

DAILY THREAT REPORT

Fortune Favors the Prepared | Intelligence Operations Division
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⚠️ PREPAREDNESS CONDITION 3 -- BROWN SKY -- INCIDENT PROBABLE ⚠️

Op Epic Fury Day 122 | Hormuz Day 122 | MOU Day 13 | PREP-CON 3 BROWN SKY | COMCON 4
INCREASED VIGILANCE | 29 JUNE 2026

COMMUNICATIONS CONDITION: COMCON 4 -- INCREASED VIGILANCE

COMCON 4 INCREASED VIGILANCE | 23 NWR transmitters OOS/DEGRADED (16 OOS / 7 DEGRADED) |
GPS/GNSS jamming ELEVATED -- major operational issue across Gulf FIRs | Cisco SD-WAN CVE-2026-
20262 NOW OVERDUE (deadline was 29-JUN) | Ubiquiti UniFi 3-CVE 6 days overdue

**WX-CON 3 CRITICAL | SPC Day 1 ENHANCED: NE SD into NW MN -- intense supercell bow echo
evolving, severe wind swath likely | Day 2 SLIGHT N WI/UP Michigan | Fire Wx Day 1 ELEVATED Great
Basin/SW/Four Corners | Day 2 CRITICAL Four Corners/CO Plateau | Cottonwood Fire UT ~94K acres
0% contained -- nation's largest flow winds. Critical fire weather Great Basin/Four Corners CS tonight |
Fire Wx CRITICAL: W/C Utah dry thunderstorms**

Cottonwood Fire: 0% contained -- extreme behavior -- Level 3 evacuations -- Utah first-ever PDS Red Flag --
state of emergency | NPL 3 | 45 uncontained large fires nationally today: 15% severe risk W Dakotas
(trough/lee cyclone) | NPL 3 | FORWARD: Major trough Friday-Saturday -- 40+ mph gusts critical fire
conditions

**SWX-CON 2 WATCH | G1 Watch 29-30 JUN | ALTEF3 CONTINUED ALERT: Electron 2MeV flux >1000
pfu since 26-JUN 1345 UTC -- yesterday max 2,637 pfu -- Day 3 of sustained HEE eventaska
Source: NOAA SWPC swpc.noaa.gov**

Publication (UTC)	29 JUN 2026 / Cycle close 1530 UTC
Reporting Period	26-JUN-2026 1530Z through 29-JUN-2026 1530Z (72-hr weekend/Monday rollup)
Analyst / Watch Officer	Fortune Favors the Prepared -- OSINT Desk
FLASH Threshold	Risk Score >= 20 -- THREE FLASH EVENTS THIS CYCLE (GEO-CF-IRAN: US-Iran mutual strikes Bahrain/Kuwait/Hormuz + MOU acute stress + stand- down 29-JUN; GEO-003 Venezuela Day 5 1,450 dead SAR-to-recovery transition; WX-001 Cottonwood Fire ~94K acres 0% contained PDS Red Flag nation's largest)
PREP-CON Baseline	PREP-CON 3 -- BROWN SKY (Incident Probable) COMCON 4 -- INCREASED VIGILANCE WX-CON 3 CRITICAL SWX-CON 2 WATCH G1 Watch + ALTEF3 HEE NPL 3 MOU Day 13 IAEA Blackout Day 122 Hormuz Day 122 Ebola PHEIC Day 45 23 NWR OOS/DEGRADED World Cup Day 20 R32 UK PM Burnham nominations 9-JUL Semper Paratus, Semper Gumby
Day Counters	Op Epic Fury: Day 122 Hormuz: Day 122 IAEA Blackout: Day 122 Ebola PHEIC: Day 45 World Cup: Day 20 R32 MOU Day 13 Cottonwood Fire Day 9 Venezuela EQ: Day 5 NPL: 3 Brent: \$72.50
Version	1.0 -- SOP v5.57 Registry v2.24 629 total sources swept 72-hr weekend/Monday rollup 26-JUN through 29-JUN Hooks PASS

BOTTOM LINE UP FRONT

29 JUNE 2026 | PREP-CON 3 BROWN SKY | COMCON 4 INCREASED VIGILANCE | Op Epic Fury / Hormuz Day 122 | MOU Day 13 | IAEA Blackout Day 122 | Ebola PHEIC Day 45 | NIFC NPL 3 | World Cup Day 20 R32 | UK PM BURNHAM NOMINATIONS 9-JUL

THE CYCLE - QUICK LOOK

- ▶ **GEO-CF-IRAN: MOU ACUTE STRESS -- MUTUAL STRIKES 26-29 JUN:** Iran struck Kiku tanker/Bahrain/Kuwait; US struck Iranian coastal radar/drone/missile sites -- stand-down reached 29-JUN; Doha talks Tue 01-JUL -- Burgenstock nuclear WG resumed -- Hezbollah rejected Rubio trilateral framework 26-JUN. See GEO-CF-IRAN.
- ▶ **NUC-001: IAEA BLACKOUT DAY 122 -- Burgenstock technical WG resumed 29-JUN (Gharibabadi leading 4 working groups) -- Iran: no clear inspection schedule -- Grossi: MOU mandates IAEA supervision -- 440.9 kg 60%-HEU unverified Day 122 -- See NUC-001.** rvision in all letters -- inspections will happen. Gharibabadi (25-JUN): no Switzerland meeting; access only after final agreement and sanctions removal. 440.9 kg 60%-HEU unverified since 28-FEB. Weekend kinetic exchange (26-29 JUN) produced no change to IAEA access status. Burgenstock WG confirmed active 29-JUN with 4 working groups; Nuclear Affairs is one track. ISIS: 60%-HEU stockpile sufficient for multiple devices; weaponization capability severely degraded by strikes; breakout timeline 1+ year from zero. See NUC-001/GEO-CF-IRAN.
- ▶ **CYB-001: CYB KEV OVERDUE CLUSTER: Cisco SD-WAN CVE-2026-20262 NOW OVERDUE (was 29-JUN) -- Cisco UCM CVE-2026-20230 OVERDUE (was 28-JUN) -- PTC Windchill CVE-2026-12569 OVERDUE (was 28-JUN) -- Ubiquiti UniFi 3-CVE 6 days overdue -- no workarounds..** CVE-2026-20262 (CVSS 6.5): path traversal in Cisco Catalyst SD-WAN Manager. Authenticated attacker overwrites files, escalates to root. Patch is only remediation. KEV adds 23-JUN: Ubiquiti UniFi OS (3 CVEs) and Lantronix EDS5000 code injection (root-level). OS files -- chain to root. All deployment types affected. Active exploitation confirmed by Cisco PSIRT + CISA. Federal mandate deadline: 29-JUN-2026 (5 days). No workaround -- upgrade only. Attribution: UAT-8616 (same campaign as CVE-2026-20245, deadline passed 23-JUN). KEV overdue backlog: Check Point (+15 days, ransomware), PAN-OS (+25 days), Arista (no patch planned), 9+ total. See CYB-001.
- ▶ **WX-001: COTTONWOOD FIRE UT ~94K ACRES 0% CONTAINED -- NATION'S LARGEST -- UTAH FIRST-EVER PDS RED FLAG -- STATE OF EMERGENCY -- LEVEL 3 EVACUATIONS -- SPC Day 1 ENHANCED NE SD/NW MN bow echo wind swath active now -- Day 2 CRITICAL fire wx Four Corners.** SPC Day 1 SLIGHT: NE CO/SW NE/W KS -- large hail, damaging wind, organizing MCS this evening. S KS/N OK into Ozarks -- hail, severe wind, isolated tornadoes. Great Basin outflow winds. Day 2: SLIGHT excessive rainfall central-southern Plains to mid-Mississippi Valley. See WX-001/WX-002.
- ▶ **GEO-003: VENEZUELA: Day 5 -- 1,450 confirmed dead / 3,150+ injured / 46,000+ missing -- 72-hr golden window closed -- SAR-to-recovery transition -- USS Fort Lauderdale at La Guaira -- USGS PAGER 44% toll exceeds 10,000.** See STSB-001.
- ▶ **PHS-002: PHS-002 EBOLA PHEIC DAY 45: 1,175 total confirmed (DRC 1,155 / Uganda 20) -- 306 deaths CFR 26% -- France EU import Day 5 -- WHO sitrep expected TODAY 29-JUN -- South Sudan 69% probability import within 12 weeks -- no vaccine / no treatment.** 1,175 total confirmed (DRC 1,155 / Uganda 20) -- 306 deaths (CFR 26%) -- 385 hospitalized (as of 24-JUN data). France EU import Day 5. WHO sitrep expected TODAY 29-JUN. South Sudan 69% probability import within 12 weeks. Contact tracing 63% vs 95% target. No vaccine / no treatment. irmed first EU imported case 25-JUN. Ituri: 1,020 cases (22 health zones). North Kivu: 94 cases. No WHO sitrep this cycle; next ~29-JUN. Bundibugyo -- no vaccine, no treatment. 0 health zones). North Kivu: 67 cases. South Kivu: 3 cases. Uganda: 20 confirmed cases (Kampala). Contact tracing ~45% (WHO requires 90%). 17 HCW dead, 75 infected. 150+ patient escapes since late May. MSF: 3 treatment centers operational. CEPI fast-track vaccine funding committed 1-JUN. CDC MMWR (June 2026): without intensified containment, could exceed 10,000-20,000 cases within 3 months. US: no confirmed cases; enhanced entry screening at IAD/ATL/IAH/JFK. See PHS-002/SEC 3.
- ▶ **DOM-002: UK PM: Burnham sole declared candidate -- nominations open 9-JUL close 16-JUL -- if uncontested PM by 17-JUL -- no new candidacies this weekend. Belfast: forward scaffold -- July**

marching season (12-JUL) approaching. NC-Statesville KJY85 NWR OOS. Belfast/NI: forward scaffold -- July marching season (12-JUL) 13 days out -- next elevated risk window. No new disorder incidents this cycle. Op Exposure ongoing. July marching season approaching -- next elevated risk window. No new disorder incidents this cycle. See DOM-002.

► **STSB-001:** WORLD CUP DAY 20 R32: No confirmed physical security incidents Days 1-20. Iran team eliminated/departing Tijuana 29-JUN. Today: Brazil-Japan (Houston), Germany-Paraguay (Boston), Netherlands-Morocco (Monterrey). July 4-5 elevated window: 5 days out.

NOT DETAILED HERE: ALTEF3 HEE Day 3 detail (Sec 7A); NWR 23 units (Sec 7); Venezuela humanitarian detail; World Cup R32 bracket; UK PM nomination timeline detail.

DECISIVE WINDOW (NEXT 48-72 HRS): US-Iran Doha talks Tue 01-JUL (Strait/MOU compliance) -- WHO Ebola sitrep today 29-JUN -- Cottonwood Fire: 0% containment expected through 01-JUL; NPL 4 risk -- Venezuela Day 6: official recovery/PAHO assessment -- Burnham Labour nominations 9-JUL -- British Airways resumes Dubai 01-JUL. gnificantly beyond 164 as La Guaira communications severed and rural impact unknown. Aftershock risk: USGS 2% probability of M7.5+ within one week. Cisco SD-WAN KEV OVERDUE (29-JUN deadline PASSED). ALSO OVERDUE: Cisco UCM CVE-2026-20230 + PTC Windchill CVE-2026-12569 (28-JUN). Ubiquiti UniFi 3-CVE 6 days overdue. WHO Ebola sitrep today. Cottonwood Fire 0% containment. Doha talks Tue 01-JUL. mph gusts.e next week at Burgenstock -- nuclear working group primary watch. Cisco SD-WAN CVE-2026-20262 federal deadline 29-JUN -- 3 DAYS. Friday-Saturday major trough -- critical fire weather conditions 40+ mph gusts -- fire managers should pre-position resources now. Ebola WHO sitrep expected ~29-JUN-2026.

SECTION INDEX

SECTION	KEY ENTRIES / THREAT DRIVERS
SEC 2 - Market Indicators	Commodity tracker: Brent ~\$72.50/bbl (29-JUN, +0.7% hostility risk premium) pump \$3.867/gal (AAA 29-JUN, 7th+ consecutive weekly decline from \$4.55 peak) WTI ~\$70.00 Hormuz ~75% prewar flows restored Saudi Aramco Ras Tanura resumed Doha talks Tue key catalyst 56 peak) Hormuz traffic recovering (~24 vs 110 vessels/day pre-war) 9-12 month normalization
SEC 3 - FLASH Events	GEO-CF-IRAN: US-Iran mutual strikes 26-29 JUN -- IRGC struck Kiku tanker/Bahrain/Kuwait -- US struck Iran coastal infrastructure -- stand-down 29-JUN -- Doha talks 01-JUL NUC-001 Burgenstock WG resumed GEO-003 Venezuela Day 5 1,450 dead recovery transition WX-001 Cottonwood ~94K acres FLASH PHS-002 Ebola 1,175 cases WHO sitrep today kage MOU Day 10 NUC-001 IAEA Blackout Day 119 Grossi: inspections will happen per MOU text -- Iran FM Gharibabadi denied; access conditioned on final deal Burgenstock nuclear WG resumes next week next week Lebanon 5th round in progress PHS-002 PHS-002 Ebola Day 45 -- 1,175 total confirmed / 306 deaths France EU import Day 5 WHO sitrep today 29-JUN:
SEC 4A - Cyber / Technology	CYB-001 Cisco SD-WAN CVE-2026-20262 CISA KEV deadline 29-JUN -- 3 DAYS Active exploitation confirmed UAT-8616 attributed New 23-JUN: Ubiquiti UniFi 3-CVE + Lantronix EDS5000 8th Cisco SD-WAN zero-day 2026 No workaround KEV overdue backlog 9+ entries
SEC 4B - Physical / Geopolitical / IO	DOM-002 UK PM Starmer resigned 22-JUN / Burnham sole declared candidate / nominations 9-JUL / uncontested PM ~17-JUL Belfast fwd scaffold / 12-JUL Twelfth approaching STSB-001 WC Day 20 R32 no incidents / Iran team departing / July 4-5 5 days out PHS-002 Ebola Day 45: 1,175 cases / WHO sitrep today / France import Day 5 / South Sudan 69% within 12 wks PHS-002

SECTION	KEY ENTRIES / THREAT DRIVERS
SEC 5 - Energy / Infrastructure / Supply Chain	FIN-001 Brent ~\$72.50 (29-JUN, +0.7% hostility bounce from weekly lows) / pump \$3.867/gal (AAA 29-JUN, 7th+ week declining) / Hormuz ~75% prewar flows / Saudi Aramco Ras Tanura resumed / weekend strikes re-introduced uncertainty -- Doha Tue 01-JUL key AVN: BA resumes Dubai 01-JUL / Kuwait Terminal 1 closed / GPS jamming elevated Gulf FIRs / EASA CZIB to 01-JUL rational minimums / 9-12 month normalization SC-001 MARAD 2026-008 active fertilizer/methanol/aluminum lag persists
SEC 6 - Aviation / Transportation	AVN-001 Iran OIIX partial reopening (eastern only, limited operators) / Iraq/Lebanon avoid BA resumes Dubai 01-JUL / Lufthansa Group Dubai to 11-JUL / Kuwait Terminal 1 closed since June 3 / GPS jamming major ops issue Gulf FIRs / Qatar Airways 85% restored / EASA CZIB extended to 01-JUL AVN-002 WC Day 20: no venue weather issues today Jet fuel systemic vulnerability EU strategic reserve review 26-JUN AVN-002 Middle East airspace ELEVATED post-exchange
SEC 7 - Meteorological / Severe Weather / Fire Weather + NWR	WX-001 COTTONWOOD FIRE ~94k acres 0% FLASH SPC Day 1 ENHANCED: NE SD/NW MN bow echo severe wind swath active NOW Day 2 SLIGHT N WI/UP Michigan Fire Wx Day 1 ELEVATED Great Basin/SW Day 2 CRITICAL Four Corners/CO Plateau NPL 3 23 NWR OOS/DEGRADED (16 OOS / 7 DEGRADED) weather Great Basin/Four Corners T: Utah/WI/FL/S.Plains Day 2 SLIGHT KS-OK-Ozarks Fire Wx CRITICAL W/C Utah today FORWARD: Trough Friday-Saturday 40+ mph gusts NPL 3 18 NWR OOS/DEGRADED WX-001 SPC Day 1 fire weather CRITICAL Great Basin / Four Corners Day 2 SLIGHT excessive rainfall central-southern Plains Saturday 15% severe W Dakotas (trough) Coast + Appalachians-Northeast WX-002 NPL 3 Cottonwood UT +30k acres overnight extreme; Iron UT/Grapevine NV/Pocket AZ/Lytle OR evacuations 32 NWR OOS/DEGRADED -- NY-Albany/NC-Statesville/CA-Santa Ana/TX-RGC/TX-Uvalde new OOS
SEC 7A - Space Weather and EMCOMM	SWX-001 G1 Watch 29-30 JUN ALTEF3 CONTINUED ALERT: Electron 2MeV flux >1000 pfu since 26-JUN 1345 UTC -- yesterday max 2,637 pfu -- Day 3 sustained HEE event -- satellite/GPS risk -- impacts poleward of 60 deg geomagnetic latitude -- SWX-CON 2 WATCH
SEC 10 - PREP-CON Assessment	PREP-CON 3 BROWN SKY / COMCON 4 INCREASED VIGILANCE / WX-CON 3 CRITICAL / SWX-CON 2 WATCH (G1 Watch + ALTEF3 HEE) / NPL 3 / MOU Day 13 acute stress Full trigger basis
SEC 11 - Alert and Readiness Conditions Panel	DEFCON EST-3 COGCON EST-3 FPCON EST-CHARLIE CYBERCON ELEVATED COMCON 4 WX-CON 3 CRITICAL SWX-CON 2 WATCH (G1 Watch + ALTEF3 HEE) PREP-CON 3
SEC 12 - Source Registry	Registry v2.24 629 total sources swept 56 mandatory dispositioned fortunefavorstheprepared.com/dtr-source-registry/

GEOGRAPHIC IMPACT INDEX

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
CONUS - Appalachians / Mid-Atlantic / Northeast	WX-001 SPC Day 1 SLIGHT: Central Plains into Upper Midwest: SPC Day 2 SLIGHT N WI/UP Michigan damaging winds; Day 3 Marginal NE. CYB-001 OVERDUE KEV cluster: Cisco SD-WAN + UCM + PTC Windchill + Ubiquiti UniFi -- all OVERDUE -- immediate enterprise triage required. NWR gaps: IL-Hillsboro KXI79 OOS; IN-Angola KXI94 DEG; MA-Leyden WXM68 OOS; ME-Sugarloaf WNG547 OOS.does upstate NY/NE NC Statesville NWR KJY85 NEW OOS WX-Arthur secondary threat GA/SC tonight

