

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 124 | Hormuz Day 124 | MOU Day 15 | PREP-CON 3 BROWN SKY | COMCON 4
INCREASED VIGILANCE | 01 JULY 2026

COMMUNICATIONS CONDITION: COMCON 4 -- INCREASED VIGILANCE
COMCON 4 INCREASED VIGILANCE -- 18 NWR OOS/DEGRADED (14 OOS / 4 DEGRADED, down from 31 on 30-JUN); GPS/GNSS jamming remains elevated across Gulf FIRs (Iran/Iraq/Lebanon corridor, standing since the Iran war began -- not a CONUS domestic risk, but affects US-flagged Gulf air/maritime traffic, see [AVN-001](#)); Cisco SD-WAN and Ubiquiti UniFi KEVs overdue, new SimpleHelp critical KEV due 02-JUL. See CYB-001, COMMS Watch.

WX-CON 3 CRITICAL -- Dangerous multi-day heat wave building Midwest-to-East Coast (Philadelphia Code Red, Extreme Heat Warnings IA/MO/KS/PA/NJ/DE); PJM grid emergency order in effect, potential all-time demand record 02-JUL. See Heat Warning box, Section 7.
National wildfire posture is at PL4 -- Cottonwood Fire remains the nation's largest active fire; see [WX-001 \(Wildfire Report\)](#) for full detail.

SWX-CON 2 WATCH -- New G2 (Moderate) geomagnetic storm watch issued for 03-JUL (WATA30, supersedes prior watches), G1 active today. See SWX-001.
Source: NOAA SWPC swpc.noaa.gov

Publication (UTC)	01 JUL 2026 / Cycle close 1530 UTC
Reporting Period	30-JUN-2026 1530Z through 01-JUL-2026 1530Z
Analyst / Watch Officer	Fortune Favors the Prepared -- OSINT Desk
FLASH Threshold	Risk Score >= 20 -- FLASH events this cycle (GEO-CF-IRAN: Doha indirect talks continue, no direct meeting, Hormuz toll-free dispute; GEO-003 Venezuela toll risen to 1,943 dead, recovery ops continue past golden window; WX-001 Cottonwood Fire 98.8K acres 4% contained, PL4 national posture, 3 firefighter fatalities Knowles Fire CO)
PREP-CON Baseline	PREP-CON 3 -- BROWN SKY (Incident Probable) COMCON 4 -- INCREASED VIGILANCE WX-CON 3 CRITICAL SWX-CON 2 WATCH G2 Watch 03-JUL NPL 4 MOU Day 15 IAEA Blackout Day 124 Hormuz Day 124 Ebola PHEIC Day 47 18 NWR OOS/DEGRADED World Cup Day 22 R32 UK/NI Domestic Watch (no delta) Semper Paratus, Semper Gumby
Day Counters	Op Epic Fury: Day 124 Hormuz: Day 124 IAEA Blackout: Day 124 Ebola PHEIC: Day 47 World Cup: Day 22 R32 MOU Day 15 Cottonwood Fire Day 11 Venezuela EQ: Day 7 NPL: 4 Brent: \$73.61
Version	1.0 -- SOP v5.58 Registry v2.25 -- RECONCILIATION OUTSTANDING (JSON is 638/v2.25; docx/HTML/SESSION_OPENER not yet reconciled) 638 total sources swept (56 mandatory individually verified) Standard 24-hr cycle 30-JUN through 01-JUL Hooks PASS stale_entry_audit.py PASS (pre- and post-pack)

BOTTOM LINE UP FRONT

01 JULY 2026 | PREP-CON 3 BROWN SKY | COMCON 4 INCREASED VIGILANCE | Op Epic Fury / Hormuz Day 124 | MOU Day 15 | IAEA Blackout Day 124 | Ebola PHEIC Day 47 | NIFC NPL 4 | World Cup Day 22 R32 | Cottonwood Fire 98.8K acres 4% contained | 3 firefighters killed Knowles Fire CO

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 124 -- Burgenstock technical WG active (Gharibabadi leading 4 working groups) -- Iran: no clear inspection schedule -- Grossi: MOU mandates IAEA supervision -- 440.9 kg 60%-HEU unverified since 28-FEB -- See NUC-001.** Revision 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 7 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. **NEW THIS CYCLE:** Microsoft KEK CA 2011 certificate expired 24-JUN and UEFI CA 2011 expired 27-JUN, a genuine Secure Boot trust chain failure, not an approaching deadline, affecting boot reliability across a large population of PCs; distinct from prior-cycle Secure Boot deadline framing. See CYB-001.
- **WX-001: SPC ENHANCED risk Midwest/Upper Great Lakes today, damaging wind gusts primary hazard, couple tornadoes possible; SLIGHT central High Plains/Northeast. Dangerous multi-day heat wave, PJM grid emergency order (see Section 7 Heat Warning box). Wildfire content: see WX-002/Section 7B.** See WX-001 (weather) and WX-002/Section 7B (wildfire) for full detail.
- **GEO-003: VENEZUELA:** Day 7 -- 1,943 confirmed dead / 10,571+ injured / 43,200+ missing -- rescues continue past the golden window -- USS Fort Lauderdale at La Guaira. See GEO-003 for full detail.1.
- **PHS-002: PHS-002 EBOLA PHEIC DAY 47: DRC 1,274 confirmed (34 health zones), Uganda 20 confirmed/2 deaths (WHO/Africa CDC, 27-JUN) -- WHO sitrep gap now 6+ days -- Continental IMST stood up in Kampala this week -- no vaccine/treatment. ility import within 12 weeks -- no vaccine / no treatment.** DRC 1,274 confirmed across 34 health zones; Uganda 20 confirmed/2 deaths -- newest figures per WHO/Africa CDC, 27-JUN. WHO sitrep gap now 6+ days. Continental IMST stood up in Kampala this week. US: no confirmed cases; enhanced entry screening remains active at IAD/ATL/IAH/JFK. See PHS-002 for full detail.
- **DOM-002: UK/NI Domestic Watch (WATCH tier, no delta this cycle): Burnham sole declared candidate, nominations open 9-JUL close 16-JUL. Belfast forward scaffold prosecution phase active, 12-JUL Twelfth approaching.** See DOM-002 for full detail.
- **STSB-001: WORLD CUP DAY 22 R32:** No confirmed physical security incidents through Day 22. Iran eliminated, departed 29-JUN. Today: Mexico 2-0 Ecuador (completed), England-DR Congo (Atlanta), Belgium-Senegal (Seattle). R32 concludes 03-JUL; R16 begins 04-JUL. See STSB-001 for full detail.

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): **PJM grid demand record risk 02-JUL under the active heat wave -- G2 geomagnetic storm watch peaks 03-JUL -- Round of 32 concludes 03-JUL / Round of 16 begins 04-JUL -- Labour leadership nominations open 9-JUL -- SimpleHelp KEV federal deadline 02-JUL.** Venezuela toll may continue climbing significantly as La Guaira communications remain degraded and rural impact is not yet fully assessed. Cisco SD-WAN, Cisco UCM, and PTC Windchill KEVs remain overdue with no workarounds; Ubiquiti UniFi cluster is now 9 days overdue; new SimpleHelp KEV carries a hard 02-JUL deadline. WHO Ebola sitrep gap is now 6+ days. Dangerous multi-day heat wave and PJM grid emergency continue through the July 4th weekend.

SECTION INDEX

SECTION	KEY ENTRIES / THREAT DRIVERS
SEC 2 - Market Indicators	Commodity tracker: Brent ~\$72.45/bbl (30-JUN, down slightly) 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 today key catalyst Hormuz traffic recovering vs pre-war baseline 9-12 month normalization
SEC 3 - FLASH Events	GEO-CF-IRAN: Doha indirect talks continue 01-JUL, no direct US-Iran meeting; Hormuz toll-free dispute unresolved. MOU Day 15. NUC-001: IAEA Blackout Day 124, Burgenstock WG active, no new Grossi statement this cycle. GEO-003: Venezuela Day 7, 1,943 dead / 43,200+ missing, rescues continue past golden window. WX-001: SPC ENHANCED Midwest/Upper Great Lakes; dangerous multi-day heat wave/PJM grid emergency. Wildfire content: see WX-002/Sec 7B. PHS-002: Ebola Day 47, DRC 1,274 confirmed (34 zones) / Uganda 20 confirmed, WHO sitrep gap 6+ days.
SEC 4A - Cyber / Technology	CYB-001 Cisco SD-WAN, Cisco UCM, PTC Windchill KEVs remain overdue; Ubiquiti UniFi cluster now 9 days overdue; new critical SimpleHelp OIIC bypass KEV due 02-JUL. No workarounds. KEV overdue backlog 10+ entries.
SEC 4B - Physical / Geopolitical / IO	DOM-002 (WATCH tier, no delta this cycle): Burnham sole declared candidate, nominations open 9-JUL close 16-JUL. Belfast forward scaffold prosecution phase active, 12-JUL Twelfth approaching. STSB-001: World Cup Day 22 R32, no incidents through Day 22, Iran eliminated/departed 29-JUN, R32 concludes 03-JUL. PHS-002: Ebola Day 47, DRC 1,274 confirmed / Uganda 20 confirmed, WHO sitrep gap 6+ days, no vaccine/treatment.
SEC 5 - Energy / Infrastructure / Supply Chain	FIN-001 Brent ~\$72.45 (30-JUN, down slightly as markets price in Doha talks) / 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 talks today key. AVN: BA resumes Dubai 01-JUL / Kuwait Terminal 1 closed / GPS jamming elevated Gulf FIRs / EASA CZIB extended to 01-JUL. 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 3-JUN, GPS jamming a major ops issue across Gulf FIRs, Qatar Airways 85% restored, EASA CZIB extended to 01-JUL. AVN-002: World Cup Day 21, no venue weather issues today. Middle East airspace remains ELEVATED post weekend exchange.
SEC 7 - Meteorological /	WX-001: SPC ENHANCED risk Midwest/Upper Great Lakes 01-JUL, damaging wind gusts primary hazard, couple tornadoes possible; SLIGHT central High Plains and Northeast. Dangerous multi-day heat wave building Midwest-East (see Heat Warning

