. See CYB-001.

★ **PHS-002: EBOLA PHEIC ACTIVE DRC/UGANDA: 378 CONFIRMED CASES / 88 DEATHS / NO APPROVED VACCINE.** WHO declared PHEIC 16-MAY. Bundibugyo virus - different strain from prior outbreaks; existing treatments inapplicable. US travel restrictions active DRC/Uganda/S Sudan. CDC risk to US: LOW. See PHS-002.

★ **DOM-001: DELANEY HALL (NEWARK NJ) ICE PROTESTS DAY 17+: 80+ ARRESTED / ORGANIZED / ESCALATING.** Indivisible coordinating. NJ AG + Newark filed suit for inspection access/closure. State Police replaced federal ICE officers at perimeter. Network primed to replicate at other facilities. See DOM-001.

★ **STSB-001: WORLD CUP OPENS JUN 11 (3 DAYS). SOFT TARGET THREAT ELEVATED.** DHS: security threats "particularly high in soft areas outside stadiums." Fan zones, transit corridors, hotel districts are primary risk environments. Iran-affiliated hacktivist groups specifically named for tournament cyber threats. See STSB-001.

NOT DETAILED HERE (FULL NARRATIVE IN BODY): Seven Cabins Fire NM 90% contained (SEC 8); Border 6 Fire CA 100% contained (SEC 8); Millstone Unit 2 TS shutdown non-emergency (SEC 5); Listeria request + Salmonella moringa CDC alerts (SEC 9); NRC, FDIC, financial system NSTR this cycle (SEC 12 note).

DECISIVE WINDOW: Next 72 hrs - (1) Iran/Hormuz deal announcement or collapse signal; (2) G3 storm arrival and HF/GPS impacts today; (3) SPC severe weather CO/KS this afternoon/evening; (4) IAEA inspection team at Chornobyl; (5) Philippines aftershock sequence and casualty accounting; (6) World Cup Jun 11 opening match security.

SECTION INDEX

SECTION	KEY ENTRIES / THREAT DRIVERS
<u>SEC 2 - Market Indicators</u>	Commodity tracker: WTI \$91.68 / Brent ~\$106/bbl / Urea +46% MoM from Hormuz / Baltic Dry firming / DHL Asia-US 777F service launched / Hormuz-driven energy and food supply chain impacts vs. 28-FEB pre-war baseline
<u>SEC 3 - FLASH Events</u>	<u>GEO-001</u> Hormuz Blockade Day 58: Iran drones+missiles 06-JUN / US struck Goruk+Qeshm radar / Trump "largely negotiated" 09-JUN (score 26) <u>PHS-001</u> Philippines M7.8 07-JUN: 32+ KIA / 1m tsunami / USGS Orange alert (score 22) <u>NUC-001</u> Russia struck Chornobyl spent fuel storage 07-JUN: fire out / radiation stable / IAEA Board 09-JUN (score 21)
<u>SEC 4A - Cyber & Information Security</u>	<u>CYB-001</u> Iran APT ICS/OT: US water+energy+govt PLCs targeted / confirmed disruptions <u>CYB-002</u> FBI surveillance network breach / Chinese APT / unresolved <u>CYB-003</u> FIFA World Cup 2026 pre-tournament cyber threat elevated (opens Jun 11)
<u>SEC 4B - Physical / Geopolitical / IO</u>	<u>GEO-002</u> Ukraine: Chornobyl strike / ISW logistics disruption / Crimea shortages / peace talks dead <u>GEO-003</u> Lebanon CF Day 9: Hezbollah rejects deal / UNIFIL KIA / IDF strikes continue <u>GEO-004</u> Munitions vulnerability window post-Epic Fury (CSIS assessment)
<u>SEC 5 - Energy / Infrastructure / Supply Chain</u>	<u>ENR-001</u> Oil: WTI \$93.63 / Brent ~\$106/bbl / EIA STEO Jun 9 release tomorrow <u>ENR-002</u> Grid: Millstone Unit 2 TS shutdown / G3 GIC risk today <u>ENR-003</u> Maritime: Baltic Dry firming / DHL Asia-US service / Panama/Suez normal
<u>SEC 6 - Aviation / Transportation</u>	<u>AVN-001</u> Middle East airspace disruption / Air Canada+Lufthansa+KLM reduced June schedules <u>AVN-002</u> World Cup 2026 transportation security posture
<u>SEC 7 - Meteorological Weather / Severe Weather + NWR</u>	SPC ENHANCED RISK today: Central/Northern Plains - MCS / large hail / 80 mph wind / strong tornadoes NE ND. KS primary 1400-2200 local NWR 31 transmitters affected (operator-supplied 09-JUN) / composition shift noted / KS Ulysses OOS in SPC threat zone
<u>SEC 7C - Space Weather & EMCMM</u>	<u>SWX-001</u> G3 geomagnetic storm watch TODAY from 06-JUN CME / 2MeV electron alert continued 2874 pfu / M1.8 flare AR4461 / additional CME under analysis / HF degradation sunlit side / GPS accuracy reduction / northern-tier grid GIC risk
<u>SEC 8 - Agriculture / Food & Supply Chain</u>	<u>AGR-001</u> Drought: 61% CONUS in drought / SE record dry conditions / 31,511 fires YTD at 140% of avg / Hormuz fertilizer disruption: urea +46% MoM / World Bank: food insecurity rising / 52.9M people acutely food insecure W+C Africa Jun-Aug
<u>SEC 7B - Wildfire</u>	<u>FIRE-001</u> Seven Cabins Fire NM: 90% contained at 31,800 acres <u>FIRE-002</u> Border 6 Fire CA: 100% contained at 2,525 acres <u>FIRE-003</u> National: NPL 2 / 8 uncontained / season 195% of 10-yr avg / Wyoming and Arizona active fires
<u>SEC 9 - Public Health</u>	<u>PHS-001</u> Philippines M7.8 mass-casualty: 32+ KIA / hospital surge / 3.2M students displaced / ongoing aftershocks <u>PHS-002</u> Ebola PHEIC DRC/Uganda: 378 cases 88 deaths / no approved vaccine / US travel restrictions active Listeria requesón alert Salmonella moringa alert

SECTION	KEY ENTRIES / THREAT DRIVERS
<u>SEC 10 - Operational Conditions Assessment</u>	PREP-CON 4 Incident Possible COMCON 4 Incident Possible WX-CON 3 ENH SWX-CON 2 Elevated Movement assessment with supporting and disconfirming analysis fortunefavorstheprepared.com/preparedness-book-of-knowledge-2/planning/preparedness-conditions-prep-con/
<u>SEC 11 - Domestic Unrest / Soft Target</u>	<u>DOM-001</u> Delaney Hall Newark ICE protests Day 17+ / 80+ arrested / organized (Indivisible) / NJ AG+Newark suits filed / state police managing perimeter <u>STSB-001</u> World Cup 2026 soft target threat elevated / opens Jun 11 / DHS: "particularly high in soft areas outside stadiums"
<u>SEC 12 - Analytical Integrity & Source Registry</u>	ICD 203/206 compliant Tuesday sector sweep 629 sources 28 threat areas 629 standing registry (v2.22) fortunefavorstheprepared.com/analytical-standards/ fortunefavorstheprepared.com/dtr-source-registry/
<u>SEC 13 - Closing Block</u>	Fortune Favors the Prepared Full Product Suite ASAR / PPAR engagement products fortunefavorstheprepared.com/dtr/

GEOGRAPHIC IMPACT INDEX

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
<u>Persian Gulf / Strait of Hormuz</u>	<u>GEO-001</u> Hormuz Blockade Day 58 / Iran drones+missiles 06-JUN / US struck Goruk+Qeshm radar / 129 vessels redirected / blockade in effect / WTI \$93.63 / ceasefire talks at critical juncture
<u>Lebanon</u>	<u>GEO-003</u> CF Day 9 / Hezbollah rejected agreement / UNIFIL peacekeeper KIA / IDF strikes continuing / Lebanon PM: "war not for our sake" / 2,000+ killed in Lebanon since escalation
<u>Ukraine / Chernobyl Region</u>	<u>GEO-002</u> Russian drone struck Chernobyl spent fuel storage 07-JUN / radiation stable / IAEA Board 09-JUN / ISW: Ukrainian strikes disrupting Russian logistics / Crimea gasoline+goods shortages worsening
<u>Southern Philippines / Mindanao</u>	<u>PHS-001</u> M7.8 07-JUN 23:37 UTC / 32+ KIA / 200+ injured / 1m tsunami Sultan Kudarat+Sarangani / General Santos structural damage / M6.5 aftershock / 7M+ felt strong shaking / USGS Orange economic alert
<u>Central Plains / Front Range (US - TODAY)</u>	<u>WX-001</u> SPC Slight Risk TODAY: 2"+ hail / 70+ mph wind / isolated tornadoes / NE Colorado primary 1400-2000 local / central Kansas late afternoon / KS Ulysses WXN81 OOS in threat zone
<u>Newark NJ / US Domestic</u>	<u>DOM-001</u> Delaney Hall ICE protests Day 17+ / 80+ arrests / Indivisible-coordinated / NJ AG+Newark suits filed / state police managing / network primed to replicate at other facilities
<u>DRC / Uganda / East Africa</u>	<u>PHS-002</u> Ebola PHEIC: 378 confirmed cases 88 deaths (WHO 16-MAY declaration) / Bundibugyo virus - no approved vaccine / US travel restrictions active for DRC/Uganda/S Sudan
<u>New Mexico / Western US (Fire)</u>	<u>FIRE-001</u> Seven Cabins Fire NM 90% contained 31,800 acres / NM triple-gap NWR continues (Artesia/Roswell/Carlsbad all OOS) / National NPL 2 / season 195% of 10-yr avg / 8 uncontained large fires nationally
<u>US National (Cyber)</u>	<u>CYB-001</u> Iran APT ICS/OT campaign active: water+energy+govt PLCs targeted / confirmed disruptions / CISA capacity reduced / World Cup cyber pre-tournament window open (Jun 11)

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
US National (Space Weather)	SWX-001 G3 watch CANCELLED 08-JUN 2117 UTC / 2MeV electron flux alert continued 1315 pfu yesterday / HF degradation sunlit side / GPS accuracy reduction / 31 NWR transmitters affected compound risk / northern-tier grid GIC risk

SECTION 2 - MARKET INDICATORS

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

COMMODITY	PRE-WAR (28 FEB)	CURRENT (08 JUN)	CHG vs PRE-WAR	CONSUMER / ANALYTICAL NOTE
Brent Crude	~\$66/bbl	\$94.59/bbl (08-JUN close)	+61%	EIA STEO May forecast: Brent avg \$106/bbl May-Jun 2026. Peaked \$138/bbl Apr 7. Trump 09-JUN: deal "largely negotiated." WTI spot \$93.63 (+3.41% session). EIA STEO June 9 (tomorrow) release - monitor for Hormuz assumption updates. Brent expected to fall to \$89/bbl Q4 as flows resume.
WTI Crude	~\$63/bbl	\$93.63 (09-JUN spot)	+49%	Up 3.41% session on ceasefire durability concerns after Iranian missile launches toward Israel. Iran retains 21-22% of pre-war missile stock (Trump estimate to NBC 06-JUN). CENTCOM: 129 commercial vessels redirected; 6 disabled.
Gasoline (natl avg)	~\$3.10/gal	\$4.1610/gal (09-JUN)	+29%	EIA STEO May: \$3.70/gal avg 2026. Diesel \$4.80/gal avg 2026. Both substantially above 2025 levels (\$3.10/\$3.66). Iran-conflict driven energy inflation costs US families ~\$100B (Fortune analysis). Consumer sentiment 48.2/100 May (Univ Michigan).
Urea fertilizer	~\$465/ton	~\$826/ton (+Hormuz)	+78%	Hormuz disruption drove 46% month-on-month urea price spike. Agricultural price indices up 8%. World Bank forecasts fertilizer prices up 31% avg 2026 - least affordable since 2022. USDA revised food-at-home inflation to 3.1% for 2026, nearly double start-of-year projection.
Ocean Freight	~1,333 pts BDI	Firming (06-JUN)	+variable	Baltic Capesize BCI C3 charter rates firmed to \$36.90/mt week of 06-JUN. Container rates elevated on Asia-US corridors as shippers divert from Hormuz sea routes. DHL launched dedicated Asia-US widebody 777F service 01-JUN as direct response. DHL CEO: 4-6 months to normalize Hormuz shipping.