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
CONUS - Gulf Coast (LA/MS/AL/FL Panhandle)	SPC Day 1 SLIGHT: Isolated high-based thunderstorms near KS/OK/TX dryline -- severe gusts from evaporatively cooled downdrafts. World Cup Houston venue (Brazil-Japan, 1pm): no severe wx threat. Ebola: IAH enhanced entry screening active.tonight -- SLIGHT: Utah/WI/FL/S.Plains
CONUS - Illinois / Indiana	SPC Day 1: Severe threat shifts toward WI/Upper Midwest this afternoon. Day 2 SLIGHT N WI/UP Michigan. IL-Hillsboro KXI79 remains OOS; IN-Angola KXI94 DEGRADED. CYB-001 OVERDUE cluster impacts all enterprise networks.to mid-Mississippi Valley extending into Ohio Valley.ITICAL NWR GAP: IL-Hillsboro KXI79 OOS (Montgomery/Bond/Fayette/Macoupin counties) and KS-Ulysses WXN81 OOS (Grant/Stanton/Haskell counties, KS) during today's active severe weather. NM triple-gap: Artesia/Roswell/Carlsbad all OOS during active fire season.
CONUS - West / Sierra Nevada / N CA / SW OR	WX-002 Day 1 COTTONWOOD FIRE UT ~94K acres 0% -- PDS Red Flag -- Level 3 evacuations -- state of emergency. Day 2 CRITICAL fire wx Four Corners/CO Plateau (30-JUN). NWR: OR-Portland DEG; NV-Owyhee DEG; CA-Santa Ana OOS. GPS jamming elevated Gulf FIRs.ds, minimum RH 10-15%. Forward: major trough Friday-Saturday, 40+ mph gusts, widespread critical conditions Great Basin/SW/NW. -- isolated lightning ignitions -- nocturnal convection possible tonight. NV Owyhee DEGRADED.
CONUS - North Carolina	WX-002 / Prosecution phase active Day 17. 25 arrests, charges proceeding. July marching season approaching -- next elevated risk window.ire-weather conditions. NC Statesville KJY85 NWR NEW OOS.
CONUS - Nationwide Wildfire	WX-002 NPL 3 (28-JUN IMSR) 45 uncontained large fires 10 new large incidents (28-JUN). Cottonwood UT ~94K acres 0% FLASH entry. Day 2 CRITICAL Four Corners. NPL 4 risk growing. AK cluster (5 units): infrastructure maintenance not SWX-caused. 6,200+ personnel 4 CIMTs Cottonwood UT +30k acres overnight extreme behavior Iron UT/Grapevine NV/Pocket AZ/Lytle OR/Garred Road WA: evacuations YTD 34,427 fires / 2.8M acres -- above 10-yr avg both metrics.Critical: Cottonwood UT (extreme), Iron UT (CIMT), Grapevine NV (extreme), Pocket AZ (CIMT), Lytle OR (extreme) YTD 34,427 fires / 2.7M acres
CONUS - Nationwide (All Regions)	CYB-001 CYB KEV OVERDUE: Cisco SD-WAN CVE-2026-20262 (deadline 29-JUN PASSED) + Cisco UCM CVE-2026-20230 (28-JUN PASSED) + PTC Windchill CVE-2026-12569 (28-JUN PASSED) + Ubiquiti UniFi 3-CVE (6 days overdue) -- immediate upgrade required. ALTEF3 HEE Day 3 -- satellite surface charging risk GEO orbit. SWX-CON 2 WATCH.uiti UniFi 3-CVE cluster + Lantronix EDS5000 CYB-002 Check Point KEV overdue +14 days PAN-OS overdue +24 days CYB-004 UAT-8616 attributed SD-WAN exploitation ongoing FIN-001 Brent sub-\$74 / pump \$3.93 / Cushing approaching operational minimums
Middle East / Strait of Hormuz	GEO-CF-IRAN MOU Day 13 ACUTE STRESS: US-Iran mutual strikes 26-29 JUN - IRGC struck Kiku tanker/Bahrain/Kuwait; US struck Iran coastal infrastructure -- stand-down 29-JUN; Doha talks 01-JUL NUC-001 Burgenstock WG resumed 29-JUN AVN: EASA CZIB to 01-JUL / Kuwait Terminal 1 closed / BA resumes Dubai 01-JUL ENR: Brent ~\$72.50 (+0.7% hostility bounce) 118-day blackout Technical talks resume next week Lebanon 5th round in progress PHS-002 Ebola PHEIC Day 42 -- 1,094 confirmed -- no vaccine/treatment -- CDC MMWR 10K-20K possible in 3 months WX: SPC Day 1 SLIGHT C. Plains/Ozarks; Fire Wx CRITICAL Great Basin/Four Corners France EU Ebola import 25-JUN Brent sub-\$74 N): inspections "going to happen" per MOU text Brent \$74.43 Technical talks resume next week
Iran / Nuclear	NUC-001 IAEA Blackout Day 122 -- Burgenstock technical WG resumed 29-JUN (Gharibabadi leading) -- 4 working groups active -- inspection dispute persists -- 440.9 kg 60%-HEU unverified. ENR: Brent ~\$72.50. AVN: EASA CZIB to 01-JUL / BA Dubai 01-JUL.- Iran FM Gharibabadi denied; access conditioned on final deal -- Burgenstock nuclear WG resumes next week resume next week -- Iran silent as

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REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
	of cycle close -- 440.9 kg 60% HEU unverifiedase 2 Burgenstock 19-JUN uncertain IAEA Board resolution passed 10-JUN 21-3 demanding cooperation
DRC / Uganda	PHS-002 Ebola Day 45 PHEIC: 1,175 total confirmed (DRC 1,155 / Uganda 20) -- 306 deaths CFR 26% -- France EU import Day 5 -- WHO sitrep expected TODAY - - South Sudan 69% probability within 12 weeks -- no vaccine / no treatmentirmed first EU imported case 25-JUN -- Ituri 997 cases (22 health zones) -- no vaccine / no treatmentacked Mongbwalu -- 5 workers taken hostage -- Uganda 19 confirmed / 2 deaths -- no licensed vaccine -- US screening active at IAD/ATL/IAH/JFK
Russia / Ukraine	GEO-002 / GEO-003 GEO-003 VENEZUELA: Twin M7.2+M7.5 earthquakes 24-JUN 2200 UTC 235+ dead / 4,300+ injured Caracas buildings collapsed Simon Bolivar Intl Airport status unclear La Guaira disaster zone US rescue deployed Strongest Venezuelan EQ in 125 yrs GEO-002 UKRAINE: ISW 24-JUN -- Belarusian signal repeaters ceased operations 22-JUN; Russian forces 101 drones overnight; Ukrainian strike on Russian gas infrastructure Orenburg Oblast no new US-household-relevant delta this cycle
Belfast / Northern Ireland / UK	DOM-002 Belfast: fwd scaffold prosecution phase -- 25 arrested / 17 charged -- July marching season approaching -- no new disorder incidents this cyclebegan) -- Active Club international coordination confirmed -- structural conditions unchanged -- Hadi Alodid next court date TBD
Space Environment	SWX-001 K4 EXTENDED WARNING -- ALTEF3 CONTINUED ALERT Day 3: 2MeV electron flux >1000 pfu since 26-JUN 1345 UTC / yesterday max 2,637 pfu / satellite charging risk GEO orbit. G1 Watch 29-30 JUN: Kp max 4.00 / aurora northern tier possible. SWX-CON 2 WATCH. (northern Michigan, Maine) -- weak power grid fluctuations possible at high latitudes today -- no geomagnetic storm -- R1-R2 flare potential 30-35% -- no HF or GNSS degradation

SECTION 2 - MARKET INDICATORS

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

COMMODITY	PRE-WAR (28 FEB)	CURRENT (26-JUN)	CHG vs PRE-WAR	CONSUMER / ANALYTICAL NOTE
Brent Crude (front)	~\$66/bbl	~\$72.50/bbl (29-JUN)	+17%	Weekend hostilities (IRGC strikes Kiku/Bahrain/Kuwait; US strikes Iran coastal) reversed 3-week Hormuz normalization trend. Brent fell >10% last week on reopening; bounced +0.7% Monday on renewed risk premium. Saudi Aramco Ras Tanura resumed loadings after 4-month suspension. Doha talks Tue 01-JUL key next catalyst.s approaching operational minimums -- domestic tightness signal despite falling Brent.ions. Iran shipped 30M+ barrels past week. Kuwait/UAE using alternative export routes. Mine-clearing underway (~80 mines estimated). Goldman cut Q4 Brent to \$80. Hormuz normalization 9-12 months.
WTI Crude (front)	~\$63/bbl	~\$70.00/bbl (29-JUN)	+17%	Tracking Brent. Monday +1.2% on renewed hostility risk. Weekend stand-down

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COMMODITY	PRE-WAR (28 FEB)	CURRENT (26-JUN)	CHG vs PRE-WAR	CONSUMER / ANALYTICAL NOTE
				reached; Doha talks Tue determine next directional move.rels). Tankers clearing Hormuz; Kuwait ramping production.
Gasoline (natl avg)	~\$3.10/gal	\$3.867/gal (AAA 29-JUN)	+25%	CHANGE FROM PRIOR: \$3.93 -> \$3.867 - 7th+ consecutive weekly decline from \$4.55 peak (21-MAY). Declining trajectory sustained. Weekend Iran-US exchange could slow further decline if Doha talks fail.y STEO projected (\$105 forecast vs \$77.20 actual). Jones Act waiver (60 days) supporting Gulf Coast. Full normalization 9-12 months; pump price decline continuing but non-oil (fertilizer, methanol) costs remain elevated.
Diesel (US No. 2)	~\$3.74/gal	~\$5.00+/gal (declining)	+34%+	Trucking and ag margins compressed. Declining with Brent as Hormuz normalizes. Fertilizer/methanol lag persists.
Ocean Freight / Maritime	Partial recovery	~75% prewar flows restored	Improving	MARAD 2026-008 active. Saudi Aramco Ras Tanura resumed. Hundreds of vessels still stranded in Persian Gulf. Weekend: IRGC struck Kiku tanker (Qatari crude) -- IMO paused vessel evacuation -- stand-down reached -- Doha talks Tue 01-JUL. GPS jamming major ops issue Gulf FIRs.C demobilization. DHL 777F emergency airlift running (Asia-US + Asia-Europe). Africa reroute +10-14 days. Port congestion: Jeddah/Khorfakkan/Sohar/Fujairah/Salalah persists until transit normalizes.

SECTION 3 - FLASH EVENTS (Score >= 20)

GEO-CF-IRAN Op Epic Fury Day 122 / Hormuz Day 122 MOU Day 13 US-IRAN MUTUAL STRIKES 26-29 JUN -- MOU ACUTE STRESS -- STAND-DOWN 29-JUN -- DOHA TALKS 01-JUL Leiter: Train Wreck Over MOU-Hezbollah Linkage Brent Sub-\$74ppen" Technical Talks Resume Next Week Lebanon 5th Round (State Dept 23-25 JUN) Brent \$74.43 IAEA Blackout Day 119		FLASH UPDATED 24
Why This Cycle	US and Iran exchanged kinetic strikes on shipping and military infrastructure across four days (26-29 JUN), the most severe test of the MOU since signing. Informal stand-down reached 29-JUN; Doha talks 01-JUL are the next off-ramp.	
Summary	MOU Day 13 of 60-day implementation window. US-Iran agreement faced first kinetic test 26-29 JUN: 4 days of mutual strikes on shipping and military infrastructure. Stand-down reached 29-JUN; Doha talks scheduled 01-JUL. Burgenstock nuclear WG technical talks resumed 29-JUN under Iranian Deputy FM Gharibabadi, focusing on nuclear issues, sanctions, monitoring, and dispute resolution. Hezbollah rejected the US-brokered Israel-Lebanon trilateral framework signed 26-JUN, calling it "null and void." n framework..	

SALUTE

SIZE: US-Iran MOU: signed 17-JUN-2026. In force Day 13 of 60-day framework. Exchange sequence 26-29 JUN: Iran drone struck Ever Lovely 26-JUN; US struck Iranian coastal radar/drone/missile sites 27-JUN; Iran struck Kiku tanker + attacked US 5th Fleet Bahrain + Kuwait 28-JUN; US struck Iran again 29-JUN. Bahrain intercepted all incoming; no US casualties. Stand-down 29-JUN informal. Burgenstock WG resumed 29-JUN. Hezbollah rejected Rubio trilateral framework 26-JUN.

ACTIVITY: 26-29 JUN (THIS 72-HR CYCLE): 26-JUN: IRGC OWA drone struck Ever Lovely (Singapore-flagged cargo ship, Hormuz). 27-JUN: CENTCOM struck Iranian coastal radar/missile/drone storage sites. 28-JUN: Iran struck Kiku tanker (Panamanian-flagged, Qatari crude, 2M+ bbl); IRGC announced strikes on US 5th Fleet Bahrain + Kuwait bases; Bahrain intercepted all incoming; no US/allied casualties. 29-JUN: US and Iran stand-down -- "both sides will stand down, vessels can move freely" (US official); Doha talks 01-JUL. Burgenstock WG resumed 29-JUN under Gharibabadi (4 working groups). Hezbollah rejected Rubio US-Israel-Lebanon trilateral. IDF continued Lebanon strikes. (Singapore-flagged). 27-JUN: CENTCOM struck Iranian coastal radar, missile sites, drone storage. 28-JUN: Iran Kiku tanker strike (Qatari crude); IRGC announced strikes on US 5th Fleet Bahrain and Kuwait bases; Bahrain intercepted incoming. 29-JUN: US and Iran agreed to stand down; Doha talks 01-JUL; Burgenstock WG resumed under Gharibabadi (4 working groups). Hezbollah rejected trilateral framework; IDF continued Lebanon strikes 27-28-29 JUN. Iran FM Araghchi in Baghdad calling for new Gulf security framework. e to Hezbollah undermined talks. Trump met both delegations Thursday. Lebanon seeking 1-month ceasefire extension; Israel holding on Hezbollah dismantlement. Iran Deputy FM Gharibabadi (25-JUN): no Grossi meeting in Switzerland; IAEA access only after final deal and sanctions removal. Grossi held firm on MOU authority. Burgenstock nuclear WG resumes next week. Brent sub-\$74 -- lowest since pre-war. Cushing approaching operational minimums. This is going to happen." Iran silent as of cycle close. Grossi called US-Iran dispute a "war of words" -- MOU text governs over public statements. Pakistan FM confirmed technical talks resume early next week at Burgenstock. Lebanon 5th-round talks ongoing at State Dept through 25-JUN (political and military tracks). Brent \$74.43 -- lowest since pre-war -- markets front-running normalization ahead of physical flows. Iran chief negotiator declared Hormuz "will be administered by Iran"; Oman-Iran transit fee discussions underway.

LOCATION: Hormuz/Gulf of Oman: kinetic exchanges 26-29 JUN. Bahrain (US 5th Fleet HQ) + Kuwait: IRGC strikes 28-JUN (intercepted). Doha Qatar: technical talks 01-JUL. Burgenstock Switzerland: nuclear WG resumed 29-JUN. Lebanon/Nabatieh: IDF strikes 27-28-29 JUN. week). Lebanon talks: US State Dept, Washington DC (23-25 JUN). Hormuz: partial recovery underway -- mine-clearing required for full normalization. Brent crude: \$74.73/bbl (25-JUN morning, lowest since pre-war).

TIME: MOU signed: 17-JUN-2026. MOU Day 13 as of 29-JUN-2026. 60-day framework expires mid-August. Exchange: 26-29 JUN. Stand-down: 29-JUN. Doha talks: 01-JUL. Burgenstock WG: 29-JUN onward. Lebanon 5th round: 23-25 JUN at State Dept. Technical talks (Burgenstock): resume early next week. Hormuz physical normalization: 9-12 months (IATA/IEA).

EQUIPMENT: IRGC: OWA drones (Ever Lovely, Kiku strikes). CENTCOM: air-launched precision munitions vs coastal radar/missile/drone storage sites. Bahrain BDF: intercepted Iranian missiles and drones. GPS jamming major ops issue Gulf FIRs (ongoing). Nuclear: 440.9 kg 60%-HEU (last IAEA-verified 28-FEB-2026; unverified Day 119). Hormuz traffic: ~24 vessels/day vs 110 pre-war. Iran-Oman transit fee discussions ongoing.

UNIT: US CENTCOM (strikes); IRGC Navy (drone/missile attacks); Bahrain BDF (interception); IMO (vessel evacuation paused/resumed); Gharibabadi (Iran Burgenstock lead, 4 WGs); Qatar + Pakistan (Doha mediators); Rubio (signed Israel-Lebanon-US trilateral 26-JUN). text requires IAEA supervision per Grossi 25-JUN.

Analyst Assessment

MOU SIGNIFICANCE: The 26-29 JUN exchange is the most severe kinetic test of the MOU since signing 17-JUN. Both sides struck the other's military assets and commercial shipping under an active ceasefire framework. Informal stand-down reached 29-JUN; Doha talks 01-JUL will determine whether this cycle is absorbed as a managed threshold event or a precedent for escalation. Iran FM Araghchi simultaneously called for a new Gulf security framework excluding

outside powers -- indicating Tehran views this as a structural repositioning, not a tactical misstep. Iran's silence rather than a new denial may signal Tehran is assessing options before responding. MOU remains a time-buying framework: oil sanctions relief and Hormuz reopening are immediate; the hard questions (HEU disposition, IAEA verification, Iranian missile program, Hezbollah) are deferred to Phase 2. The 60-day Phase 2 window is now running. Watch: (a) Iran response to Grossi; (b) whether Burgenstock technical talks next week specifically address inspection modalities.

HORMUZ REOPENING TIMELINE: Persian Gulf exports had recovered to ~75% of prewar levels entering this cycle. Weekend exchange reversed momentum: IMO paused vessel evacuation Saturday; Brent fell >10% last week then bounced +0.7% Monday on renewed risk premium. Kiku strike (Qatari crude) will likely deter additional Qatari crude tenders in near term. Goldman Sachs pre-weekend cut Q4 Brent to \$80; that forecast under review pending Doha 01-JUL outcome. Saudi Aramco Ras Tanura resumed loadings after ~4-month suspension -- positive structural signal. IMF PortWatch 21-JUN). Cushing crude approaching operational minimums. ~24 vessels/day vs 110 pre-war -- a 78% gap. GPS spoofing has subsided near the strait, a positive maritime safety indicator. Mine-clearing is ongoing but requires weeks of coordinated EOD effort before full commercial transit. IATA/IEA: 9-12 month physical normalization under optimistic scenario. Iran chief negotiator's "administered by Iran" statement and Oman-Iran transit fee discussions represent an emerging structural risk not yet priced by markets.

LEBANON SPOILER RISK: US-Israel-Lebanon trilateral framework signed 26-JUN in Washington by Rubio. Key terms: Hezbollah must cease hostilities and withdraw from southern Lebanon; IDF remains in security zone until Hezbollah disarms. Hezbollah leader Qassem rejected it as "null and void" same day. IDF continued strikes 27-28-29 JUN. Lebanon clause in MOU (all fronts including Lebanon) remains core structural tension -- Iran has tied Hormuz compliance to Lebanon ceasefire holding. Hezbollah was not party to the Islamabad MOU negotiations. track as parallel channel. Outcome carries direct Hormuz compliance implications. IDF strike in Lebanon gives Iran grounds to exit the agreement. Hezbollah continues to reject any deal absent full IDF withdrawal. Iran has tied Hormuz compliance to Lebanon ceasefire -- meaning Hormuz traffic at ~24/day vs 110 pre-war could fall further if any significant IDF-Hezbollah exchange occurs before the Lebanon track concludes.

PHASE 2 BURGENSTOCK WATCH: Technical WG confirmed resumed 29-JUN (Iranian FM Baqaei via IRNA; Gharibabadi leading). Four working groups: Sanctions Termination, Nuclear Affairs, Reconstruction/Economic Development, Monitoring/Implementation. Sessions planned through end of week in Switzerland. Doha talks 01-JUL are SEPARATE, focused on Hormuz/MOU compliance; nuclear track remains Burgenstock. IAEA inspection dispute: Iran FM Baghaei says no clear schedule for access to bombed sites; Grossi holds MOU text governs. 440.9 kg 60%-HEU remains unverified Day 122. Pakistan FM. Sessions to meet twice weekly alternating Vienna/virtual. Nuclear working group is the primary watch item: will it specifically address IAEA inspection modalities, and does Iran participate constructively or obstruct? The 60-day framework expires mid-August -- the clock is running.