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SECTION	KEY ENTRIES / THREAT DRIVERS
Severe Weather / Fire Weather + NWR	box). Wildfire content moved to WX-002/Sec 7B. WX-002 : : Cottonwood Fire 98,800 acres, 4% contained (nation's largest); NPL 4; 3 firefighters killed 28-JUN Knowles Fire (CO); no known reports of planned Public Safety Power Shutoffs this cycle.
SEC 7B - Wildfire Report	WX-002 : Cottonwood Fire 98,800 acres, 4% contained (nation's largest); NPL 4; 3 firefighters killed 28-JUN Knowles Fire (CO); no known reports of planned Public Safety Power Shutoffs this cycle.
SEC 7A - Space Weather and EMCOMM	SWX-001 : New G2 (Moderate) geomagnetic storm watch issued for 03-JUL (WATA30, supersedes prior watches); G1 active today. Extended K5 warning through 1800Z, K4 through 2100Z. SWX-CON 2 WATCH.
SEC 7D - Tropical / Hurricane Weather	NSTR -- no Atlantic, Eastern Pacific, or Central Pacific tropical cyclone formations or disturbances as of 01-JUL. One named storm to date this season (TS Arthur, dissipated 17-JUN).
SEC 10 - PREP-CON Assessment	PREP-CON 3 BROWN SKY (Incident Probable) / COMCON 4 INCREASED VIGILANCE -- see full trigger basis and scoring
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 risk central High Plains and the Northeast (strong buoyancy, damaging wind gusts primary hazard); Day 2 SLIGHT extends into the Northeast; Day 3 SLIGHT southern SD into northern NE. CYB-001: Cisco SD-WAN, Cisco UCM, PTC Windchill KEVs remain overdue; new critical SimpleHelp KEV due 02-JUL -- immediate enterprise triage required. NWR gaps in the region: ME-Sugarloaf Mtn WNG547 OOS.
CONUS - Gulf Coast (LA/MS/AL/FL Panhandle)	SPC Day 1: strong-to-severe pulse thunderstorms possible along the Southeast/Gulf Coast today given a hot, moist airmass (3000-4000 J/kg MLCAPE) under weak easterly flow -- localized 50-65 mph wet-microburst gusts the primary hazard. Ebola: IAH enhanced entry screening remains active.
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 (Section 7B): Cottonwood Fire 98,800 acres, 4% contained -- first containment progress since ignition; Level 3 evacuations and Utah state of emergency remain in effect. Critical fire weather continues across the Four Corners/Colorado Plateau. NWR: OR-Portland DEGRADED; NV-Owyhee DEGRADED. National Preparedness Level at PL4. Forward: dangerous multi-day heat wave and continued critical fire weather through the weekend.
CONUS - North Carolina	WX-002 NWR transmitter status nominal for the region this cycle. No region-specific severe weather or fire-weather delta identified for North Carolina today beyond the standing national NWR roster (see COMCON masthead).
CONUS - Nationwide Wildfire	WX-002 NPL 4 of 5 (raised 29-JUN) 37 uncontained large fires nationally Cottonwood Fire (UT) 98,800 acres, 4% contained -- nation's largest, see WX-002/Section 7B 3 firefighters killed 28-JUN on the Knowles Fire (CO), a separate

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
	incident No known reports of planned Public Safety Power Shutoffs this cycle YTD: 35,884+ fires / 3.1M+ acres -- both well above the 10-year average
CONUS - Nationwide (All Regions)	CYB-001 CYB KEV cluster remains overdue: Cisco SD-WAN, Cisco UCM, PTC Windchill, and the Ubiquiti UniFi 3-CVE cluster (now 9 days overdue) -- immediate upgrade required. New this cycle: critical SimpleHelp OIDC bypass KEV, federal deadline 02-JUL. SWX-CON 2 WATCH -- new G2 geomagnetic storm watch for 03-JUL (see SWX-001). CYB-002 : Check Point and PAN-OS KEVs remain on the overdue backlog CYB-004 : UAT-8616-attributed SD-WAN exploitation activity, no new escalation confirmed this cycle FIN-001 : Brent \$73.61/bbl (01-JUL), 48-72hr delta down from ~\$74.43 -- see ENR-001 for full detail
Middle East / Strait of Hormuz	GEO-CF-IRAN MOU Day 15: Doha indirect US-Iran talks continue via Qatari/Pakistani mediators, no direct meeting; Hormuz toll-fee dispute and ~\$6B frozen-asset transfer remain unresolved NUC-001: IAEA Blackout Day 124, Burgenstock WG active, no new Grossi statement this cycle AVN-001: EASA CZIB review date today (01-JUL), outcome pending; BA Dubai resumption scheduled, not yet confirmed operated ENR-001: Brent \$73.61/bbl, 48-72hr delta down from ~\$74.43 PHS-002: Ebola Day 47, DRC 1,274 confirmed (34 health zones) as of 27-JUN, WHO sitrep gap now 6+ days WX-001: SPC ENHANCED Midwest/Upper Great Lakes today; dangerous multi-day heat wave, PJM grid emergency order
Iran / Nuclear	NUC-001 IAEA Blackout Day 124 -- Burgenstock technical WG active (Gharibabadi leading four working groups) -- inspection dispute persists, no new Grossi statement or Board action this cycle -- 440.9 kg 60%-HEU remains unverified since 28-FEB. IAEA Board resolution passed 10-JUN, 21-3, demanding cooperation -- no follow-on action to date.
DRC / Uganda	PHS-002 Ebola Day 47 PHEIC: DRC 1,274 confirmed across 34 health zones, Uganda 20 confirmed / 2 deaths (WHO/Africa CDC, 27-JUN -- newest available figure) -- WHO sitrep gap now 6+ days -- France EU import case confirmed -- Continental IMST stood up in Kampala this week -- no vaccine / no treatment -- US screening active at IAD/ATL/IAH/JFK
Venezuela (Earthquake Recovery)	GEO-002 / GEO-003 GEO-003 VENEZUELA: Twin M7.2+M7.5 earthquakes 24-JUN 2200 UTC 1,943 confirmed dead / 10,571+ injured / 43,200+ missing as of 01-JUL rescues continue past the golden window USS Fort Lauderdale on station at La Guaira strongest Venezuelan EQ in 125 yrs UKRAINE: no new US-household-relevant delta identified this cycle -- background watch only, not separately tracked as an active DTR entry.
Belfast / Northern Ireland / UK	DOM-002 UK/NI Domestic Watch (downgraded to WATCH tier, no delta this cycle): Belfast forward scaffold prosecution phase active (25 arrested/17 charged), 12-JUL Twelfth of July is the next elevated-risk window. UK Labour leadership: nominations open 9-JUL, close 16-JUL, unchanged since 22-JUN.
Space Environment	SWX-001 New G2 (Moderate) geomagnetic storm WATCH issued for 03-JUL (WATA30), superseding all prior watches; G1 active today. Extended K5 warning through 1800Z, K4 through 2100Z; ALERT-level K5 threshold reached 0259 UTC. Weak-to-moderate GIC/grid risk possible if G2 verifies; aurora possible as far south as NY/WI/WA if G2 verifies, northern-tier US under today's G1. SWX-CON 2 WATCH.

SECTION 2 - MARKET INDICATORS

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

COMMODITY	PRE-WAR (28 FEB)	CURRENT (01-JUL)	CHG vs PRE-WAR	CONSUMER / ANALYTICAL NOTE
Brent Crude (front)	~\$66/bbl	\$73.61/bbl (01-JUL)	+17%	48-72 HOUR DELTA: down from ~\$74.43 to \$73.61 -- steadied after posting the steepest quarterly decline since 2020 (~23% for the quarter, ~20% for the month) as Doha talks continue and Hormuz tanker traffic remains resumed. Saudi Aramco Ras Tanura resumed loadings after a 4-month suspension. Oman-Iran transit-fee proposal remains a structural forward risk, opposed by the US, Europe, and Gulf Arab states.
WTI Crude (front)	~\$63/bbl	~\$72.80/bbl (01-JUL)	+17%	48-72 HOUR DELTA: tracking Brent's modest further easing. Tankers continue clearing Hormuz; Kuwait maintaining elevated production.
Gasoline (natl avg)	~\$3.10/gal	~\$4.00/gal (EIA estimate, not independently AAA-verified this cycle)	+25%	AAA retail figure not independently reverified this cycle -- carrying forward EIA estimate pending a fresh AAA pull. Declining trajectory has been sustained for six-plus consecutive weeks from the \$4.56 peak (21-MAY). Diesel running ~\$4.80/gal average 2026 per EIA. but non-oil (fertilizer, methanol) costs remain elevated.
Diesel (US No. 2)	~\$3.74/gal	~\$4.80/gal (01-JUL, EIA avg)	+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 remains active. Ocean freight routes improving but not fully normalized; Panama Canal and Suez Canal operating normally, though some carriers still route via Cape of Good Hope. DHL's dedicated Asia-US 777F service (launched 01-JUN in direct response to Hormuz disruption) continues operating. GPS jamming remains a standing ops issue across Gulf FIRs -- see AVN-001.

SECTION 3 - FLASH EVENTS (Score >= 20)

GEO-CF-IRAN | Op Epic Fury Day 124 / Hormuz Day 124 | MOU Day 15 | DOHA INDIRECT TALKS CONTINUE 01-JUL -- NO DIRECT MEETING -- HORMUZ TOLL-FEE DISPUTE ACTIVE

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Why This Cycle

Doha technical talks continued 01-JUL via Qatari and Pakistani mediators with no direct US-Iran meeting; Iran's Ghalibaf conditioned final-agreement talks on US implementation of MOU Clause 13, and Qatar confirmed roughly \$6B in frozen Iranian assets remain untransferred.

Summary

MOU Day 14 of 60-day implementation window. US-Iran agreement faced its first kinetic test 26-29 JUN: four days of mutual strikes on shipping and military infrastructure, including an Iranian strike on a cargo vessel near Oman and US/Iranian counterstrikes on Kuwait and Bahrain bases. Witkoff and Kushner arrived in Doha today (30-JUN), but Iran's foreign ministry has publicly denied any scheduled direct US meeting while confirming separate Iran-Qatar consultations. 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."

SALUTE

SIZE: US-Iran MOU: signed 17-JUN-2026. In force Day 14 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 14 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 since 28-FEB, now Day 124 of the blackout. Burgenstock sessions continue in Switzerland. The Nuclear Affairs WG is the primary watch item: will it specifically address IAEA inspection modalities, and does Iran participate constructively or continue to defer? The 60-day MOU 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: 1,719 (was: 1,450). Doha indirect talks continued 01-JUL with no resolution (was: talks pending). Brent eased further to \$73.61 (prior cycle ~\$74.43). NWR count improved to 18 OOS/DEGRADED (was: 31). SWX-CON escalated to a G2 watch for 03-JUL (was: G1 minor). Score maintained at FLASH reflecting: Hormuz toll-free dispute unresolved; IAEA access modalities unresolved; national wildfire posture at PL4.

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 Nuclear Affairs WG produces concrete IAEA access modalities in the near term [unlikely]

Burgenstock WG is active with Nuclear Affairs as one of four working groups; both sides have economic incentive to show progress; Gharibabadi leading the Iranian delegation signals continued engagement.

✓ **Supporting Evidence:** Iran Deputy FM Gharibabadi has explicitly conditioned IAEA access on a final deal and sanctions removal (per FM Baghaei, 29-JUN); inspection access is not the Nuclear Affairs WG's primary current agenda item; Gharibabadi previously declined a Grossi meeting request; no precedent exists for a rapid IAEA access concession under the current talks structure.

✗ **Ruling-Out Evidence:** Burgenstock's 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; the Lebanon impasse gives Iran additional leverage to delay; Khamenei's final sign-off on any framework has not been publicly confirmed; physical Hormuz normalization will take weeks-to-months regardless of the WG's pace.

ALT B: Renewed direct kinetic exchange erodes the MOU framework before the 60-day deadline (mid-August) [unlikely]

The 26-29 JUN exchange demonstrated both sides remain willing to use force under the active ceasefire; the stand-down reached was informal with no binding protocol; Lebanon's

status remains a live variable; Israel has stated it is not bound by the US-Iran deal and retains independent operational freedom.

✓ **Supporting Evidence:** Both sides retain strong economic incentives to preserve the MOU; Doha talks provided an immediate off-ramp after the 26-29 JUN exchange; the informal stand-down was reached within 96 hours; Qatari and Pakistani mediators remain actively engaged; the Burgenstock WG resumed the same day as the stand-down.