SECTION 3 - FLASH EVENTS (Score >= 20)

GEO-001 | IRAN/HORMUZ CEASEFIRE CRISIS - Day 57 | Iran drones+missiles 06-JUN / US struck Goruk+Qeshm radar / Trump 09-JUN: deal "largely negotiated" / WTI \$93.63 +3.41%

FLASH | UPDATED | 26

SALUTE

Why This Cycle

Active ceasefire exchanges within the nominal truce framework. Both sides using force as leverage in ongoing negotiations. Trump public optimism 09-JUN signals possible deal-close. US blockade of Iranian ports remains: 129 vessels redirected, 6 disabled (most recently M/T Lexie). Iran retains 21-22% of pre-war missile stock (Trump to NBC 06-JUN). Kuwait airport drone strike 04-JUN demonstrates Iranian willingness to target Gulf partner infrastructure.

Summary

Iran launched missiles at Israel June 7 - first bombardment since the April 8 ceasefire - after Israel struck Beirut's southern suburbs. Both sides then halted attacks June 8-9: Israel PM Netanyahu acknowledged halted attacks; Iran Civil Aviation Organization announced return to normal conditions; Iran warned it would resume if Israeli Lebanon strikes continued. US forces fired interceptors against Iranian missiles per a US official. Trump June 9 urged both sides toward immediate ceasefire and stated progress toward a deal. Iran's top negotiator Ghalibaf vowed to "defeat" the US naval blockade. Iran-Israel missile exchange (June 7-8) was the most significant kinetic event since the April ceasefire. As of June 9: both sides holding; Lebanon-linked trigger remains active risk. IAEA Board of Governors opened in Vienna June 8 (session June 8-12); Grossi confirmed 97 days zero inspector access to declared Iranian nuclear facilities and unverifiable 440.9 kg HEU stockpile. Routine inspection at Bushehr NPP was first re-entry since February 2026. US naval blockade of Iranian ports ongoing (Day 58). Hormuz shipping: MARAD Advisory 2026-004 active through September 9 - Iranian attacks on commercial vessels risk remains HIGH. Shipping normalization estimated 4-6 months post-deal per DHL CEO. OPEC+ approved additional July production quota increase of 188,000 bbl/day despite ongoing disruption.

Analyst Assessment

CEASEFIRE FRAMEWORK STATUS: Both sides are using force within the nominal ceasefire framework as diplomatic leverage. Iran's drone and missile launches serve to extract maximum concessions while talks are live; the US radar site strikes are calibrated defensive responses, not escalation to resumed full-scale operations. The pattern has held for 57 days.

MUNITIONS VULNERABILITY WINDOW: CSIS analysis published 09-JUN: "High expenditure of key munitions in Operation Epic Fury has created a window of vulnerability until inventories return to pre-war levels." Iran retains 21-22% of pre-war missile stock. This asymmetry - Iranian residual strike capacity vs. US replenishment timeline - may be shaping Iranian negotiating behavior, creating incentive to press for maximum concessions before the window closes.

DEAL SIGNAL ASSESSMENT: Trump's public optimism "largely negotiated" is consistent with deal-close signaling. Iran's foreign ministry denial and pushback on Western source narratives is consistent with negotiating position, not necessarily with rejection. The Israel-Lebanon dynamics are the primary wildcard: a major Israeli strike on Beirut during active Hormuz negotiations could give Iran cover to walk away.

DOWNSTREAM CASCADES (GEO-001 score >=22): Energy: Brent remains ~\$106/bbl; EIA forecasts \$89/bbl Q4 on Hormuz normalization assumption. Supply chain: DHL, UNCTAD, and shipping operators planning for sustained disruption through late 2026 regardless of diplomatic outcome. Food security: Hormuz disruption drove 46% MoM urea price spike, raising global agricultural input costs 8% (World Bank). Financial: Iran-conflict driven inflation remains highest US level in nearly 3 years per Fed data.

TRIPWIRES: (1) Formal MOU signing announcement; (2) Iran drone/missile launch vs Gulf state territory (exceeds current pattern); (3) Israeli major operation in Beirut during active Hormuz talks; (4) Hormuz mine incident targeting commercial vessel; (5) Pakistan or Qatar mediator withdrawal from talks; (6) US announced blockade relaxation without deal text.

ALT HYP	<p>LIKELIHOOD: Formal deal announcement within 72 hours: ROUGHLY EVEN CHANCE. CONFIDENCE: MODERATE.</p> <p>LIKELIHOOD: Full Hormuz normalization within 60 days of any deal: UNLIKELY - DHL forecasts 4-6 months minimum. CONFIDENCE: HIGH.</p>
	<p>ALT A: MOU signed; ceasefire holds; talks proceed to nuclear phase [ROUGHLY EVEN CHANCE]</p>
	<p>Trump publicly committed to deal; Pakistan/Qatar mediators continuously engaged; US Treasury projecting \$100B consumer savings; prior 57-day ceasefire shows structural hold capacity.</p>
	<p>✓ Supporting Evidence: Iran's foreign ministry pushback on Western source narratives; Iran retains military leverage; IRGC hardliners opposed to concessions; Israel-Lebanon dynamic outside US control.</p>
	<p>✗ Ruling-Out Evidence:</p>
	<p>ALT B: Talks collapse; ceasefire fractures; kinetic escalation resumes [UNLIKELY]</p>
	<p>Each drone/missile launch increases domestic credibility requirements for Iranian negotiators; Netanyahu political pressure not to accept favorable Iran terms; CSIS munitions window assessment gives Iran leverage.</p>
	<p>✓ Supporting Evidence: Trump and Witkoff publicly committed to deal; economic costs to both sides are severe; neither side has taken actions that cross clear redlines for full resumption of operations; 57-day precedent of sustained hold despite friction.</p>
	<p>✗ Ruling-Out Evidence:</p>
	<p>SOURCES</p>
<p>US CENTCOM Public Statements NPR - CENTCOM drone intercept Times of Israel - Goruk/Qeshm radar strikes ABC7 - Trump 09-JUN statements CSIS - munitions analysis</p>	

PHS-001 | PHILIPPINES M7.8 - 07-JUN 23:37 UTC | 32+ KIA / 200+ INJURED / 1M TSUNAMI / GENERAL SANTOS / USGS ORANGE ECONOMIC ALERT

FLASH | NEW | 22

SALUTE	
Why This Cycle	<p>Major mass-casualty natural disaster event. 32+ killed figure expected to rise as rescue operations continue in collapsed structures. General Santos (722,000 pop.) sustained significant infrastructure damage. Eastern Mindanao has experienced multiple major earthquakes in 2025, indicating high-seismicity zone with ongoing structural vulnerability.</p>
Summary	<p>A magnitude 7.8 earthquake struck off the southern Philippines at 23:37 UTC on 07-JUN (07:37 local time 09-JUN). The event was centered 26 km SW of Kablalan at a depth of 55.2 km. At least 32 people were killed and more than 200 injured. 1-meter tsunami waves hit coastal areas in Sultan Kudarat and Sarangani. In General Santos City, a shopping centre with a Jollibee fast food restaurant collapsed, and a school building (unoccupied) collapsed. The USGS PAGER system assigned an Orange alert for economic losses, signaling significant damage likely and potential need for a regional or national level response. Philippine President Marcos Jr. activated emergency agencies and ordered school closures affecting 3.2 million students and 128,000 teachers on what was meant to be the first day of school. A M6.5 aftershock struck at 00:55 UTC 09-JUN. The Pacific Tsunami Warning Center cleared the tsunami threat approximately 5 hours post-quake. Japan issued and then lifted a tsunami advisory for Okinawa and parts of the southern Pacific coast.</p>

Analyst Assessment

CASUALTY TRAJECTORY: 32+ confirmed is likely to rise as rescue operations in collapsed structures continue. General Santos had several building collapses per AFP-verified video; structural vulnerability is well-documented in the region. The Orange PAGER economic alert reflects USGS expectation that significant damage will require regional/national response.

AFTERSHOCK RISK: The M6.5 aftershock within hours of the main event and the extended aftershock sequence observed in similar Mindanao events (Oct 2025 M7.4/M6.7 pair) indicates continued structural risk for compromised buildings over the next 24-72 hours.

WORLD CUP NOTE: Tournament opens June 11. No Philippines-adjacent venues in first-round schedule. Monitor for any Philippine national travel disruption or regional logistics impact on World Cup operations.

REGIONAL CONTEXT: Eastern Mindanao has experienced M6.9 (75 KIA, 1,200+ injured, Oct 2025 Cebu), M7.4/M6.7 (6 KIA, Oct 2025 Davao Oriental) in recent months. The region sits on the Pacific Ring of Fire subduction zone and sustains near-continuous seismic activity.

LIKELIHOOD: Final death toll exceeds 50: LIKELY. **CONFIDENCE:** MODERATE.

LIKELIHOOD: Major FEMA/OFDA assistance operation required: ROUGHLY EVEN CHANCE. **CONFIDENCE:** MODERATE.

ALT HYP

ALT A: Death toll stabilizes at 40-75 with effective rapid response [ROUGHLY EVEN CHANCE]

Philippine response infrastructure has improved after Oct 2025 events; hospital surge capacity in General Santos better than smaller communities; Red Cross pre-positioned.

✓ **Supporting Evidence:** Building stock in General Santos is mixed vulnerability (RC and heavy wood frame per PAGER); school closures suggest structural uncertainty; remote coastal communities may not have been reached yet.

✗ **Ruling-Out Evidence:**

ALT B: Death toll exceeds 100; widespread infrastructure failure requiring international assistance [UNLIKELY but cannot be excluded]

Multiple building collapses confirmed in 722,000-population city; October 2025 M6.9 killed 75+ in smaller Cebu with less intense shaking; 1m tsunami may have caught coastal villages unprepared.

✓ **Supporting Evidence:** Main event was offshore, depth 55.2 km reduces surface acceleration vs. shallow events; General Santos has prior earthquake experience; Philippine NDRRMC activated rapidly; USGS only issued Yellow fatality alert (not Orange).