CHANGE FROM PRIOR (Day 10 to Day 13): CHANGE FROM PRIOR (Day 10 to Day 13): US-Iran kinetic exchange 26-29 JUN (was: fragile stand-off, Lebanon talks stalled). Hezbollah rejected trilateral framework (was: framework in negotiation). Burgenstock WG resumed (was: scheduled next week). Stand-down reached 29-JUN (was: escalation trajectory). Brent fell from \$74.43 to ~\$72.50 then bouncing on risk premium. Venezuela toll: 1,450 (was: 235+). Cottonwood Fire: ~94K acres (was: 70,992). Ebola: 1,175 cases (was: 1,094). World Cup: R32 began (was: group stage Day 17). Domress). Leiter train wreck declaration new. Iran Deputy FM Gharibabadi explicitly denied IAEA access (was: silence). France confirmed first EU Ebola import (25-JUN). NWR count increased to 32 OOS/DEGRADED (was: 23). SWX: G1 Minor storm active (was: NSTR). Providing authoritative resolution to US-Iran public dispute. Brent fell further to \$74.73 (prior cycle ~\$77.20). Lebanon 5th round now at State Dept (23-25 JUN) vs prior cycle preparation phase. Score maintained at FLASH (25) reflecting: MOU implementation fragility; unresolved IAEA access modalities; Lebanon tripwire active; Hormuz physical traffic still far below pre-war norms.

LIKELIHOOD: Doha talks 01-JUL produce durable Hormuz/MOU compliance protocol: UNLIKELY -- structural disputes over Hormuz control, Lebanon clause, and IAEA access unresolved; informal stand-down is not a binding protocol. **CONFIDENCE:** MODERATE. ned access on sanctions removal and final agreement. Grossi holds MOU text as authority but has no enforcement mechanism. access. **CONFIDENCE:** MODERATE.

LIKELIHOOD: MOU framework collapses before 60-day deadline (mid-August): UNLIKELY -- both sides retain strong economic incentive; informal stand-down held; Doha provides next stabilization off-ramp. **CONFIDENCE:** MODERATE. I impasse over Hezbollah dismantlement vs. MOU linkage not resolved. Qatar indirect track adds complexity. **CONFIDENCE:** MODERATE.

LIKELIHOOD: Hormuz commercial traffic returns to prewar levels within 60 days: UNLIKELY -- structural constraints (infrastructure lag, tanker backlog, IRGC unpredictability) persist even under stand-down. **CONFIDENCE:** HIGH.Y. **CONFIDENCE:** HIGH.

ALT HYP

ALT A: Burgenstock technical WG resumed 29-JUN -- nuclear working group produces concrete IAEA access modalities within current session [unlikely]

Burgenstock WG is now active with 4 working groups including Nuclear Affairs; economic incentives on both sides are significant; US diplomatic pressure sustained; Gharibabadi leading Iranian delegation signals Tehran is engaged. genstock framework intact.s priced in deal; Trump at G7 Evian today where Iran deal will be on agenda; economic incentives on both sides are enormous.

✓ **Supporting Evidence:** Iran Deputy FM Gharibabadi IAEA access explicitly conditioned on final deal and sanctions removal -- Iran FM Baghaei 29-JUN; inspection access is not Nuclear Affairs WG primary agenda item; Gharibabadi denied Grossi meeting request during prior Switzerland session; no precedent for rapid IAEA access concession in current talks structure. ccess on sanctions removal is entrenched; Lebanon impasse provides Iran leverage to delay.ell >4% reflecting high market confidence in near-term signing.

✗ **Ruling-Out Evidence:** Burgenstock Nuclear Affairs WG must first agree on enrichment caps and HEU disposition before inspection modalities can be addressed; Iran has consistently treated IAEA access as a final-deal deliverable, not a good-faith interim step. elay serves Iranian leverage posture.o go unanswered"; Israel is not party to deal and retains operational freedom; Supreme Leader Khamenei final sign-off not publicly confirmed; physical Hormuz reopening will take weeks-to-months regardless.

ALT B: Repeated kinetic exchanges erode MOU framework before 60-day deadline (mid-August) [unlikely]

26-29 JUN exchange demonstrated both sides are willing to use force under active ceasefire; stand-down was informal with no binding protocol; Doha talks 01-JUL may not produce structural restraints; Lebanon clause remains unresolved; Iran FM warned of "complete halt" to talks if attacks continue; each exchange sets a lower escalation threshold. asefire; structural impasse unresolved as of cycle close.ted ceasefire terms; Israel has explicitly said it is not bound by the US-Iran deal; prior exchanges (7-JUN, 14-JUN) each nearly derailed negotiations.

✓ **Supporting Evidence:** Both sides have strong economic incentives; Doha talks 01-JUL provide immediate off-ramp; stand-down reached within 96 hours; Qatar and Pakistan mediators remain engaged; Burgenstock WG resumed same day as stand-down. r diplomatic workarounds; Trump meeting with both delegations 25-JUN signals continued US commitment to framework.trikes on Beirut (a departure from prior posture); Pakistan and Qatar mediators remain actively engaged; Iran SNSC confirmed ceasefire intent same day as Dahiyeh strikes.

✗ Ruling-Out Evidence: Pattern of prior exchanges (June 3, June 8) shows both sides absorbed kinetic contact and continued talks; informal stand-down 29-JUN reached within 96 hours; economic pressure on both sides is enormous. xplicitly separating Lebanon from Iran bilateral discussions; Rubio in Abu Dhabi defending MOU framework.of events has been absorb-and-sign rather than escalate-and-reject.

SOURCES

ABC News Iran live updates 29-JUN | CBS News 28-JUN | PBS NewsHour 28-JUN | NPR US-Iran strikes 27-JUN | RFE/RL stand-down 29-JUN | Al Jazeera Lebanon framework | CNN oil/hostilities 28-JUN | Crisis Group Hormuz tracker | CNBC US Iran agree to peace deal 14-JUN | Axios MOU breakdown 14-JUN | Al Jazeera Beirut Dahiyeh strikes 14-JUN | GEF Hormuz live status | Trading Economics Crude Oil 15-JUN

NUC-001 | IAEA BLACKOUT DAY 122 | BURGENSTOCK TECHNICAL WG RESUMED 29-JUN -- GHARIBABADI LEADS 4 WORKING GROUPS | IRAN: NO CLEAR INSPECTION SCHEDULE | 440.9 KG 60%-HEU UNVERIFIED SINCE 28-FEB
Bion Blackout | Technical Talks Resume Next Week | Lebanon 5th Round In Progress (23-25 JUN)m in MOU -- Phase 2 Burgenstock 19-JUN Uncertain

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Why This Cycle

Burgenstock technical WG resumed 29-JUN under Gharibabadi, but the IAEA inspection dispute is unchanged -- Iran has no clear schedule for access, and 440.9 kg of 60%-HEU remains unverified at Day 122.

Summary

Burgenstock WG resumed 29-JUN. IAEA inspection dispute unchanged through weekend exchange. Iran FM Baghaei: no clear schedule for access to bombed sites. Grossi: MOU text mandates IAEA supervision "in all letters." 440.9 kg 60%-HEU at Isfahan complex unverified since 28-FEB-2026 -- Day 122 of blackout. MOU signing. Iran's position -- access only after final deal and sanctions -- removes near-term inspection pathway and elevates proliferation risk assessment.ction requirement in MOU text rather than Vance's assertion, directly contradicting Iran's 23-JUN denial. Lebanon 5th-round talks are at a critical juncture -- their outcome controls Hormuz normalization vs. Iran has tied Hormuz compliance to Lebanon ceasefire holding.e MOU "does not create access" for IAEA inspectors..

SALUTE

SIZE: 440.9 kg 60%-enriched uranium hexafluoride (60% UF₆) plus 8,599.6 kg lower-enriched uranium -- last IAEA-verified snapshot per GOV/2026/8, 27-FEB-2026.

ACTIVITY: 26-29 JUN (THIS CYCLE): Iranian FM Baqaei confirmed (29-JUN IRNA) technical talks underway in Switzerland. Gharibabadi leads Iranian delegation. Four working groups established. Sessions through end of week. IAEA inspection dispute status unchanged through weekend kinetic exchange. Iran FM Baghaei: no clear schedule. Grossi: MOU text governs. No new IAEA Board action this cycle. 440.9 kg 60%-HEU unverified Day 122.onditioned on final agreement and sanctions removal. Grossi countered: MOU text is unambiguous, inspection mandatory in all letters. Dispute unresolved. 440.9 kg 60%-HEU at Isfahan complex unverified since 28-FEB. ctivities -- "This is going to happen." Iran silent as of cycle close. Grossi called US-Iran dispute a "war of words" -- MOU text governs. Pakistan FM confirmed technical talks resume early next week Burgenstock. Lebanon 5th-round talks at State Dept through 25-JUN: political and military tracks. access. MOU SIGNED 17-JUN: does NOT create IAEA access -- Iran FM Araghchi confirmed. MOU text (Art. 5): Iran reaffirms shall not procure or develop nuclear weapons; mechanism to dispose of enriched material "will be mutually agreed" -- i.e., deferred to Phase 2. IAEA supervision of downblending mentioned as minimum arrangement but mechanics remain Phase 2 subjects. Arms Control Association: even starting from zero HEU, Iranian nuclear breakout likely less than 12 months. IAEA Board resolution passed 10-JUN 21-3 (Russia, China, Niger against) demanding cooperation. Fordow largely intact per open-source assessment. Isfahan tunnel complex received 18 blue transport casks on flatbed trucks 9-JUN-2025 per Bulletin of Atomic Scientists satellite analysis -- potential HEU repository.

LOCATION: Natanz (above-ground centrifuge hall significantly degraded by strikes); Fordow underground enrichment facility (assessed intact); Isfahan tunnel complex (assessed intact); Pickaxe Mountain candidate site.

TIME: Burgenstock WG resumed: 29-JUN-2026 (this cycle). MOU signed: 17-JUN-2026. MOU Day 13. IAEA Blackout: Day 122 (since 28-FEB-2026). 60-day roadmap expires mid-August. IAEA Blackout Day 119.

EQUIPMENT: Centrifuge cascades at Fordow and Isfahan assessed operational. HEU stockpile location currently unverifiable.

UNIT: AEOI (Atomic Energy Organization of Iran); IRGC site security; IAEA Board of Governors.

Analyst Assessment

PROLIFERATION SIGNIFICANCE: 440.9 kg of 60%-enriched uranium is sufficient fissile material for multiple nuclear weapons if further enriched to 90%+. At 60% the material is already well past the threshold enrichment level and represents the most proliferation-significant HEU stockpile outside declared nuclear weapon states. The verification gap means neither the quantity nor the location of this material can be confirmed by any external party.

DEAL LEVERAGE DYNAMIC: The HEU stockpile is Iran's primary negotiating leverage. Surrendering it as the US demands removes that leverage permanently. Iran's down-blend counter-offer preserves the option of re-enrichment and is therefore strategically rational from Tehran's perspective. This asymmetry is unlikely to resolve without a verification mechanism neither side has demonstrated willingness to create.

MOU DAY 13 -- VERIFICATION GAP UNCHANGED: The MOU is now signed and in force. It does not restore IAEA access. The 440.9 kg of 60%-enriched HEU remains unverified and unaccounted. The MOU's own text defers the disposal mechanism to Phase 2 mutual agreement. Until Phase 2 produces a verification framework, the IAEA blackout continues regardless of MOU status. Saudi Arabia has conditioned Phase 2 nuclear acceptance on IAEA verification guarantees the agency can no longer provide -- this is a structural constraint on Phase 2 success independent of US-Iran goodwill.

LIKELIHOOD: Iran maintaining functional enrichment capacity with no IAEA visibility: ALMOST CERTAIN. **CONFIDENCE:** HIGH.

LIKELIHOOD: HEU stockpile surrendered or fully verifiably down-blended within 30 days: ALMOST NO CHANCE. **CONFIDENCE:** HIGH.

LIKELIHOOD: Deal framework includes verifiable IAEA access restoration within 60 days: UNLIKELY. **CONFIDENCE:** MODERATE.

ALT HYP

ALT A: Burgenstock Nuclear Affairs WG produces concrete IAEA inspection access modalities within current session [unlikely]

Burgenstock WG now active with Nuclear Affairs as one of four working groups; Gharibabadi is the lead; both sides have economic incentive to show progress; Grossi has publicly stated inspections will happen per MOU text. al deal; down-blend removes domestic political liability of visibly holding bomb-grade material during negotiations.

✓ **Supporting Evidence:** Burgenstock WG is now active with Nuclear Affairs as one of four tracks; both sides have economic incentive to show progress; Grossi has publicly stated inspections will happen per MOU text. as non-binding and non-surrendering; Isfahan tunnel complex assessed as HEU storage site with no observable material drawdown in satellite imagery; historical AEOI pattern is to maximize stockpile during inspection gaps.

✗ **Ruling-Out Evidence:** Iran FM Baghaei stated 29-JUN no clear schedule for IAEA access; inspection access conditioned on final deal and sanctions removal -- structural position unchanged through weekend exchange; Gharibabadi denied Grossi meeting during prior Switzerland session. tunnel, and Pickaxe Mountain -- candidate entombment sites where material movement would be hardest to detect.

	ALT B: Enrichment activity continued and stockpile has grown beyond the 27-FEB-2026 baseline [roughly even chance]
	Fordow and Isfahan underground halls are both assessed as largely intact and operational; 122 days of unmonitored operations (since 28-FEB-2026) provides substantial time for continued enrichment; ntial time for additional enrichment; historical AEOI behavior under inspection gaps is to accelerate production; underground facilities were specifically designed for operational continuity under attack conditions.
	✓ Supporting Evidence: Active kinetic operations through 29-JUN have continued to degrade logistics; some Natanz above-ground capacity was destroyed; disruption may have constrained output even if underground facilities continued operating. eli strikes had broad suppressive effect on Iranian nuclear workforce; down-blend offer from Iran signals a desire to reduce the stockpile number if only for optics.
	✗ Ruling-Out Evidence: No direct evidence of post-28-FEB enrichment activity is accessible to open-source analysis; disruption to Natanz above-ground capacity may have constrained overall output even if underground facilities continued.
SOURCES	FDD/ISIS Analysis 09-JUN 2026 (IAEA Iran reports) IAEA GOV/2026/8 last verified snapshot 27-FEB ISIS-Online IAEA Iran June 2026 analysis Houseofsaud.com IAEA Iran June 2026 analysis

CYB-001 CISCO SD-WAN CVE-2026-20262 NOW OVERDUE (Federal Deadline 29-JUN PASSED) CISCO UCM CVE-2026-20230 OVERDUE (28-JUN) PTC WINDCHILL CVE-2026-12569 OVERDUE (28-JUN) Ubiquiti UniFi 3-CVE 6 Days Overdue UAT-8616 Activeributed 8th Cisco SD-WAN Zero-Day of 2026 No Workaround KEV Overdue Backlog: 9+ Entries		FLASH UPDATED 20
Why This Cycle	Three simultaneous CISA KEV deadlines passed this weekend -- Cisco SD-WAN, Cisco UCM, and PTC Windchill/FlexPLM -- all with no workarounds, joining Ubiquiti UniFi (6 days overdue). Federal agencies are now in violation of BOD 26-04; treat all as active threat-hunt priorities.	
Summary	Three simultaneous OVERDUE KEVs -- Cisco SD-WAN CVE-2026-20262, Cisco UCM CVE-2026-20230, PTC Windchill CVE-2026-12569 -- plus Ubiquiti UniFi 3-CVE cluster 6 days overdue. No workarounds for any; upgrade is the only remediation. UAT-8616 confirmed on SD-WAN. Federal agencies in violation of BOD 26-04; all organizations should conduct compromise assessment before patching.	
SALUTE	SIZE: OVERDUE KEV CLUSTER: CVE-2026-20262 (Cisco SD-WAN Manager, path traversal/file write, CVSS 6.5, all deployment types: on-prem/Cloud-Pro/FedRAMP, UAT-8616); CVE-2026-20230 (Cisco UCM, SSRF, unauthenticated, deadline 28-JUN PASSED); CVE-2026-12569 (PTC Windchill/FlexPLM, RCE critical, deadline 28-JUN PASSED). Ubiquiti UniFi 3-CVE 6 days overdue. No workarounds -- upgrade only for all.. Authenticated attacker with write-level credentials can overwrite OS files -- chain to root. Active exploitation confirmed (CISA + Cisco PSIRT). Federal deadline: 29-JUN-2026 (4 days remaining). No workaround -- upgrade only. Attribution: UAT-8616 (same APT campaign as CVE-2026-20245, deadline 23-JUN). 8th Cisco SD-WAN zero-day of 2026 -- sustained coordinated campaign against SD-WAN management infrastructure. KEV overdue backlog: Check Point CVE-2026-50751 (+13 days, VPN auth bypass, ransomware chain), PAN-OS (+25 days), Arista EOS (+1, no patch planned), Joomla CE (+5 days), SolarWinds Serv-U (+5 days), 9+ total. ACTIVITY: CVE-2026-20262: Federal deadline 29-JUN PASSED -- NOW OVERDUE. Upgrade only; no workaround. Exploitation chain: crafted HTTP request to API endpoint > arbitrary file write > WAR deploy via WildFly > root escalation. IOC logs: vmanage-server.log, vmanage-appserver.log, serviceproxy-access.log. CVE-2026-20230: deadline 28-JUN PASSED; unauthenticated SSRF; write arbitrary text files to endpoints; Defused confirmed active exploitation. CVE-2026-12569: deadline 28-JUN PASSED; deserialization RCE; affects	

manufacturing, engineering, retail, footwear, apparel sectors. No public KEV ransomware-attribution reports found this cycle for any of the three overdue CVEs. e deploys malicious WAR file via WildFly; JSP shell interaction. Detection: log entries showing path traversal during file upload to vManage API endpoint. KEV overdue backlog represents a significant cumulative risk posture -- Check Point CVE-2026-50751 (+13 days, VPN auth bypass, Qilin ransomware confirmed) is the highest-urgency overdue entry after Cisco. to tournament traffic. 300+ suspicious domains registered pre-tournament. Recorded Future: Iranian hacktivist personas expanded scope/language range -- no confirmed World Cup attack as of 14-JUN but infrastructure "staged and waiting."

LOCATION: Cisco SD-WAN Manager: controls entire SD-WAN fabric -- compromising it gives push-access to every branch edge device under management. Medium CVSS understates downstream blast radius. Check Point CVE-2026-50751 (+13 days) is the highest-urgency overdue entry after Cisco. Tournament venue cities (Atlanta, Miami, LA, Seattle, others); fan zone and online commerce ecosystems.

TIME: CVE-2026-20262 federal deadline: 29-JUN (TODAY -- PASSED). CVE-2026-20230 deadline: 28-JUN (PASSED). CVE-2026-12569 deadline: 28-JUN (PASSED). Ubiquiti UniFi 3-CVE deadline: 23-JUN (6 days overdue). KEV overdue backlog: Arista EOS no-patch, Check Point +18 days, PAN-OS +28 days, 12+ entries total.-JUN. FIFA World Cup cyber: active now, ongoing through tournament (19-JUL).

EQUIPMENT: Oracle PeopleSoft enterprise applications; Ivanti Sentry mobile gateway; Check Point Security Gateway VPN appliances; Microsoft Windows ecosystem (Patch Tuesday residual); FIFA digital ticketing and payment platforms; Chromium-based browsers.

UNIT: CISA; Oracle PSIRT; Ivanti PSIRT; Check Point PSIRT; Microsoft MSRC; FBI Cyber; Arctic Wolf; Recorded Future Insikt Group.