✗ **Ruling-Out Evidence:** The pattern across prior exchanges shows both sides have absorbed kinetic contact and continued talks rather than abandoning them; the informal stand-down was reached within 96 hours this time as well; economic pressure on both sides to preserve the deal remains substantial; the overall trend has been absorb-and-continue 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 124 | 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 | NO NEW GROSSI STATEMENT OR BOARD ACTION THIS CYCLE

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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 124.

Summary

Burgenstock WG resumed 29-JUN and remained the operative nuclear-track venue through this cycle. IAEA inspection dispute is structurally unchanged: Iran FM Baghaei maintains there is no clear schedule for access to bombed sites, while Grossi maintains the MOU text mandates IAEA supervision "in all letters." No new IAEA Board action, Grossi statement, or Iran position shift was identified this cycle -- the dispute persists in the same posture as 29-30 JUN. 440.9 kg of 60%-HEU at the Isfahan complex remains unverified since 28-FEB-2026, now Day 124 of the blackout.

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: 30-JUN through 01-JUL (THIS CYCLE): No new IAEA Board action, no new Grossi statement, no shift in Iran's access position identified. Burgenstock technical WG (resumed 29-JUN, Gharibabadi leading four working groups: Sanctions Termination, Nuclear Affairs, Reconstruction/Economic Development, Monitoring/Implementation) remains the active venue; sessions continue in Switzerland. Iran FM Baghaei's position stands: access conditioned on final agreement and sanctions removal. Grossi's counter stands: MOU text is unambiguous, inspection mandatory "in all letters." 440.9 kg 60%-HEU at Isfahan remains unverified since 28-FEB. MOU signed 17-JUN does not itself create IAEA access -- Iran FM Araghchi has confirmed this; the MOU's Article 5 defers the disposal/verification mechanism to Phase 2 mutual agreement. Arms Control Association assesses that even starting from zero HEU, Iranian nuclear breakout would likely take under 12 months. IAEA Board resolution passed 10-JUN, 21-3 (Russia, China, Niger against), demanding cooperation -- no follow-on Board action this cycle. Fordow assessed largely intact; Isfahan tunnel complex received 18 blue transport casks on flatbed trucks 9-JUN-2025 per Bulletin of the Atomic Scientists satellite analysis, assessed as a 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. MOU signed: 17-JUN-2026. MOU Day 15. IAEA Blackout: Day 124 (since 28-FEB-2026). 60-day roadmap expires mid-August.

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 15 -- 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 leads the Iranian delegation; both sides have economic incentive to show progress toward a final deal; a verified down-blend removes the domestic political liability of visibly holding bomb-grade material during negotiations.

✓ **Supporting Evidence:** Burgenstock WG 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.

✗ **Ruling-Out Evidence:** Iran FM Baghaei stated 29-JUN no clear schedule for IAEA access; inspection access remains conditioned on a final deal and sanctions removal -- structural position unchanged through this cycle; Gharibabadi denied a Grossi meeting during the prior Switzerland session. Fordow tunnel and Pickaxe Mountain remain 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; 124 days of unmonitored operations (since 28-FEB-2026) provides substantial time for continued 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. Israeli strikes had a 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 NEW THIS CYCLE: SIMPLEHELP OI DC BYPASS CVE-2026-48558 CRITICAL (Federal Deadline 02-JUL) Ubiquiti UniFi 3-CVE 9 Days Overdue Cisco SD-WAN CVE-2026-20262, Cisco UCM CVE-2026-20230, PTC Windchill CVE-2026-12569 All Overdue, No Workarounds KEV Overdue Backlog: 10+ Entries		FLASH UPDATED 20
Why This Cycle	Ubiquiti UniFi KEV is now 9 days overdue with no new exploitation reporting on the tracked cluster; CISA added a new critical SimpleHelp OI DC authentication-bypass KEV entry this cycle carrying a 02-JUL federal remediation deadline.	
Summary	Ubiquiti UniFi 3-CVE cluster is now 9 days overdue with no new exploitation reporting confirmed this cycle. CISA added a new critical KEV entry this cycle: SimpleHelp OI DC authentication-bypass (CVE-2026-48558), federal remediation deadline 02-JUL. The three previously-overdue KEVs (Cisco SD-WAN CVE-2026-20262, Cisco UCM CVE-2026-20230, PTC Windchill CVE-2026-12569) remain overdue with no workarounds; federal agencies remain in violation of BOD 26-04.	
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); CVE-2026-12569 (PTC Windchill/FlexPLM, RCE critical). Ubiquiti UniFi 3-CVE cluster now 9 days overdue. NEW THIS CYCLE: CVE-2026-48558 (SimpleHelp OI DC authentication bypass, CRITICAL, federal deadline 02-JUL) -- outside the previously tracked cluster. No workarounds -- upgrade only for all. Authenticated attacker with write-level credentials can overwrite OS files -- chain to root on the Cisco SD-WAN entry. Federal agencies remain in violation of BOD 26-04 on all previously overdue entries. KEV overdue backlog: Check Point CVE-2026-50751, PAN-OS, Arista EOS (no patch planned), Joomla CE, SolarWinds Serv-U, Mirasvit Full Page Cache Warmer, BerriAI LiteLLM -- 10+ total. ACTIVITY: CVE-2026-20262: no workaround, upgrade only. 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: unauthenticated SSRF; write arbitrary text files to endpoints; active exploitation previously confirmed. CVE-2026-12569: 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. Detection: log entries showing path traversal during file upload to the vManage API endpoint. KEV overdue backlog represents a significant cumulative risk posture -- Check Point CVE-2026-50751 (VPN auth bypass, Qilin ransomware confirmed)	

remains the highest-urgency overdue entry after the Cisco cluster; SimpleHelp OIDC bypass is the newest addition and carries a hard 02-JUL deadline.

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 remains the highest-urgency overdue entry after Cisco. SimpleHelp is widely deployed by MSPs for remote monitoring/management, giving downstream access to client environments if exploited.

TIME: Cisco SD-WAN, Cisco UCM, and PTC Windchill deadlines all previously passed and remain overdue. Ubiquiti UniFi 3-CVE cluster deadline: 23-JUN (9 days overdue as of 01-JUL). SimpleHelp OIDC bypass: added this cycle, federal deadline 02-JUL. KEV overdue backlog: Arista EOS no-patch, Check Point, PAN-OS, 10+ entries total.

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 remote monitoring/management tooling (SimpleHelp, newly added this cycle) plus the overdue backlog (Check Point, PAN-OS) -- a sustained pattern targeting network and remote-access management infrastructure rather than end-user systems. This is not the profile of opportunistic criminal exploitation, which typically targets a single high-value vulnerability. The combination is consistent with 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 a layered attack surface. UniFi is widely deployed in enterprise, government, and small-business environments. FCEB remediation deadline has passed; the cluster is now 9 days overdue. 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 routine patch-management item.

GEOPOLITICAL CONTEXT: The active US-Iran diplomatic and maritime friction materially elevates the probability that IRGC-nexus or MOIS-affiliated cyber actors are behind some portion of current KEV exploitation activity. Iran has a documented pattern of escalating cyber operations against US critical infrastructure during periods of 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 this cycle's KEV additions.

DEADLINE POSTURE: FOUR OVERDUE/NEW KEVs THIS CYCLE: Cisco SD-WAN CVE-2026-20262, Cisco UCM CVE-2026-20230, and PTC Windchill CVE-2026-12569 remain overdue with no workarounds; Ubiquiti UniFi cluster is now 9 days overdue; SimpleHelp OIDC bypass (CVE-2026-48558) is newly added with a hard 02-JUL deadline. Federal agencies remain in violation of BOD 26-04 on all previously overdue entries. Conduct compromise assessment before patching. Sectors at risk: enterprise SD-WAN, unified communications, manufacturing/engineering/retail PLM, and any MSP-managed environment running SimpleHelp RMM.

LIKELIHOOD: Unpatched Cisco SD-WAN Manager CVE-2026-20262 systems experience exploitation this week: VERY LIKELY -- no workaround exists; active exploitation confirmed prior to this cycle; sophisticated targeting pattern suggests ongoing campaign. **CONFIDENCE:** HIGH.

LIKELIHOOD: Cisco UCM CVE-2026-20230 exploited against unpatched systems within 7 days: LIKELY -- unauthenticated SSRF, PoC available, no workaround; exploitation typically follows KEV listing within days. **CONFIDENCE:** HIGH.

LIKELIHOOD: PTC Windchill/FlexPLM CVE-2026-12569 exploited against a manufacturing target within 7 days: LIKELY -- critical RCE, no workaround. Management-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 [roughly even chance]

UAT-8616 is attributed to Cisco SD-WAN exploitation; network management plane focus is consistent with the SD-WAN campaign profile; the Ubiquiti cluster targets the same management-plane category; 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); a multi-sector pre-positioning pattern is consistent with APT methodology.

✓ **Supporting Evidence:** No public attribution for Ubiquiti exploitation has been issued; UAT-8616 infrastructure targeting has not previously included Ubiquiti; the distinct vulnerability class suggests a different threat actor; no confirmed compromise pattern matches 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: Overdue KEV cluster remains unpatched across significant federal and private-sector exposure [roughly even chance]

KEV backlog history (Check Point, PAN-OS) demonstrates that federal agencies routinely miss KEV deadlines; SD-WAN complexity and management-plane sensitivity can slow emergency patching cycles; MSP-tooling exploits like SimpleHelp create broad downstream exposure and maximize 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

Iran-affiliated ICS/OT campaign -- BACKGROUND WATCH, NSTR. Standing threat since Feb 2026, last cited development dates to mid-April. No current-cycle delta. Demoted from HIGH/CONTINUED after 18 cycles with no update; note this entry duplicated the CYB-001 identifier already in use by the Cisco SD-WAN/KEV cluster entry. Will return to active reporting if a genuine new development occurs.

CYB-002 -- BACKGROUND WATCH, NSTR. FBI surveillance network breach (Chinese APT, declared major cyber incident April 2026) remains unresolved with no current-cycle delta after 14 consecutive cycles. Demoted from HIGH/CONTINUED to background watch per standing no-carryover-without-delta rule; will return to active reporting if a genuine development occurs.

CYB-003 -- RETIRED, NSTR. Pre-tournament cyber threat window framing is obsolete -- the World Cup opened 11-JUN and is now at Day 21, Round of 32 (see STSB-001). No physical or cyber incidents have been confirmed against tournament infrastructure through Day 21. Entry retired; ongoing World Cup cyber monitoring is now carried under STSB-001 if a genuine incident occurs.

SECTION 4B - PHYSICAL / GEOPOLITICAL / IO

GEO-003 | VENEZUELA TWIN EARTHQUAKES (24-JUN 2200 UTC) | M7.2 + M7.5 | DAY 7 RECOVERY OPERATIONS | 1,943 CONFIRMED DEAD / 10,571+ INJURED / 43,200+ MISSING | USS FORT LAUDERDALE AT LA GUAIRA | RESCUES CONTINUE PAST GOLDEN WINDOW

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Why This Cycle

Confirmed toll rose to 1,943 dead, 10,571+ injured, and 43,200+ missing as of 01-JUL; rescue teams continue pulling survivors from rubble past the golden-window mark, including a child freed after six days trapped.

