

# DAILY THREAT REPORT

Fortune Favors the Prepared | Intelligence Operations Division  
UNCLASSIFIED - OPEN SOURCE - FOR PUBLIC DISTRIBUTION



**⚠️ PREPAREDNESS CONDITION 3 -- BROWN SKY -- INCIDENT PROBABLE ⚠️**  
Op Epic Fury Day 129 | Hormuz Day 129 | MOU Day 20 | PREP-CON 3 BROWN SKY | COMCON 4  
INCREASED VIGILANCE | 06 JULY 2026 | See [Section 10](#)

**COMMUNICATIONS CONDITION: COMCON 4 -- INCREASED VIGILANCE**  
COMCON 4 INCREASED VIGILANCE. See [CYB-001](#) and [Section 10](#) for full detail.

**WX-CON 4 ELEVATED. See [WX-001](#) and [Section 10](#) for full detail.**  
Wildfire: see [WX-002 / Section 7B](#).

**SWX-CON 2 WATCH. See [SWX-001](#) and [Section 10](#) for full detail.**  
Source: NOAA SWPC [swpc.noaa.gov](http://swpc.noaa.gov)

|                         |                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Publication (UTC)       | 06 JUL 2026 / Cycle close 1530 UTC                                                                                                                                                                                                                                                                                                                                                     |
| Reporting Period        | 04-JUL-2026 1530Z through 06-JUL-2026 1530Z                                                                                                                                                                                                                                                                                                                                            |
| Analyst / Watch Officer | Fortune Favors the Prepared -- OSINT Desk                                                                                                                                                                                                                                                                                                                                              |
| FLASH Threshold         | Risk Score >= 20 -- FLASH events this cycle (GEO-CF-IRAN: Iran hardens Hormuz toll-free position, NATO summit takes up strait security; GEO-003 Venezuela toll risen to 2,954 dead, posture shifted recovery/reconstruction; PHS-002 Ebola confirmed cases +564/deaths +220 since 19-JUN DON, CFR risen to ~31%; ENR-002 second DOE 202(c) grid emergency (Duke Energy) alongside PJM) |
| PREP-CON Baseline       | PREP-CON 3 -- BROWN SKY   COMCON 4 -- INCREASED VIGILANCE   WX-CON 4 ELEVATED   SWX-CON 2 WATCH -- see Section 10 for full assessment   Semper Paratus, Semper Gumby                                                                                                                                                                                                                   |
| Day Counters            | Op Epic Fury: Day 129   Hormuz: Day 129   IAEA Blackout: Day 129   Ebola PHEIC: Day 52   World Cup: Day 27 R16   MOU Day 20   Cottonwood Fire Day 16   Venezuela EQ: Day 12   NPL: 4 (unverified this cycle)   Brent: \$71.70                                                                                                                                                          |
| Version                 | 1.0 -- SOP v5.59   Registry v2.25 -- docx reconciled this cycle (HTML/SESSION_OPENER reconciliation remains outstanding, website-side)   638 total sources swept (56 mandatory individually dispositioned)   Standard 24-hr cycle 04-JUL through 06-JUL   Hooks PASS   stale_entry_audit.py PASS (pre- and post-pack)   cross_reference_audit.py PASS (pre- and post-pack)             |

## BOTTOM LINE UP FRONT

06 JULY 2026 | PREP-CON 3 BROWN SKY | COMCON 4 INCREASED VIGILANCE | Op Epic Fury / Hormuz Day 129 | MOU Day 20 | IAEA Blackout Day 129 | Ebola PHEIC Day 52 | NIFC NPL 4 (unverified this cycle) | World Cup Day 27 R16 | Cottonwood Fire ~94.8K acres, containment unverified this cycle (source conflict, see WX-002) | Second DOE 202(c) grid emergency (Duke Energy) alongside PJM

## THE CYCLE - QUICK LOOK

- ▶ **GEO-CF-IRAN: MOU UNDER STRAIN, TOLL DISPUTE HARDENING: 26-29 JUN mutual strikes were the most severe kinetic test of the MOU to date; stand-down held through the 4th of July. Doha talks concluded 01-JUL with "positive progress, no breakthrough"; next round deferred until after Khamenei's funeral (burial 09-JUL). Iran has hardened its Hormuz tolling position this cycle and warned the UK/France directly. See GEO-CF-IRAN.**
  
- ▶ **NUC-001: IAEA BLACKOUT DAY 129 -- 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.** Grossi has maintained that inspection means inspection "in all letters" and that access will happen under the MOU's terms. Gharibabadi stated 25-JUN that no Switzerland meeting was scheduled at that time, and that access would come only after a 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 15 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 -- now overdue. 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. Microsoft KEK CA 2011 and UEFI CA 2011 certificate expirations (24-JUN/27-JUN) remain a standing Secure Boot trust-chain reliability issue -- no new development this cycle; not independently reverified. 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 12 -- 2,954 confirmed dead / 16,592 injured, 10,700 housed in 79 camps -- posture shifted to recovery/reconstruction; toll climbing on backlog processing, not new harm.** See GEO-003 for full detail.
  