Analyst Assessment

FOUR-VECTOR PATTERN: SD-WAN management plane (Cisco Catalyst) plus network device management (Ubiquiti UniFi OS) plus serial device server (Lantronix EDS5000) plus overdue backlog (Check Point +14 days, PAN-OS +24 days) -- sustained campaign targeting network management infrastructure.ing event covers end-user access, network transit, and remote management simultaneously. This is not the profile of opportunistic criminal exploitation, which typically targets a single high-value vulnerability. The combination is consistent with nation-state pre-positioning to establish persistent access across multiple layers of enterprise architecture before executing a coordinated campaign.

UBIQUITI CLUSTER: CVE-2026-34908/34909/34910 added 23-JUN: three-vulnerability cluster targeting Ubiquiti UniFi OS. Combined network access control failure (34908), path traversal (34909), and input validation (34910) create layered attack surface. UniFi is widely deployed in enterprise, government, and small-business environments. Active exploitation is confirmed. FCEB deadline is TODAY 11-JUN. Any organization -- not just federal agencies -- that has not patched or disconnected the affected appliances should treat this as an active incident response situation, not a patch management cycle item.

GEOPOLITICAL CONTEXT: The active US-Iran military exchange materially elevates the probability that IRGC-nexus or MOIS-affiliated cyber actors are behind some or all of the 09-JUN KEV exploitation activity. Iran has a documented pattern of escalating cyber operations against US critical infrastructure during periods of kinetic confrontation, including the confirmed ICS/OT campaign noted in prior cycles (CISA-FBI-NSA joint advisory April 2026). No attribution has been confirmed by CISA for the 09-JUN entries.

DEADLINE POSTURE: THREE SIMULTANEOUS OVERDUE KEVs: Cisco SD-WAN CVE-2026-20262 (29-JUN deadline PASSED), Cisco UCM CVE-2026-20230 (28-JUN PASSED), PTC Windchill CVE-2026-12569 (28-JUN PASSED). Federal agencies NOW in violation of BOD 26-04 for all three. No workarounds exist. Conduct compromise assessment before patching. Sectors at risk: enterprise SD-WAN, unified communications, manufacturing/engineering/retail PLM. KEV deadline as operational urgency -- no workaround exists for CVE-2026-20262; upgrade is the only remediation.ing what matters most. Enterprise security teams should monitor the BOD text for publication today and assess whether the prioritization signals align with their own critical asset definitions. Sectors that have already implemented consequence-based approaches will have a head start on compliance.

LIKELIHOOD: Cisco SD-WAN Manager CVE-2026-20262 unpatched Cisco SD-WAN Manager CVE-2026-20262 systems experience exploitation this week: VERY LIKELY -- KEV deadline passed; active exploitation confirmed pre-deadline. **CONFIDENCE:** HIGH.irmed prior to patching cycle; sophisticated targeting pattern suggests ongoing campaign. **CONFIDENCE:** HIGH.

LIKELIHOOD: Ubiquiti UniFi OS exploitation of CVE-2026-34908/34909/34910 Cisco UCM CVE-2026-20230 exploited against unpatched systems within 7 days: LIKELY -- unauthenticated SSRF, PoC available, deadline passed. **CONFIDENCE:** HIGH. plane; exploitation typically follows KEV listing within days. **CONFIDENCE:** HIGH.

LIKELIHOOD: One or more organizations with unpatched SD-WAN Manager PTC Windchill/FlexPLM CVE-2026-12569 exploited against manufacturing target within 7 days: LIKELY -- critical RCE, no workaround, deadline passed. **CONFIDENCE:** MODERATE.ent plane compromise enables push-access to all edge devices. **CONFIDENCE:** MODERATE.

ALT HYP

ALT A: UAT-8616 SD-WAN campaign expands to Ubiquiti network management infrastructure [unlikely]ghly even chance]

UAT-8616 is attributed to Cisco SD-WAN exploitation; network management plane focus is consistent with SD-WAN campaign profile; Ubiquiti cluster targets same management plane category.ure; CISA CI Fortify program has been warning of geopolitical-crisis cyber scenarios since May 2026; IRGC-affiliated CyberAv3ngers group already conducting confirmed ICS/OT operations against US water and energy systems (CISA-FBI April advisory); three-sector pre-positioning pattern is consistent with APT methodology.

✓ **Supporting Evidence:** No public attribution for Ubiquiti exploitation issued; UAT-8616 infrastructure targeting has not previously included Ubiquiti; distinct vulnerability class suggests different threat actor.ompromise matching known IRGC tooling; criminal groups independently exploit browser and VPN vulnerabilities routinely for financial gain.

✗ **Ruling-Out Evidence:** KEV catalog entry describes active exploitation without attribution; CISA has not issued an emergency directive or threat actor attribution for these specific CVEs.

ALT B: Cisco SD-WAN deadline passes 29-JUN with significant unpatched federal and private sector exposure [roughly even chance]

KEV backlog (Check Point +14 days, PAN-OS +24 days) demonstrates that federal agencies miss KEV deadlines; SD-WAN complexity and management plane sensitivity may slow emergency patching cycles.bypasses for initial access establishment; broad enterprise surface area (all Chromium-based browsers) maximizes criminal ROI; VPN auth bypass (Check Point) is a classic ransomware initial access vector.

✓ **Supporting Evidence:** Criminal exploitation is financially motivated and typically targets individual organizations sequentially; simultaneous three-sector pattern covering browser, network OS, and SD-WAN management plane is more consistent with strategic APT pre-positioning than criminal opportunism.

✗ **Ruling-Out Evidence:** Criminal groups do exploit KEVs immediately after publication; the Check Point VPN vulnerability is particularly consistent with criminal initial access patterns.

SOURCES

CISA KEV Catalog (09-JUN additions) | Defense One -- CISA new BOD announcement 09-JUN | Federal News Network -- CISA AI directive context | NVD CVE-2026-11645 (Chromium V8) | NVD CVE-2026-7473 (Arista EOS) | NVD CVE-2026-20245 (Cisco SD-WAN) | CISA ICS-CERT ICSA-26-160-03 (Schneider EcoStruxure)

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	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. 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. 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. 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. LIKELIHOOD: Disruptive ICS/OT incident affecting US utility in next 30 days: LIKELY. CONFIDENCE: MODERATE.
SOURCES	CISA-FBI Joint Advisory (Apr 7) Palo Alto Unit 42 - Handala Hack TechCrunch - Iranian hackers targeting CI CSIS - Iran cyber threat analysis

CYB-002 | FBI SURVEILLANCE NETWORK BREACH - CHINESE APT - UNRESOLVED | Phone numbers of surveillance targets potentially exposed

HIGH | CONTINUED | 14

Why This Cycle	No resolution reported. Major cyber incident designation maintained. Congressional notification has been filed. Breach represents a significant counterintelligence compromise.
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Summary	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.
Analyst Assessment	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. LIKELIHOOD: Public attribution to Chinese state actor confirmed: LIKELY. CONFIDENCE: MODERATE.
SOURCES	TechCrunch - worst hacks 2026

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		HIGH NEW 15
Why This Cycle	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.	
Summary	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.	
Analyst Assessment	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-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	

GEO-003 | VENEZUELA TWIN EARTHQUAKES (24-JUN 2200 UTC) | M7.2 + M7.5 | DAY 5 SAR-TO-RECOVERY TRANSITION | 1,450 CONFIRMED DEAD / 3,150+ INJURED / 46,000+ MISSING | USS FORT LAUDERDALE AT LA GUAIRA | 72-HR GOLDEN WINDOW CLOSED

FLASH | NEW | 22

Why This Cycle	SAR has passed the 72-hour golden window; the toll stands at 1,450 confirmed dead with 46,000+ missing and operations transitioning to recovery.
Summary	Twin M7.2/M7.5 earthquakes struck northwestern Venezuela 24-JUN 2200 UTC. Day 5: 1,450 confirmed dead (up from 235 at prior cycle close); 3,150+ injured; 46,000+ missing per family-tracking site; 68,900 reported missing per Wikipedia. USGS PAGER: 44% probability final toll 10,000-100,000; 23% >100,000. La Guaira: >1,400 buildings destroyed; Simón Bolívar International Airport heavily damaged. SAR transitioning to recovery. Bolivian team pulled 2 survivors over weekend. A father-and-son rescued after 86 hours (Belkys Josefina Barreto Garcia rescued after 86 hrs). US: USS Fort Lauderdale delivering supplies at Port of La Guaira; SOUTHCOM MG Jarrard conducting port survey. The diplomatic track remains stalled, with US mediation attention shifted to the Middle East. No US-household-relevant change occurred this cycle; the prior-cycle items (the 07-JUN Chornobyl spent-fuel-stoprior-cycle drivers carry no current-cycle delta. Entry retained as standing background watch only.
Analyst Assessment	BACKGROUND-WATCH STATUS: No US-household-relevant delta this cycle. The overnight Kyiv/Mykolaiv barrage is pattern-consistent and does not change the assessment. Demoted to MONITOR / CONTINUED, score 15 to 10, pending a genuine US-relevant development. CHANGE FROM PRIOR: GEO-002 Ukraine carried as NSTR MONITOR. GEO-003 Venezuela: toll rose from 235+ to 1,450 confirmed dead; 72-hr golden window closed; SAR transitioned to recovery; USS Fort Lauderdale at La Guaira. LIKELIHOOD: A US-household-relevant Venezuela rescue of additional survivors (Day 6+): UNLIKELY -- 72-hr golden window closed; SAR transitioning to recovery. CONFIDENCE: HIGH. CONFIDENCE: MODERATE.
SOURCES	NBC News Venezuela 29-JUN AP Venezuela SOUTHCOM CNN Venezuela EQ Wikipedia 2026 Venezuela earthquakes

GEO-003 | LEBANON CF DAY 8 - HEZBOLLAH REJECTS CEASEFIRE AGREEMENT / UNIFIL PEACEKEEPER KIA / IDF STRIKES CONTINUE

HIGH | UPDATED | 14

Why This Cycle	Hezbollah formally rejected the US-brokered Israel-Lebanon trilateral framework (signed 26-JUN); IDF strikes in Lebanon continued through the weekend.
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: UK PM Starmer resigned 22-JUN-2026 after losing parliamentary party confidence. Andy Burnham (won Makerfield by-election 18-JUN, 55% vote, 9,200+ majority over Reform) confirmed candidacy; Wes Streeting endorsed Burnham. Near-coronation. Nominations 9-16 JUL; new PM ~18-19 JUL (Eurasia Group). Burnham was sworn in as Makerfield MP on 22-JUN. Caretaker government limits UK binding policy commitments for ~4 weeks during MOU implementation window. Britain will have 7 PMs

in 10 years. The CF Day 14 counter reflects the nominal framework only; active fighting has continued throughout this period.

CHANGE FROM PRIOR: Entry retired this cycle. Lebanon CF ceasefire status absorbed into GEO-CF-IRAN Trilateral Framework assessment. See GEO-CF-IRAN Analyst Assessment -- LEBANON SPOILER RISK section.

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

SOURCES

NPR - Hezbollah rejects ceasefire | Time - Hezbollah rejects deal

DOM-001 | NORTHERN IRELAND ANTI-IMMIGRANT RIOTS - DAY 4 | PSNI 16 ARRESTED THIS WEEK / 12 OFFICERS INJURED / WATER CANNON + AEPs DEPLOYED | Unrest 10-JUN LOWER than prior night / PSNI seeking further suspects

HIGH | UPDATED | 16

Why This Cycle

Forward scaffold only -- no current-cycle delta. July marching season (12-JUL) is the next elevated risk window.

Summary

A knife attack in north Belfast on 08-JUN, carried out by a Sudanese asylum seeker, triggered violent anti-immigrant riots across Northern Ireland that have continued on a nightly basis. Homes and vehicles were torched in multiple districts in the opening nights. By the fourth day (this cycle) PSNI reported 16 arrests for the week and 12 officers injured, with water cannon and attenuating energy projectiles deployed; crucially the unrest on 10-JUN was lower than the prior night, suggesting the disorder may be fatiguing. The US Embassy in London previously issued a Demonstration Alert covering protests in Belfast and across the UK..

SALUTE

SIZE: Multi-district riot across Belfast; spread to Glasgow, Edinburgh, Southampton. Water cannons deployed 10-JUN (PSNI Sandyknowes Roundabout and Glengormley). Bus/rail cancelled; schools and businesses closed early.

ACTIVITY: TRIGGER 09-JUN: Hadi Alodid (30, Sudanese asylum seeker) charged with attempted murder after knife attack on Stephen Ogilvie, 22:30 local. Victim lost left eye. RIOTS 09-JUN NIGHT 1: homes, Middle Eastern supermarket, Glider bus, vehicles set ablaze (Crumlin Road, Lower Newtownards Road). NIGHT 2 10-JUN: PSNI water cannons deployed at Sandyknowes Roundabout and Glengormley; water truck set alight at Dept for Infrastructure depot; Alodid remanded in custody via video link. Spread to Glasgow, Edinburgh, Southampton. Belfast City Council suspended all services from 17:30. All five Stormont party leaders issued joint condemnation. US Embassy Demonstration Alert issued 09-JUN.

LOCATION: Belfast (Crumlin Road, Lower Newtownards Road, Sandyknowes Roundabout, Glengormley, Chimney Corner Hotel area); Glasgow; Edinburgh; Southampton.

TIME: Trigger event 08-JUN (knife attack). Nightly disorder 8-11 JUN. Day 4 as of cycle open: PSNI 16 arrested this week, 12 officers injured, unrest 10-JUN lower than prior night. Pattern: 2025 NI riots ran 9-18 June (9 days), 107 officers injured, 56 arrested.

EQUIPMENT: PSNI water cannon vehicles; petrol bombs and incendiary devices (rioters); multiple vehicles and structures destroyed.

UNIT: PSNI (Chief Constable Jon Boutcher); Belfast City Council; Stormont executive; NI Fire and Rescue Service.

Analyst Assessment

CHANGE FROM PRIOR: DOM-001 Belfast retired from active products this cycle -- prosecution phase only, no current-cycle delta. Forward scaffold retained. See DOM-002 for current UK/Belfast posture. ergy projectiles (AEPs) used. Crucially, unrest on 10-JUN was LOWER than the prior night, indicating the disorder may be fatiguing. PSNI is still seeking further suspects. Score reduced 18 to 16. Prior cycle posture was active multi-city escalation with water cannon first deployed.

ESCALATION TRAJECTORY: The 2024 UK riots (Southport, July-August 2024) and the 2025 NI riots (Ballymena, June 2025) both began as localised responses to individual violent incidents involving asylum seekers or migrants and escalated to multi-city disorder within 48-72 hours. The same pattern is active here. The key variable is whether today's Belfast City Hall

rally produces additional violence and whether that amplifies beyond Northern Ireland. The joint loyalist-nationalist framing of today's rally is the most important indicator to watch -- if it holds, it signals the anti-immigration frame is overriding the historic sectarian divide, which would represent a significant shift in Northern Irish political dynamics.

IO AMPLIFICATION PATTERN: Musk, Farage, and Robinson were cited by NI officials as key amplifiers within hours of the knife attack. This is the identical pattern documented in the 2024 UK riots, where Musk's X platform posts directly preceded new riot locations. The reach of these accounts is global. Social media platforms have not acted to limit amplification. Expect continued spread of calls for protests in UK cities throughout today.

ICA CONTEXT: The Irish Citizen Army (ICA) -- a new far-right group that has appropriated the name of the 1913 socialist labour militia -- is a background-level presence within the broader ecosystem but is NOT the operational driver of current events. The ICA is under Garda monitoring including involvement of the anti-terror Special Detective Unit. Its splinter group the Irish Defence Army (IDA) had five members arrested in December 2025 for plotting to attack a mosque in Galway and target migrant accommodation. The ICA's online activity uses AI-generated Marvel superhero imagery and is assessed as primarily online and disorganised at this stage. However, the current riot environment provides exactly the conditions under which such groups historically attempt to insert themselves as organisational nodes.

US EQUITIES: US citizens in Belfast, Glasgow, and London should exercise caution and avoid protest areas. The US Embassy demonstration alert is an operational signal: US government personnel are being warned. US-Ireland and US-UK relations are not materially affected. The Sudanese national's asylum route (Paris to Dublin to Northern Ireland) will draw attention to the Common Travel Area and may generate political pressure on the Irish government from the UK. Watch for Taoiseach and Irish government response today.

LIKELIHOOD: Continued nightly disorder in Northern Ireland through the weekend: ROUGHLY EVEN CHANCE. **CONFIDENCE:** MODERATE.

LIKELIHOOD: Disorder spreading to additional GB cities within 48 hours: ROUGHLY EVEN CHANCE. **CONFIDENCE:** MODERATE.

LIKELIHOOD: ICA or IDA conducting organised action in Republic of Ireland in conjunction with NI disorder: UNLIKELY. **CONFIDENCE:** MODERATE.

ALT HYP

ALT A: Violence peaks at today's Belfast City Hall rally then de-escalates over 48-72 hrs consistent with prior NI riot cycles [roughly even chance]

Prior NI riot cycles (2024, 2025, 2021) typically peaked in the first 48-72 hours; PSNI has substantial experience managing anti-immigration disorder; victim's family has called for calm; counter-protests and community leaders are active; NI Secretary Benn is making public statements.

✓ **Supporting Evidence:** PSNI has deployed riot units; Government of UK and NI are making statements; community response in prior cycles was effective; the loyalist-nationalist joint framing may not hold if nationalist communities decline to participate.

✗ **Ruling-Out Evidence:** Today's City Hall rally has not occurred yet; joint loyalist-nationalist framing, if it holds, would be a structural escalation beyond prior cycles.

ALT B: Joint loyalist-nationalist rally holds today; disorder spreads beyond Northern Ireland; multi-city unrest comparable to 2024 UK riots develops within 48-72 hrs [roughly even chance]

IO amplification pattern is identical to 2024 UK riots; Musk and Robinson reach is global; 2024 riots spread from Southport to 30+ English cities in 72 hours; anniversary timing (exactly 1 year after 2025 Ballymena riots) is psychologically significant; fuel protest networks and anti-immigration protest networks across Ireland and GB are primed.

✓ **Supporting Evidence:** Counter-protests consistently outnumbered far-right protesters in 2024; UK government rapid prosecution was effective deterrent; NI political leadership is bipartisan in condemning the violence; community resilience in Belfast is high after decades of managing disorder.

✗ **Ruling-Out Evidence:** The loyalist-nationalist joint framing is the key unknown -- if it fractures on sectarian lines it limits spread; PSNI surge capacity is operational.