Summary

Twin M7.2/M7.5 earthquakes struck northwestern Venezuela 24-JUN 2200 UTC. Confirmed toll as of 01-JUL: 1,943 dead, 10,571+ injured, 43,200+ missing. USGS PAGER: high probability final toll continues to climb given the scale of missing-persons reports. La Guaira: 1,400+ buildings destroyed; Simón Bolívar International Airport heavily damaged. Rescue operations continue past the 72-hour golden window -- a child was pulled alive after six days trapped, and an 11-year-old and 3-year-old have also been rescued in the past 48 hours, so SAR has not fully closed out despite the elapsed time. US: USS Fort Lauderdale continues delivering supplies at Port of La Guaira. The diplomatic track remains stalled.

Analyst Assessment

RECOVERY PHASE STATUS: Toll continues to climb seven days out -- 1,943 dead, 43,200+ missing -- a scale consistent with USGS PAGER's early high-probability-of-mass-casualty modeling. Survivors are still being pulled from rubble past the nominal 72-hour golden window, which argues against fully closing out SAR operations even as the primary posture shifts toward recovery. US military logistics support (USS Fort Lauderdale) continues; no confirmed change in Caracas government cooperation posture with the international response this cycle.

CHANGE FROM PRIOR: GEO-003 Venezuela toll rose from 1,719 to 1,943 confirmed dead, missing count rose to 43,200+; rescue operations continue past the golden window with multiple survivors pulled in the past 48 hours; USS Fort Lauderdale remains on station at La Guaira.

LIKELIHOOD: Additional survivor rescues from rubble (Day 7+): ROUGHLY EVEN CHANCE -- multiple survivors have been pulled past the nominal 72-hour window, including a six-day rescue, so recovery-phase framing alone does not rule out further finds. **CONFIDENCE:** MODERATE.

SOURCES

NBC News Venezuela 01-JUL | AP Venezuela | SOUTHCOM | CNN Venezuela EQ | ABC News Venezuela | Wikipedia 2026 Venezuela earthquakes

Lebanon Ceasefire -- NSTR. 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.

DOM-001 -- NSTR. Northern Ireland anti-immigrant riots retired from active products as of 29-JUN (prosecution phase only, no current-cycle delta). Forward scaffold retained for 12-JUL Twelfth of July watch. See DOM-002 for current UK/Belfast posture.

SECTION 5 - ENERGY / INFRASTRUCTURE / SUPPLY CHAIN

ENERGY / INFRASTRUCTURE MONITORS - 30 JUNE 2026

ENR-001 OIL / ENERGY PRICES: Brent \$73.61/bbl (01-JUL) -- steadied after posting the steepest quarterly decline since 2020 (~23% for the quarter, ~20% for the month) as Doha talks and resumed Hormuz tanker traffic eased supply fears. 48-72 HOUR DELTA: Brent down from ~\$74.43 (26-JUN reference) to \$73.61 (01-JUL) -- a modest further easing, not a reversal of the broader multi-week decline. AAA pump price and DOJ fuel-price-gouging investigation status not independently reverified this cycle -- carrying forward from last confirmed check pending a fresh AAA pull. FORWARD: Iran's chief negotiator maintains Hormuz "will never return to prewar conditions and will be administered by Iran"; Oman-Iran transit-fee proposal remains a structural forward risk opposed by the US, Europe, and Gulf Arab states. EIA STEO (June 2026 edition) assumed Hormuz remained effectively closed and modeled ~\$105/bbl through July -- that assumption is now stale given confirmed resumed tanker flows and the price collapse; treat EIA's STEO figure as outdated pending its next revision, not as the operative forecast.

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 - 30 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 21, 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. Problem set." Philadelphia deploying sanitation vehicles to block intersections as vehicle-as-weapon mitigation. Airport security enhanced at tournament city airports. No specific credible threat identified as of publication. See also STSB-001 (SEC 11) for full soft target assessment.

SECTION 7 - METEOROLOGICAL WEATHER / SEVERE WEATHER / FIRE WEATHER

⚠ SEVERE HEAT WARNING -- DANGEROUS MULTI-DAY HEAT WAVE, MIDWEST TO EAST COAST

Extreme Heat Warnings active for Philadelphia (Code Red emergency, noon 01-JUL through Saturday 8PM), southeastern PA / northern DE / much of NJ, Iowa, Missouri, and Kansas; highs mid-90s to 100+°F with heat indices well into the 100s, overnight lows offering little relief. NWS: potentially the hottest stretch since July 2011 for parts of the Northeast. Peaks into the July 4th weekend before easing early next week. Grid impact: DOE issued emergency 202(c) orders 30-JUN authorizing PJM Interconnection (67M people, 13 states + DC) to run at maximum generation and curtail data centers onto backup power; PJM forecasts a potential all-time record peak demand of 166,304 MW on 02-JUL, which would break the 2006 record of 165,563 MW. Emergency orders in effect through 03-JUL. Source: NWS Philadelphia/Mount Holly; PJM Interconnection; US DOE.

**WX-001 | SEVERE THUNDERSTORMS: ENHANCED RISK
MIDWEST/UPPER GREAT LAKES 01-JUL | SLIGHT CENTRAL HIGH
PLAINS AND NORTHEAST | DANGEROUS MULTI-DAY HEAT WAVE
MIDWEST-EAST -- SEE HEAT WARNING BOX | WILDFIRE
REPORTING MOVED TO WX-002 (SECTION 7B)**

FLASH | ACTIVE | 22

SALUTE

SIZE: SPC Day 1 (011300Z-021200Z): ENHANCED risk Midwest into Upper Great Lakes (MN/WI/N IA into U.P. Michigan) -- scattered severe thunderstorms with a couple tornadoes possible, damaging wind gusts the more widespread hazard, isolated large-to-very-large hail. SLIGHT risk central High Plains and Northeast. Day 2 (021200Z-031200Z): SLIGHT risk northern Plains into Upper Midwest, plus Tennessee Valley/Southeast and parts of the Northeast. Day 3 (031200Z-041200Z): SLIGHT risk southern South Dakota into northern Nebraska. Wildfire and fire-weather content has moved to WX-002 (Section 7B) -- see that entry for all fire-specific reporting.

ACTIVITY: Midwest/Upper Great Lakes: showers and thunderstorms moving east over the Upper Midwest, associated with a couple of MCVs near the northwest IA / SD-MN border, along a west-east frontal zone draped MN into WI and the U.P. of Michigan. Moist airmass (lower-to-mid 70s F dewpoints) with strong SW mid/high-level flow (50+ kt in the 5-9km layer) sampled on KFSD/KMPX/KARX VAD; intensifying 3-6km flow may push wind-damage/large-hail risk beyond isolated, with organized multicells or supercells possible through the afternoon. Central/southern High Plains: high-based thunderstorm development along a lee trough/dryline during the afternoon and evening; modest deep-layer shear (25-30 kt) with steep low/mid-level lapse rates supporting a strongly unstable airmass -- a mix of clusters and possible supercells capable of severe wind gusts and large hail. Northeast: enhanced west-northwesterly midlevel flow with a warm/moist airmass (~3000 J/kg MLCAPE) supporting damaging wind gusts and isolated hail. Southeast: weak easterly flow and 3000-4000 J/kg MLCAPE supporting strong-to-severe pulse thunderstorms with localized 50-65 mph wet-microburst gusts.

LOCATION: ENHANCED: Minnesota, Wisconsin, northwest Iowa, Upper Peninsula Michigan. SLIGHT: central High Plains (eastern Colorado into western Kansas) and the

Northeast. Day 2 SLIGHT: northern Plains into Upper Midwest, Tennessee Valley/Southeast, parts of the Northeast. Day 3 SLIGHT: southern South Dakota into northern Nebraska.

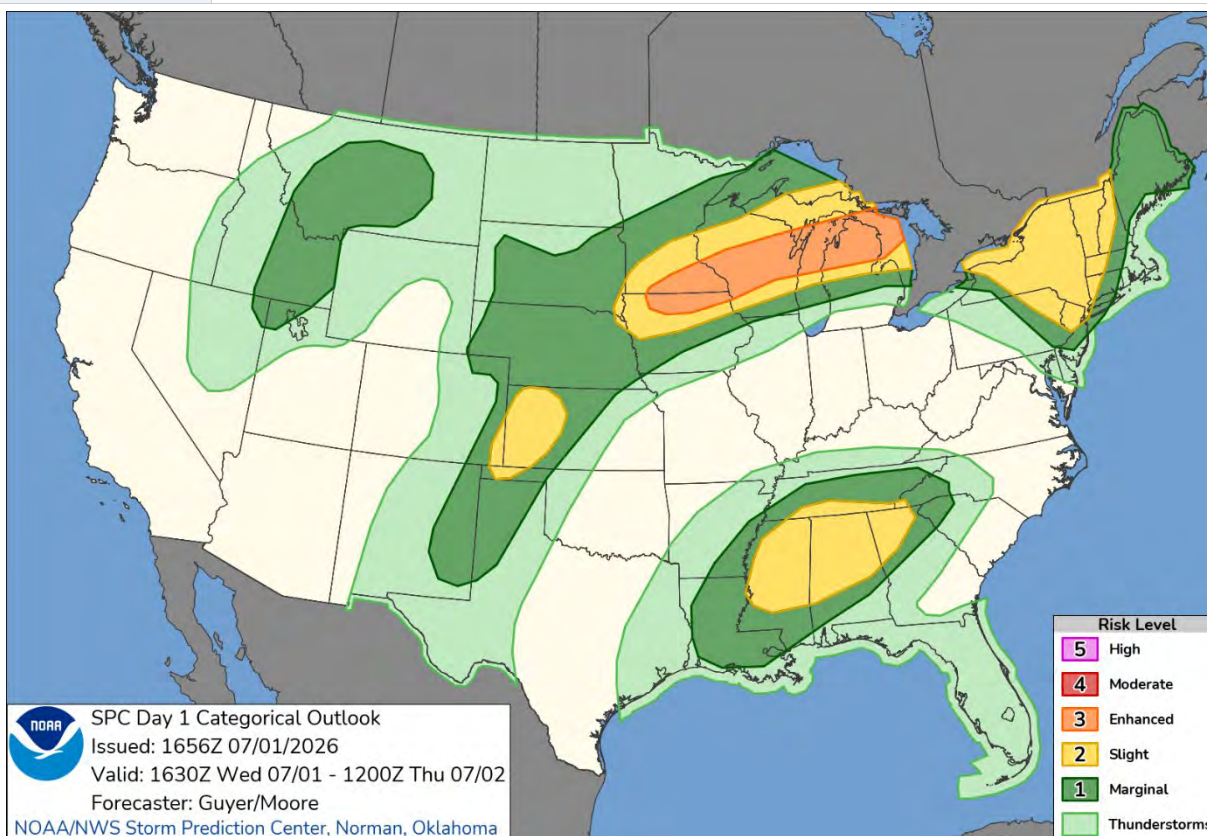
TIME: Day 1 SPC valid 011300Z-021200Z (01-JUL). Day 2 valid 021200Z-031200Z (02-JUL). Day 3 valid 031200Z-041200Z (03-JUL). Upper Midwest activity ongoing this morning; afternoon/evening development expected central High Plains and Northeast.