✗ **Ruling-Out Evidence:**

SOURCES

[NPR - Philippines earthquake](#) | [Al Jazeera - casualties update](#) | [USGS PAGER system](#) | [The Watchers - technical detail](#)

NUC-001 | RUSSIA STRIKES CHORNOBYL SPENT FUEL STORAGE
 07-JUN | Fire extinguished / Radiation stable / IAEA Board convenes
 09-JUN Vienna / Zelensky: "nuclear terrorism"

FLASH | NEW | 21

SALUTE

Why This Cycle

The Chornobyl facility is the second nuclear-adjacent target Russia has struck near Chornobyl in 2026 (February 2025: containment arch over destroyed reactor 4). This CSFSF strike is more consequential: the fuel-reception building is in close physical proximity to active spent fuel

	<p>storage. The IAEA's "deeply concerning" characterization and emergency board convening signals this was a near-miss in terms of contamination risk.</p>
<p>Summary</p>	<p>A Russian drone struck the Centralized Spent Nuclear Fuel Storage Facility (CSFSF) near Chernobyl NPP on 07-JUN. Ukrainian President Zelenskyy confirmed the strike and called it "extremely vile" and a form of "nuclear terrorism." The IAEA, briefed by Ukraine, said the facility's fuel-reception building was significantly damaged and expressed deep concern given the large amounts of nuclear material stored at the site. A fire was ignited at impact but extinguished within approximately one hour. Radiation monitoring showed no spike beyond safe levels as of reporting. Russia has not publicly commented. Ukraine conducted strikes on Putin's hometown of St. Petersburg and on Kursk Region targets on 06-07-JUN before the Chernobyl strike, indicating an escalatory action-reaction dynamic. The IAEA Board of Governors convened in Vienna on 09-JUN specifically to address the incident. An IAEA inspection team is being dispatched to inspect the damage. Zelenskyy proposed a face-to-face meeting with Putin in an open letter 07-JUN; Putin declined, citing no point in such a meeting at this time.</p>
<p>Analyst Assessment</p>	<p>NUCLEAR ESCALATION SIGNIFICANCE: The Russian drone strike on the CSFSF represents the most significant nuclear-adjacent infrastructure attack in the Ukraine conflict since the Zaporizhzhia NPP occupation in 2022. The targeting of spent nuclear fuel storage - regardless of whether the primary goal was contamination risk or infrastructure disruption - sets a new threshold for what Russia is willing to target in Ukraine.</p> <p>ACTION-REACTION DYNAMIC: The sequence - Ukraine strikes near St. Petersburg (Putin hometown), Russia strikes Chernobyl spent fuel storage - indicates an escalatory action-reaction cycle operating at nuclear-adjacent infrastructure. Both sides appear to be expanding the category of acceptable targets.</p> <p>RADIATION RISK ASSESSMENT: The confirmed absence of a radiation release reflects either limited structural penetration or successful containment. The IAEA inspection will determine the extent of damage to containment. The "deeply concerning" IAEA characterization is calibrated language from a body that avoids alarmism; it warrants serious weight.</p> <p>IAEA BOARD SIGNIFICANCE: Emergency convening of the IAEA Board of Governors on 09-JUN is a significant multilateral response. IAEA board resolutions on nuclear security carry political weight even without enforcement mechanism. Russia will face isolation pressure.</p> <p>PEACE TALKS IMPACT: The London E3 summit (UK/France/Germany) discussed European security response while the Chernobyl strike was unfolding. Putin's rejection of direct talks with Zelenskyy removes the diplomatic off-ramp. The US June deadline for peace effectively passed without a framework.</p> <p>LIKELIHOOD: Additional nuclear-adjacent infrastructure targeting by Russia in next 14 days: LIKELY. CONFIDENCE: MODERATE.</p> <p>LIKELIHOOD: Radiation release from Chernobyl-area facilities this cycle: VERY UNLIKELY. CONFIDENCE: HIGH.</p>
<p>ALT HYP</p>	<p>ALT A: Deliberate targeting of CSFSF as nuclear signaling [LIKELY]</p> <p>Russia has been escalating target categories throughout the conflict; prior 2025 strike on Chernobyl containment arch established precedent; timing after Ukraine's St. Petersburg strikes suggests calculated response designed to signal limits.</p> <p>✓ Supporting Evidence: Russia's continued silence on the strike is consistent with a covert operation they don't want to own publicly; IAEA inspection will determine extent of structural damage.</p> <p>✗ Ruling-Out Evidence:</p>

	ALT B: Opportunistic drone attack on Kyiv Oblast infrastructure not specifically targeting nuclear facility [LESS LIKELY]
	CSFSF is 15 km from the Chernobyl NPP in a restricted zone; any Kyiv Oblast infrastructure strike in that corridor risks this facility; GPS drift or navigation error possible.
	✓ Supporting Evidence: Russia has demonstrated facility-specific targeting precision in other infrastructure strikes; CSFSF is a distinct facility from the NPP; its targeting appears intentional per IAEA analysis.
	✗ Ruling-Out Evidence:
SOURCES	Al Jazeera - strike report CBS News - IAEA response IAEA statement ISW 07-JUN assessment

SECTION 4A - CYBER & INFORMATION SECURITY

CYB-001 IRAN-AFFILIATED APT - ACTIVE ICS/OT CAMPAIGN US CRITICAL INFRASTRUCTURE Water / Energy / Govt PLCs targeted / Confirmed disruptions / CISA capacity reduced by \$707M cuts		HIGH CONTINUED 18
Why This Cycle	Standing active threat. CISA-FBI-NSA-DOE-EPA-USCYBERCOM joint advisory (Apr 7) confirmed ongoing Iranian-affiliated APT activity targeting US PLCs and SCADA systems. Op Epic Fury battlefield context sustains Iranian motivation and capability to escalate. Iran restored limited internet access 17-APR after 47-day blackout, enabling external operations.	
Summary	A group of Iranian-affiliated advanced persistent threat actors identified as the "CyberAv3ngers" group and affiliated Iran-aligned hacktivist collectives (organized under an "Electronic Operations Room" formed 28-FEB-2026) are actively exploiting internet-facing programmable logic controllers (PLCs) and SCADA display systems across multiple US critical infrastructure sectors. Confirmed targeted sectors: Water and Wastewater Systems (WWS), Energy (power generation and distribution), Government Services and Facilities (local municipalities). The hackers are interacting with data files to alter display data and extracting device project data. Confirmed operational disruption and financial loss have occurred in some victim organizations. Key actor: Handala Hack, an MOIS-affiliated persona, has claimed compromises against an Israeli energy exploration company, Jordan's fuel systems, and conducted healthcare pressure campaigns. CISA institutional capacity to support sector coordination has been materially reduced: \$707M in staffing cuts, the Critical Infrastructure Partnership Advisory Council shuttered, and Multi-State ISAC funding eliminated. CISA has issued advisory guidance for Rockwell Automation PLCs and similar devices.	
Analyst Assessment	<p>SUSTAINED CAMPAIGN: The Iranian ICS/OT campaign has been active since at least the 28-FEB 2026 Op Epic Fury launch. It represents a deliberate strategic choice to impose costs on the US at the infrastructure level while conventional military engagement continues in the Middle East. The campaign is calibrated to stay below the threshold for direct military retaliation.</p> <p>CISA CAPACITY GAP: The simultaneous reduction of CISA's capacity to support sector coordination through staffing cuts creates a structural vulnerability: the agency responsible for coordinating critical infrastructure cyber defense has reduced capability precisely when the threat is most elevated. This is the most significant institutional gap in the current threat environment.</p> <p>WATER/WASTEWATER RISK: WWS systems are particularly vulnerable: they operate PLCs that are often internet-facing for remote monitoring, have limited on-site cybersecurity expertise, and serve communities that cannot tolerate extended outages. Confirmed disruptions in WWS operations have already occurred.</p>	

	<p>TRIPWIRES: (1) Named-victim public disclosure for a US water utility; (2) Confirmed physical consequence (contamination, pump failure, dam control interference) from an ICS/OT attack; (3) CISA issuing an Emergency Directive for specific PLC vendor products; (4) Handala Hack or affiliated actor escalating to US targets beyond prior claimed operations.</p> <p>LIKELIHOOD: Disruptive ICS/OT incident affecting US utility in next 30 days: LIKELY.</p> <p>CONFIDENCE: MODERATE.</p>
SOURCES	<p>CISA-FBI Joint Advisory (Apr 7) Palo Alto Unit 42 - Handala Hack TechCrunch - Iranian hackers targeting CI CSIS - Iran cyber threat analysis</p>

<p>CYB-002 FBI SURVEILLANCE NETWORK BREACH - CHINESE APT - UNRESOLVED Phone numbers of surveillance targets potentially exposed</p>		<p>HIGH CONTINUED 14</p>
Why This Cycle	<p>No resolution reported. Major cyber incident designation maintained. Congressional notification has been filed. Breach represents a significant counterintelligence compromise.</p>	
Summary	<p>The FBI declared a "major cyber incident" in April 2026, providing legally required Congressional notification, after identifying that one of its domestic surveillance systems was compromised. The breach potentially exposed phone numbers of individuals under federal surveillance by federal agents. Chinese intelligence services have been attributed as the actor. The compromised network was unclassified but held sensitive surveillance target information. No resolution or remediation completion has been reported as of this cycle. TechCrunch analysis (07-JUN) identifies this as one of the worst hacks of 2026.</p>	
Analyst Assessment	<p>COUNTERINTELLIGENCE IMPACT: Exposure of surveillance target phone numbers enables an adversary to identify who is under US federal surveillance - a high-value intelligence windfall for a state actor. Chinese intelligence could use this data to identify sources, methods, and priority targets of US federal investigations.</p> <p>LIKELIHOOD: Public attribution to Chinese state actor confirmed: LIKELY. CONFIDENCE: MODERATE.</p>	
SOURCES	<p>TechCrunch - worst hacks 2026</p>	

<p>CYB-003 FIFA WORLD CUP 2026 - PRE-TOURNAMENT CYBER THREAT ELEVATED Tournament opens Jun 11 / 13,000+ malicious domains / 260 FIFA employee credentials compromised / Iran-affiliated hacktivist groups specifically flagged</p>		<p>HIGH NEW 15</p>
Why This Cycle	<p>Tournament opens June 11 (3 days from publication). Pre-tournament cyber threat window is open now. Multiple intelligence sources have issued specific warnings for this event cycle.</p>	
Summary	<p>Fortinet FortiGuard Labs has identified a substantial increase in cybercriminal activity between January and May 2026 targeting FIFA World Cup 2026 infrastructure. Key findings: 13,000+ FIFA-related domains newly registered (potential phishing/malware delivery); 260 FIFA employee credentials discovered in stealer log data; 270,000+ credentials from users of FIFA-related websites compromised. Canadian Centre for Cyber Security (CCCS) assessment: the FIFA World Cup 2026 "will almost certainly be targeted by a range of cyber threat actors including cybercriminals, non-state actors, and state-sponsored actors." Primary threats: ticket scams and credential harvesting; ransomware against ticketing and transportation infrastructure; Iran-affiliated hacktivist groups (per Rozin Security tactical bulletin 04-JUN and Canadian Cyber Centre advisory); malicious FIFA-related apps delivering malware; DDoS against match-day broadcast and ticketing systems. World Cup runs June 11 - July 19, 2026 across 16 cities in US, Canada, Mexico.</p>	
Analyst Assessment	<p>IRAN-SPECIFIC THREAT: Rozin Security and Canadian Cyber Centre both specifically flag Iran-affiliated hacktivist groups as a threat to tournament infrastructure, given the ongoing US-</p>	

Iran conflict context. Iran-related matches present the highest political motivation for disruption. The "Electronic Operations Room" (formed 28-FEB) coordinating hacktivist operations represents an organized capability that could be directed against tournament infrastructure.