SOURCES

Washington Post (Belfast riots 10-JUN) | CBS News (violent anti-immigration protests Belfast) | CNN (homes and vehicles set alight, violence spreads) | TIME (masked men, burning homes, IO spread) | Irish News (loyalist-nationalist joint rally Belfast City Hall today) | US Embassy London -- Demonstration Alert 10-JUN | The Journal.ie (ICA far-right ecosystem, Garda SDU probe) | Irish Examiner (IDA arrests December 2025)

SECTION 5 - ENERGY / INFRASTRUCTURE / SUPPLY CHAIN**ENERGY / INFRASTRUCTURE MONITORS - 29 JUNE 2026**

ENR-001 OIL / ENERGY PRICES: Brent \$74.43/bbl (26-JUN) -- lowest since pre-war. AAA pump \$3.93/gal -- 6-week consecutive decline from \$4.56 peak (21-MAY). Trump announced DOJ investigation into fuel price gouging 25-JUN. FORWARD: Iran chief negotiator declared Hormuz "will never return to prewar conditions and will be administered by Iran." Oman-Iran transit fee discussions -- structural forward risk. Physical normalization 9-12 months (IATA). EU energy ministers meet 26-JUN re strategic aviation fuel reserve releases. nt to fall to \$89/bbl Q4 2026, \$79/bbl 2027, as Hormuz flows resume. Goldman Sachs projects Brent to \$80 Q4 2026. EIA STEO June 2026 -- expects Hormuz normalization by end of July. 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: SPC Day 1 Enhanced: NE SD/NW MN severe wind swath active (bow echo, MCD #1376). Watch for grid outage reports Upper Midwest through evening. Day 2 SLIGHT N WI/UP Michigan. No G-scale geomagnetic storm active; G1 Watch 29-30 JUN (Kp max 4.00, primarily poleward of 60 deg). ALTEF3 HEE Day 3 (max 2,637 pfu yesterday): potential weak GIC high latitudes only. NRC: no emergency class events this cycle.; tornado or two possible; MCS with 75+ mph gusts by evening. SLIGHT: Utah (outflow winds); WI/N Illinois (hail/winds); Florida (pulse storms); Southern Plains (MCV). Day 2 SLIGHT: KS/OK/Ozarks -- tornado threat elevated evening hours as LLJ strengthens. itor SWPC for potential GIC if CME delivers Kp 3-5 late 23-JUN/23-JUN. NRC: no emergency class events this cycle.

ENR-003 MARITIME SUPPLY CHAIN: Hormuz partial recovery (~75% prewar Persian Gulf exports) reversed by weekend IRGC strikes. IMO paused vessel evacuation Saturday after Kiku strike; stand-down 29-JUN; hundreds of vessels still stranded in Persian Gulf. Saudi Aramco Ras Tanura resumed after ~4-month suspension. MARAD 2026-008 active. Ocean freight routes: improving but not normalized. Panama Canal: operating normally. Suez: operating. Cape of Good Hope bypass still in use by some carriers. ued 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 - 29 JUNE 2026

AVN-001 MIDDLE EAST / HORMUZ AIRSPACE: EASA CZIB 2026-03-R13 extended to 01-JUL. AVOID at all altitudes: Iran (OIIIX Tehran FIR) / Iraq (Baghdad FIR) / Lebanon (Beirut FIR). CAUTION: Bahrain/Kuwait/Israel/Jordan/Qatar/Oman/UAE/Saudi Arabia. Iran OIIIX partial (eastern only, limited operators; western Iran restricted). Kuwait Terminal 1 closed since June 3 IRGC strike (foreign airlines at T4/T5, 1 daily flight per airline 0400-2200). BA resumes Dubai 01-JUL (1 daily). Lufthansa Group: Dubai to 11-JUL; Abu Dhabi/GCC to 24-OCT. Qatar Airways: 85% pre-crisis routes. Emirates: ~96% pre-war. GPS jamming: major ops issue across Gulf FIRs -- radar vectors/runway heading departures standard. Weekend Iranian strikes 28-JUN did not close Bahrain airport; interception successful.ries 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 Day 20, Round of 32. No confirmed transportation security incidents Days 1-20. Iran team eliminated; departing Tijuana 29-JUN 6 PM local (removes highest diplomatic flashpoint from US venues). Today: Brazil-Japan Houston NRG (1 PM) / Germany-Paraguay Boston Gillette (4:30 PM) / Netherlands-Morocco Monterrey BBVA (9 PM). July 4-5 elevated window: 5 days out (Dallas/KC/Houston/Philadelphia/NYC converging with Independence Day). US-Iran weekend hostilities did not generate specific WC venue threats but elevated ambient threat environment. DHS \$250M+ anti-drone tech deployed at host city venues. 400+ LE agencies engaged. roblem 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 / FIRE WEATHER

WX-001 | COTTONWOOD FIRE UT ~94,000 ACRES 0% CONTAINED -- NATION'S LARGEST | SPC DAY 1 ENHANCED: NE SD INTO NW MN -- INTENSE BOW ECHO SEVERE WIND SWATH | DAY 1 FIRE WX ELEVATED GREAT BASIN/SW | DAY 2 CRITICAL FIRE WX FOUR CORNERS/CO PLATEAU5+ mph MCS Gusts Tonight, Tornadoes Possible | SLIGHT: Utah / Wisconsin-N Illinois / Florida / S. Plains-ArkLaTex | DAY 2 SLIGHT: KS-OK-Ozarks -- Evening Tornado Threat ElevatedTuesday update]

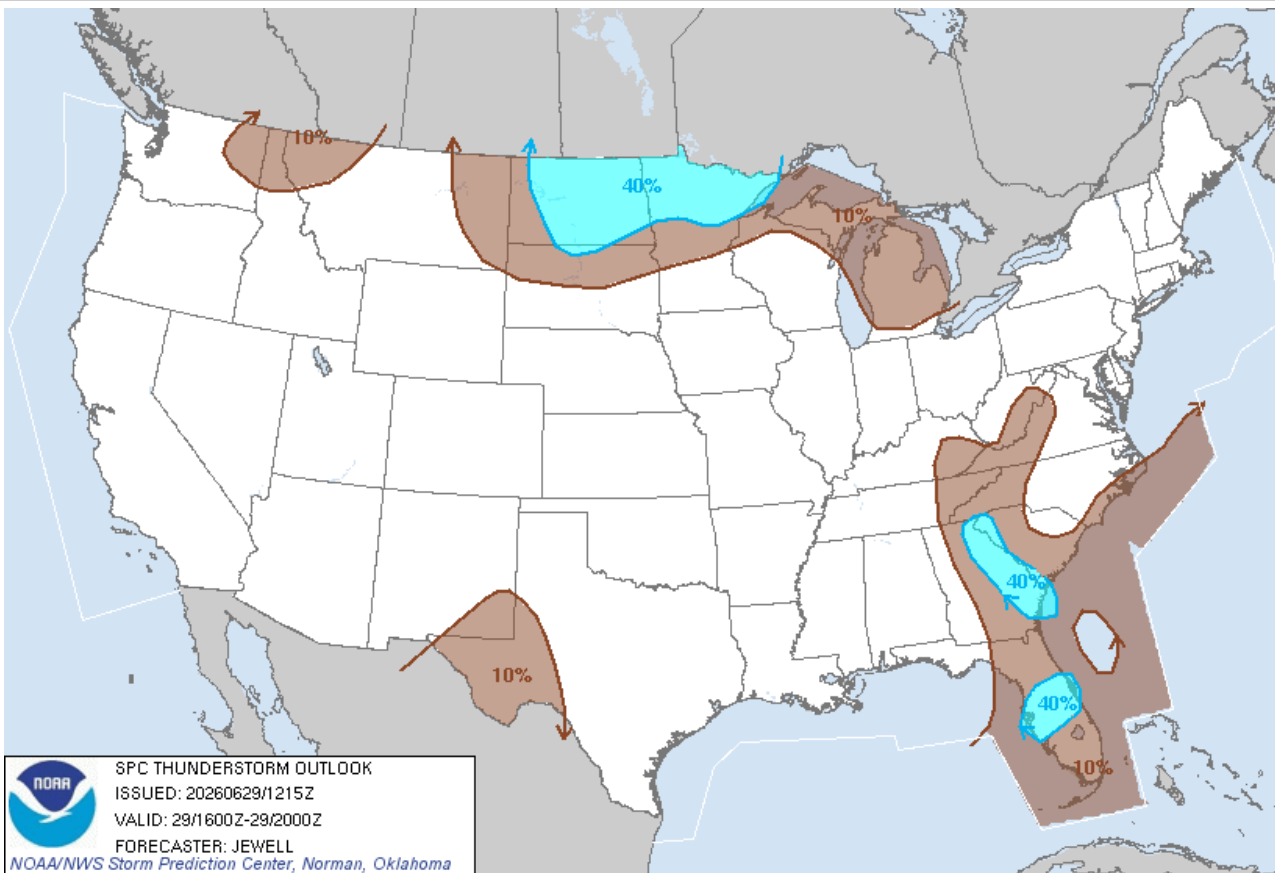
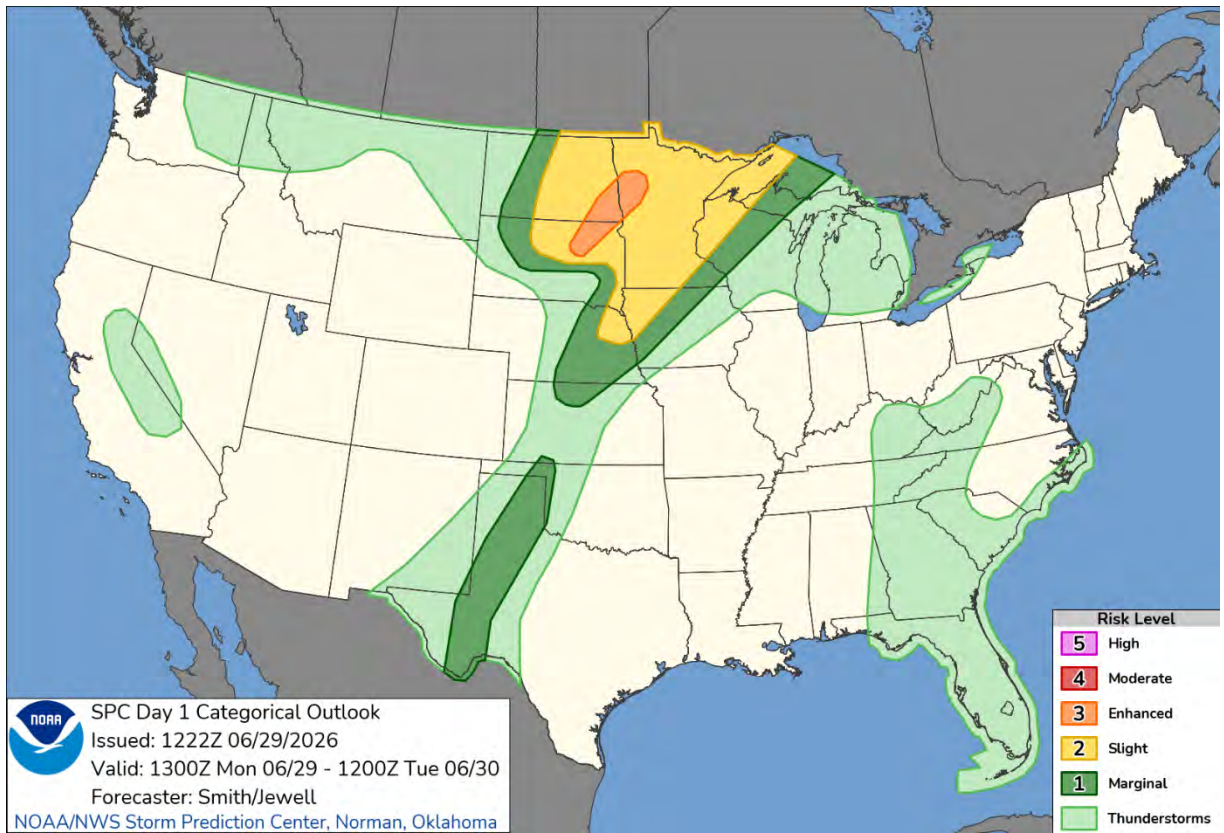
FLASH | ACTIVE | 22

SALUTE

SIZE: SPC Day 1 (291300Z-301200Z): ENHANCED risk NE SD into NW MN (bow echo severe wind swath active through midday, MCD #1376). Day 2 SLIGHT N WI/UP Michigan. Cottonwood Fire ~94K acres 0% contained -- NPL 3 -- 45 uncontained large fires nationally. Day 1 ELEVATED fire wx Great Basin/SW/Four Corners. Day 2 CRITICAL fire wx Four Corners/CO Plateau (Cottonwood area within zone). Level 3 evacuations: HiLo Estates, Merchant Valley, Eagle Point Resort, Arrowhead Summer Homes. Utah state of emergency. rks (NE Colorado into SE Wyoming). SLIGHT: Utah Great Basin (outflow winds); Wisconsin into N Illinois (hail/winds); Florida Peninsula (pulse storms); S. Oklahoma/ArkLaTex (MCV); N Louisiana (clusters). Day 2 SLIGHT: Central/Southern High Plains + southern Kansas/N Oklahoma into Ozarks. Tornado threat elevated evening hours as LLJ strengthens.

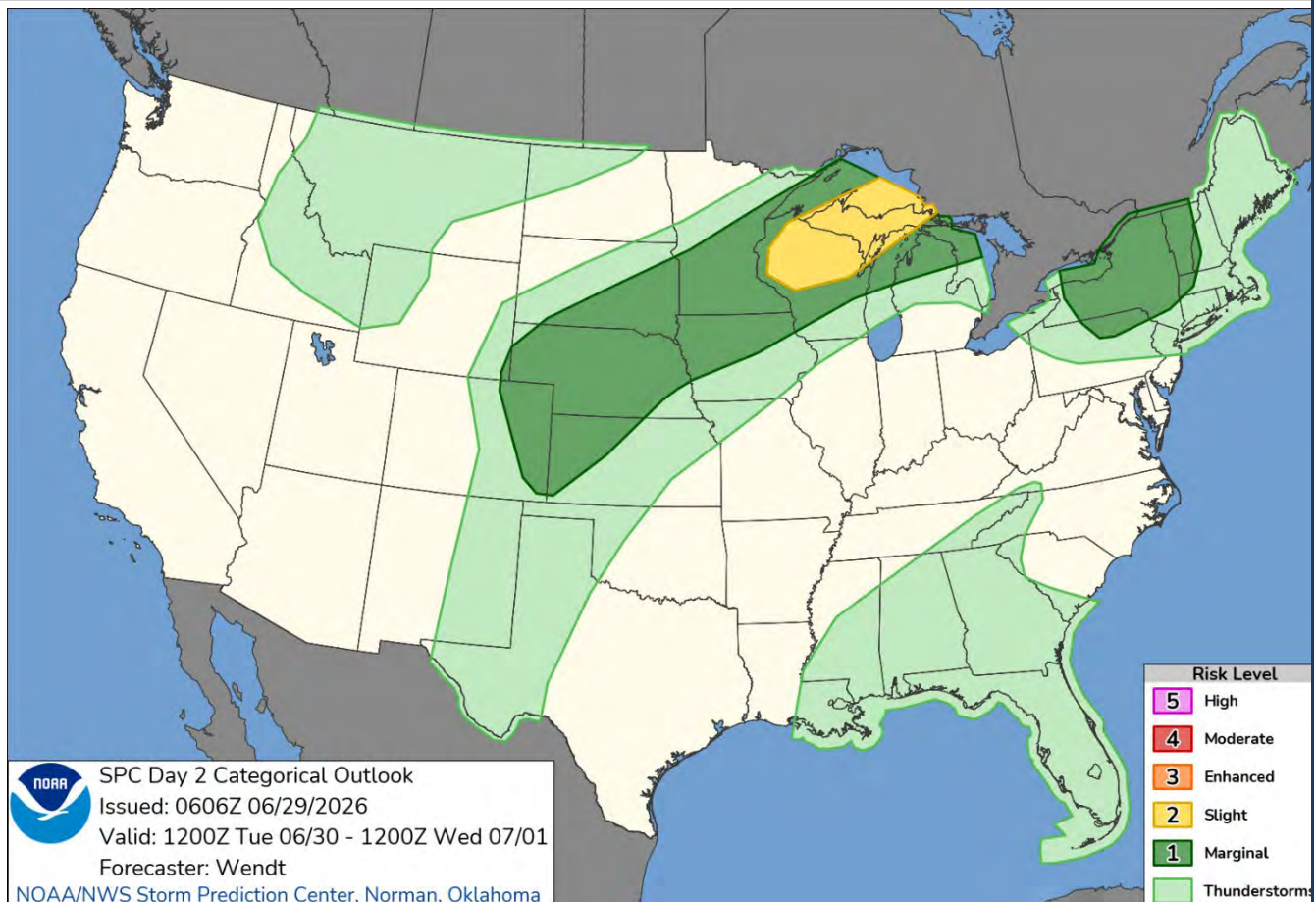
ACTIVITY: Cottonwood Fire: extreme behavior; 14+ large air tankers, 4 air attack planes, 5+ helicopters, Hotshot crews, structural protection. SPC Day 1 Enhanced (NE SD/NW MN): intense supercell evolving into bow echo, moving NE rapidly; HRRR-consistent. Day 1 fire wx: SW surface winds 15-20 mph / RH 10-15% / ERCs 80th-95th+ pct / gusts 30-40 mph (highest concern central CO to N NM). Day 2 CRITICAL: winds 20-25 mph sustained / RH 5-10% / ERCs 80th-98th+ pct / gusts 30-35 mph (Four

	Corners/CO Plateau). No containment expected Cottonwood through 01-JUL minimum. ernoon; deep-layer shear 50-60 kt; strong hodograph curvature supports supercells. Large to VERY LARGE hail (2-4 inch isolated); tornado or two possible; upscale MCS growth into eastern CO/western KS by evening with 75+ mph gusts. SLIGHT UTAH: High-based dry thunderstorms; primary risk severe outflow winds. SLIGHT WI/N IL: 40-50 kt mid-level flow; hail and damaging winds. SLIGHT FLORIDA: Pulse storms, occasional damaging downburst winds. SOUTHERN PLAINS: MCV from N OK/S KS toward ArkLaTex; re-intensification possible; isolated hail/winds. LOCATION: ENHANCED: Cottonwood Fire: Beaver County UT, Fishlake NF. Day 1 Enhanced: NE SD/NW MN. Day 1 ELEVATED fire wx: AZ/SE UT/W-C CO/W-C NM/S WY. Day 2 CRITICAL: NE AZ/NW NM/W CO/E UT (Four Corners/Colorado Plateau -- Cottonwood Fire area within zone). aramie/Albany County). MCS track: eastern CO / western KS tonight. SLIGHT: Utah Great Basin; WI/N Illinois; Florida interior/Atlantic Coast; Southern Plains/ArkLaTex. Fire Weather CRITICAL: Western and central Utah (dry thunderstorms today). TIME: Cottonwood Fire: ignited ~18-JUN; Day 9 active burning 29-JUN. Day 1 SPC valid 291300Z-301200Z. Enhanced risk (NE SD/NW MN): severe wind through midday 29-JUN. Day 2 fire wx CRITICAL 30-JUN valid 301200Z-011200Z. NPL 28-JUN IMSR -- next update 29-JUN morning. fternoon NE CO/SE WY; MCS development evening hours. Southern Plains/ArkLaTex: afternoon into early evening. Day 2 SLIGHT valid 251200Z-261200Z: evening tornado threat KS/OK/Ozarks. EQUIPMENT: KS-Ulysses WXN81 OOS (Cottonwood: 14+ large air tankers, 4 air attack planes, 5+ helicopters, multiple Hotshot crews. NWR: 16 OOS / 7 DEGRADED. NM triple-gap (Artesia/Roswell/Carlsbad all OOS) -- critical fire season gap. NV-Owyhee DEG, CA-Santa Ana OOS, OR-Portland DEG, TX-Ozona OOS, TX-Rio Grande City OOS. tion -- Grant/Stanton/Haskell counties. IL-Hillsboro KXI79 OOS. NM triple-gap (Artesia/Roswell/Carlsbad all OOS). WEA, NOAA Weather App, and EAS broadcast radio are alternate pathways in all gap zones. UNIT: SPC Norman OK; SPC Norman OK; NWS Salt Lake City UT; NWS Albuquerque NM; NWS Grand Junction CO; NIFC/NICC Boise; Beaver County EM; USFS Fishlake NF; Utah Gov. Spencer Cox. ouis MO; NWS Tampa FL; NWS Lake Charles LA.
SPC Day 1 Convective Outlook	SPC Day 1 Convective Outlook (issued 0722 AM CDT 29-JUN-2026, valid 291300Z-301200Z): ENHANCED risk NE SD into NW MN -- intense supercell evolving into bow echo, moving rapidly NE, severe wind swath likely through midday (MCD #1376). Later today: scattered supercells Upper Midwest, large to very large hail, couple tornadoes, severe gusts possible. KS/OK/TX dryline: isolated high-based storms, severe gusts from evaporative downdrafts. lls with large to very large hail (2-4 inch isolated), possible tornadoes, 75+ mph MCS wind threat tonight. SLIGHT: Utah outflow winds; WI/N Illinois hail/winds; Florida pulse storms; Southern Plains MCV. Source: NOAA SPC spc.noaa.gov.