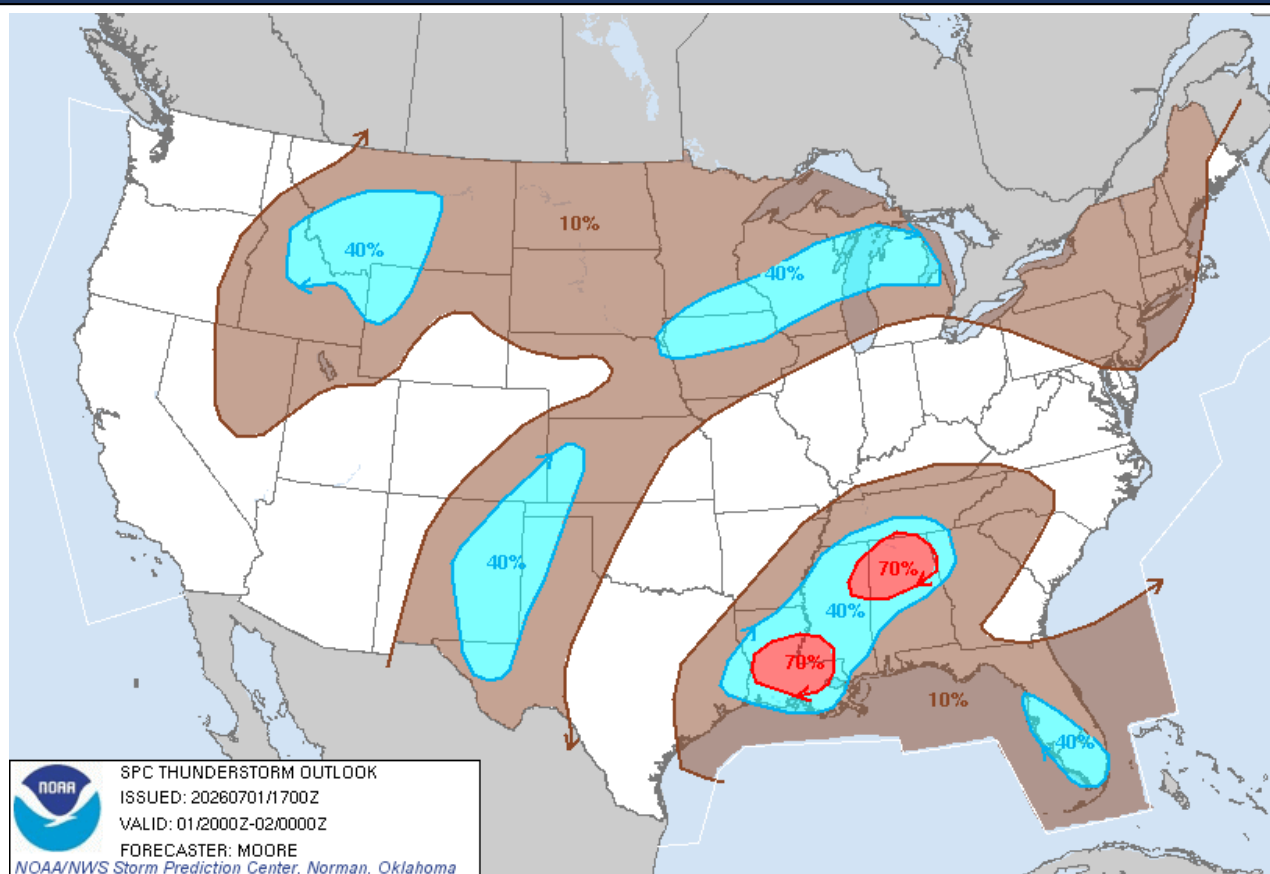
EQUIPMENT: NWR transmitter roster: 18 OOS/DEGRADED (14 OOS / 4 DEGRADED), down from 31 on 30-JUN -- see COMCON masthead and COMMS Watch for full roster. WEA, NOAA Weather App, and EAS broadcast radio remain alternate pathways in any gap zones.

UNIT: NWS Storm Prediction Center, Norman OK; NWS Weather Prediction Center; local NWS forecast offices in affected regions.

SPC Day 1 Convective Outlook

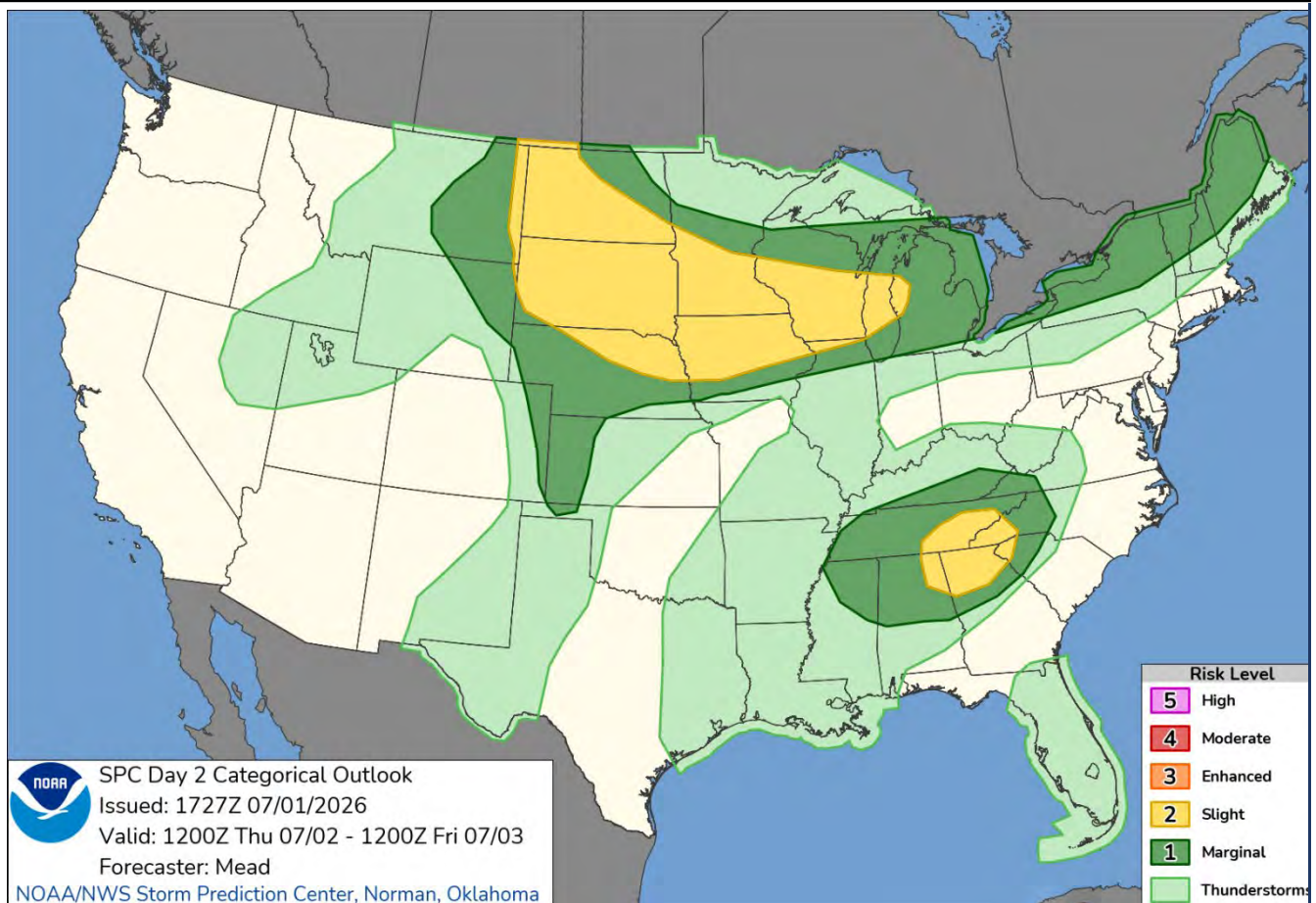
SPC Day 1 Convective Outlook (issued 0735 AM CDT 01-JUL-2026, valid 011300Z-021200Z): ENHANCED risk Midwest into Upper Great Lakes -- scattered severe thunderstorms today and tonight, a couple tornadoes possible but damaging wind gusts the more widespread hazard, isolated large-to-very-large hail. SLIGHT risk central High Plains and Northeast; strong to severe pulse thunderstorms possible Southeast. Source: NOAA SPC spc.noaa.gov.





SPC Day 2 Convective Outlook

SPC Day 2 Convective Outlook (issued 0101 AM CDT 01-JUL-2026, valid 021200Z-031200Z): SLIGHT risk northern Plains into Upper Midwest -- broad cyclonic flow aloft promotes a lee trough and surface low near the Black Hills; supercells likely initially with large-to-very-large hail, severe winds, and a tornado or two possible, with potential upscale growth into an MCS along the surface boundary. SLIGHT risk also carried for the Tennessee Valley/Southeast (scattered-to-numerous storms, damaging winds the main threat) and parts of the Northeast (isolated storms, damaging winds, isolated large hail). Source: NOAA SPC spc.noaa.gov.