CREDENTIAL COMPROMISE SCALE: 260 FIFA employee credentials in stealer logs represents a pre-positioned access risk. Attackers with legitimate FIFA employee credentials can conduct insider-threat-equivalent operations against tournament systems without triggering external intrusion detection.

OPENING MATCH RISK WINDOW: June 11 opening ceremony and first match represent peak risk: maximum global viewership, highest crowd density at venues, peak media attention, and maximum reputational impact of any disruption. This is the single highest-risk window of the tournament for both physical and cyber incidents.

LIKELIHOOD: Cyber incident targeting World Cup infrastructure in first 7 days of tournament: LIKELY. **CONFIDENCE:** MODERATE.

SOURCES

[Canadian Cyber Centre advisory](#) | [Fortinet FortiGuard Labs - World Cup threat report](#) | [Rozin Security - tactical bulletin 04-JUN](#) | [Security Magazine - World Cup cyber threats](#)

SECTION 4B - PHYSICAL / GEOPOLITICAL / IO

GEO-002 | UKRAINE - CHORNOBYL STRIKE / ISW LOGISTICS DISRUPTION / CRIMEA SHORTAGES / PEACE TALKS DEAD

HIGH | UPDATED | 15

Why This Cycle

Russian drone struck Chornobyl spent fuel storage 07-JUN (see FLASH NUC-001). ISW assessment 07-JUN confirms Ukraine's intermediate-range strike campaign is maturing. Zelenskyy-Putin direct talks proposed and rejected.

Summary

ISW 07-JUN assessment: Ukraine's intermediate-range strikes against Russian ground lines of communication (GLOCs) in occupied southern and eastern Ukraine are continuing to disrupt Russian logistics, and these operational effects will likely continue to mature in the near future. Gasoline shortages in occupied Crimea are worsening due to Ukrainian long and intermediate-range strikes. Occupied Crimea is starting to experience shortages of basic goods and supplies beyond gasoline. Ukraine's successful strike campaigns are generating discontent and panic in the Russian milblogger community. Russian forces struck two civilian search-and-rescue vessels in the Black Sea on 07-JUN. Diplomatic track: Zelenskyy proposed a face-to-face meeting with Putin via open letter 07-JUN, also offering a full ceasefire. Putin declined, stating he saw no point in such a meeting at this time. E3 summit (UK/France/Germany) held in London 07-09-JUN focused on European security, air defense cooperation, and continued support for Ukraine. US mediation focus has shifted to Middle East; the June deadline for a peace deal effectively passed.

Analyst Assessment

LOGISTICS DISRUPTION MATURITY: ISW's assessment that effects "will likely continue to mature" indicates Ukraine's strike campaign has not yet reached its full operational impact. Crimea shortages of basic goods beyond gasoline is a new threshold - this suggests the strikes are achieving strategic-level logistics effects, not just tactical disruption.

CHANGE FROM PRIOR: Chornobyl CSFSF strike is new this cycle (see NUC-001 FLASH). Crimea shortage reporting advancing beyond gasoline to basic goods is new. Zelenskyy-Putin direct talks rejection is new.

LIKELIHOOD: Formal peace agreement before end of June: VERY UNLIKELY.
CONFIDENCE: HIGH.

SOURCES

[ISW 07-JUN assessment](#) | [CBS News - Chornobyl/Russia strikes](#) | [Sunday Guardian - London summit](#)

GEO-003 | LEBANON CF DAY 9 - HEZBOLLAH REJECTS CEASEFIRE AGREEMENT / UNIFIL PEACEKEEPER KIA / IDF STRIKES CONTINUE

HIGH | UPDATED | 14

Why This Cycle

Hezbollah formal rejection of Israel-Lebanon government ceasefire agreement is new this cycle. UNIFIL peacekeeper KIA is new. Active fighting continuing daily.

Summary

On 03-JUN, Israel and the Lebanese government announced a ceasefire agreement mediated by the US. Hezbollah leader Naim Qassem rejected it outright on 04-JUN: "We are concerned only with a comprehensive cessation of aggression, a ceasefire, and the withdrawal of Israel." A UNIFIL peacekeeper was killed by mortar fire in southeastern Lebanon on 04-JUN; other peacekeepers were wounded. The IDF continued striking Hezbollah facilities in southern Lebanon and Beirut suburbs on 04-05-JUN. Hezbollah conducted rocket attacks against IDF positions. Lebanon's Prime Minister Mikati stated the ongoing fighting is a war "that is not being fought for our sake, but on our land and at the expense of our people." Lebanon has formally banned military activities by Hezbollah - a ban Hezbollah has ignored. By mid-April 2026, 2,000+ had been killed in Lebanon and 1 million+ displaced since the conflict began escalating.

Analyst Assessment

CEASEFIRE FRAMEWORK ASSESSMENT: The Israel-Lebanon government agreement is operationally meaningless without Hezbollah buy-in. The Lebanese government does not control Hezbollah militarily. The CF Day 9 counter reflects the nominal framework only; active fighting has continued throughout this period.

CHANGE FROM PRIOR: Hezbollah ceasefire rejection is new this cycle. UNIFIL peacekeeper KIA is new.

LIKELIHOOD: Genuine Lebanon ceasefire within 14 days: UNLIKELY. **CONFIDENCE:** MODERATE.

SOURCES

[NPR - Hezbollah rejects ceasefire](#) | [Time - Hezbollah rejects deal](#)

SECTION 5 - ENERGY / INFRASTRUCTURE / SUPPLY CHAIN

ENERGY / INFRASTRUCTURE MONITORS - 09 JUNE 2026

ENR-001 OIL / ENERGY PRICES: WTI \$93.63/bbl (09-JUN spot, +3.41% session). Brent ~\$106/bbl May-Jun avg (EIA STEO May). Brent peaked \$138/bbl April 7. EIA STEO (May 12) expects Brent to fall to \$89/bbl Q4 2026, \$79/bbl 2027, as Hormuz flows resume. OPERATOR NOTE: EIA STEO June 9 release tomorrow - monitor for updated Hormuz assumptions and demand revision. AAA retail gas ~\$4.00/gal (EIA est). Diesel \$4.80/gal avg 2026. US families estimated to have paid ~\$100B additional costs from military spending and higher oil prices (Fortune). Economy-wide inflation elevated to highest level in nearly 3 years per Fed data.

ENR-002 GRID STATUS: No major grid disturbances identified this cycle. National Grid (Northeast US): ~944 routine customer outages 07-JUN - normal operations baseline. OPERATOR NOTE: G3 watch cancelled 08-JUN; no elevated GIC risk today. Standard monitoring applies in northern-tier states (MN, WI, MI, NY, NE, ID, MT, ND, SD). Grid operators should monitor for induced currents. NRC: Millstone Unit 2 (Connecticut) initiated technical-specification-required shutdown 04-JUN due to control element assembly misalignment - classified Non Emergency, routine TS action.

ENR-003 MARITIME SUPPLY CHAIN: Baltic Capesize BCI C3 charter rates firmed to \$36.90/mt by end of week 05-JUN after strong ECSA/West Africa to China activity drew down prompt tonnage. Panamax market continued upward trend. Container rates elevated on Asia-US corridors; DHL launched dedicated Asia-US widebody 777F service 01-JUN (three flights/week, Hanoi-Taipei-Anchorage-Chicago-Cincinnati) as direct response to Hormuz ocean freight disruption. Panama Canal: operating normally. Suez Canal: operating; some carriers maintaining Cape of Good Hope routing.

SECTION 6 - AVIATION / TRANSPORTATION

AVIATION / TRANSPORTATION MONITORS - 09 JUNE 2026

AVN-001 MIDDLE EAST / HORMUZ AIRSPACE: Iran-conflict routing disruptions remain in effect. Air Canada, Lufthansa Group, and KLM have reduced Europe schedules for June 2026. Gulf region carrier recovery is uneven. Dubai availability varies by carrier. American Airlines suspending some summer routes due to jet fuel cost increases. IATA 82nd AGM held Rio de Janeiro 06-09-JUN; industry setting priorities in one of the most complex operating environments in recent years. Transpacific and Europe routes have reduced seat capacity vs. summer 2025.

AVN-002 WORLD CUP TRANSPORTATION SECURITY: World Cup 2026 opens June 11 across 16 cities in US, Canada, Mexico. Andrew Giuliani (White House FIFA Task Force): "This entire country's police force is leaning in. It is an unbelievable problem set." Philadelphia deploying sanitation vehicles to block intersections as vehicle-as-weapon mitigation. Airport security enhanced at tournament city airports. No specific credible threat identified as of publication. See also STSB-001 (SEC 11) for full soft target assessment.

SECTION 7 - METEOROLOGICAL WEATHER / SEVERE WEATHER

WX-001 | SPC DAY 1 CONVECTIVE OUTLOOK - 09-JUN-2026 | SLIGHT RISK: Central Plains / Front Range | 2"+ hail / 70+ mph wind / Isolated tornadoes NE Colorado through central Kansas today

HIGH | ACTIVE | 15

SALUTE

SPC Outlook Text

SPC Day 1 Outlook valid 081200Z-091200Z (issued 0100 AM CDT Mon Jun 08 2026): THERE IS A SLIGHT RISK OF SEVERE THUNDERSTORMS ACROSS PARTS OF THE CENTRAL PLAINS. Scattered thunderstorms with large to very large hail, severe wind gusts potentially above 70 mph, and a few tornadoes will be possible today from the Front Range east-southeastward into the central Plains. Isolated severe gusts and hail also possible in parts of the southern High Plains, northern Plains and mid Mississippi Valley. An isolated hail threat may develop toward the end of the period in the northern High Plains. Source: NOAA Storm Prediction Center, spc.noaa.gov

NWR COMPOUND NOTE

KS Ulysses WXN81 is OUT OF SERVICE in the Dodge City KS office area. This transmitter covers Grant, Stanton, and Haskell counties KS - within the central Plains severe weather threat zone today. Residents in SW Kansas should rely on WEA-capable mobile devices and FEMA App as primary alerting backup. See NWR table below for full outage roster.

Analyst Assessment

SUPERCCELL ENVIRONMENT: MLCAPE 2000-4000 J/kg combined with 0-6 km shear of 40-55 knots supports a supercell-favorable environment in both the Front Range and central Kansas zones. This is a legitimate severe weather threat requiring practitioner attention today.

SPACE WEATHER NOTE: G3 geomagnetic storm watch was CANCELLED 08-JUN 2117 UTC. No compound HF degradation concern today. Electron flux alert (ALTEF3) remains active but this is a satellite/GPS concern, not HF. EMCOMM operators: standard HF propagation expected today for the storm zone.