**SPC Day 2
Convective
Outlook**

SPC Day 2 Convective Outlook (issued 0106 AM CDT 29-JUN-2026, valid 301200Z-011200Z): SLIGHT N WI/UP Michigan -- damaging winds primary (storms outflow dominant, effective shear 40-50 kt, CAPE strong). CO/KS/SW NE: organized storms possible post-00Z, large hail and severe winds. NE (Marginal): MCV timing uncertain, damaging winds/hail. into Ozarks. Tornado threat elevated evening hours as LLJ strengthens over Oklahoma and southern Kansas. MCS morning activity from today expected in Kansas through Thursday morning. Eastern Ohio to southern NY: 5% wind probabilities from compact mid-level jet. S. Severe thunderstorms are **LIKELY** across portions of the central Plains vicinity from Saturday afternoon into Saturday evening. Large to very-large hail, severe winds (some 75+ mph), and tornadoes are possible. Mid-level ridge de-amplifies emerging from Rockies; strong lee cyclogenesis eastern CO; frontal zone near southern NE; dryline extending south into southern Plains. Low-level flow strengthens Saturday as lee cyclone deepens, supporting northward moisture transport and destabilization across KS, NE CO, SW NE. Afternoon: storm development along uncapped dryline in E CO and W KS; supercell mode dominant. By evening: supercells congeal into MCS tracking SE into central/eastern KS with increasing wind threat (75+ mph gusts) and QLCS/embedded supercell tornado risk. Source: NOAA SPC [spc.noaa.gov](https://www.spc.noaa.gov).

**Arthur Aftermath
Summary**

DAY 2 CRITICAL FIRE WEATHER (30-JUN): CRITICAL designation for NE AZ/NW NM/W CO/E UT (Four Corners/Colorado Plateau) tomorrow is more severe than today. Cottonwood Fire area falls within or adjacent. No containment window through 01-JUL. NPL 4 escalation risk elevated. Additional ignitions in critical zone would compound resource demands severely., bringing widespread and significant critical fire weather conditions with southwest winds gusting above 40 mph ahead of a strong cold front." Any lightning holdover ignitions from today's dry thunderstorm activity over Utah or tomorrow's Four Corners activity could rapidly expand under Friday-Saturday conditions. Fire managers should pre-position resources before Thursday evening.

**Analyst
Assessment**

TODAY'S THREAT CHARACTER: The TWO SIMULTANEOUS CONCERNS: (1) Cottonwood Fire (~94K acres 0% under Day 1 ELEVATED / Day 2 CRITICAL fire wx) -- no containment window through 01-JUL; (2) SPC Day 1 Enhanced NE SD/NW MN -- bow echo severe wind swath is active NOW through midday. If in NE SD or NW MN, shelter upon NWS warning. Cottonwood: residents evacuated Level 3 areas must NOT return.. 2,000-3,000 J/kg MLCAPE with 50-60 kt deep-layer shear is classic supercell parameter space. Very large hail (2-4 inch isolated) causes catastrophic damage to vehicles and structures. Residents in Weld, Larimer, Logan counties CO and Laramie, Albany counties WY should have shelter plans ready by mid-afternoon and WEA alerts enabled. MCS development tonight extends wind threat into eastern Colorado and western Kansas. robust downburst-producing storms. Day 2 ENHANCED Central Plains is the more significant threat this cycle -- supercell outbreak potential Saturday warrants preparedness now.

WORLD CUP VENUE WEATHER TODAY (19-JUN): TODAY (29-JUN) World Cup R32 matches: Houston NRG (Brazil-Japan, 1 PM); Boston/Foxborough Gillette (Germany-Paraguay, 4:30 PM); Monterrey BBVA (Netherlands-Morocco, 9 PM). No severe weather threat at any venue today. Enhanced risk (NE SD/NW MN) has no World Cup matches. a, 9 PM ET) and Monterrey (BBVA, 9 PM ET) -- no severe weather threat. Vancouver (BC Place, 3 PM ET) and Seattle (Lumen Field, 3 PM ET) -- no significant weather threat, Pacific marine layer. Miami (Hard Rock Stadium, 6 PM ET) and Atlanta (Mercedes-Benz, 6 PM ET) -- no significant weather threat today. ENHANCED risk zone (NE CO/SE WY) has no World Cup matches today.

FIRE WEATHER TODAY AND TOMORROW: Day 1 Fire Weather CRITICAL: Western and central Utah -- upper-level shortwave trough triggering high-based DRY THUNDERSTORMS today. Critically dry fuels; pyrocumulus development possible; potentially strong outflow winds. Precipitable water climbing to ~1.0 inch by evening (transitioning from dry to wet mix near I-15 by evening). ELEVATED: NW Colorado/NE Utah/SW Wyoming (45-50 kt mid-level flow, 15 mph WSW winds, RH 10-15%); Central-Eastern Nevada (25-35 kt mid-level flow, RH 10-15%). Day 2: Subtropical moisture continues east; scattered high-based thunderstorms Four Corners region. FORWARD CRITICAL (Friday-Saturday): Major trough bringing widespread critical fire conditions with SW winds gusting above 40 mph. NIFC NPL 3; 31 large fires uncontained; 6,200+ personnel; 4 CIMTs. YTD 34,427 fires / 2.7M acres.

LIKELIHOOD: Significant severe weather event (reports of damage) in NE Colorado or SE Wyoming today: **LIKELY**. **CONFIDENCE:** MODERATE.

LIKELIHOOD: Significant tornado event (EF2+) in ENHANCED risk area today: **ROUGHLY EVEN CHANCE**. **CONFIDENCE:** HIGH.

SOURCES

NOAA SPC Day 1 Outlook | NOAA SPC Day 2 Outlook | NWS Albuquerque NM | NWS Atlanta (Spain vs Cape Verde) | NWS Miami (heat advisory)

WX-002 | SEC 7B MANDATORY FIRE WEATHER | NPL 3 | COTTONWOOD FIRE ~94K ACRES 0% (NATION'S LARGEST) | Day 1 ELEVATED Great Basin/SW/Four Corners | Day 2 CRITICAL Four Corners/CO PlateauNW Colorado/NE Utah/SW Wyoming + Central-Eastern Nevada | FORWARD: Major Trough Friday-Saturday -- Widespread Critical Conditions, 40+ mph Gusts/rns/Great Basin | Day 2 CRITICAL N AZ/S UT / 27 uncontained large fires / Day 1: DRY THUNDERSTORM area N CA / SW OR / W NV -- Sierra Nevada (lightning ignition risk) / AZ-NM wet-dry mix / central NC brief elevated fire-weather conditions

FLASH | ACTIVE | 22

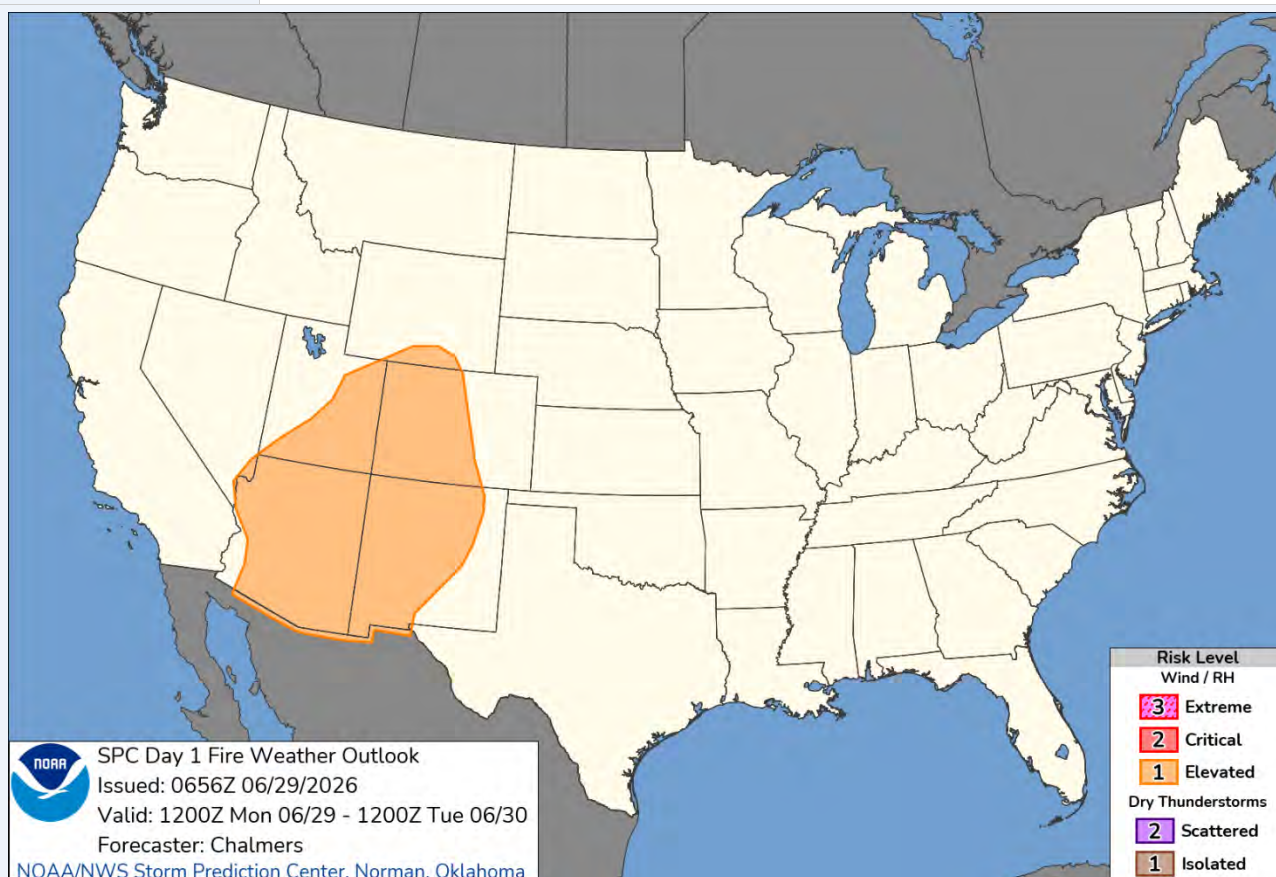
National Status

NIFC National Preparedness Level (NPL): 3 of 5 as of 28-JUN-2026 IMSR 0730 MDT. Source: NIFC National Fire News (nifc.gov/fire-information/nfn) | ID: nifc | T1. 45 uncontained large fires nationally; 10 new large incidents Saturday; 2 large fires contained. 112 new ignitions (Light IA). 7 CIMTs committed. NPL 4 escalation risk is elevated given Cottonwood growth trajectory and CRITICAL Day 2 fire weather forecast

SPC Fire Weather Day 1

for 30-JUN.tted; 1 CIMT assigned (South Fork Fire, Nebraska). YTD: 31,511+ wildfires (~140% of 10-yr avg); ~2.5 million acres (~195% of 10-yr avg). South Fork Fire (Nebraska, Soldier Creek Wilderness, Nebraska National Forest) is the most significant active incident with evacuation orders in place. SWCC (Southwest) most active GACC: 3 fires, 38,632 cumulative acres, 671 personnel. Source: NIFC National Fire News, nifc.gov/fire-information/nfn.

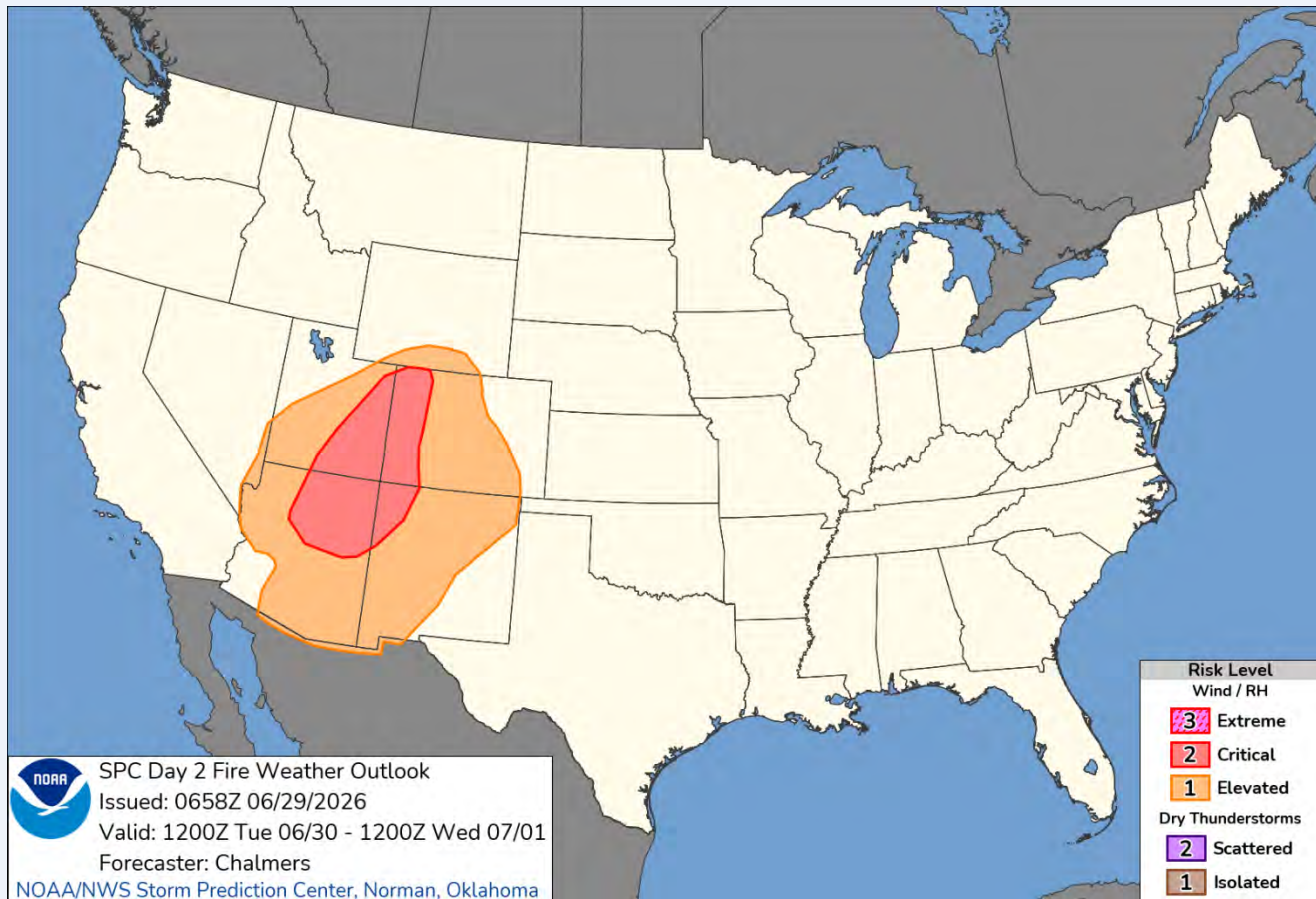
SPC Day 1 Fire Weather Outlook (valid 291200Z-301200Z, issued 0156 AM CDT 29-JUN-2026): ELEVATED to locally CRITICAL: AZ/SE UT/W-C CO/W-C NM/S WY. Sustained SW surface winds 15-20 mph; RH 10-15%; ERCs 80th-95th+ pct; gusts 30-35 mph. Highest concern: central CO south into N-C NM -- ERCs 90th-99th pct, gusts 30-40 mph. Critical upgrade possible in D1 update if wind/RH conditions broaden.the eastern two-thirds of the CONUS and an upper ridge over the West, a robust midlevel speed max will overspread the northern/central Plains during the day. Along/behind the cold front/surface trough, ample diurnal heating will result in a well-mixed boundary layer with 15-20 percent RH expected across parts of eastern Wyoming into the Nebraska Panhandle and vicinity. Enhanced low/midlevel flow along the periphery of the passing speed max and tightening pressure gradient will result in 15-25 mph sustained northwesterly surface winds -- elevated to locally critical fire-weather conditions. Additionally, strong terrain-driven winds (15-20 mph, locally greater in gap-flow areas) and 10-15 percent RH will promote locally elevated fire weather conditions across parts of the eastern Great Basin, Four Corners, and Central Rockies. Source: NOAA SPC spc.noaa.gov. [Operator-supplied SPC Day 1 Fire Weather map image to follow.]



SPC Fire Weather Day 2

SPC Day 2 Fire Weather Outlook (valid 301200Z-011200Z, issued 0158 AM CDT 29-JUN-2026): CRITICAL: NE AZ/NW NM/W CO/E UT (Four Corners/Colorado Plateau). Mid-level jet streak overspreads region as embedded shortwave rounds base of longwave trough. Winds 20-25 mph sustained; gusts 30-35 mph; RH 5-10%; ERCs 80th-98th+ pct (locally higher). Several preceding dry/breezy days exacerbating fuel receptiveness. Cottonwood Fire area (eastern Utah) falls within or adjacent to this

CRITICAL zone. er ridge, a midlevel trough and accompanying 70-80-kt speed max will advance southeastward across the Northwest and northern Rockies on Tuesday. NORTHERN INTERMOUNTAIN WEST (elevated to locally critical): strong deep-layer west-northwesterly flow with 15-25 mph sustained westerly surface winds amid 15-20 percent afternoon RH over increasingly dry/receptive fuels. Locally critical conditions most likely in gap-flow areas through the Cascades and Snake River Plain. EASTERN GREAT BASIN INTO THE ROCKIES AND ADJACENT PLAINS (broadly elevated): breezy/gusty west-northwesterly surface winds with single-digit to lower-teens RH yield broad elevated fire-weather conditions. Stronger sustained winds (~20-25 mph) over southern Wyoming where locally critical conditions are possible. Locally critical also in terrain-favored areas throughout the elevated area. Source: NOAA SPC spc.noaa.gov. [Operator-supplied SPC Day 2 Fire Weather map image to follow.]



Active Fire Areas (14-JUN IMSR / InciWeb)

NEBRASKA: South Fork Fire (Soldier Creek Wilderness, Nebraska National Forest, Pine Ridge RD): ignited 09-JUN; evacuation orders and closures in effect; Rocky Mountain Complex IMT committed. Most significant new-evacuation incident this cycle.

NEW MEXICO: SEC 7B MANDATORY FIELDS (§0.117): NPL 3 as of 28-JUN-2026 (source: nifc.gov/fire-information/nfn | ID: nifc | T1). 7-Day Significant Fire Potential: ABOVE NORMAL Great Basin, Southwest, Four Corners through 05-JUL. Operator to verify current-day NIFC 7-day graphic. fire behavior, smoldering; numerous structures threatened; area/road/trail closures; complex IMT. Bear Fire (Gila NF, 18 mi SE of Quemado): ~150 acres, running/flanking/spotting, structures threatened. 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.

SOUTHWEST AREA (SWCC most active GACC): 3 fires, 38,632 cumulative acres, 671 personnel. Today's Day 1 fire weather conditions (elevated-to-critical WY/NE Panhandle; elevated Great Basin/Four Corners) apply directly to this GACC's active fire country.