SPC Day 3 Convective Outlook

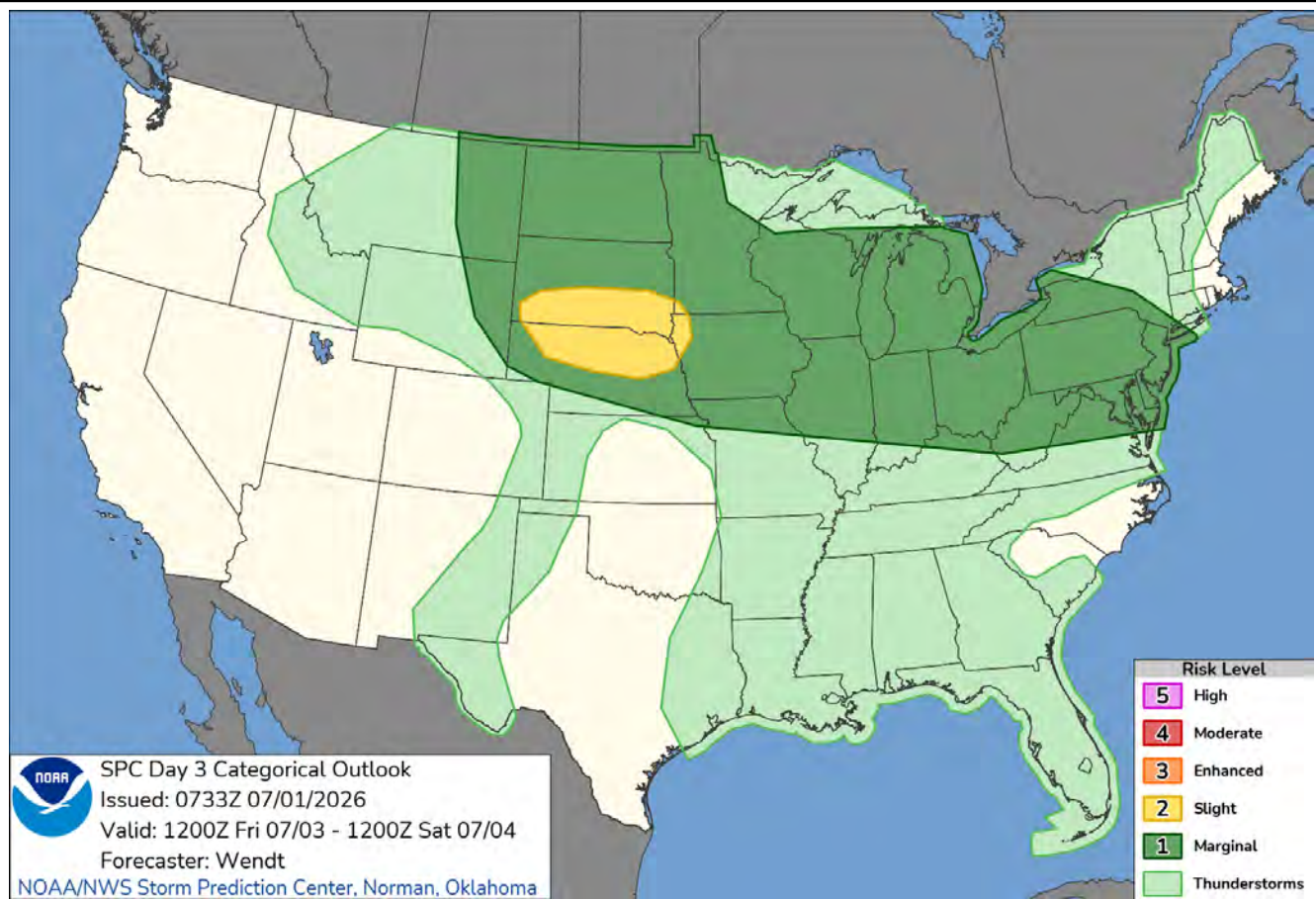
SPC Day 3 Convective Outlook (valid 031200Z-041200Z, 03-JUL): SLIGHT risk carried for southern South Dakota into northern Nebraska. Model disagreement (NAM/GFS vs ECMWF) on morning convection placement complicates the forecast; a broad marginal risk extends from the northern Plains into the Midwest/Mid-Atlantic given the large spatial extent of strong-to-severe storm potential, with shear and lapse rates more favorable across the High Plains. Isolated damaging downburst winds possible into the Ohio Valley/Mid-Atlantic on a very unstable airmass. Source: NOAA SPC spc.noaa.gov. Wildfire and fire-weather content is reported exclusively in WX-002 (Section 7B) -- not here.

Analyst Assessment

TODAY'S THREAT CHARACTER: ENHANCED risk today spans the Midwest into the Upper Great Lakes, where 2,000-3,000 J/kg MLCAPE and strong deep-layer shear support a classic supercell parameter space; very large hail (2-4 inch isolated) can cause catastrophic damage to vehicles and structures, and damaging wind gusts are the more widespread hazard, with a couple of tornadoes possible. Residents across MN/WI/N IA/U.P. Michigan should have shelter plans ready and WEA alerts enabled through this evening. Day 2 (02-JUL) carries the Slight risk into the northern Plains, Tennessee Valley/Southeast, and Northeast -- monitor for potential upgrades as timing firms up.

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 | NWS Miami (heat advisory)

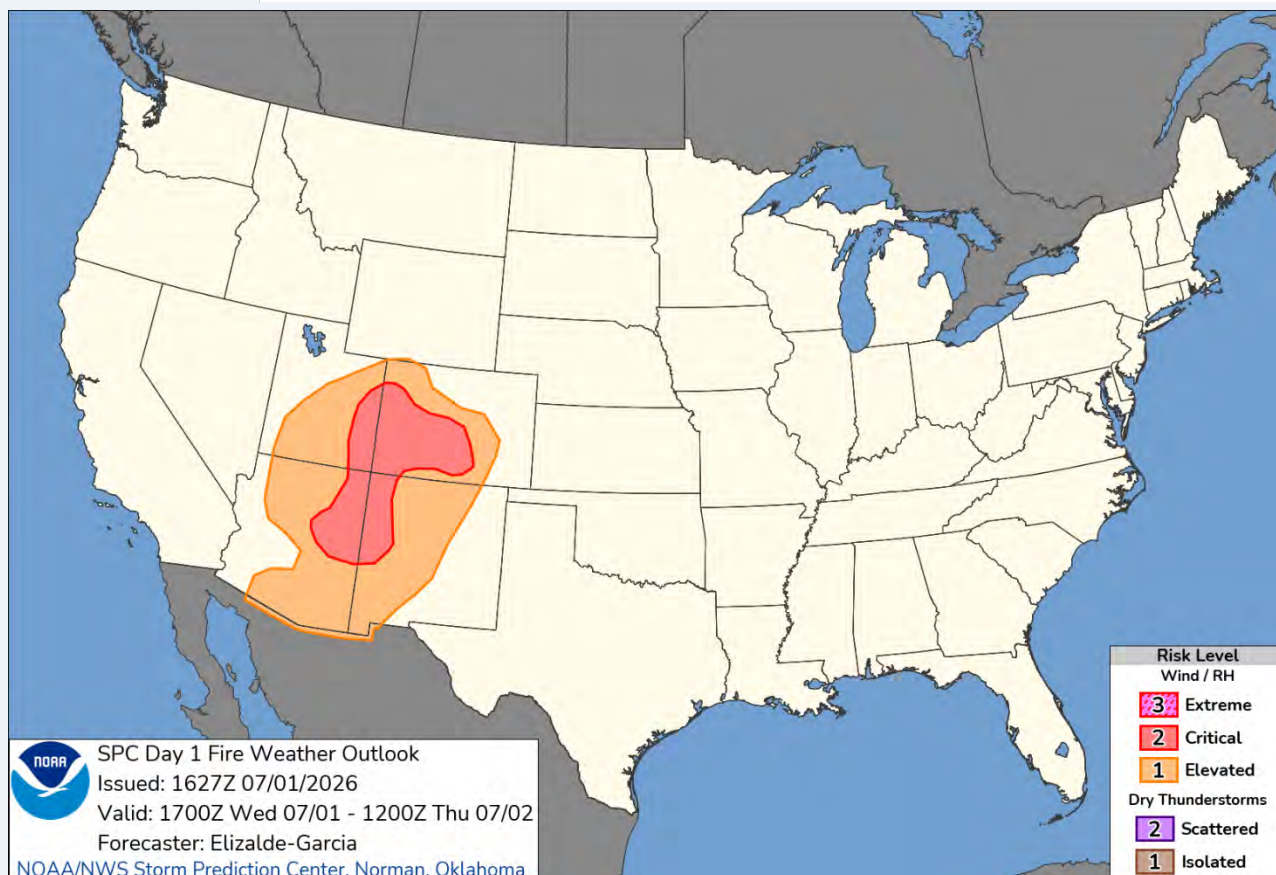
SECTION 7B - WILDFIRE REPORT (SEPARATE FROM METEOROLOGICAL WEATHER -- SEE SECTION 7 FOR WX-001)

WX-002 | SEC 7B MANDATORY FIRE WEATHER | NPL 4 | COTTONWOOD FIRE UT 98,800 ACRES 4% CONTAINED (NATION'S LARGEST) | 3 FIREFIGHTERS KILLED KNOWLES FIRE CO 28-JUN | NO KNOWN REPORTS OF PLANNED PUBLIC SAFETY POWER SHUTOFFS THIS CYCLE | FORWARD: critical fire weather continues Four Corners region

FLASH | ACTIVE | 22

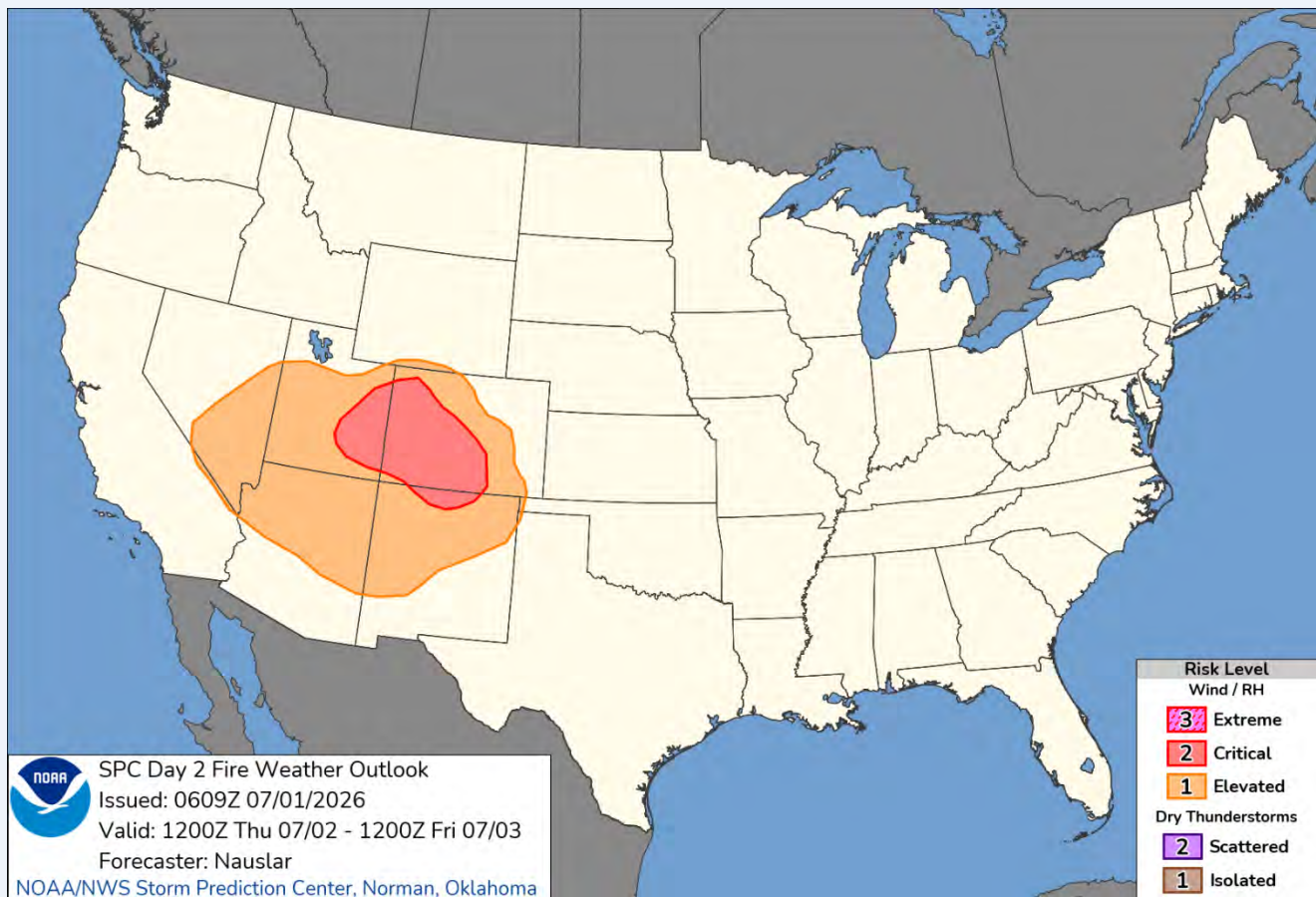
National Status	NIFC National Preparedness Level (NPL): 4 of 5, raised 29-JUN-2026. Source: NIFC National Fire News (nifc.gov/fire-information/nfn) ID: nifc T1. 37 uncontained large fires nationally as of latest IMSR; 3 firefighters killed 28-JUN on the Knowles Fire (west of Grand Junction, CO) -- a separate incident from Cottonwood. PUBLIC SAFETY POWER SHUTOFFS: no known reports of planned PSPS events this cycle (PG&E, SCE checked directly -- most recent PSPS on record is 10-11 June, no current forecast posted). YTD: 35,884+ wildfires, 3.1M+ acres burned nationally as of 30-JUN -- both well above the 10-year average. Source: NIFC National Fire News, nifc.gov/fire-information/nfn.
SPC Fire Weather Day 1	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 Kopshesut; 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 - 30 JUNE 2026