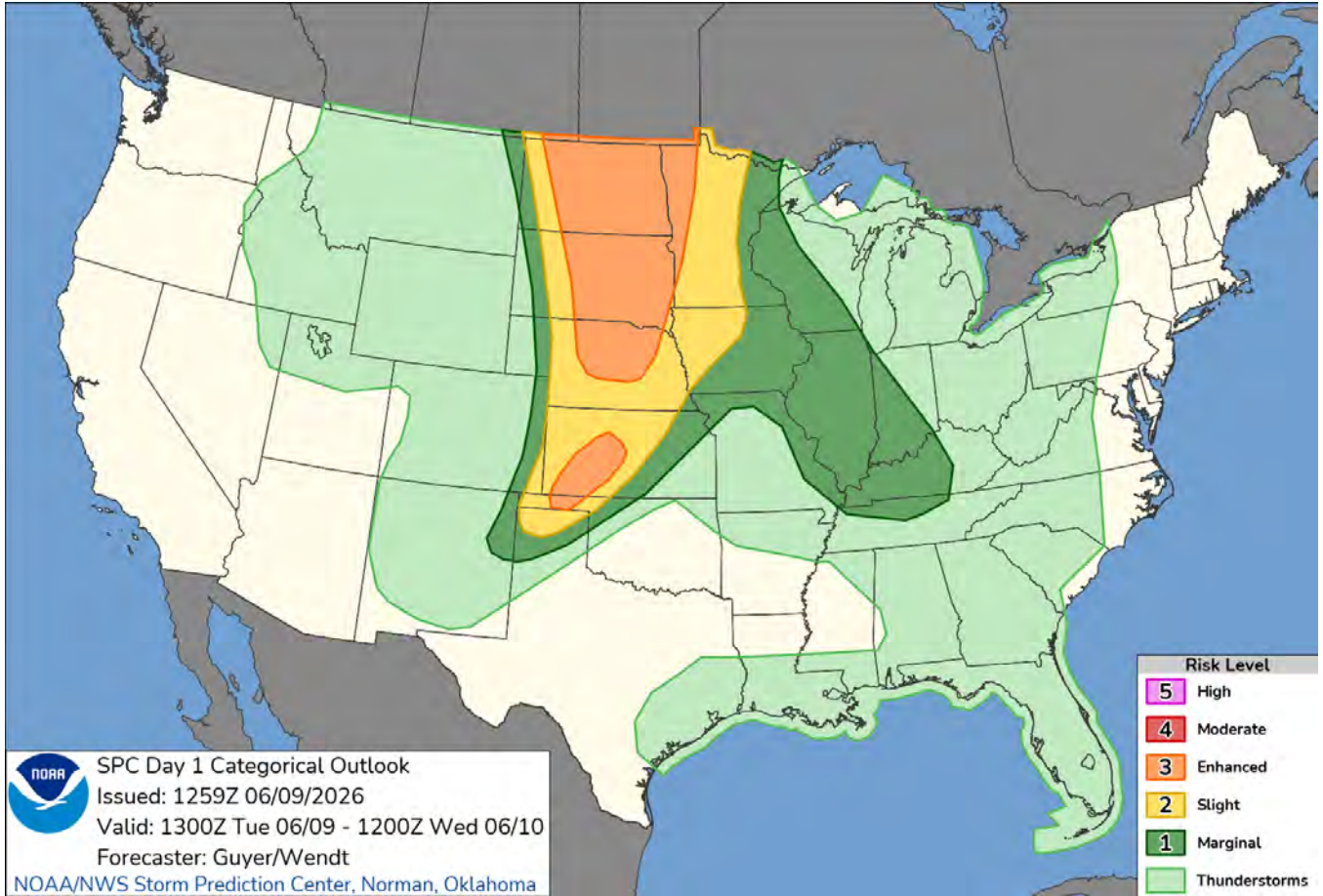
NWR OVERLAP: KS Ulysses WXN81 OOS sits in the threat zone. No critical Illinois or Indiana NWR gaps align with today's secondary risk areas. The Mid-Mississippi Valley risk zone (western KY/southern IL) has no major NWR outages confirmed this cycle.

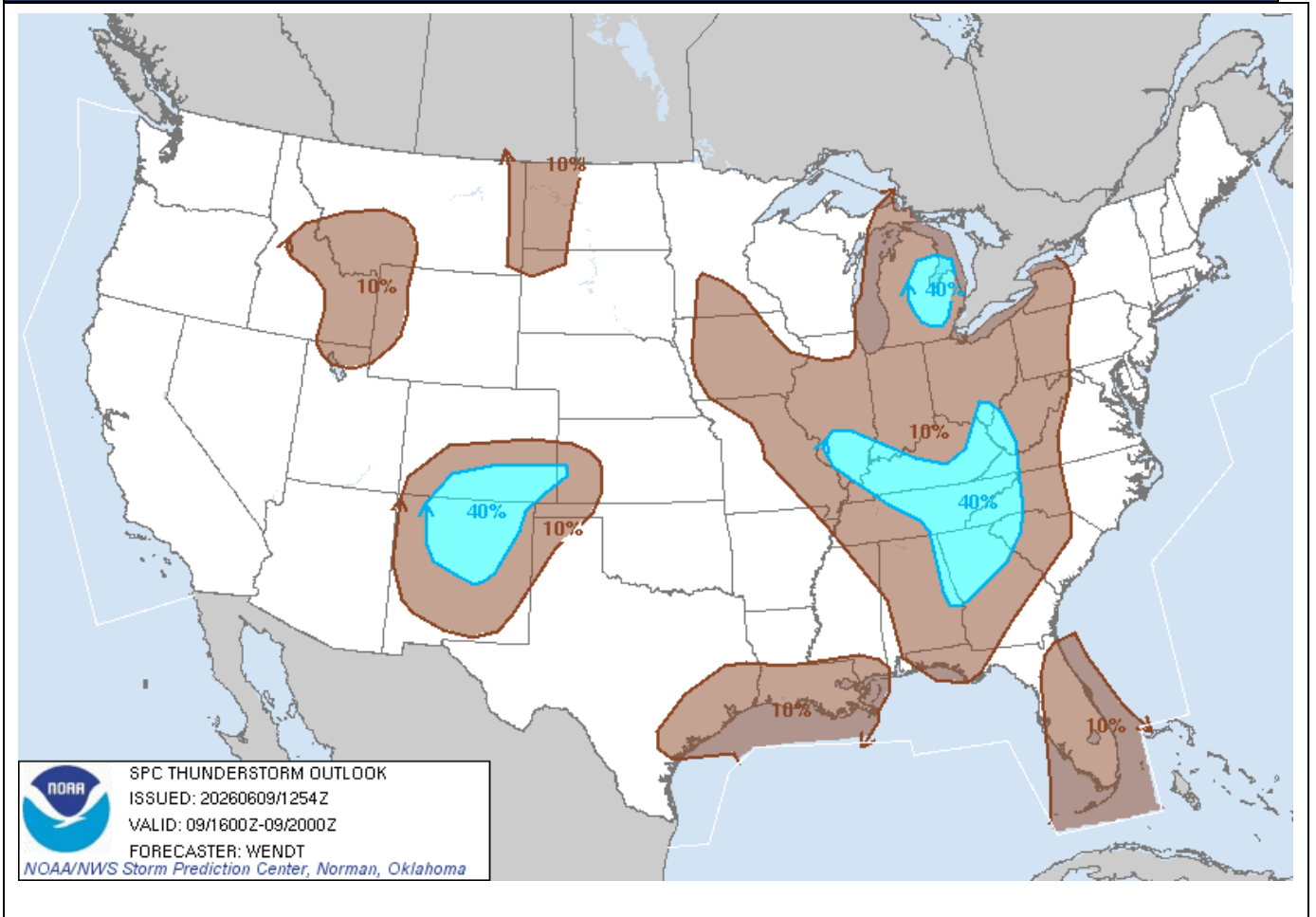
LIKELIHOOD: Tornado touchdowns today in NE Colorado or central Kansas: ROUGHLY EVEN CHANCE. **CONFIDENCE:** MODERATE.

LIKELIHOOD: Significant hail (2-inch+) damage today in CO/KS corridor: **LIKELY.**
CONFIDENCE: MODERATE.

SOURCES

[NOAA SPC Day 1 Outlook](#) | [NWS Dodge City KS](#) | [NWS Denver CO](#) | [NOAA NHC - no active Atlantic TC this cycle](#)





NWR TRANSMITTER OUTAGE STATUS - 09 JUNE 2026

Source: weather.gov/nwr/outages | Operator-supplied 09-JUN-2026 per SOP §0.92 | 15 OUT OF SERVICE | 15 DEGRADED | Multiple states

▲ HIGH-GAP ALERT - ACTIVE HAZARD OVERLAP: (1) SEVERE WEATHER + NWR GAP TODAY: KS Ulysses WXN81 OOS sits within the SPC Slight Risk central Kansas threat zone (Grant/Stanton/Haskell counties). Residents in SW Kansas: use WEA mobile alerts and FEMA App as primary alerting. (2) NM TRIPLE-GAP + ACTIVE FIRE SEASON: Roswell WWG36 + Carlsbad WWF37 + Artesia WXN24 all OOS - Chaves and Eddy counties with zero primary NWR coverage during active wildfire and Stage 1 fire restriction period. (3) AK JUNEAU CLUSTER: 12 transmitters DEGRADED in SE Alaska Juneau forecast area. Cause unknown; may reflect ongoing NWS transmitter upgrade activity or equipment issues. Monitor weather.gov/nwr for status updates.

ST	Callsign	Location	Freq	WFO	Status	Counties / Notes
AK	KZZ96	Gravina Island	162.525	Juneau AK	DEGRADED	Ketchikan Gateway, SE Alaska - JUNEAU CLUSTER
AK	KZZ88	Cape Fanshaw	162.425	Juneau AK	DEGRADED	Wrangell, SE Alaska - JUNEAU CLUSTER
AK	KZZ86	Althorp Peak	162.425	Juneau AK	DEGRADED	Skagway/Hoonah/Angoon, SE Alaska - JUNEAU CLUSTER
AK	KWN30	Kotzebue	162.550	Fairbanks AK	DEGRADED	Northwest Arctic Borough, AK
AK	KZZ95	Mt. McArthur	162.525	Juneau AK	DEGRADED	Haines/Skagway area, SE Alaska - JUNEAU CLUSTER

FORTUNE FAVORS THE PREPARED | DAILY THREAT REPORT | 09 JUNE 2026 | PREP-CON 4 INCIDENT POSSIBLE | HORMUZ BLOCKADE Day 58 | Op Epic Fury Day 101 | Lebanon CF Day 9 | 2MeV ELECTRON FLUX ALERT