- ▶ **PHS-002: PHS-002 EBOLA PHEIC DAY 52: DRC 1,460 confirmed (452 deaths, CFR ~31%) (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.** DRC 1,460 confirmed (452 deaths, CFR ~31%) across 34 health zones; Uganda 20 confirmed/2 deaths -- newest figures per WHO/Africa CDC, 27-JUN. WHO sitrep gap now 6+ days. NEW THIS CYCLE: geographic spread confirmed to Tshopo and Haut-Uele provinces, traced to unsafe transport/burial of a case who died in Ituri 27-JUN and was moved ~186 miles by motorcycle to Kisangani; DRC has banned mass gatherings in Kinshasa in response. Separate and unrelated: Uganda confirmed a Marburg virus death in a child, Kyegegwa district -- no known link to the Ebola outbreak, no other cases identified. 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 27 R16 -- no new stadium-venue or fan-zone incident this cycle beyond the round transition (R32 concluded 03-JUL as scheduled, R16 began 04-JUL). San Pedro Square fan-zone incidents (homicide 28-JUN, stabbings/unlawful assembly 01-JUL) and Iran's 29-JUN elimination/departure**

remain the last confirmed security-relevant developments; no update to that record this cycle. See STSB-001 for full detail.

**NOT DETAILED HERE:** ALTEF3 HEE Day 3 detail (Sec 7A); NWR 18 units (Sec 7); Venezuela humanitarian detail; World Cup R32 bracket; UK PM nomination timeline detail.

**DECISIVE WINDOW (NEXT 48-72 HRS): PJM 202(c) order and the separate Duke Energy 202(c) order both expire tonight (06-JUL) -- Khamenei funeral processions run 04-JUL through burial on 09-JUL, during which no Doha/Burgenstock talks are scheduled to resume -- Labour leadership nominations open 09-JUL, close 16-JUL -- ECDC's next weekly Ebola update is due today (06-JUL) and may revise the DRC/Uganda figures in this report.** 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 15 days overdue; the SimpleHelp KEV deadline (02-JUL) and the newly tracked Microsoft SharePoint Server KEV deadline (04-JUL) have both now passed without confirmed remediation. WHO Ebola sitrep gap is now 6+ days pending today's ECDC update. The Hormuz toll-free dispute remains unresolved heading into the funeral-period pause in talks.

## SECTION INDEX

| SECTION                                      | KEY ENTRIES / THREAT DRIVERS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>SEC 2 - Market Indicators</b>             | Commodity tracker: Brent ~\$71.70/bbl (06-JUL, down from ~\$72.12 04-JUL)   pump \$3.804/gal (AAA 05-JUL, down from \$3.847 02-JUL, continued weekly decline)   WTI ~\$68.40 (06-JUL)   OPEC+ approved +188,000 bpd August output increase 05-JUL, primary driver of today's softness   Hormuz traffic ~25-35 transits/day vs ~110 prewar baseline, five-vessel convoy cleared Omani corridor 05-JUL key catalyst   Hormuz traffic recovering vs pre-war baseline   9-12 month normalization                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>SEC 3 - FLASH Events</b>                  | <b>GEO-CF-IRAN:</b> Iran hardened Hormuz tolling position this cycle (will "definitely" charge transit fees, floated differential treatment for "friendly" nations, warned UK/France directly); NATO put strait security on this week's summit agenda; IRGC patrol activity and VHF-triggered turnarounds continued 04-05 JUL. MOU Day 20. <b>NUC-001:</b> IAEA Blackout Day 129, no new Grossi statement, Board action, or access breakthrough since the June 2026 safeguards report -- straight day-counter carryforward. <b>GEO-003:</b> Venezuela Day 12, 2,954 dead / 16,592 injured, 10,700 housed in 79 camps -- posture shifted to recovery/reconstruction. <b>WX-001:</b> SPC SLIGHT risk eastern Dakotas/western MN and central VA/north-central NC today (down from ENHANCED prior cycle); PJM 202(c) order active, expires tonight; second DOE 202(c) grid emergency issued for Duke Energy Carolinas/Progress 02-JUL (also expires tonight). Wildfire content: see WX-002/Sec 7B. <b>PHS-002:</b> Ebola Day 52, DRC 1,460 confirmed (452 deaths, CFR ~31%, up from ~26%) (34 zones) / Uganda 20 confirmed / 1 France-linked -- 1,481 total, 454 deaths -- per WHO DON 03-JUL. |
| <b>SEC 4A - Cyber / Technology</b>           | <b>CYB-001</b> Cisco SD-WAN, Cisco UCM, PTC Windchill KEVs remain overdue; Ubiquiti UniFi cluster now overdue. TWO KEV deadlines now overdue: SimpleHelp OIDS bypass CVE-2026-48558 (deadline 02-JUL, overdue) AND Microsoft SharePoint Server deserialization vulnerability (deadline 04-JUL, overdue -- new this cycle). No workarounds confirmed. KEV overdue backlog 10+ entries.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>SEC 4B - Physical / Geopolitical / IO</b> | <b>DOM-002</b> (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. <b>STSB-001:</b> World Cup Day 27 R16 (R32 concluded 03-JUL as scheduled, R16 began 04-JUL). No new stadium-venue or fan-zone incident this cycle beyond round transition. <b>PHS-002:</b> Ebola Day 52, DRC 1,460 confirmed (452 deaths, CFR ~31%, up from ~26%) / Uganda 20 confirmed -- 1,481 total confirmed, 454 deaths per WHO DON 03-JUL, no vaccine/treatment.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