Source: Operator-supplied roster 30-JUN | NOAA NWR (noaa_nwr T1) | As of 30-JUN-2026 1340Z | 31 transmitters affected (17 OOS / 14 DEGRADED) | NET +8 from prior cycle (23 total) | Heavy new AK Juneau-area DEGRADED cluster (11 stations) | New to roster this cycle: CA-Santa Ana, CT-Meriden, NV-Owyhee, NY-Albany, TX-Rio Grande City, TX-Uvalde, WA-Yakima | Resolved/dropped from prior roster: AR-Fountain Hill, CO-Colorado Springs, OR-Coos Bay, TX-Brownsville | NM triple-gap (Artesia/Carlsbad/Roswell) persists unchanged

▲ HIGH-GAP ALERT - ACTIVE HAZARD OVERLAP: (1) NM TRIPLE-GAP PERSISTS: Artesia WXN24 OOS / Roswell WWG36 OOS / Carlsbad WWF37 OOS -- Chaves/Eddy counties zero primary NWR coverage during active fire season, unchanged from prior cycle. (2) AK CLUSTER EXPANDED: 11 Juneau-area transmitters now DEGRADED (Althorp Peak, Cape Fanshaw, Duffield Peninsula, Duke Island, Gravina Island, Kotzebue, Manleyville, Mt. McArthur, Mt. Robert Barron, Sukkwan Island, Zarembo Island) plus Saint Paul Island OOS -- a significant increase from prior cycle's smaller AK footprint; infrastructure-attributed, not SWX-caused. (3) NEW TO ROSTER THIS CYCLE: CA-Santa Ana OOS (San Diego WFO coverage reduced), CT-Meriden OOS (New York WFO), NV-Owyhee DEGRADED (Elko WFO), NY-Albany OOS, TX-Rio Grande City OOS and TX-Uvalde OOS (both Texas WFOs), WA-Yakima OOS (Pendleton WFO). (4) IN-ANGOLA KXI94 remains DEGRADED (Northern Indiana reduced coverage, unchanged). (5) RESOLVED FROM PRIOR ROSTER: AR-Fountain Hill, CO-Colorado Springs, OR-Coos Bay, TX-Brownsville no longer affected. Emergency managers in all affected counties: verify alternate alerting pathways (WEA, NOAA Weather App, EAS broadcast radio) are operational.

ST	Callsign	Location	Freq	WFO	Status	Counties / Notes
AK	KZZ86	Althorp Peak	162.425	Juneau AK	DEGRADED	Operator-supplied roster 30-JUN
AK	KZZ88	Cape Fanshaw	162.425	Juneau AK	DEGRADED	Operator-supplied roster 30-JUN
AK	WZ2555	Duffield Peninsula	162.525	Juneau AK	DEGRADED	Operator-supplied roster 30-JUN
AK	KZZ92	Duke Island	162.450	Juneau AK	DEGRADED	Operator-supplied roster 30-JUN
AK	KZZ96	Gravina Island	162.525	Juneau AK	DEGRADED	Operator-supplied roster 30-JUN
AK	KWN30	Kotzebue	162.550	Fairbanks AK	DEGRADED	Operator-supplied roster 30-JUN
AK	KAD96	Manleyville	162.500	Juneau AK	DEGRADED	Operator-supplied roster 30-JUN
AK	KZZ95	Mt. McArthur	162.525	Juneau AK	DEGRADED	Operator-supplied roster 30-JUN
AK	KZZ87	Mt. Robert Barron	162.450	Juneau AK	DEGRADED	Operator-supplied roster 30-JUN

FORTUNE FAVORS THE PREPARED DAILY THREAT REPORT 01 JULY 2026						
ST	Callsign	Location	Freq	WFO	Status	Counties / Notes
AK	KJY73	Saint Paul Island	162.525	Anchorage AK	OUT OF SERVICE	Operator-supplied roster 30-JUN
AK	KZZ89	Sukkwana Island	162.425	Juneau AK	DEGRADED	Operator-supplied roster 30-JUN
AK	KZZ91	Zarembo Island	162.450	Juneau AK	DEGRADED	Operator-supplied roster 30-JUN
CA	WWG21	Santa Ana	162.450	San Diego CA	OUT OF SERVICE	Operator-supplied roster 30-JUN
CT	WXJ42	Meriden	162.400	New York NY	OUT OF SERVICE	Operator-supplied roster 30-JUN
GA	WXM65	Baxley	162.525	Jacksonville FL	OUT OF SERVICE	Operator-supplied roster 30-JUN
IL	KXI79	Hillsboro	162.425	St. Louis MO	OUT OF SERVICE	Operator-supplied roster 30-JUN
IN	KXI94	Angola	162.425	Northern Indiana IN	DEGRADED	Operator-supplied roster 30-JUN
KS	WXN81	Ulysses	162.450	Dodge City KS	OUT OF SERVICE	Operator-supplied roster 30-JUN
ME	WNG547	Sugarloaf Mtn	162.450	Gray/Portland ME	OUT OF SERVICE	Operator-supplied roster 30-JUN
MI	WNG572	Petoskey	162.475	Gaylord MI	OUT OF SERVICE	Operator-supplied roster 30-JUN
MN	KXI45	Gunflint Lake	162.525	Duluth MN	OUT OF SERVICE	Operator-supplied roster 30-JUN
NM	WXN24	Artesia	162.425	Midland/Odessa TX	OUT OF SERVICE	Operator-supplied roster 30-JUN
NM	WWF37	Carlsbad	162.475	Midland/Odessa TX	OUT OF SERVICE	Operator-supplied roster 30-JUN
NM	WWG36	Roswell	162.450	Albuquerque NM	OUT OF SERVICE	Operator-supplied roster 30-JUN
NV	WNG731	Owyhee	162.450	Elko NV	DEGRADED	Operator-supplied roster 30-JUN
NY	WXL34	Albany	162.550	Albany NY	OUT OF SERVICE	Operator-supplied roster 30-JUN
OR	KIG98	Portland	162.550	Portland OR	DEGRADED	Operator-supplied roster 30-JUN
TN	WXK63	Shelbyville	162.475	Nashville TN	OUT OF SERVICE	Operator-supplied roster 30-JUN
TX	WNG601	Rio Grande City	162.425	Brownsville/Rio Grande Valley TX	OUT OF SERVICE	Operator-supplied roster 30-JUN
TX	KWN51	Uvalde	162.425	Austin/San Antonio TX	OUT OF SERVICE	Operator-supplied roster 30-JUN
WA	KIG75	Yakima	162.550	Pendleton OR	OUT OF SERVICE	Operator-supplied roster 30-JUN

SOURCES: Source: weather.gov/nwr/outages.

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 | 2

SWPC Status (01-JUL 1245Z)

SUPERSEDED. NOAA SWPC issued a new G2 (Moderate) geomagnetic storm WATCH (WATA30, serial 277) at 1240 UTC 01-JUL for 03-JUL, superseding all prior watches; G1 conditions are active today. Active extended K-index warnings remain in force: K5 through 1800Z today, K4 through 2100Z today. An ALERT-level K5 threshold was reached at 0259 UTC today. A Type IV radio emission alert (ALTTP4, serial 712) began 2055 UTC 30-JUN. Source: NOAA SWPC swpc.noaa.gov.

Why This Cycle

NOAA SWPC issued a new G2 (Moderate) geomagnetic storm WATCH for 03-JUL (WATA30, superseding all prior watches) with G1 conditions active today -- this is an escalation from yesterday's flare-driven blackout, not a continuation of the same event.

Summary

A new G2 (Moderate) geomagnetic storm WATCH has been issued for 03-JUL (WATA30), superseding all prior watches; G1 conditions are active today, 01-JUL. Extended K-index warnings remain active: K5 through 1800Z, K4 through 2100Z, with an ALERT-level K5 threshold reached at 0259 UTC. A Type IV radio emission alert began 2055 UTC 30-JUN. This supersedes yesterday's flare-driven R2 radio blackout event, which has resolved; today's driver is the geomagnetic storm progression toward 03-JUL, not a continuation of yesterday's flare. SWX-CON should reflect an active WATCH posture ahead of the 03-JUL peak.

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: Weak-to-moderate GIC (geomagnetically induced current) risk under the new G2 watch for 03-JUL -- power grid fluctuations can occur, with high-latitude power systems potentially experiencing voltage alarms. No GIC risk from today's G1 conditions alone. Grid operations normal at present. 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: Aurora possible at high latitudes today under G1 conditions (northern tier US, e.g. northern Michigan and Maine). If the G2 (Moderate) watch for 03-JUL verifies, aurora may become visible as far south as New York, Wisconsin, and Washington state.
HF / COMMS Assessment	HF radio propagation can fade at higher latitudes if the G2 watch verifies 03-JUL. EMCOMM operators: monitor SWPC for confirmation as 03-JUL approaches; no special band selection required today under G1 conditions. This is a new watch cycle, not a continuation of a prior multi-day event -- treat the 03-JUL window as the operative planning horizon.
Analyst Assessment	PRIMARY CONCERN THIS CYCLE: The new G2 watch for 03-JUL is a geomagnetic storm risk relevant to power grid operators, HF communications, and satellite operators alike -- broader than the prior electron-flux-only satellite concern. No action required for ground-based emergency communicators today under G1 conditions; monitor toward 03-JUL for confirmation. DURATION AND PERSISTENCE: This is a newly issued watch (WATA30, serial 277), not a persistence event -- the prior ALTEF3 electron-flux alert has effectively lapsed and this cycle's driver is a fresh geomagnetic storm forecast. SWPC's 3-day outlook shows G1 today, none tomorrow (02-JUL), G2 on 03-JUL -- monitor swpc.noaa.gov for any upgrade or downgrade as the window approaches. CURRENT STATUS: CHANGE FROM PRIOR: G2 (Moderate) geomagnetic storm watch newly issued for 03-JUL, superseding all prior watches -- this is an escalation from the prior cycle's flare-driven R2 blackout assessment, not a continuation. G1 active today. Extended K5 warning through 1800Z, K4 through 2100Z. ALERT-level K5 threshold reached 0259 UTC. Type IV radio emission alert active since 2055 UTC 30-JUN. SWX-CON updated to WATCH posture ahead of 03-JUL. LIKELIHOOD: G2 (Moderate) geomagnetic storm verifies as forecast on 03-JUL: LIKELY -- NOAA SWPC has issued a formal watch (WATA30); current K-index trajectory and Type IV radio emission are consistent with continued geomagnetic activity. CONFIDENCE: LOW. LIKELIHOOD: GEO satellite anomaly or ground power-grid voltage alarm attributable to the 03-JUL G2 event: ROUGHLY EVEN CHANCE -- G2-class storms have historically produced isolated high-latitude grid and satellite effects. 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 7D - TROPICAL / HURRICANE WEATHER