	ALASKA: Multiple fires in the Galena Zone (BLM) area including Kopshehut; structures threatened. SE Alaska: 12 Juneau-cluster NWR transmitters DEGRADED further compounds wildfire alerting in AK.
Analyst Assessment	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. 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. DRY-THUNDERSTORM IGNITION WATCH: The Day 2 (13-JUN) SPC Fire Weather highlights mostly dry, high-based thunderstorms over the southern/eastern Great Basin into the central Rockies, with inverted-V soundings favoring strong/erratic outflow gusts and lightning ignitions on critically dry fuels. This is the primary new-start mechanism to watch over the next 48 hours, layered on the elevated-to-critical Day 1 conditions already present across the eastern Great Basin and central Rockies. LIKELIHOOD: New fire starts in the eastern Great Basin / central Rockies critical-fuel zone over the next 48 hours: LIKELY. CONFIDENCE: MODERATE. LIKELIHOOD: National Preparedness Level escalation to NPL 3 before end of June: ROUGHLY EVEN CHANCE. CONFIDENCE: MODERATE.
SOURCES	NIFC National Situation Report SPC Fire Weather Outlook InciWeb Active Incidents USFS Active Fire Mapping Program

NWR TRANSMITTER OUTAGE STATUS - 29 JUNE 2026

Source: Operator-supplied roster 29-JUN | NOAA NWR (noaa_nwr T1) | As of 25-JUN-2026 1530Z | 23 transmitters affected (15 OOS / 8 DEGRADED) | NET +5 from prior | RESTORED: AR-Fountain Hill, CO-Colorado Springs, OR-Coos Bay, TX-Brownsville | NEW OOS/DEGRADED: AK-Point Pigot (OUT), CA-Santa Ana (OUT), MA-Leyden (OUT), NC-Statesville (OUT), NV-Owyhee (DEG), TX-Ozona (OUT), TX-Rio Grande City (OUT) | IN-Angola improved OOS to DEGRADED9 affected (22-JUN) to 22 today | RESTORED: IL Lockport (IL double-gap RESOLVED), AK Cape Gull, AR Fountain Hill, CO Colorado Springs, OR Coos Bay, TX Brownsville | NEW: CA Santa Ana, TX Ozona, TX Rio Grande City, AK Point Pigot, AK cluster updates

⚠ HIGH-GAP ALERT - ACTIVE HAZARD OVERLAP: (1) NM TRIPLE-GAP: Artesia WXN24 OOS / Roswell WWG36 OOS / Carlsbad WWF37 OOS -- critical fire season coverage gap. AK CLUSTER (5): Kotzebue KWN30 DEG / Zarembo Island KZZ91 DEG / Mt Robert Barron KZZ87 DEG / Mt McArthur KZZ95 DEG / Point Pigot KZZ93 OOS -- infrastructure maintenance NOT SWX-caused. NEW THIS CYCLE: CA-Santa Ana WWG21 OOS / MA-Leyden WXM68 OOS / NC-Statesville KJY85 OOS / TX-Ozona WXL44 OOS / TX-Rio Grande City WNG601 OOS. IN-Angola KXI94 IMPROVED OOS to DEGRADED. RED this cycle -- IL double-gap resolved. Montgomery/Bond/Fayette/Macoupin counties without primary NWR. (2) AK CLUSTER: Kotzebue DEGRADED + Zarembo Island/Mt Robert Barron/Mt McArthur DEGRADED + Point Pigot OOS -- 5 AK transmitters affected. (3) NM TRIPLE-GAP PERSISTS: Artesia WXN24 + Roswell WWG36 + Carlsbad WWF37 all OOS -- Chaves/Eddy counties zero primary NWR coverage during active fire season. (4) KS ULYSSES WXN81 OOS (Dodge City KS WFO) during active Southern Plains elevated convection today. (5) IN ANGOLA KXI94 DEGRADED (improved from OOS) -- Northern Indiana reduced coverage. (6) NC STATESVILLE KJY85 OOS -- Iredell/Rowan/Cabarrus/Stanly counties no primary NWR during SPC Day 1 SLIGHT (SE VA/NC). (7) CA SANTA ANA WWG21 OOS -- San Diego WFO coverage reduced. Emergency managers in all affected counties: verify alternate alerting pathways (WEA, NOAA Weather App, EAS broadcast radio) are operational.

FORTUNE FAVORS THE PREPARED DAILY THREAT REPORT 29 JUNE 2026						
ST	Callsign	Location	Freq	WFO	Status	Counties / Notes
AK	KWN30	Kotzebue	162.550	Fairbanks AK	DEGRADED	Northwest Arctic Borough, AK
AK	KZZ91	Zarembo Island	162.450	Juneau AK	DEGRADED	Wrangell/Petersburg, SE Alaska
AK	KZZ87	Mt. Robert Barron	162.450	Juneau AK	DEGRADED	Juneau/Douglas, SE Alaska
AK	KZZ93	Point Pigot	162.450	Anchorage AK	OUT OF SERVICE	Anchorage area, AK -- NEW THIS CYCLE
AK	KZZ95	Mt. McArthur	162.525	Juneau AK	DEGRADED	Haines/Skagway area, SE Alaska
CA	WWG21	Santa Ana	162.450	San Diego CA	OUT OF SERVICE	Orange/San Diego area, CA -- NEW THIS CYCLE
GA	WXM65	Baxley	162.525	Jacksonville FL	OUT OF SERVICE	Appling/Pierce/Wayne/Jeff Davis counties, GA
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 (improved from OOS)
KS	WXN81	Ulysses	162.450	Dodge City KS	OUT OF SERVICE	Grant/Stanton/Haskell counties, KS -- ACTIVE SEVERE WX
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
NC	KJY85	Statesville	162.525	Greenville-Spartanburg SC	OUT OF SERVICE	Iredell/Rowan/Cabarrus/Stanly counties, NC -- SPC SLIGHT
NM	WXN24	Artesia	162.425	Midland/Odessa TX	OUT OF SERVICE	Eddy/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	WXL44	Ozona	162.500	San Angelo TX	OUT OF SERVICE	Crockett/Sutton/Edwards counties, TX -- NEW THIS CYCLE
TX	WNG601	Rio Grande City	162.425	Brownsville/Rio Grande Valley TX	OUT OF SERVICE	Starr County, TX -- NEW THIS CYCLE

SOURCES: Source: weather.gov/nwr/outages. As of 25-JUN-2026 1530Z. 23 transmitters affected (15 OOS / 8 DEGRADED). RESTORED this cycle: AR-Fountain Hill, CO-Colorado Springs, OR-Coos Bay, TX-Brownsville (4 restored). NEW this cycle: AK-Point Pigot, CA-Santa Ana, MA-Leyden, NC-Statesville, NV-Owyhee, TX-Ozona, TX-Rio Grande City. IN-Angola improved OOS to DEGRADED. EGRADED -- note: IN Angola reclassified

FORTUNE FAVORS THE PREPARED | DAILY THREAT REPORT | 29 JUNE 2026

DEGRADED from OOS). New this cycle: CA-Santa Ana WVG21 OOS (San Diego WFO coverage gap); MA-Leyden WXM68 OOS; NC-Statesville KJY85 OOS; TX-Ozona WXL44 OOS; TX-Rio Grande City WNG601 OOS; AK-Point Pigot KZZ93 OOS; NV-Owyhee WNG731 DEGRADED. AK cluster (5 transmitters affected) significantly degrades SE Alaska coverage. IN-Angola improved OOS to DEGRADED. NM triple-gap: Artesia/Roswell/Carlsbad all OOS (St. Louis). NM triple-gap (Artesia/Roswell/Carlsbad all OOS) leaves Chaves/Eddy counties without NWR during today's active fire weather. TN-Shelbyville WXX63 OOS (Nashville) -- Bedford/Marshall/Coffee counties.

SECTION 7B - WILDFIRE

WILDFIRE STATUS - 26 JUNE 2026 | NIFC NPL 3 (raised 19-JUN-2026) | 31 LARGE FIRES ACTIVE | 77 NEW FIRES YESTERDAY | 6,200+ PERSONNEL | 4 CIMTs | YTD: 34,427 FIRES / 2.8M ACRES -- EXCEEDS 10-YR AVG BOTH METRICS

COTTONWOOD FIRE (UT): ACTIVE -- near Beaver, UT; Utah DOF Central Area. Extreme fire behavior: wind-driven runs and spotting. Numerous structures threatened. Evacuations and road closures. Iron Fire (UT): ACTIVE -- 1 mi NW Eureka, UT. CIMT (GB Team 3). Extreme: uphill runs, spotting, crown runs. Evacuations. Grapevine Fire (NV): 10 mi SE Caliente, NV. Extreme. BLM Ely. Kane Springs Fire (NV): 17 mi SW Caliente, NV. Extreme. Pocket Fire (AZ): 7 mi N Sedona, AZ. CIMT (SW Team 2). Evacuations. Lytle Fire (OR): 3 mi S Vale, OR. BLM. Extreme. Garred Road Fire (WA): 4 mi W Coulee City, WA. Structures threatened. Starry Fire (AK): 1 mi S Anderson, AK. Railroad infrastructure threatened.

FIRE-002 SHORE FIRE (CA): ACTIVE -- 2 mi west of Calimesa CA; Riverside Unit Cal Fire. Grass and brush. Minimal fire behavior with smoldering, creeping and backing. Structures and railroad infrastructure threatened. Status per IMSR 18-JUN. **FIRE-003 MATEO FIRE (CA):** ACTIVE -- 10 mi north Camp Pendleton; DOW. Chaparral, grass and brush; isolated torching.

NATIONAL OUTLOOK: NIFC NPL 3 of 5 (raised 19-JUN-2026, per NIFC National Fire News 25-JUN). 31 large fires uncontained; 77 new fires yesterday; 6 new large fires; 6,200+ personnel assigned; 4 CIMTs. YTD: 34,427 fires (exceeds 10-yr avg); 2.8 million acres (exceeds 10-yr avg). 7-day significant fire potential: above-normal Great Basin, Southwest, and Northwest. **FORWARD:** Major trough Friday-Saturday -- widespread critical fire conditions 40+ mph SW winds. **SOURCES** per §0.117: NIFC National Fire News nifc.gov/fire-information/nfn (NPL source of record); NIFC IMSR nifc.gov/nicc-files/sitreprt.pdf; SPC spc.noaa.gov/products/fire_wx/.

SECTION 7C - SPACE WEATHER & EMCOMM

SWX-001 | SWX-CON 2 WATCH | K4 EXTENDED WARNING | SUBSIDING (607 pfu, BELOW 1000 THRESHOLD) | CME FROM M6.8 AR4473 21-JUN DID NOT ARRIVE | Kp MAX 2 | NO GEOMAGNETIC STORM | R1-R2 FLARE POTENTIAL 30-35% | CHANGE FROM PRIOR (Day 119 to Day 122): UPGRADE FROM SWX-CON 2 WATCH (G1 Minor) TO SWX-CON 2 WATCH (G1 Watch + ALTEF3 HEE Day 3 continued)

**WATCH | UPDATED --
DOWNGRADE | WATCH**

SWPC Status (25- JUN 1530Z)

NSTR. No alerts or warnings active as of 1530Z 25-JUN-2026. K4 extended warning through 1200 UTC 26-JUN -- aurora possible N-tier US. Source: NOAA SWPC swpc.noaa.gov) DID NOT ARRIVE as a geomagnetic storm. ALTEF3 CONTINUED (Day 3): GOES-19 integral ≥ 2 MeV electron flux elevated above 1000 pfu threshold since 26-JUN 1345 UTC; yesterday max 2,637 pfu. Threshold breach sustained this cycle. ALTEF3 Serial 3703 (18-JUN): no formal cancel issued by SWPC but event is effectively over per observed flux. Forecast max Kp Jun 23-25: 4.00 (below G1). No geomagnetic storm expected. Solar radiation: no S1+ events; 5% S1 probability per day. Radio blackout: no R events past 24 hours; R1-R2 30-35% per day due to AR4473 flare potential.

Why This Cycle

ALTEF3 continued alert (Day 3) -- 2MeV electron flux has been above 1000 pfu since 26-JUN 1345 UTC; G1 Watch issued for 29-30 JUN.

Summary	SWX-CON 2 WATCH. No active alerts or warnings. 2 probability 30-35% per day from AR4473 flare potential. ALTEF3 STATUS: Serial 3703 issued 18-JUN -- no formal cancel. But GOES-19 integral ≥ 2 MeV flux has not crossed 1000 pfu threshold at any point during this reporting cycle (22-JUN 1530Z to 23-JUN 1530Z). Today range: 65-681 pfu. Current: 607 pfu and oscillating. The ALTEF3 event from 13-JUN has effectively subsided. COMCON basis revised: ALTEF3 ACTIVE removed; NWR/theater EW maintain COMCON 4. CME from 21-JUN M6.8 flare: no arrival confirmed. No aurora, no HF degradation, no GIC risk this cycle.
Operational Impacts	HF RADIO: No HF degradation associated with this event. ALTEF3 is a radiation belt electron event, not a geomagnetic or X-ray event. HF conditions are within normal seasonal parameters. No solar flare or X-ray enhancement noted. Standard propagation expected on all HF bands. GPS / NAVIGATION: No ionospheric GPS degradation associated with this ALTEF3 event. Quiet geomagnetic conditions mean GNSS accuracy is within normal parameters. No polar route HF or navigation issues expected. POWER GRID: No GIC (geomagnetically induced current) risk this cycle. ALTEF3 electron events do not drive GIC -- that risk is associated with geomagnetic storms (K-index elevation). Grid operations normal. SATELLITE OPERATIONS: PRIMARY RISK THIS CYCLE: Surface charging and deep dielectric charging on satellites at geosynchronous orbit. Sustained high-energy electron flux (>1000 pfu Day 6) increases risk of electrostatic discharge events on GEO satellites. Satellite operators should monitor for anomalous charging signatures. GOES-19 is the primary SWPC monitoring asset. LEO satellites experience elevated drag only during geomagnetic storms -- not applicable this event. AURORA: No aurora expected this cycle. No geomagnetic storm is active. Aurora requires elevated K-index (geomagnetic disturbance) -- not present in current ALTEF3-only event.
HF / COMMS Assessment	All HF bands: G1 MINOR ACTIVE -- No degradation associated with ALTEF3. Standard propagation in effect. EMCOMM operators: no special band selection required this cycle due to space weather. Monitor SWPC for any new geomagnetic alerts that could change this assessment. ALTEF3 context: electron belt events are primarily a satellite risk, not a surface communications risk. Duration note: this event is now Day 6 -- persistence above average; if a CME or solar flare coincides with existing enhanced electron belt, compound effects are possible. No imminent CME threat identified.
Analyst Assessment	PRIMARY CONCERN THIS CYCLE: Elevated electron flux (ALTEF3 Day 6) is a satellite operations issue, not a surface or EMCOMM issue. The relevant audience is satellite operators and space system program managers. No action required for ground-based emergency communicators or utility operators this cycle based on SWX conditions alone. DURATION AND PERSISTENCE: Day 6 of continuous ALTEF3 is notable. Most electron enhancement events resolve within 1-4 days. Extended events (5+ days) can result in deeper charging penetration in dielectric satellite materials. SWPC has not cancelled -- monitor swpc.noaa.gov for Serial 3704 or cancellation. If a new CME or geomagnetic storm develops while electron belt is already enhanced, compound GEO satellite risk would elevate. CURRENT STATUS: CHANGE FROM PRIOR (Day 119 to Day 122): ALTEF3 CONTINUED ALERT (Day 3). Flux sustained above 1000 pfu since 26-JUN 1345 UTC; yesterday max 2,637 pfu. G1 Watch issued 28-JUN 1041 UTC for 29-30 JUN. Kp max 4.00. No geomagnetic storm. No proton event. No HF degradation. No aurora. No GIC risk. AR4473 watch: R1-R2 flare potential 30-35%. SWX-CON downgraded from R2 MODERATE to SWX-CON 3 WATCH. LIKELIHOOD: ALTEF3 event resolving within 24-48 hours: ROUGHLY EVEN CHANCE. CONFIDENCE: LOW. LIKELIHOOD: GEO satellite anomaly attributable to ALTEF3 charging event: UNLIKELY but non-zero given Day 6 duration. CONFIDENCE: LOW.
SOURCES	NOAA SWPC main portal SWPC Real-Time Solar Wind SWPC Planetary K-index GPSJam real-time interference map SWPC HF Radio Impacts SpaceWeatherLive

SECTION 8 - AGRICULTURE / FOOD & SUPPLY CHAIN

NIFC NPL 3 of 5 (raised 19-JUN-2026) | 31 Uncontained Large Fires | 77 New Fires Yesterday | 6 New Large Fires | 6,200+ Personnel | 4 CIMTs | YTD: 34,427 Fires / 2.8M Acres -- Exceeds 10-yr Avg Both Metrics | Source: NIFC National Fire News (nifc.gov/fire-information/nfn)cres | SPC Day 2 CRITICAL N AZ/S UT | §0.117 MANDATORY: nifc.gov/fire-information/nfn