| SECTION                                                             | KEY ENTRIES / THREAT DRIVERS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>SEC 5 - Energy / Infrastructure / Supply Chain</b>               | <b>FIN-001</b> Brent ~\$71.70 (02-JUL), down sharply from \$75.02 (30-JUN, 48hr delta) as Hormuz flows exceed 10M bbl/day) / pump \$3.804/gal (AAA 05-JUL, down from \$3.847 02-JUL) / Hormuz ~25-35 transits/day vs ~110 prewar flows / Saudi Aramco Ras Tanura resumed / Iran has hardened its Hormuz tolling position this cycle; Doha talks concluded 01-JUL with "positive progress, no breakthrough," next round deferred until after Khamenei's funeral. AVN: Gulf aviation status (BA Dubai resumption, Kuwait Terminal 1, GPS jamming, EASA CZIB) not independently reverified this cycle -- carrying forward from 02-JUL. <b>SC-001</b> MARAD 2026-008 active   fertilizer/methanol/aluminum lag persists |
| <b>SEC 6 - Aviation / Transportation</b>                            | <b>AVN-001:</b> Gulf aviation status (Iran OIIX, BA/Lufthansa Dubai resumption, Kuwait Terminal 1, GPS jamming, Qatar Airways capacity restoration) not independently reverified this cycle -- carrying forward from 02-JUL pending fresh check. <b>AVN-002:</b> World Cup Day 27, no venue weather issues today. Middle East airspace remains ELEVATED post weekend exchange.                                                                                                                                                                                                                                                                                                                                      |
| <b>SEC 7 - Meteorological / Severe Weather / Fire Weather + NWR</b> | <b>WX-001:</b> SPC SLIGHT risk eastern Dakotas/western MN and central VA/north-central NC today, down from ENHANCED prior cycle. Dangerous multi-day heat wave continues (see Heat Warning box). Wildfire content moved to WX-002/Sec 7B. <b>WX-002:</b> : Cottonwood Fire ~94,800 acres (stable); containment % unverified this cycle -- source conflict 23-42%, see WX-002 (nation's largest); NPL 4; 3 firefighters killed 28-JUN Knowles Fire (CO); no known reports of planned Public Safety Power Shutoffs this cycle.                                                                                                                                                                                        |
| <b>SEC 7B - Wildfire Report</b>                                     | <b>WX-002</b> : Cottonwood Fire ~94,800 acres (stable); containment % unverified this cycle -- source conflict 23-42%, see WX-002 (nation's largest); NPL 4; 3 firefighters killed 28-JUN Knowles Fire (CO); no known reports of planned Public Safety Power Shutoffs this cycle.                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>SEC 7A - Space Weather and EMCOMM</b>                            | <b>SWX-001</b> : 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>SEC 7D - Tropical / Hurricane Weather</b>                        | NSTR -- no Atlantic, Eastern Pacific, or Central Pacific tropical cyclone formations or disturbances as of 06-JUL, confirmed via a fresh NHC check this cycle. One named storm to date this season (TS Arthur, dissipated 17-JUN).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>SEC 10 - PREP-CON Assessment</b>                                 | PREP-CON 3 BROWN SKY (Incident Probable) / COMCON 4 INCREASED VIGILANCE -- see full trigger basis and scoring                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>SEC 12 - Source Registry</b>                                     | Registry v2.25   638 total sources swept   56 mandatory dispositioned   fortunefavorstheprepared.com/dtr-source-registry/                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

## GEOGRAPHIC IMPACT INDEX

| REGION / THEMATIC                                      | KEY ENTRIES / THREAT DRIVERS                                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CONUS - Appalachians / Mid-Atlantic / Northeast</b> | <b>WX-001</b> 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 deadline TODAY (02-JUL) -- immediate enterprise triage required. NWR gaps in the region: ME-Sugarloaf Mtn WNG547 OOS. |
| <b>CONUS - Gulf Coast (LA/MS/AL/FL Panhandle)</b>      | 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.                                                                                                                                               |