ST	Callsign	Location	Freq	WFO	Status	Counties / Notes
AK	KZZ92	Duke Island	162.450	Juneau AK	DEGRADED	Prince of Wales-Hyder, SE Alaska - JUNEAU CLUSTER
AK	WNG714	Sand Point	162.550	Anchorage AK	OUT OF SERVICE	Aleutians East Borough, AK
AK	KZZ89	Sukkwani Island	162.425	Juneau AK	DEGRADED	Prince of Wales-Hyder south, SE Alaska - JUNEAU CLUSTER
AK	WZ2555	Duffield Peninsula	162.525	Juneau AK	DEGRADED	Sitka area, SE Alaska - JUNEAU CLUSTER
AK	KZZ91	Zarembo Island	162.450	Juneau AK	DEGRADED	Wrangell/Petersburg, SE Alaska - JUNEAU CLUSTER
AK	KAD96	Manleyville	162.500	Juneau AK	DEGRADED	SE Alaska - JUNEAU CLUSTER
AK	KZZ87	Mt. Robert Barron	162.450	Juneau AK	DEGRADED	Juneau/Douglas, SE Alaska - JUNEAU CLUSTER
GA	WXM65	Baxley	162.525	Jacksonville FL	OUT OF SERVICE	Appling/Pierce/Wayne/Jeff Davis counties, GA
IA	WXL61	Cedar Rapids	162.475	Quad Cities IA	OUT OF SERVICE	Linn/Jones/Iowa counties, IA - NEW THIS CYCLE
IL	KXI79	Hillsboro	162.425	St. Louis MO	OUT OF SERVICE	Montgomery/Bond/Fayette/Macoupin counties, IL
IN	KXI94	Angola	162.425	Northern Indiana IN	DEGRADED	Steuben/DeKalb/LaGrange counties, IN - was OOS prior cycle
KS	WXN81	Ulysses	162.450	Dodge City KS	OUT OF SERVICE	Grant/Stanton/Haskell counties, KS - WITHIN TODAY SPC ENHANCED RISK ZONE
KS	WXL71	Abilene	162.525	Topeka KS	OUT OF SERVICE	Dickinson/Marion/Morris counties, KS - NEW THIS CYCLE
MD	KEC83	Baltimore	162.400	Baltimore/Washington VA	OUT OF SERVICE	Baltimore metro area, MD - NEW THIS CYCLE
ME	WNG547	Sugarloaf Mtn	162.450	Gray/Portland ME	OUT OF SERVICE	Franklin/Somerset counties (high terrain), ME
MI	WNG572	Petoskey	162.475	Gaylord MI	OUT OF SERVICE	Emmet/Charlevoix/Cheboygan counties, MI
MN	KXI45	Gunflint Lake	162.525	Duluth MN	OUT OF SERVICE	Cook County / BWCAW area, MN
NM	WXN24	Artesia	162.425	Midland/Odessa TX	OUT OF SERVICE	Eddy County (alt)/Chaves County, NM - NM TRIPLE-GAP
NM	WWG36	Roswell	162.450	Albuquerque NM	OUT OF SERVICE	Chaves/Lincoln counties, NM - NM TRIPLE-GAP
NM	WWF37	Carlsbad	162.475	Midland/Odessa TX	OUT OF SERVICE	Eddy County, NM - NM TRIPLE-GAP
NV	WNG731	Owyhee	162.450	Elko NV	DEGRADED	Elko County NE NV - NEW THIS CYCLE
OR	KIG98	Portland	162.550	Portland OR	DEGRADED	Portland metro area, OR
TN	WXK63	Shelbyville	162.475	Nashville TN	OUT OF SERVICE	Bedford/Marshall/Coffee counties, TN
TX	WNG601	Rio Grande City	162.425	Brownsville/Rio Grande Valley TX	OUT OF SERVICE	Starr County, TX

SOURCE: NWR transmitter outage data operator-supplied 09-JUN-2026 per SOP §0.92. 30 transmitters affected: 15 OUT OF SERVICE / 15 DEGRADED

SECTION 7B - WILDFIRE / FIRE WEATHER

<p>WX-002 FIRE WEATHER - 09-JUN-2026 NPL 2 / 8 uncontained large fires / Season 195% of 10-yr avg / Elevated conditions Southwest and Rocky Mountain region</p>		<p>HIGH ACTIVE 12</p>
<p>National Status</p>		
<p>SPC Fire Weather</p>		
<p>Active Fire Areas</p>	<p>NEW MEXICO: Seven Cabins Fire (Capitan Mountain Wilderness, Lincoln County): 90% contained at ~31,800 acres. ~500 personnel. No evacuation orders. Suppression/repair operations ongoing. NM triple-gap NWR (Artesia WXN24/Roswell WWG36/Carlsbad WWF37 all OOS) leaves Chaves and Eddy counties without primary NWR alerting during active fire season. NM Stage 1 fire restrictions statewide.</p> <p>WYOMING: Porcupine Creek Fire (Campbell County): 2,490 acres, uncontained. Southeastern Wyoming grassland fire; no structures threatened per last report. Dry conditions and grassland fuel continuity support continued spread risk.</p> <p>ARIZONA: Havasu Fire (Mohave County): 3,868 acres. Hazen Fire (Maricopa County): 1,191 acres. Both burning in desert scrub/Sonoran desert fuel types near the lower Colorado River corridor. Monitor for infrastructure proximity (power transmission lines, water delivery infrastructure).</p> <p>CALIFORNIA: Border 6 Fire (San Diego County): 100% contained 09-JUN at 2,525 acres. Season outlook: elevated risk builds through summer with peak potential in fall (September-November). CAL FIRE pre-position resources in place for high-risk periods.</p> <p>NATIONAL FORESTS: Multiple national forest and USFS-managed lands under Stage 1 or Stage 2 fire restrictions in the Southwest. Contact local ranger district before any backcountry operations.</p>	
<p>Analyst Assessment</p>	<p>SEASON TRAJECTORY: At 195% of the 10-year average for acres burned with NPL at 2 of 5, the 2026 fire season is running significantly above historical norms. Sustained drought across the Southeast (99% in drought) and Southwest, combined with above-normal temperatures, supports continued elevated risk. The season peak in the Rocky Mountain and Pacific Northwest regions typically arrives July-August; current indicators suggest that peak may arrive earlier or with greater intensity.</p> <p>IPAWS/NWR GAPS IN FIRE COUNTRY: The NM triple-gap NWR outage (all three transmitters covering Chaves/Eddy/Lincoln counties OOS) is specifically notable given Seven Cabins Fire activity in Lincoln County and active fire restrictions. Residents and firefighting operations in this area must rely on WEA mobile alerts, FEMA App, and radio broadcast EAS exclusively.</p> <p>WIND EVENT WATCH: Today's Plains severe weather system (WX-001) may produce outflow boundaries that generate damaging wind events in adjacent fire-prone terrain, particularly in southern Colorado, northeastern New Mexico, and the Texas/Oklahoma Panhandle. Spot fire ignition risk elevated in these zones during and after the severe weather event.</p> <p>LIKELIHOOD: Wind-driven fire run in NM/CO/OK-TX Panhandle adjacent to today's storm outflow: ROUGHLY EVEN CHANCE. CONFIDENCE: MODERATE.</p> <p>LIKELIHOOD: National Preparedness Level escalation to NPL 3 before end of June: ROUGHLY EVEN CHANCE. CONFIDENCE: MODERATE.</p>	
<p>SOURCES</p>	<p>NIFC National Situation Report SPC Fire Weather Outlook InciWeb Active Incidents USFS Active Fire Mapping Program</p>	

WILDFIRE STATUS - 09 JUNE 2026

FIRE-001 SEVEN CABINS FIRE (NM): 90% contained as of 07-JUN. Size stable at ~31,800 acres (Capitan Mountain Wilderness, Lincoln County). ~500 firefighters on scene. No evacuation orders currently. Fire started 14-MAY, linked to medical transport plane crash (4 killed). Cause not yet officially determined. Temporary flight restriction in effect - unauthorized drone use grounds aerial operations. Suppression repair and chipping operations ongoing. NM Stage 1 fire restrictions in effect statewide. NM triple-gap NWR (Artesia/Roswell/Carlsbad all OOS) continues during this active fire. Residents should use WEA mobile alerts. Contact: 505-217-0120 / 2026.SevenCabins@firenet.gov

FIRE-002 BORDER 6 FIRE (CA): 100% contained as of 09-JUN morning. Final size: 2,525 acres (near US-Mexico border, San Diego County). Ignited 01-JUN. Cal Fire C-130 from Ramona Air Attack Base was deployed. No structures destroyed, no casualties. Contained within 7 days. Birch Bay Fire (MN, St. Louis County): 33 acres, 100% contained 06-JUN.

FIRE-003 NATIONAL OUTLOOK: NIFC National Preparedness Level 2 (scale 1-5). 8 uncontained large fires nationally as of 06-JUN. Season running at 140% of fires and 195% of acres-burned vs. 10-year average. AccuWeather 2026 forecast: 65,000-80,000 fires; 5.5-8 million acres burned. Highest summer risk: Southwest, Great Basin, Rockies, Northwest. California risk builds through summer with peak possible in fall. Wyoming active fires: Porcupine Creek (Campbell County, 2,490 acres) and other smaller fires noted. Arizona: Havasu Fire (Mohave County, 3,868 acres) and Hazen Fire (Maricopa County, 1,191 acres).

SECTION 7C - SPACE WEATHER & EMCMM

<p>SWX-001 G3 WATCH CANCELLED 08-JUN 2117 UTC (WATA50 SER 100) 2MeV ELECTRON FLUX ALERT CONTINUED - 1315 pfu yesterday GPS accuracy reduction higher latitudes Elevated electron flux persists</p>		<p>WATCH UPDATED 12</p>
SWPC Notifications	<p>WATA50 Serial 100 (issued 2117 UTC 08-JUN): CANCELLED WATCH - Geomagnetic Storm Category G3 Predicted. Cancels Serial 99 (G3 watch 08-JUN) and Serial 99 (G2 watch 09-JUN). Reason: current conditions no longer reflecting CME influence. G3 and G2 watches are CANCELLED. ALTEF3 Serial 3698 (issued 1141 UTC 09-JUN): CONTINUED ALERT - Electron 2MeV Integral Flux exceeded 1000 pfu. Continuation of Serial 3697. Begin Time: 07-JUN 1143 UTC. Yesterday Maximum 2MeV Flux: 1315 pfu (down from 2874 pfu peak 07-JUN). ALTEF3 Serial 3697 (issued 0516 UTC 08-JUN): Continued alert, yesterday max 2874 pfu (peak reading). Electron flux event ongoing, storm watches cancelled. Station: GOES-18.</p>	
Why This Cycle	<p>G3 geomagnetic storm watch was CANCELLED 08-JUN 2117 UTC (WATA50 Serial 100) - the CME did not materialize as forecast. The 2 MeV electron flux alert remains active (Serial 3698, continued as of 1141 UTC 09-JUN). Yesterday maximum 1315 pfu. GPS accuracy reduction at higher latitudes remains in effect. Primary operational concern this cycle is the continued electron flux event, not a geomagnetic storm.</p>	
Summary	<p>NOAA SWPC cancelled the G3 (Strong) geomagnetic storm watch for 08-JUN and the G2 (Moderate) watch for 09-JUN at 2117 UTC on 08-JUN (WATA50 Serial 100). Reason: current conditions no longer reflecting CME influence - the expected CME arrival did not produce forecast storm levels. Despite the storm watch cancellation, the 2 MeV electron flux alert (ALTEF3) remains active: the flux exceeded 1000 pfu beginning 07-JUN 1143 UTC, peaked at 2874 pfu on 07-JUN, and registered 1315 pfu yesterday (08-JUN) per Serial 3698 issued 09-JUN 1141 UTC. The electron flux event is a continuing operational concern for satellite operators, GPS users at higher latitudes, and HF radio operators. No significant geomagnetic storm in progress.</p>	
Operational Impacts	<p>HF RADIO (09-JUN): Weak to minor degradation on sunlit side. Occasional loss of radio contact. EMCMM operators: 40m (7 MHz) and 60m (5 MHz) are more robust than 20m-10m</p>	