ELEVATED | UPDATED | 10

Why This Cycle	Cottonwood Fire (Beaver County UT) is ~94,000 acres and 0% contained -- the nation's largest active wildfire -- with Day 2 CRITICAL fire weather forecast for the Four Corners/Colorado Plateau on 30-JUN.
Summary	NIFC IMSR 18-JUN 0753 MDT: 27 large fires being suppressed nationally; 8 new large fires 18-JUN. YTD: 33,349 wildfires (135%+ of 10-yr avg); 2,627,549 acres; 4,988 personnel assigned. National Preparedness Level 2 of 5. ACTIVE FIRES OF NOTE: (1) South Fork Fire (NE, Nebraska NF) -- 12 mi west of Crawford; CIMT RM Team 2 committed; grass/timber; minimal fire behavior with flanking/backing/creeping; numerous residences threatened; evacuations in place. (2) Iron Fire (UT, Eureka area) -- CIMT assigned -- extreme fire behavior -- evacuations in effect; Grapevine Fire (NV) and Kane Springs Fire (NV) -- extreme; Pocket Fire (AZ, Sedona) -- CIMT assigned; Lytle Fire (OR) -- extremetures and railroad infrastructure threatened. (3) Garred Road Fire (WA) and Starry Fire (AK) also active. CA -- 10 mi north; DOW; chaparral/grass/brush; isolated torching. FIRE WEATHER: SPC Day 1 CRITICAL -- far northern CA + extreme southern OR + NW Nevada; dry southwesterly flow 15-20 mph; RH 10-15%; high-based dry thunderstorm lightning risk (ERCs 80-90th percentile). Elevated: Great Basin to Four Corners. Day 2 CRITICAL -- Four Corners; near single-digit RH, 15-20 mph WSW winds; Elevated Pacific Northwest (Cascade lee). §0.117 SOURCES: NIFC National Fire News (nifc.gov/fire-information/nfn) -- NPL 2 as of 15-JUN sustained; IMSR 18-JUN; SPC Day 1/2 Fire Weather Outlooks.
Analyst Assessment	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. 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. 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.
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 BUNDIBUGYO PHEIC DAY 45 DRC 1,155 CONFIRMED / 304 DEATHS UGANDA 20 CONFIRMED / 2 DEATHS FRANCE EU IMPORT DAY 5 WHO SITREP EXPECTED TODAY 29-JUN SOUTH SUDAN 69% PROBABILITY 12 WEEKS NO VACCINE / NO TREATMENT		HIGH UPDATED 14
Why This Cycle	ECDC update (26-JUN) confirmed 1,175 total cases and 306 deaths; France EU import remains active (Day 5); WHO sitrep expected today.	
Summary	Bundibugyo ebolavirus PHEIC declared 17-MAY-2026 -- Day 45 as of 29-JUN. DRC 1,155 confirmed / 304 deaths; Uganda 20 confirmed / 2 deaths. Total 1,175 confirmed / 306 deaths (CFR 26%). France EU import (Day 5): doctor returned from DRC humanitarian mission, confirmed 24-JUN. ECDC: EU/EEA risk very low. WHO sitrep expected TODAY 29-JUN. No approved vaccine or specific treatment for Bundibugyo strain. Ituri >91% of cases; hotspots Bunia, Mongbwalu, Rwampara, Nyankunde. 17 HCW dead, 75 infected. Contact tracing ~45% (WHO requires 90%). CDC MMWR (June 2026): without large-scale intensified containment, outbreak could exceed 10,000-20,000 cases within 3 months. No approved vaccine or specific treatment for Bundibugyo strain. MSF: 3 treatment centers operational. CEPI fast-track vaccine funding committed 1-JUN. 6 confirmed deaths / 376 hospitalized. Uganda: 20 confirmed / 2 deaths (all linked to DRC). +29 cases +4 deaths since 16-JUN update. Ituri: 767 confirmed cases from 20 health zones. North Kivu: 67 cases from 10 health zones. South Kivu: 3 cases. No new health zones since previous update. Contact tracing still limited. Security: burial team attacked Mongbwalu; 5 response workers taken hostage. CEPI funded three vaccine candidates (IAVI, Moderna, Oxford). MBP-134 and remdesivir in clinical trials. No licensed vaccine or therapeutic. True scale likely higher given infrastructure gaps and ongoing insecurity. MSF: 'Never before has an Ebola outbreak recorded so many cases so soon after declaration.' True scale is likely higher given limited healthcare infrastructure and ongoing insecurity that hinder detection and response. KEY TREATMENT GAP: no vaccines or medications are licensed for Bundibugyo virus; existing Ebola therapeutics (mAb114, REGN-EB3) and vaccines were developed for Zaire ebolavirus, a different strain, which materially complicates response. WORLD CUP NEXUS: DRC and Uganda not participating nations. US entry restrictions remain for non-citizens recently in affected countries (routed through IAD/ATL/IAH/JFK). France EU import confirms EU healthcare system exposure -- second EU/EEA import after German case (US healthcare worker). Travelers at World Cup from affected regions remain a theoretical import vector but risk assessed VERY LOW per CDC/ECDC. US RESTRICTIONS remain in effect (entry limits on non-citizens recently in affected countries; routing of citizens/residents through designated airports). US CDC risk to the US population: LOW -- extremely low likelihood of transmission, though impact would be high if cases arrive. No US cases to date. RESPONSE: Africa CDC and WHO continental response plan active. ADDITIONAL CDC ACTIVE ALERTS this cycle: mandatory quarantine imposed on cruise-ship hantavirus passengers; respiratory viruses (COVID-19, flu, RSV) at LOW activity nationally.	
Analyst Assessment	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. 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. LIKELIHOOD: Ebola cases detected in US in next 30 days: VERY UNLIKELY (CDC assessed LOW risk). CONFIDENCE: MODERATE.	

SOURCES

CDC Ebola update 24-JUN | WHO Africa CDC joint response plan | CDC newsroom - Listeria + Salmonella alerts | CDC respiratory status 25-JUN

SECTION 10 - OPERATIONAL CONDITIONS ASSESSMENT

PREP-CON 3
BROWN SKY
Incident
Probable

STABLE |
ASSESSED 26-
JUN

PREP-CON 3 -- BROWN SKY (Incident Probable) MAINTAINED. WX-CON elevated to 3 CRITICAL (Cottonwood Fire FLASH + Day 2 CRITICAL fire wx). SWX-CON 2 (G1 Watch + ALTEF3 HEE Day 3). COMCON 4 maintained (GPS jamming elevated Gulf FIRs + 23 NWR OOS/DEGRADED). CYBERCON ELEVATED (three simultaneous OVERDUE KEVs). PREP-CON 4 drivers present but 3 held: informal stand-down reached 29-JUN; Doha talks 01-JUL provide off-ramp. PREP-CON 4 (Incident Possible) is held this cycle. The MOU announcement is a significant de-escalation signal but does not justify a step down: the deal is unsigned, the ceasefire does not take legal effect until 19-JUN, IAEA access has been explicitly excluded from the MOU, Lebanon IDF-Hezbollah exchanges continue, and the World Cup mass-gathering period is in full operation with confirmed soft-target and cyber threat activity. The prior-cycle G2 storm watch (PREP-CON 4 trigger per §0.129) has been cancelled, removing that specific trigger. Remaining triggers still met at Possible tier: (1) active KEV exploitation including KEV deadline TODAY (Oracle PeopleSoft), Ivanti deadline passed 14-JUN, Check Point overdue; (2) World Cup mass-gathering open; (3) MARAD 2026-008 active (Hormuz maritime risk remains HIGH pre-signing); (4) G7 summit opens today with confirmed Black Bloc protest activity in Geneva; (5) Iran vs NZ in LA tonight with protests and extra security. A step down to PREP-CON 5 would require: MOU signed, ceasefire in force, Hormuz reopening underway, and resolution of active KEV exploitation window. None of those conditions are met today.

MOVEMENT ASSESSMENT

SUPPORTS STEP DOWN TO 5 (after 19-JUN): If MOU signs Friday 19-JUN, Lebanon ceasefire holds, and Hormuz mine-clearing begins, the basis for PREP-CON 4 erodes meaningfully. Monitor 19-JUN signing status as the primary trigger for a re-assessment.

SUPPORTS STAYING AT 4 (today): Unsigned deal, Lebanon volatile, active KEV exploitation, World Cup Day 6, G7 protests, Iran vs NZ tonight. All Possible-tier triggers remain active. ORANGE SKY is the correct posture until signature confirms and Lebanon stabilizes.

SUPPORTS MOVING BACK TO 3: If MOU collapses (Lebanon IDF-Hezbollah exchange escalates), or confirmed CONUS comms degradation (COMCON move to 3), or confirmed cyber attack on critical infrastructure -- none currently met.

LIKELIHOOD: MOU signed 19-JUN and PREP-CON step down to 5 by end of week: ROUGHLY EVEN CHANCE. **CONFIDENCE:** MODERATE.

Reference: fortunefavorstheprepared.com/preparedness-book-of-knowledge-2/planning/preparedness-conditions-prep-con/

COMCON 4
INCREASED
VIGILANCE
OPERATOR
CONFIRMED

COMCON 4 (Increased Vigilance) DTR-ASSESSED 26-JUN-2026. Governing rule -- level reflects highest-severity domain in degradation. 32 NWR transmitters OOS/DEGRADED (net +5 from prior cycle). No new GPS/GNSS jamming reported this cycle. Cisco SD-WAN CVE-2026-20262 KEV deadline 29-JUN (5 days, active exploitation). No confirmed critical infrastructure outages this cycle beyond NWR transmitter roster. No new GPS/GNSS jamming. Cisco SD-WAN KEV deadline 29-JUN -- 3 DAYS. Ubiquiti UniFi KEV TODAY 26-JUN. Venezuela internet outage ongoing. EMCOMM: K4 warning expires ~1200 UTC.

WX-CON 2 --
SLIGHT
SPC Day 1
SLIGHT

WX-CON 2 SLIGHT (sweep-based). SPC Day 1 SLIGHT: NE CO/SW NE/W KS and S KS/N OK-Ozarks (NE Colorado / SE Wyoming) -- very large hail 2-4 inch, possible tornadoes, 75+ mph MCS gusts tonight. SLIGHT: Utah outflow, WI/N IL hail/winds, Florida pulse storms, Southern Plains MCV. Day 2 SLIGHT: KS/OK/Ozarks -- evening tornado threat elevated. Fire Wx CRITICAL: W/C Utah dry thunderstorms today. FORWARD: Major trough Friday-Saturday -- widespread critical fire weather 40+ mph gusts. (ront) AND N/Central High Plains (supercells, large hail, 1-2 tornadoes NE Panhandle/NE CO). Weekend: EF2 KS 1 fatality,

IL/IN 2 fatalities 21-JUN. SPC Day 2 SLIGHT: E COM/ KS/N OK. Fire Weather Day 2 CRITICAL: N AZ/S UT. NPL 3 per 23-JUN 0730 MDT IMSR.

**SWX-CON --
R2**

MODERATE

Driver: M6.8

Flare 21-JUN

Possible CME

Glancing Blow

SWX-CON 2 WATCH (sweep-based). NSTR -- no alerts or warnings as of 1530Z 25-JUN-2026. K4 extended warning through 1200 UTC 26-JUN -- aurora possible N-tier US. No geomagnetic activity, no solar radiation events, no R-scale events. EMCOMM: K4 warning expires ~1200 UTC 26-JUN. Monitor SWPC for follow-on. No solar radiation events. No GPS/HF degradation.

SECTION 11 - DOMESTIC UNREST / SOFT TARGET

DOM-002 | UK PM LABOUR LEADERSHIP -- BURNHAM SOLE DECLARED CANDIDATE | NOMINATIONS OPEN 9-JUL CLOSE 16-JUL | NEW PM ~18-19 JUL | CARETAKER GOVERNMENT DURING ACTIVE MOU/HORMUZ WINDOW | DOM-002 | BELFAST - FORWARD SCAFFOLD | PROSECUTION PHASE ACTIVE | JULY MARCHING SEASON 12-JUL APPROACHING

HIGH | UPDATED | 12

Summary

Belfast anti-immigration riots began 9-JUN following a stabbing attack. Peak violence ran 9-11 JUN: 27 residents made homeless by door-to-door targeting; bus and vehicles burned; 62 fire brigade incidents; PSNI deployed water cannon and plastic bullets. Wired confirmed the "Ulster Youth Club" (global neo-Nazi network) played a role in not only stoking tensions, but advising and orchestrating the masked youths who spearheaded much of the violence. Elon Musk amplified an AI-generated list targeting businesses. Counter-protest: on 13-JUN thousands gathered at Belfast City Hall ("Riots don't speak for Belfast").

SALUTE

SIZE: Riots peaked 9-11 JUN. PSNI with 200+ mainland UK and 90 Scottish officers deployed. Counter-protests dominated 13-JUN. No confirmed violence overnight 13-15 JUN found in sweep. PSNI elevated posture continues.

ACTIVITY: 9-JUN: riots triggered by Sudanese national Hadi Alodid's knife attack on Stephen Ogilvie. 9-11-JUN peak violence: 27 homeless, homes torched door-to-door targeting immigrants, bus burned, 62 fire brigade incidents in Belfast, water cannon and plastic bullets deployed. Active Club "Ulster Youth Club" (global neo-Nazi network) confirmed by Wired as orchestrating violence. 11-JUN: smaller activity (~100 Newtownards Road). 13-JUN: massive counter-protests Belfast City Hall and Derry -- largest anti-racism rally ever held in Belfast per Amnesty International NI. 23 arrested / 17 charged as of 13-JUN. Spread: Glasgow, Edinburgh, Southampton. No confirmed violence overnight 13-15 JUN.

LOCATION: Belfast (Crumlin Road, Lower Newtownards Road, Glengormley, Newtownabbey, Portadown). Spread to Glasgow, Edinburgh, Southampton, England.

TIME: Began 9-JUN-2026. Today Day 10. 18-JUN matches: Switzerland 4-Bosnia 1 (LA); Czechia 1-South Africa 1 (Atlanta); Mexico 1-South Korea 0; Canada 6-Qatar 0. No major security incidents at venues. 19-JUN matches: USA vs Australia (Seattle, 1900Z -- high visibility); Scotland vs Morocco (Boston, 2200Z); Brazil vs Haiti (Philadelphia, 0100Z 20-JUN); Turkey vs Paraguay (Santa Clara, 0300Z 20-JUN). Iran flag ban lawsuit filed LA Superior Court -- TRO sought; Iran next plays Belgium 21-JUN at SoFi (elevated protest/security posture expected). Hadi Alodid remanded in custody; next court date not yet scheduled.

EQUIPMENT: Rioters: petrol/incendiary devices, vehicles, construction site projectiles. PSNI: water cannon, AEPs (plastic bullets).

UNIT: PSNI; UK National Police (200+ deployed); Scotland Police (90 deployed); Active Club network; counter-protest coalition (Amnesty, trade unions, civil society).

**Analyst
Assessment**

DE-ESCALATION SIGNAL: The 13-JUN counter-protests are the dominant signal this cycle. Large-scale public rejection of riots is historically the most reliable predictor of violence

	subsiding. Trajectory is toward de-escalation. However the Active Club network remains intact; trial proceedings will generate flashpoints; and structural conditions (economic deprivation, online far-right organizing) are unchanged. ACTIVE CLUB SIGNIFICANCE: Confirmation of Active Club orchestration is significant beyond Belfast. Active Clubs are a decentralized global neo-Nazi model designed for rapid mobilization and cross-jurisdiction replication. Monitor for replication attempts in other UK cities and potentially US cities with similar demographic and economic profiles. LIKELIHOOD: Further organized anti-immigration violence Belfast next 7 days: UNLIKELY given counter-protest momentum and arrests. CONFIDENCE: MODERATE. LIKELIHOOD: Active Club replication another UK/European city next 30 days: ROUGHLY EVEN CHANCE. CONFIDENCE: MODERATE.
ALT HYP	ALT A: De-escalation holds; criminal process prevents recurrence [likely] Counter-protest dominance 13-JUN; 17 charged; PSNI elevated posture; community and political leadership unified. ✓ Supporting Evidence: Active Club network intact; Alodid trial proceedings create recurring flashpoints; structural conditions unchanged. ✗ Ruling-Out Evidence: Counter-protest precedent is historically most reliable predictor; Belfast has absorbed worse without sustained recurrence. ALT B: Recurrence during Alodid trial or another triggering incident [unlikely] Active Club explicitly calling for replication; trial dates will generate media coverage; Southampton/Scottish spread shows contagion. ✓ Supporting Evidence: 17 charged creates deterrent; PSNI elevated; counter-protest movement demonstrated organizational capacity. ✗ Ruling-Out Evidence: Near-term recurrence in days assessed as unlikely; trial proceedings (weeks/months) are more plausible recurrence trigger.
SOURCES	Al Jazeera 13-JUN anti-racism rally Belfast PBS - Belfast stabbing riots explainer NBC News - Musk amplification ABC News - extra officers deployed

STSB-001 FIFA WORLD CUP DAY 20 R32 NO PHYSICAL SECURITY INCIDENTS DAYS 1-20 (protests / extra security / walk-off threat) FBI: FIFA website spoofing ACTIVE 300+ malicious domains Heat Advisory Miami Hard Rock (Saudi vs Uruguay 2200Z)		HIGH UPDATED 16
SALUTE	SIZE: Tournament Day 6. Today: Spain vs Cape Verde (Atlanta 1600Z), Belgium vs Egypt (Seattle 1900Z), Saudi Arabia vs Uruguay (Miami Hard Rock 2200Z), Iran vs New Zealand (LA SoFi ~0100Z 16-JUN). Iranian-American diaspora protest planned outside SoFi; extra security deployed. ACTIVITY: HIGH-PRIORITY TONIGHT: Iran vs NZ at SoFi Stadium. Protest planned outside by Iranian-American coalition opposing IRGC; extra security. Iran sports minister pre-threatened walk-off if unauthorized flags displayed inside stadium. Iranian team arrived LAX Sunday after Tijuana practice restriction lifted. FBI: active spoofing attacks on official FIFA website/platforms in Week 1 confirmed. Chinese cybercriminals: 300 FIFA clone domains harvesting credentials/payments. Recorded Future: IRGC-linked hacktivist personas expanded scope -- no confirmed World Cup attack as of 14-JUN but infrastructure staged. Miami Hard	

	Rock: Heat Advisory active (103-107F heat index); afternoon storms expected to largely clear before 2200Z kickoff. LOCATION: High-priority tonight: SoFi Stadium Inglewood CA (Iran vs NZ); Hard Rock Stadium Miami (Saudi vs Uruguay). Cyber threat: worldwide. TIME: Tournament through 19-JUL. Iran vs NZ: ~0100Z 16-JUN (6 PM PT today). Saudi vs Uruguay: 2200Z. Heat Advisory Miami: in effect today. EQUIPMENT: Counter-drone deployed. Vehicle-as-weapon barriers. Law enforcement surge at SoFi for protest management. UNIT: FBI; CISA; LAPD; Inglewood PD; FIFA security; Iranian-American protest coalition.
Analyst Assessment	IRAN vs NZ RISK PROFILE: Three factors converge tonight: (1) large pre-staged protest at SoFi; (2) Iranian sports minister's pre-threat to walk off if protesters display unauthorized symbols inside stadium -- a scenario where a spectator action inside becomes a government security incident; (3) the MOU announcement Sunday elevated geopolitical symbolism of Iran's first US World Cup match during the war. Extra security deployed; highest probability is protests remain lawful and match proceeds normally. FIFA CYBER - ACTIVE THREAT: FBI confirmation of active FIFA website spoofing attacks is the highest-confidence cyber threat this cycle. The 300 Chinese clone domains and spoofing attacks are simultaneously active. Readers attending or streaming World Cup events should use only official FIFA app and official.fifa.com; verify URLs before entering credentials or payment information. MIAMI HEAT COMPOUND: Hard Rock Stadium is an outdoor stadium. Heat index 103-107F with NWS advisory in effect. Pre-match outdoor fan zones and transit queues are the primary heat exposure window before afternoon storms move through. Medical stations and cooling centers should be at full capacity. LIKELIHOOD: Iran vs NZ proceeds without major incident: VERY LIKELY. CONFIDENCE: MODERATE. LIKELIHOOD: Significant security incident at any World Cup venue today: VERY UNLIKELY. CONFIDENCE: MODERATE.
SOURCES	CSIS Cyber Threat 2026 World Cup KTLA Iranian-American protest SoFi Cybersecurity Insiders FIFA Week 1 active threats Recorded Future World Cup physical-cyber threats

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 v5.57 §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) Friday sweep: all 629 registry sources checked per SOP daily sweep requirement; all 56 mandatory sources individually dispositioned. (6) NPL stated in Sec 7B per SOP §0.117.

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

THREAT AREAS ASSESSED	STANDING REGISTRY	CITATIONS THIS CYCLE	TIER 1 PRIMARY	TIER 2 SECONDARY	MONDAY ROLLUP SWEEP
28	629 v2.24 56 mandatory	76	40	36	629 ALL SOURCES
25-JUN through 26-JUN-2026 standard 24-hr cycle. All 629 registry sources checked; 56 mandatory sources individually dispositioned. Registry v2.24. fortunefavorstheprepared.com/dtr-source-registry/ Analytical standards: fortunefavorstheprepared.com/analytical-standards/					

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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INT-03 SALUTE and SPOT Reporting

INT-04 Elicitation Tradecraft - collecting information through conversation

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ACCESS

RATE
LOCK-IN

Releasing this week (currently in beta testing):

LOG-01 MAG Logistics Training Curriculum - know what you have and how to manage it.

MED-

SEC-01 MAG Member Vetting Course - includes worksheets, symbology guide and more.

SEC-02 Know What You're Showing (OPSEC)

SEC-03 Watching the Watchers (Surveillance Detection)

Coming soon:

SEC-03 Digital Security

Training no one else is teaching.

Right now, full access to everything behind the paywall is **\$11.95/month**. In three days, course access goes to **\$24.95**. Subscribe before the deadline and you lock in **\$11.95**

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Semper Paratus, Semper Gumby