| REGION / THEMATIC                                  | KEY ENTRIES / THREAT DRIVERS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CONUS - Illinois / Indiana</b>                  | 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 in the region. SPC severe threat extends to mid-Mississippi Valley and into the Ohio Valley. CRITICAL 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.                                                                                                                                                                                                       |
| <b>CONUS - West / Sierra Nevada / N CA / SW OR</b> | <b>WX-002</b> (Section 7B): Cottonwood Fire ~94,800 acres (stable); containment % unverified this cycle -- source conflict 23-42%, see WX-002 -- 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.                                                                                                                                                                                                                                                                      |
| <b>CONUS - North Carolina</b>                      | <b>WX-002</b> 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).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>CONUS - Nationwide Wildfire</b>                 | <b>WX-002</b> NPL 4 of 5 (raised 29-JUN)   37 uncontained large fires nationally   Cottonwood Fire (UT) ~94,800 acres (stable); containment % unverified this cycle -- source conflict 23-42%, see WX-002 -- nation's largest, see WX-002/Section 7B   3 firefighters killed 28-JUN on the Knowles Fire (CO), a separate incident   No known reports of planned Public Safety Power Shutoffs this cycle   YTD fire/acreage totals not independently reverified this cycle -- last confirmed 02-JUL, carrying forward pending fresh NIFC pull                                                                                                                                                                                                                                                    |
| <b>CONUS - Nationwide (All Regions)</b>            | <b>CYB-001</b> CYB KEV cluster remains overdue: Cisco SD-WAN, Cisco UCM, PTC Windchill, and the Ubiquiti UniFi 3-CVE cluster (now 15 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). <b>CYB-002</b> : Check Point and PAN-OS KEVs remain on the overdue backlog   <b>CYB-001</b> : UAT-8616-attributed SD-WAN exploitation activity (same campaign, see full detail above), no new escalation confirmed this cycle   <b>FIN-001</b> : Brent \$71.70/bbl (02-JUL), 48hr delta down from \$75.02 (30-JUN) -- see ENR-001 for full detail                                                                                                   |
| <b>Middle East / Strait of Hormuz</b>              | GEO-CF-IRAN MOU Day 20: Doha talks concluded 01-JUL with positive progress but no breakthrough; next round deferred until after Khamenei's funeral (burial 09-JUL); Hormuz toll-fee dispute and ~\$6B frozen-asset transfer remain unresolved   NUC-001: IAEA Blackout Day 129, Burgenstock WG active, no new Grossi statement this cycle   AVN-001: Gulf aviation status not independently reverified this cycle, carrying forward from 02-JUL   ENR-001: Brent \$71.70/bbl, 48hr delta down from \$72.12 (04-JUL)   PHS-002: Ebola Day 52, DRC 1,460 confirmed (452 deaths, CFR ~31%, up from ~26%) (34 health zones) as of 03-JUL per WHO DON; ECDC weekly update due 06-JUL   WX-001: SPC ENHANCED Midwest/Upper Great Lakes today; dangerous multi-day heat wave, PJM grid emergency order |
| <b>Iran / Nuclear</b>                              | <b>NUC-001</b> IAEA Blackout Day 129 -- 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.                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>DRC / Uganda</b>                                | <b>PHS-002</b> Ebola Day 52 PHEIC: DRC 1,460 confirmed (452 deaths, CFR ~31%) across 34 health zones, Uganda 20 confirmed / 2 deaths (WHO DON, 03-JUL -- 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                                                                                                                                                                                                                                                                                                                                                                                                                     |

| REGION / THEMATIC               | KEY ENTRIES / THREAT DRIVERS                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Venezuela (Earthquake Recovery) | <b>GEO-002 / GEO-003</b> GEO-003 VENEZUELA: Twin M7.2+M7.5 earthquakes 24-JUN 2200 UTC   2,954 confirmed dead / 16,592 injured as of 05-JUL   10,700 housed in 79 camps, posture shifted to recovery/reconstruction   USS Fort Lauderdale logistics status not independently reverified this cycle   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 | <b>DOM-002</b> 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               | <b>SWX-001</b> 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 (06-JUL)                                   | CHG vs PRE-WAR | CONSUMER / ANALYTICAL NOTE                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|----------------------------|------------------|----------------------------------------------------|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Brent Crude (front)</b> | ~\$66/bbl        | \$71.70/bbl (02-JUL)                               | <b>+17%</b>    | 48-HOUR DELTA: down from \$72.12 (04-JUL) to \$71.70 (06-JUL) -- a modest ~0.6% easing, not the sharp multi-dollar swings of two cycles ago. Driver: OPEC+ approved a +188,000 bpd August output increase 05-JUL, layered on continued Gulf export recovery (Saudi/UAE both near or above 90% of pre-war baseline). Doha talks concluded 01-JUL with positive progress but no breakthrough; next round deferred until after Khamenei's funeral (burial 09-JUL). |
| <b>WTI Crude (front)</b>   | ~\$63/bbl        | ~\$68.40/bbl (06-JUL)                              | <b>+17%</b>    | 48-72 HOUR DELTA: tracking Brent's modest further easing. Tankers continue clearing Hormuz; Kuwait maintaining elevated production.                                                                                                                                                                                                                                                                                                                             |
| <b>Gasoline (natl avg)</b> | ~\$3.10/gal      | \$3.804/gal (AAA 05-JUL, down from \$3.847 02-JUL) | <b>+25%</b>    | 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.                                                                                                                           |