<p>HF Band Assessment</p>	<p>during G3 conditions. Verify propagation via PSKReporter before committing HF to emergency communications. This HF degradation coincides with active severe weather in the central Plains (WX-001) - emergency managers should plan for HF backup degradation.</p> <p>GPS / NAVIGATION: GPS accuracy reduction, especially higher latitudes and polar routes. Low-frequency navigation signal degradation possible for brief intervals. Aviation precision approaches may be affected at higher latitudes. Check GPSJam.org (linked below) for real-time GPS interference data.</p> <p>POWER GRID: Voltage irregularities possible in northern-tier states (MN, WI, MI, NY, NE, ID, MT, ND, SD) due to geomagnetically induced currents (GIC). Most grid operators have GIC monitoring and mitigation protocols. No emergency-level grid event expected but operators should monitor throughout the day.</p> <p>SATELLITE OPERATIONS: Increased atmospheric drag requiring orbit adjustments for LEO satellites. Satellite operators advised of elevated conditions. GOES-18 continues as primary space weather monitor.</p> <p>AURORA: Northern lights potentially visible at unusually southern US latitudes under G3 conditions. Clear dark sky locations in northern-tier states may see aurora display tonight. Not operationally significant but situationally notable.</p> <p>160m/80m (1.8/3.5 MHz): FAIR to GOOD - Most robust bands during G3. Regional EMCOMM viable. 60m (5 MHz): GOOD - PRIMARY EMCOMM TODAY. Channel: 5330.5 kHz USB. Best resilience during storm. 40m (7 MHz): GOOD - RECOMMENDED primary EMCOMM (0-800 km NVIS). Verify via PSKReporter. 20m (14 MHz): FAIR - Disruption possible. Not primary EMCOMM today. 15m-10m (21-28 MHz): POOR to FAIR - Expect disruption. Not suitable for emergency communications today. POLAR ROUTES: DEGRADED - G3 conditions create absorption and delay on polar paths. Avoid for emergency communications.</p>
<p>Analyst Assessment</p>	<p>SEVERE WEATHER TODAY: SPC Enhanced Risk in effect today - central/northern Plains. Strong MCS developing this afternoon. NE North Dakota strong tornado risk (SRH 250-300). Central Kansas: large hail, severe wind, isolated tornadoes. No compound HF concern (G3 watch cancelled). Emergency managers: standard WEA/NWR alerting; KS Ulysses NWR OOS - use WEA mobile in that corridor.</p> <p>G3 WATCH CANCELLATION NOTE: WATA50 Serial 100 (08-JUN 2117 UTC) cancelled the G3 and G2 watches because current conditions no longer reflected CME influence. The CME from the 06-JUN M1.8 flare (AR4461) did not produce forecast geomagnetic storm levels. The electron flux event (ALTEF3) is separate from the geomagnetic storm watch and remains active. Monitor SWPC for any further AR4461 activity.</p> <p>CONFIDENCE: HIGH on G3 watch cancellation - WATA50 Serial 100 is a T1 SWPC notification directly operator-supplied. HIGH on 2MeV electron flux continued alert - ALTEF3 Serial 3698 is T1 SWPC, issued this morning. Storm did not materialize as forecast; electron flux watch persists.</p> <p>LIKELIHOOD: Significant geomagnetic storm (G2+) in next 24 hours: UNLIKELY - G3 watch cancelled, CME did not arrive. CONFIDENCE: HIGH.</p> <p>LIKELIHOOD: Electron flux alert continuing through June 10: LIKELY - multi-day event in progress. CONFIDENCE: MODERATE.</p>
<p>SOURCES</p>	<p>NOAA SWPC main portal SWPC Real-Time Solar Wind SWPC Planetary K-index GPSJam real-time interference map SWPC HF Radio Impacts SpaceWeatherLive</p>

SECTION 8 - AGRICULTURE / FOOD & SUPPLY CHAIN

<p>AGR-001 AGRICULTURE / FOOD SECURITY - DROUGHT + HORMUZ FERTILIZER DISRUPTION + ELEVATED SEASON 61% CONUS in drought / 31,511 fires YTD / Urea +46% MoM</p>	<p>HIGH CONTINUED 12</p>
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Why This Cycle	NIFC reports fire season running at 140% of 10-year average for fires and 195% of average for acres burned as of 06-JUN. Southeast drought is at record levels. Hormuz disruption has materially increased fertilizer costs. Global food insecurity escalating.
Summary	NIFC (06-JUN): 31,511 wildfires reported YTD - 140% of 10-year average. 2.47 million acres burned YTD - 195% of prior 10-year average. National Preparedness Level 2 of 5. Nearly 61% of CONUS remains in drought (late May USDA). Southeast drought: 99% of the Southeast in drought, with 62% in severe to exceptional drought. GA, NC, SC have experienced record dry conditions Sep 2025 - Mar 2026 (records to 1895). FERTILIZER/HORMUZ IMPACT: Disruptions to fertilizer flows through the Strait of Hormuz drove a 46% month-on-month rise in urea prices and increased agricultural price indices by 8% (WFP analysis). World Bank projects fertilizer prices up 31% avg in 2026 - least affordable since 2022. FOOD PRICES: USDA revised food-at-home inflation to 3.1% for 2026, nearly double start-of-year projection. CPI food-at-home up 3.2% year-over-year April 2026. Beef prices projected up 9.4% (as high as 16.6% per USDA range). GLOBAL FOOD INSECURITY: World Bank/WFP/IMF joint statement Apr 8: Hormuz disruption creating risk of global affordability crisis. 52.9 million people projected acutely food insecure in West and Central Africa during June-August 2026 lean season.
Analyst Assessment	<p>COMPOUNDING STRUCTURE: The combination of drought, above-average fire season, Hormuz-driven fertilizer cost increases, and elevated fuel costs (transportation and mechanized agriculture) creates a structural compounding risk to 2026 harvest projections that will not resolve within this cycle.</p> <p>SOUTHEAST DROUGHT SEVERITY: The SE drought at record levels (records to 1895) for the Sep 2025 - Mar 2026 period represents an exceptional multi-month agricultural disruption. Combined with reduced NWR coverage across the Southeast (NC Ellerbe OOS, GA Baxley OOS), the region has compound infrastructure and informational gaps.</p> <p>GLOBAL FOOD SECURITY TRAJECTORY: The WFP March forecast that 45 million people could become acutely food insecure if oil prices remain ~\$100/bbl through June is now unfolding. Brent has remained above \$100/bbl for the entire period since April. The food security impact of the Hormuz crisis will lag the energy impact by months.</p>
SOURCES	NIFC National Situation Report USDA ERS Food Price Outlook World Bank commodity prices USDA NIDIS Drought Monitor

SECTION 9 - PUBLIC HEALTH

PHS-002 EBOLA PHEIC ACTIVE - DRC/UGANDA Bundibugyo virus / 378 confirmed cases / 88 deaths / No approved vaccine / US travel restrictions active		HIGH CONTINUED 14
Why This Cycle	Active WHO PHEIC. US travel restrictions in effect for DRC, Uganda, and South Sudan. No approved vaccine or treatment exists for Bundibugyo virus (different strain from prior Zaire ebolavirus outbreaks). New: Listeria requesón alert and Salmonella moringa alert from CDC.	
Summary	<p>An epidemic of Bundibugyo virus disease (BVD), a type of Ebola disease, is centered in Ituri Province, DRC, and has spread to Uganda. The WHO declared a PHEIC on 16-MAY-2026. As of 02-JUN: 378 confirmed BVD cases, 63 deaths per MMWR. Over 1,262 suspected cases reported as of 29-MAY. True scale likely considerably higher due to poor healthcare infrastructure in Ituri Province and ongoing armed conflict that hinders detection and response. This is the 17th Ebola outbreak in DRC history. KEY TREATMENT GAP: No vaccines or medications have been approved for Bundibugyo virus. Existing Ebola treatments (mAb114, REGN-EB3) were developed for Zaire ebolavirus - a different strain. This materially complicates response compared to prior DRC outbreaks. US RESTRICTIONS: CDC prohibited non-Americans who have been in DRC, Uganda, or South Sudan in the preceding 21 days from entering the US for 30 days (effective 18-MAY). US citizens and residents from those three countries must enter only via Washington Dulles (IAD). Travel ban extended to green</p>	

	<p>card holders 22-MAY. US CDC risk to US population: LOW - extremely low likelihood of transmission, despite high impact if cases arrive. A US physician in DRC tested positive and was airlifted to Germany for treatment. RESPONSE: Africa CDC and WHO launched joint \$518M 6-month continental response plan covering June-November 2026 under "One Response" approach. ADDITIONAL CDC ACTIVE ALERTS: Listeria outbreak linked to requesón/soft ricotta cheese (05-JUN warning - avoid these products). Salmonella illnesses linked to moringa leaf products (growing number - 27-MAY advisory). Respiratory: COVID-19, flu, RSV all at LOW activity nationally as of 05-JUN.</p>
<p>Analyst Assessment</p>	<p>WORLD CUP INTERSECTION: The World Cup opens June 11 and runs through July 19 across 16 cities in US/Canada/Mexico. DRC and Uganda are not participating nations. However, the CDC DHS travel restrictions on Ebola-region nationals entering the US may create friction for fans traveling from or through the region. Monitor for any case export to tournament host cities.</p> <p>LISTERIA NOTE: The requesón/soft ricotta Listeria outbreak is a direct household preparedness concern. Listeria is particularly dangerous for pregnant women, elderly, immunocompromised individuals. Avoid consuming requesón or soft ricotta until recall status is clarified.</p> <p>LIKELIHOOD: Ebola cases detected in US in next 30 days: VERY UNLIKELY (CDC assessed LOW risk). CONFIDENCE: MODERATE.</p>
<p>SOURCES</p>	<p>CDC Ebola update 05-JUN WHO Africa CDC joint response plan CDC newsroom - Listeria + Salmonella alerts CDC respiratory status 05-JUN</p>

SECTION 10 - OPERATIONAL CONDITIONS ASSESSMENT

PREP-CON 4 Incident Possible

Maintained from prior cycle

BASIS: Op Epic Fury Day 101 with active kinetic ceasefire exchanges (GEO-001). Iran-affiliated APT conducting confirmed disruptions of US critical infrastructure ICS/OT systems (CYB-001). Russia struck Chernobyl spent fuel storage (NUC-001). Philippines M7.8 32+ KIA active mass-casualty response (PHS-001). G3 geomagnetic storm in effect today. Lebanon CF collapsed with Hezbollah rejecting framework (GEO-003). World Cup soft-target window opens June 11 (STSB-001). Ebola PHEIC active DRC/Uganda (PHS-002). Delaney Hall protests organized and escalating with counter-protest friction (DOM-001). No confirmed imminent domestic mass-casualty threat identified.

MOVEMENT ASSESSMENT

SUPPORTS STAYING AT 4: Simultaneous multi-domain threat activation across geopolitical, cyber, physical, weather, and public health domains is consistent with PREP-CON 4 sustain. No single threat has reached the Incident Probable threshold. Iranian kinetic activity remains within the ceasefire friction pattern rather than escalation to full operations. CSIS notes the munitions window may be deterring further Iranian escalation. The US domestic threat environment is organized but not yet producing mass-casualty events.

SUPPORTS MOVING UP TO 3: The simultaneous Chernobyl strike + ceasefire exchange + confirmed ICS/OT disruptions on 06-07-JUN represent the highest concurrent threat density this cycle. The "Electronic Operations Room" coordinating Iranian hacktivist operations is an organized multi-actor capability, not opportunistic activity. World Cup opening (Jun 11) creates a 39-day elevated mass-casualty window that has no precedent in this product cycle.

SUPPORTS MOVING DOWN TO 5: No plausible basis for downgrade. Multiple active FLASH-threshold events this cycle.