NSTR -- No Atlantic or Eastern/Central Pacific tropical cyclone formations or disturbances as of 01-JUL.	
Status	NHC 2-Day and 7-Day Graphical Tropical Weather Outlooks show "Disturbances: None" across the Atlantic, Eastern Pacific, and Central Pacific basins as of 01-JUL. The 2026 Atlantic season (began 01-JUN) has produced one named storm to date (Tropical Storm Arthur, formed 17-JUN, made landfall near Galveston TX and dissipated) -- no active or developing systems this cycle. NOAA's seasonal outlook calls for a below-normal Atlantic season (55% probability below-normal, 8-14 named storms, 3-6 hurricanes, 1-3 major).
Sources	NOAA NHC (nhc.noaa.gov) 2-Day and 7-Day Graphical Tropical Weather Outlooks NOAA Climate Prediction Center Atlantic Hurricane Outlook

SECTION 8 - AGRICULTURE / FOOD & SUPPLY CHAIN

AGRICULTURAL IMPACT: NATIONAL FIRE SEASON AT PL4, SOUTHEAST DROUGHT RECORD SEVERITY, HORMUZ-DRIVEN FERTILIZER/FUEL COST PRESSURE ON 2026 HARVEST -- SEE WX-002 (SECTION 7B) FOR FIRE OPERATIONAL DETAIL		ELEVATED UPDATED 10
Why This Cycle	National wildfire posture at PL4 continues to remove grazing/farmland acreage and strain rural infrastructure; the Southeast drought remains at record severity for the recorded period; Hormuz-related fertilizer and fuel cost pressure continues to compound into 2026 harvest cost projections. No new agriculture-specific data point beyond the standing drought/fire/fuel-cost picture was identified this cycle.	
Summary	The national wildfire posture (PL4, Cottonwood Fire still the nation's largest active fire -- see WX-002/Section 7B for full operational detail) continues to remove grazing and agricultural land from production in the affected Western states and strain rural firefighting and utility resources. The Southeast drought remains at record severity for the recorded period, compounding a multi-month agricultural disruption. Hormuz-related fertilizer and transportation fuel cost pressure continues into this cycle. \$0.117 SOURCES: NIFC National Fire News (nifc.gov/fire-information/nfn); USDA ERS Food Price Outlook.	
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 47 DRC 1,274 CONFIRMED (34 HEALTH ZONES) UGANDA 20 CONFIRMED / 2 DEATHS FRANCE EU IMPORT WHO SITREP GAP NOW 6+ DAYS (LAST CONFIRMED 27-JUN WHO/AFRICA CDC) CONTINENTAL IMST STOOD UP KAMPALA NO VACCINE / NO TREATMENT		HIGH UPDATED 14
Why This Cycle	WHO/Africa CDC confirmed DRC case count rose to 1,274 across 34 health zones as of 27-JUN, the newest available figure; a dedicated WHO-Africa CDC Continental Incident Management Support Team stood up this week in Kampala, and no fresh sitrep has published in 6+ days.	
Summary	Bundibugyo ebolavirus PHEIC declared 17-MAY-2026 -- Day 47 as of 01-JUL. DRC 1,274 confirmed across 34 health zones; Uganda 20 confirmed / 2 deaths (all linked to DRC) -- figures per WHO/Africa CDC, 27-JUN, the newest available data. WHO-Africa CDC Continental Incident Management Support Team (IMST) stood up in Kampala this week. WHO/ECDC sitrep gap is now 6+ days as of 01-JUL (last confirmed data 25/27-JUN) -- the gap itself is a current-window fact. No approved vaccine or specific treatment for the Bundibugyo strain; the PARTNERS trial is ongoing. US travel restrictions remain in effect (since 18-MAY); enhanced entry screening continues at IAD/ATL/IAH/JFK. True scale likely higher given infrastructure gaps and ongoing insecurity in affected health zones. 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 01-
JUL

PREP-CON 3 -- BROWN SKY (Incident Probable) MAINTAINED. Drivers this cycle: Doha indirect US-Iran talks continue with no direct meeting and a Hormuz toll-free dispute unresolved (see GEO-CF-IRAN); Venezuela earthquake recovery ongoing with toll still climbing (see GEO-003); national wildfire posture at PL4 with the Cottonwood Fire still the nation's largest active fire (see WX-001); a dangerous multi-day heat wave and PJM grid emergency order in effect (see Section 7 Heat Warning). **PREP-CON 4 (Incident Possible) drivers are present but not sufficient to step up: the MOU remains in force and no ceasefire violation has escalated to renewed kinetic exchange this cycle, and Doha talks -- while inconclusive -- represent an active off-ramp rather than a breakdown.** PREP-CON 3 (Incident Probable) is held this cycle. Case against escalating to PREP-CON 2: the MOU remains signed and in force; Doha technical talks continued today without a breakdown; no new kinetic exchange has been confirmed this reporting window; the World Cup remains incident-free through Day 22 of Round of 32. Case against de-escalating to PREP-CON 4: Hormuz toll-free dispute and asset-transfer standoff remain unresolved; IAEA access remains unrestored (Day 124 blackout); the national wildfire posture is at PL4 with active fatalities this week; a dangerous multi-day heat wave is straining the PJM grid toward a potential all-time demand record. De-escalation to PREP-CON 4 would require the Hormuz/asset dispute to resolve and the national fire/heat posture to ease meaningfully. Neither condition is met today.

MOVEMENT ASSESSMENT

SUPPORTS DE-ESCALATION TO 4: If the Hormuz toll-free dispute resolves, frozen assets transfer, and the national fire/heat posture eases, the basis for holding PREP-CON 3 erodes meaningfully. Monitor Doha outcome and PL4 status as the primary triggers for re-assessment.

SUPPORTS HOLDING AT 3 (today): Hormuz/asset dispute unresolved, PL4 national fire posture with active fatalities, record-threatening grid demand under the heat wave. All Incident-Probable-tier triggers remain active. BROWN SKY is the correct posture until the Hormuz dispute resolves and the fire/heat posture eases.

SUPPORTS ESCALATION TO 2: If the MOU collapses (renewed direct kinetic exchange between US and Iran), or confirmed CONUS comms degradation (COMCON move to 3), or confirmed cyber attack on critical infrastructure -- none currently met.

LIKELIHOOD: Hormuz/asset dispute resolves and PREP-CON de-escalates to 4 within the 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 01-JUL-2026. Governing rule -- level reflects highest-severity domain in degradation. 18 NWR transmitters OOS/DEGRADED (14 OOS / 4 DEGRADED, down from 31 on 30-JUN -- net improvement). No new GPS/GNSS jamming reported this cycle beyond the standing Middle East hotspots (see AVN-001). Cisco SD-WAN, Cisco UCM, and PTC Windchill KEVs remain overdue with active exploitation history; a new critical SimpleHelp OIDC bypass KEV was added this cycle with a 02-JUL federal deadline. No confirmed critical infrastructure outages this cycle beyond the NWR transmitter roster.

SECTION 11 - DOMESTIC UNREST / SOFT TARGET

DOM-002 | UK/NI DOMESTIC WATCH: LABOUR LEADERSHIP TRANSITION (BURNHAM SOLE CANDIDATE, NOMINATIONS 9-16 JUL) & BELFAST FORWARD SCAFFOLD (PROSECUTION PHASE, 12-JUL TWELFTH APPROACHING)

WATCH | CONTINUED | 13

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" Active 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. UK Labour: Burnham won the Makerfield by-election 18-JUN, returning him to the Commons; Starmer announced his resignation as PM/party leader 22-JUN. Nominations open 9-JUL, close 16-JUL; if Burnham remains the sole candidate, he becomes Labour leader at close of nominations and PM around 17-19-JUL. If contested, a winner is expected before Parliament's 1-Sep return. Belfast: forward scaffold riots began 9-JUN following a stabbing attack; peak violence ran 9-11-JUN; prosecution phase is now active (25 arrested / 17 charged). 12-JUL Twelfth of July marching season is the next elevated-risk window. 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 22 R32 NO PHYSICAL SECURITY INCIDENTS DAYS 1-22 IRAN ELIMINATED, DEPARTED 29-JUN FBI: FIFA WEBSITE SPOOFING ACTIVE 300+ MALICIOUS DOMAINS TOURNAMENT VENUES UNDER ACTIVE HEAT WAVE		HIGH UPDATED 16
SALUTE	SIZE: Round of 32, Day 22 (concludes 03-JUL; Round of 16 begins 04-JUL). Today's matches (01-JUL): Mexico 2-0 Ecuador (Mexico City, completed), England vs DR Congo (Atlanta), Belgium vs Senegal (Seattle). Iran was eliminated in the Round of 32 and departed Tijuana 29-JUN, removing the highest diplomatic-flashpoint fixture from the US venue slate. ACTIVITY: No physical security incidents confirmed at any venue through Day 22. FBI: active spoofing attacks on official FIFA website/platforms remain confirmed and ongoing. Chinese cybercriminals: 300+ FIFA clone domains continue harvesting credentials/payments. Recorded Future: IRGC-linked hacktivist personas remain active but no confirmed World Cup attack has occurred to date. Miami Hard Rock: Heat Advisory active (103-107F heat index); afternoon storms expected to largely clear before evening kickoffs. LOCATION: Today's venues: Estadio Azteca Mexico City (completed), Mercedes-Benz Stadium Atlanta (England-DR Congo), Lumen Field Seattle (Belgium-Senegal). Cyber threat: worldwide (FIFA digital platforms). TIME: Tournament through 19-JUL. Round of 32 concludes 03-JUL; Round of 16 begins 04-JUL. Today's kickoffs: Mexico City (completed), Atlanta and Seattle this evening (local times). EQUIPMENT: Counter-drone systems deployed at host venues. Vehicle-as-weapon barriers standard at all tournament sites. DHS \$250M+ anti-drone technology deployment ongoing across host cities. UNIT: FBI; CISA; DHS; local law enforcement at host city venues; FIFA security; 400+ LE agencies engaged nationally.	
Analyst Assessment	ROUND OF 32 SECURITY POSTURE: Iran's elimination and departure 29-JUN removed the tournament's single highest diplomatic-flashpoint fixture from the remaining US venue slate. Remaining Round of 32 risk is now dominated by standard mass-gathering factors (crowd	

density, heat exposure, cyber targeting of fans) rather than a specific geopolitical trigger. No new specific credible threat has been identified for today's fixtures.

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.

TOURNAMENT HEAT COMPOUND: Atlanta and Seattle host today's evening fixtures under the active multi-day heat wave (see Section 7 Heat Warning box); outdoor fan zones and transit queues are the primary heat-exposure window ahead of kickoff. Medical stations and cooling centers should be at full capacity at all outdoor host venues while the heat wave persists, not just at stadiums with matches today.

LIKELIHOOD: Today's Round of 32 fixtures (Atlanta, Seattle) proceed 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 World Cup security coverage | 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/epared.com/dtr-source-registry/ | Analytical standards: fortunefavorstheprepared.com/analytical-standards/

SECTION 13 - CLOSING

END OF REPORT

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