# FORTUNE FAVORS THE PREPARED | DAILY THREAT REPORT | 06 JULY 2026

| COMMODITY                | PRE-WAR (28 FEB) | CURRENT (06-JUL)              | CHG vs PRE-WAR | CONSUMER / ANALYTICAL NOTE                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------|------------------|-------------------------------|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 / Hormuz Day 129   MOU Day 20 -- HORMUZ TOLL-FEE DISPUTE ACTIVE |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | FLASH   UPDATED   24 |
|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| Why This Cycle                                                                             | Doha talks concluded 01-JUL with "positive progress but no breakthrough"; the next round is now deferred until after Khamenei's funeral (burial 09-JUL). Iran has separately hardened its Hormuz tolling position and Parliament Speaker Ghalibaf has denied IAEA access to the bombed nuclear sites, citing a new parliamentary law.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                      |
| Summary                                                                                    | MOU Day 20 of the 60-day implementation window. The agreement faced its first serious kinetic test 26-29 JUN -- four days of mutual strikes on shipping and military infrastructure -- followed by an informal stand-down that held through the 4th of July. Doha talks concluded 01-JUL with "positive progress but no breakthrough"; the next round awaits the end of Khamenei's funeral proceedings (burial 09-JUL). Burgenstock nuclear-track technical talks resumed 29-JUN under Iranian Deputy FM Gharibabadi and remain the operative nuclear-track venue. Hezbollah continues to reject the US-brokered Israel-Lebanon trilateral framework signed 26-JUN, calling it "null and void," and Iran has hardened its Hormuz tolling position this cycle.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                      |
| SALUTE                                                                                     | <p><b>SIZE:</b> US-Iran MOU: signed 17-JUN-2026, now Day 20 of the 60-day framework. Exchange sequence 26-29 JUN: Iran drone struck the Ever Lovely 26-JUN; US struck Iranian coastal radar/drone/missile sites 27-JUN; Iran struck the Kiku tanker and targeted US 5th Fleet assets in Bahrain and Kuwait 28-JUN; US struck Iran again 29-JUN. Bahrain intercepted all incoming fire; no US casualties. An informal stand-down held from 29-JUN through the 4th of July. Burgenstock WG resumed 29-JUN. Hezbollah rejected the Rubio-brokered trilateral framework 26-JUN.</p> <p><b>ACTIVITY:</b> 26-29 JUN (kinetic exchange): 26-JUN, an IRGC OWA drone struck the Ever Lovely (Singapore-flagged cargo ship, Hormuz). 27-JUN, CENTCOM struck Iranian coastal radar/missile/drone storage sites. 28-JUN, Iran struck the Kiku tanker (Panamanian-flagged, Qatari crude, 2M+ bbl) and targeted US 5th Fleet assets in Bahrain and Kuwait; Bahrain intercepted all incoming fire, no US/allied casualties. 29-JUN, the US and Iran reached an informal stand-down ("both sides will stand down, vessels can move freely" -- US official); Burgenstock WG resumed under Gharibabadi (four working groups); Hezbollah rejected the Rubio-brokered US-Israel-Lebanon trilateral and IDF continued strikes in Lebanon. THIS CYCLE (01-06 JUL): Doha talks concluded 01-JUL with "positive progress but no breakthrough" -- an emergency communication channel for MOU violations was agreed, and release of part of Iran's ~\$6B in frozen funds was discussed. Iran's senior negotiators did not personally attend;</p> |                      |

Deputy FM Gharibabadi led. The next round is deferred until after Khamenei's funeral concludes (burial 09-JUL). Parliament Speaker Ghalibaf publicly denied IAEA access to the bombed Fordow/Natanz/Isfahan sites, citing a new parliamentary law -- a genuine hardening of the nuclear-verification standoff. Iran has hardened its Hormuz tolling position, saying it will "definitely" charge transit fees from mid-August and warning the UK and France directly. NATO placed strait security on this week's summit agenda.

**LOCATION:** Hormuz/Gulf of Oman: kinetic exchanges 26-29 JUN; ongoing IRGC patrol activity and VHF-triggered vessel turnarounds. Bahrain (US 5th Fleet HQ) and Kuwait: IRGC strikes 28-JUN (intercepted). Doha, Qatar: talks concluded 01-JUL. Burgenstock, Switzerland: nuclear WG resumed 29-JUN, ongoing. Lebanon/Nabatieh: IDF strikes 27-29 JUN, continuing tension. Hormuz: partial recovery underway, mine-clearing still required for full normalization. Brent crude: \$71.70/bbl (06-JUL).

**TIME:** MOU signed 17-JUN-2026, now Day 20 of the 60-day framework, which expires mid-August. Exchange: 26-29 JUN. Stand-down: 29-JUN through the 4th of July. Doha talks: concluded 01-JUL, next round deferred until after Khamenei's funeral (burial 09-JUL). Burgenstock WG: resumed 29-JUN, ongoing. Hormuz physical normalization: 9-12 months under an optimistic scenario (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 remains a major ops issue across Gulf FIRs (ongoing). Nuclear: 440.9 kg 60%-HEU, last IAEA-verified 28-FEB-2026, unverified Day 129. Hormuz traffic: ~25-35 vessels/day vs ~110 pre-war. Iran-Oman transit fee discussions ongoing, with Iran now saying fees will "definitely" apply from mid-August.

**UNIT:** US CENTCOM (strikes); IRGC Navy (drone/missile attacks); Bahrain BDF (interception); Gharibabadi (Iran's Burgenstock and Doha technical-team lead, four working groups); Qatar and Pakistan (Doha mediators); Rubio (signed the Israel-Lebanon-US trilateral 26-JUN); Ghalibaf (denied IAEA site access this cycle); Grossi (maintains MOU requires IAEA supervision).