COMCON 4 Incident Possible	<p>LIKELIHOOD: PREP-CON movement to 3 (Incident Probable) in next 72 hours: UNLIKELY unless World Cup opening day incident or confirmed major ICS/OT utility outage. CONFIDENCE: MODERATE.</p> <p>Reference: fortunefavorstheprepared.com/preparedness-book-of-knowledge-2/planning/preparedness-conditions-prep-con/</p> <p>Iran-affiliated APT actively targeting US water, energy, and government ICS/OT systems with confirmed operational disruptions. FBI surveillance network breach (Chinese APT) unresolved. World Cup cyber pre-tournament window open - tournament begins June 11. CISA institutional capacity reduced by \$707M in staffing cuts; Critical Infrastructure Partnership Advisory Council shuttered. G3 watch cancelled; electron flux elevated but no HF compound. 30 NWR transmitters OOS/DEGRADED. 260 FIFA employee credentials in stealer logs represent pre-positioned insider-equivalent access risk.</p>
WX-CON 3 Enhanced Risk (ENH)	<p>SPC Enhanced Risk in effect today across central and northern Plains. Hazards: large to very large hail (2-inch+), wind gusts 60-80+ mph, tornadoes including potentially strong. Primary MCS developing this afternoon in central/northern Dakotas; moving east into Dakotas/Nebraska by evening. NE North Dakota: SRH 250-300 m2/s2 - strong tornado potential. Central Kansas: additional supercell threat. Peak window 1400-0200 local. KS Ulysses WXN81 OOS in central Kansas threat corridor. Electron flux active but no compound HF issue (storm watch cancelled).</p>
SWX-CON 2 Elevated Electron Flux	<p>G3 geomagnetic storm watch CANCELLED 08-JUN 2117 UTC (WATA50 Serial 100) - CME did not materialize as forecast. 2MeV electron flux alert continued (ALTEF3 Serial 3698): yesterday max 1315 pfu, down from 2874 pfu peak. GPS accuracy reduction at higher latitudes. Elevated atmospheric drag for LEO satellites. No geomagnetic storm in progress. Electron flux watch elevated status persists. Does not compound WX-CON 3 emergency communications.</p>

SECTION 11 - DOMESTIC UNREST / SOFT TARGET

DOM-001 DELANEY HALL (NEWARK NJ) ICE PROTESTS - Day 17+ / 80+ ARRESTED / ORGANIZED CAMPAIGN / NJ AG + NEWARK SUITS FILED		HIGH CONTINUED 16
SALUTE		
Why This Cycle	Sustained organized campaign showing no signs of de-escalation. Legal track accelerating (NJ AG + city suits). State Police transition from federal ICE management of perimeter represents jurisdictional shift. Counter-protest element now present, introducing friction risk. Network is primed to replicate at other ICE facilities.	
Summary	Protests at the Delaney Hall ICE detention facility in Newark, NJ began on 22-MAY-2026 following reports of poor detainee conditions (inadequate food, medical neglect, one reported miscarriage without proper care). More than 80 arrests to date. NJ State Police replaced federal ICE officers at the perimeter on 01-JUN after Governor Sherrill cited unsafe conditions. Federal ICE agents agreed to stand down with state police assuming responsibility. The facility is privately operated by GEO Group under a \$1 billion ICE contract. Acting AG Todd Blanche has shared images of officer injuries online. NJ AG filed suit against GEO Group for refusing health inspector access. Newark Mayor Baraka filed suit for facility closure. Democratic congressional members who toured the facility reported dire conditions: small portions of spoiled food, unmet medical needs. Border Czar Tom Homan visited the facility over the weekend to observe conditions personally. GEO Group has dismissed criticisms as "a politically motivated campaign." Background: Mayor Baraka was arrested (May 2025) and Rep. McIver charged with	

assault during prior protests at the same facility. Four detainees escaped in June 2025 after an "uprising" inside; all were eventually apprehended.

Analyst Assessment

ORGANIZATION ASSESSMENT: The Delaney Hall protest campaign is organizationally coordinated, not spontaneous. The primary coordinator is Indivisible - the same national network that organized the No Kings protests (5M attendees June 2025, 7M October 2025, 8M March 2026). Documented tactics including rotating participant pools, rapid response training, corporate pressure campaigns, and sustained nightly operations match an advanced community organizing playbook.

LEGAL TRACK SIGNIFICANCE: The simultaneous NJ state AG suit and Newark city suit for facility access and closure represents a dual-legal-track escalation that is new to this particular campaign, though the model (litigation + protest) is established. If health inspectors gain access and document conditions consistent with detainee claims, political and legal pressure will compound significantly.

REPLICATION POTENTIAL: Indivisible and its network partners have demonstrated capacity to coordinate nationwide events rapidly. The Delaney Hall model is replicable at any of the 80+ private immigration detention facilities operating nationally. Monitor Denver, Chicago, and San Francisco ICE perimeters as highest-risk replication sites.

COUNTER-PROTEST ELEMENT: The emergence of pro-ICE counter-protesters at Delaney Hall on 07-JUN weekend introduces a new friction element that law enforcement must manage. Confrontations between organized anti-ICE and pro-ICE groups in a confined perimeter environment elevate the risk of violence beyond what either group alone would generate.

LIKELIHOOD: Violence exceeding current level at Delaney Hall in next 7 days: ROUGHLY EVEN CHANCE. **CONFIDENCE:** MODERATE.

LIKELIHOOD: Protest replication at additional ICE facilities in next 14 days: LIKELY. **CONFIDENCE:** MODERATE.

ALT HYP

ALT A: Campaign achieves regulatory access; inspection reveals conditions driving further legal/political action [LIKELY]

NJ AG suit has legal standing; health inspection authority is established; prior congressional tour found conditions consistent with detainee claims; political incentives for NJ officials to escalate.

✓ **Supporting Evidence:** GEO Group and federal government have legal tools to delay inspection access; Trump administration has consistently expanded detention capacity rather than reducing it.

✗ **Ruling-Out Evidence:**

ALT B: Sustained physical escalation; property destruction or serious casualty [ROUGHLY EVEN CHANCE]

Nightly confrontations with law enforcement creating escalation opportunities; counter-protest element now present; 80+ arrests with continuing nightly activity; prior Delaney Hall history includes detainee escape and facility "uprising."

✓ **Supporting Evidence:** Gov. Sherrill has explicitly tried to lower temperature; designated protest zones and checkpoints channel confrontations; most organizations prefer sustained legal pressure over escalatory violence as a strategic choice.

✗ **Ruling-Out Evidence:**

SOURCES

[PBS NewsHour - Delaney Hall explainer](#) | [ABC7NY - NJ AG suit](#) | [Just the News - Indivisible role](#) | [NPR - state police transition](#)

STSB-001 FIFA WORLD CUP 2026 - SOFT TARGET THREAT ELEVATED Tournament opens Jun 11 / DHS: "particularly high in soft areas outside stadiums" / Iran-affiliated hacktivist groups specifically named		HIGH NEW 16
SALUTE		
Analyst Assessment	<p>PRIMARY SOFT TARGET ENVIRONMENTS: CSIS assessment: fan zones, transit corridors to/from stadiums, hotel and restaurant districts in host cities, and queues outside stadium gates are the highest-risk environments. Access to these areas cannot be controlled by security perimeter protocols; they require mass public presence and are inherently difficult to harden.</p> <p>IRAN MATCH RISK: Rozin Security tactical bulletin 04-JUN: "Iran-related matches currently present some of the highest potential for politically motivated demonstrations, counterprotests, and heightened security attention." This is not a generic assessment - it reflects the specific current US-Iran conflict context, the presence of Iranian diaspora and opposition communities in US host cities, and the visibility of any Iran-related match day.</p> <p>MEXICO CITIES: Recorded Future/Insikt Group: Mexico host cities face the highest physical risk from cartel-associated TCO opportunistic crime. Guadalajara, Mexico City, and Monterrey very likely to see TCO-affiliated activity around tournament. This is cartel opportunism (theft, extortion, crowd exploitation), not terrorism, but the operational effect for attendees is significant.</p> <p>OPENING MATCH PRIORITY: June 11 opening match is the single highest-risk event of the tournament: maximum global viewership, maximum crowd concentration, peak media attention, peak symbolic value for any actor seeking impact. This is the primary enforcement priority for the first tournament week.</p> <p>CYBER-PHYSICAL COMPOUND: The FIFA World Cup 2026 represents a compound cyber-physical threat environment. A cyberattack on ticketing, transportation, or stadium operations during a major match creates physical crowd management risks (queues, entry delays, transportation gridlock) that can be exploited by physical threat actors.</p> <p>LIKELIHOOD: Significant security incident (soft target attack or major cyber event) during first 14 days of World Cup: UNLIKELY but this assessment warrants heightened vigilance.</p> <p>CONFIDENCE: MODERATE.</p>	
SOURCES	CSIS - terrorist threat to 2026 World Cup Recorded Future - World Cup threats Rozin Security - tactical bulletin 04-JUN ESPN - World Cup security challenge	

SECTION 12 - ANALYTICAL INTEGRITY & SOURCE REGISTRY

ANALYTICAL INTEGRITY STANDARD - APPLIED TO THIS PRODUCT

No Epistemic Cowardice. When evidence supports a finding, we state the finding. We do not substitute hedges, attribution-laundering, or filler phrasing for assessments the evidence justifies. Genuinely mixed evidence is stated directly with the split explained. This applies to all state actors equally.

No Gatekeeping. Our readers receive the same operational picture a federal practitioner would see. PREP-CON assessment is not softened for comfort. If the operational basis supports a given level, the DTR states that level.

No Dunning-Kruger Enablement. We do not publish confidence our sources cannot sustain. Every confidence level is auditable against the cited sources. Split confidence is applied when different aspects of a finding sit at different evidentiary levels.

ANTI-BIAS DISCIPLINE - SOURCE-SYMMETRIC SKEPTICISM

This product applies the same evidentiary standard to all state actors. Iranian, Israeli, US, Chinese, and Russian state sources are all flagged when cited as primary attribution. Single-source state-media claims are classified LOW CONFIDENCE absent multi-stream corroboration regardless of which state is the source. Loaded language is stripped from DTR narrative unless quoted with attribution. The same skepticism applied to adversary state media is applied to allied state media.

ICD 203 / ICD 206 ANALYTIC STANDARDS CONFORMANCE (SOP v5.55 §0.113)

This product is produced in conformance with ICD 203 (Analytic Standards) and ICD 206 (Sourcing Requirements for Disseminated Analytic Products). Standards applied this cycle: (1) Likelihood and confidence stated as separate dimensions on all forward-looking judgments. (2) Estimative language drawn exclusively from the ICD 203 7-term ladder (almost no chance / very unlikely / unlikely / roughly even chance / likely / very likely / almost certain). Forbidden hedges (might, maybe, possibly, perhaps) not used. (3) Every FLASH/HIGH scored entry includes minimum 2 alternative hypotheses with supporting and disconfirming evidence using altHypCard() format. (4) Changed judgments carry CHANGE FROM PRIOR notation in body text. (5) Tuesday sweep: all 629 registry sources checked per SOP Monday sweep requirement.

Full Analytical Methodology: fortunefavorstheprepared.com/analytical-standards/

THREAT AREAS ASSESSED	STANDING REGISTRY	CITATIONS THIS CYCLE	TIER 1 PRIMARY	TIER 2 SECONDARY
28	629 <small>v2.22 56 mandatory</small>	76	40	36
<small>Tuesday sector sweep: all 629 registry sources checked per SOP Monday sweep requirement. 28 threat areas assessed. Registry v2.22. Source registry: fortunefavorstheprepared.com/dtr-source-registry/ Analytical standards: fortunefavorstheprepared.com/analytical-standards/</small>				

SECTION 13 - CLOSING

END OF REPORT

Fortune Favors the Prepared brings together 30+ years of operational emergency management practice - law enforcement, EMS/paramedicine, wilderness search and rescue, airport emergency management, statewide logistics, and federal alerting infrastructure - into a daily intelligence product suite designed for practitioners.

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