#### Analyst Assessment

**MOU SIGNIFICANCE:** The 26-29 JUN exchange was the most severe kinetic test of the MOU since its 17-JUN signing -- both sides struck the other's military assets and commercial shipping under an active ceasefire framework. An informal stand-down held from 29-JUN through the 4th of July, though the understanding was explicitly framed as one week only, meaning renewed friction remains possible now that window has closed. Doha talks concluded 01-JUL with "positive progress but no breakthrough" (Qatari FM spokesperson al-Ansari): the two sides agreed to establish an emergency communication channel to flag MOU violations, and discussed releasing a portion of Iran's roughly \$6B in frozen funds. Iran's senior negotiators (Araghchi, Ghalibaf) did not personally attend; Deputy FM Gharibabadi led Tehran's delegation. The next round is deferred until after funeral processions for former Supreme Leader Khamenei conclude (04-JUL through burial on 09-JUL) -- a real scheduling delay, not a diplomatic rupture. NEW THIS CYCLE: Parliament Speaker Ghalibaf publicly denied IAEA inspectors have access to the bombed Fordow, Natanz, and Isfahan sites, saying Iran's parliament has passed a law barring such access -- a genuine hardening of the nuclear-verification standoff, not a restatement of the existing blackout. MOU remains a time-buying framework: oil sanctions relief and partial Hormuz reopening are immediate; the hard questions (HEU disposition, IAEA verification, Iran's missile program, Hezbollah) are deferred to the 60-day Phase 2 window, now running. Watch: (a) Iran's response to Grossi on the access dispute; (b) whether Burgenstock technical talks resume and address inspection modalities once the funeral period ends.

**HORMUZ REOPENING TIMELINE:** Hormuz traffic remains well below prewar levels and the picture is mixed rather than a clean recovery: current estimates run ~25-35 transits/day against a ~110/day prewar baseline, though a five-vessel convoy (crude tanker, LPG/LNG carriers, container ship) successfully cleared the Omani corridor 05-JUL -- the cleanest multi-vessel transit logged in several days. Iran has hardened its tolling position this cycle: it says it will "definitely" charge transit fees once the 60-day toll-free window ends in mid-August, has floated differential treatment for "friendly" nations, and has directly warned the UK and France. NATO has placed strait security on this week's summit agenda -- a new internationalization angle. Saudi Aramco's Ras Tanura resumed loadings after an approximately 4-month suspension, a positive structural signal not yet reflected in the transit-count figures above. Brent has stabilized



in the low-\$70s (see ENR-001) rather than continuing the sharp swings of two cycles ago. Mine-clearing remains a slow, multi-week EOD effort; several European nations have offered assistance, though Germany's defense minister has said he does not expect German participation given Iran's unwillingness to cooperate. Structural risk not yet fully priced by markets: Iran's insistence that the strait is "administered by Iran" in coordination with Oman, and continued IRGC patrol activity with VHF-triggered vessel turnarounds.

**LEBANON SPOILER RISK:** A US-Israel-Lebanon framework was signed 26-JUN in Washington (Secretary Rubio): Hezbollah must cease hostilities and withdraw from southern Lebanon, while IDF forces remain in a security zone until Hezbollah disarms. Hezbollah leader Naim Qassem rejected the framework the same day as "null and void," and IDF strikes continued 27-29 JUN. This remains a live structural tension for the broader MOU, not a resolved side issue: Hezbollah was never a party to the Islamabad negotiations, so Iran cannot credibly invoke the MOU's violation clause on Hezbollah's behalf, yet Iran has explicitly tied Hormuz compliance to the Lebanon ceasefire holding. Every additional IDF strike in Lebanon gives Iran a pretext to argue the broader framework has been breached. Track this as a parallel channel with direct Hormuz implications: renewed IDF-Hezbollah exchanges could push Hormuz transit volumes (currently ~25-35/day vs. ~110 pre-war) lower still before the Lebanon track concludes.

**PHASE 2 BURGENSTOCK WATCH:** Burgenstock refers to the Swiss lakeside resort (Burgenstock, near Lucerne) serving as the venue for the MOU's Phase 2 nuclear-track technical talks -- distinct from the Doha venue used for the Hormuz/MOU-compliance track. 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 02-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 129 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 \$75.02 (30-JUN) to \$71.70 (02-JUL) on sustained supply glut, not a risk-premium bounce. Venezuela toll: 1,719 (was: 1,450). Doha indirect talks continued 02-JUL with no resolution (was: talks pending). Brent fell sharply to \$71.70 (30-JUN was \$75.02, 48hr delta -\$4.37/-5.8%). 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 02-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.

#### 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 129 | 440.9 KG 60%-HEU UNVERIFIED SINCE 28-FEB | NO NEW GROSSI STATEMENT OR BOARD ACTION THIS CYCLE**

**FLASH | UPDATED | 24**

#### Why This Cycle

No new IAEA Board action, Grossi statement, or Iran access-position shift this cycle; 440.9 kg of 60%-HEU remains unverified at Day 129.

#### 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 129 of the blackout.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>SALUTE</b>             | <p><b>SIZE:</b> 440.9 kg 60%-enriched uranium hexafluoride (60% UF<sub>6</sub>) plus 8,599.6 kg lower-enriched uranium -- last IAEA-verified snapshot per GOV/2026/8, 27-FEB-2026.</p> <p><b>ACTIVITY:</b> This cycle (04-JUL through 06-JUL): 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.</p> <p><b>LOCATION:</b> Natanz (above-ground centrifuge hall significantly degraded by strikes); Fordow underground enrichment facility (assessed intact); Isfahan tunnel complex (assessed intact); Pickaxe Mountain candidate site.</p> <p><b>TIME:</b> Burgenstock WG resumed: 29-JUN-2026. MOU signed: 17-JUN-2026. MOU Day 20. IAEA Blackout: Day 129 (since 28-FEB-2026). 60-day roadmap expires mid-August.</p> <p><b>EQUIPMENT:</b> Centrifuge cascades at Fordow and Isfahan assessed operational. HEU stockpile location currently unverifiable.</p> <p><b>UNIT:</b> AEOI (Atomic Energy Organization of Iran); IRGC site security; IAEA Board of Governors.</p> |
| <b>Analyst Assessment</b> | <p><b>PROLIFERATION SIGNIFICANCE:</b> 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.</p> <p><b>DEAL LEVERAGE DYNAMIC:</b> 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.</p> <p><b>MOU DAY 20 -- VERIFICATION GAP UNCHANGED:</b> 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.</p> <p><b>LIKELIHOOD:</b> Iran maintaining functional enrichment capacity with no IAEA visibility: ALMOST CERTAIN. <b>CONFIDENCE:</b> HIGH.</p> <p><b>LIKELIHOOD:</b> HEU stockpile surrendered or fully verifiably down-blended within 30 days: ALMOST NO CHANCE. <b>CONFIDENCE:</b> HIGH.</p> <p><b>LIKELIHOOD:</b> Deal framework includes verifiable IAEA access restoration within 60 days: UNLIKELY. <b>CONFIDENCE:</b> MODERATE.</p>                                                                                                                                                                                                                                                             |

## 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; 129 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 | TWO KEV DEADLINES NOW OVERDUE: SIMPLEHELP AND MICROSOFT SHAREPOINT | KEV OVERDUE BACKLOG: 10+ ENTRIES**

FLASH | UPDATED | 20

**Why This Cycle**

Ubiquiti UniFi KEV is now 15 days overdue with no new exploitation reporting on the tracked cluster. Two KEV remediation deadlines have now passed without confirmed compliance: SimpleHelp OIDC authentication-bypass (deadline 02-JUL) and a newly identified Microsoft SharePoint Server deserialization vulnerability (deadline 04-JUL) -- the second is new to this cycle's tracking, not previously reported.

**Summary**

Ubiquiti UniFi 3-CVE cluster is now 15 days overdue with no new exploitation reporting confirmed this cycle. CISA added a new critical KEV entry this cycle: SimpleHelp OIDC 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 15 days overdue. PREVIOUSLY NEW, NOW OVERDUE: CVE-2026-48558 (SimpleHelp OIDC 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 carries a federal deadline of 02-JUL, now overdue.

**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 (15 days overdue as of 06-JUL, up from 11 days as of 02-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 10 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 15 days overdue; SimpleHelp OIDC bypass (CVE-2026-48558, deadline 02-JUL) and a newly tracked Microsoft SharePoint Server KEV (deadline 04-JUL) are both now overdue. 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.

**SECTION 4B - PHYSICAL / GEOPOLITICAL / IO**

**GEO-003 | VENEZUELA TWIN EARTHQUAKES (24-JUN 2200 UTC) | M7.2 + M7.5 | DAY 12 -- RECOVERY/RECONSTRUCTION PHASE**

**FLASH | CONTINUED | 22**

|                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Why This Cycle</b>     | Confirmed toll rose to 2,954 dead and 16,592 injured as of 05-JUL (backlog processing, not new harm), while displacement improved to 10,700 housed across 79 camps, down from a 17,345 peak. Posture has shifted government- and NGO-side to recovery/reconstruction.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Summary</b>            | Twin M7.2/M7.5 earthquakes struck northwestern Venezuela 24-JUN 2200 UTC. Confirmed toll as of 05-JUL: 2,954 dead, 16,592 injured. Government figures report 856 damaged buildings (190 collapsed) and nearly 900 aftershocks since the mainshocks. 10,700 people remain housed in 79 temporary camps (capacity ~14,600, some being expanded); La Guaira state alone accounts for 6,655 displaced across 20 shelters. PROVEA estimates losses and reconstruction costs at ~\$37 billion, roughly 40% of current GDP. Operations have moved from search-and-rescue to debris removal and long-term recovery -- isolated post-golden-window rescues (8+ days) are now outliers, not the operational tempo. US: USS Fort Lauderdale logistics support status not independently reverified this cycle. The diplomatic track remains stalled.                                                                                                                                                                                                                               |
| <b>Analyst Assessment</b> | <p><b>RECOVERY PHASE STATUS:</b> Toll continues to climb on lag/backlog reporting, not new harm -- 2,954 dead, 16,592 injured, Day 12 out. Displacement has genuinely improved (10,700 currently housed vs a 17,345 peak), a real recovery-phase indicator rather than a stale carryover. New this cycle: PROVEA's ~\$37B loss estimate (~40% of GDP) quantifies reconstruction scale for the first time. No confirmed change in Caracas government cooperation posture with the international response this cycle.</p> <p><b>CHANGE FROM PRIOR:</b> GEO-003 Venezuela toll rose from 2,295 to 2,954 confirmed dead (11,267 to 16,592 injured) on backlog processing; displaced-in-camps count fell from a 17,345 peak to 10,700 currently housed, a genuine improvement; posture confirmed shifted to recovery/reconstruction; new PROVEA loss estimate ~\$37B (~40% GDP).</p> <p><b>LIKELIHOOD:</b> Additional survivor rescues from rubble (Day 12+): VERY UNLIKELY -- operational tempo has moved decisively to debris removal/recovery; no rescue reported in</p> |

most recent 48-hour reporting window. **CONFIDENCE:** MODERATE. Hospitals in Caracas reportedly again face medicine/supply shortages as post-earthquake donation surge tapers (TalCual investigation) -- a secondary humanitarian strain, not a new casualty driver. **LIKELIHOOD** official toll is understated: **LIKELY**, **CONFIDENCE:** LOW (unverified single-source reporting, not an independent count; carried forward from prior cycle assessment, not independently reconfirmed this cycle).

**SOURCES**

NBC News Venezuela 02-JUL | AP Venezuela | SOUTHCOM | CNN Venezuela EQ | ABC News Venezuela | Wikipedia 2026 Venezuela earthquakes

**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 - 06 JULY 2026**

**ENR-001 OIL / ENERGY PRICES:** Brent \$71.70/bbl (06-JUL) -- down ~0.5% from prior close \$72.12, softened by OPEC+'s 05-JUL decision to raise August output targets by 188,000 bpd, layered on continued Gulf export recovery (Saudi/UAE both near or above 90% of pre-war baseline). 48-HOUR DELTA: Brent effectively flat, \$72.12 (04-JUL) to \$71.70 (06-JUL), roughly -0.6% -- not material. AAA national average \$3.804/gal (05-JUL), down from \$3.847 (02-JUL) -- continued weekly decline. DOJ fuel-price-gouging investigation status not independently reverified this cycle. **FORWARD:** Iran has hardened its tolling position this cycle -- it will "definitely" charge Hormuz transit fees with possible differential treatment for "friendly" nations, and has directly warned the UK and France; NATO has placed strait security on this week's summit agenda. This is a new escalation in the governance dispute, not a restatement.

**ENR-002 GRID STATUS:** SECOND DOE 202(c) grid emergency this cycle: DOE Order 202-26-32A (PJM data-center curtailment authority) extended 02-JUL, expires 11:59 PM ET TONIGHT (06-JUL) -- active but lapsing. DOE separately issued Order 202-26-34 for Duke Energy Carolinas/Progress 02-JUL (max-output authority past emission limits), also expiring 10:00 PM EDT tonight -- a distinct RTO footprint from PJM, new this cycle. PJM peak load 02-JUL ~162,700 MW (preliminary, suppressed ~6,000 MW by demand response); PJM states the unsuppressed peak likely surpassed the 2006 all-time record of 165,563 MW, pending a 60-day official DR-performance calculation -- report as "record likely broken, not yet officially confirmed," not as clean pass/fail. Current PJM load has fallen to 143,861 MW (04-JUL) as of last reading, consistent with the heat wave moderating as forecast. NRC: new Event Notification Report 01-JUL -- a licensee reported a major loss of offsite emergency-communications capability (Everbridge notification system OOS) at 1023 CDT, reportable under 10 CFR 50.72(b)(3)(xiii); no health/safety impact, NRC Resident Inspector notified. This is a new finding, not previously reported.

**ENR-003 MARITIME SUPPLY CHAIN:** Hormuz traffic remains well below prewar levels: ~25-35 transits/day vs. ~110/day prewar, though a five-vessel convoy (crude tanker, LPG/LNG carriers, container ship) cleared the Omani corridor 05-JUL -- the cleanest multi-vessel transit logged in several days. Saudi Aramco's Ras Tanura resumed loadings after an approximately 4-month suspension. MARAD 2026-008 remains active. Ocean freight routes: improving but not fully normalized; Panama Canal and Suez Canal both operating normally, though some carriers still route via the Cape of Good Hope. Container rates remain elevated on Asia-US corridors; DHL's dedicated Asia-US widebody 777F service (launched 01-JUN in direct response to the Hormuz disruption) continues operating.



## SECTION 6 - AVIATION / TRANSPORTATION

## AVIATION / TRANSPORTATION MONITORS - 06 JULY 2026

**AVN-001 MIDDLE EAST / HORMUZ AIRSPACE:** AVOID at all altitudes: Iran (OIIIX Tehran FIR) / Iraq (Baghdad FIR) / Lebanon (Beirut FIR). CAUTION: Bahrain/Kuwait/Israel/Jordan/Qatar/Oman/UAE/Saudi Arabia. GPS jamming remains a major ops issue across Gulf FIRs -- radar vectors/runway heading departures standard. Gulf carrier operational status (EASA CZIB review, Kuwait Terminal 1 closure, BA/Lufthansa/Qatar Airways/Emirates Dubai capacity restoration) not independently reverified this cycle -- carrying forward from 02-JUL pending a fresh check. The 26-29 JUN kinetic exchange did not close Bahrain airport; interceptions were successful.

**AVN-002 WORLD CUP TRANSPORTATION SECURITY:** World Cup Day 27, Round of 16 (R32 concluded 03-JUL as scheduled). No new transportation-security incident this cycle beyond the round transition; Iran's elimination and 29-JUN departure removed the highest prior diplomatic flashpoint from US venues. Today's match schedule not independently reverified this cycle. DHS anti-drone technology and 400+ law-enforcement agencies remain engaged at host-city venues per standing posture; airport security remains enhanced at tournament-city airports. No specific credible threat identified as of publication. See also STSB-001 (SEC 11) for full soft target assessment.

## SECTION 7 - METEOROLOGICAL WEATHER / SEVERE WEATHER / FIRE WEATHER

**WX-001 | SEVERE THUNDERSTORMS: SLIGHT RISK TODAY | DANGEROUS MULTI-DAY HEAT WAVE CONTINUES | WILDFIRE REPORTING: SEE 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.

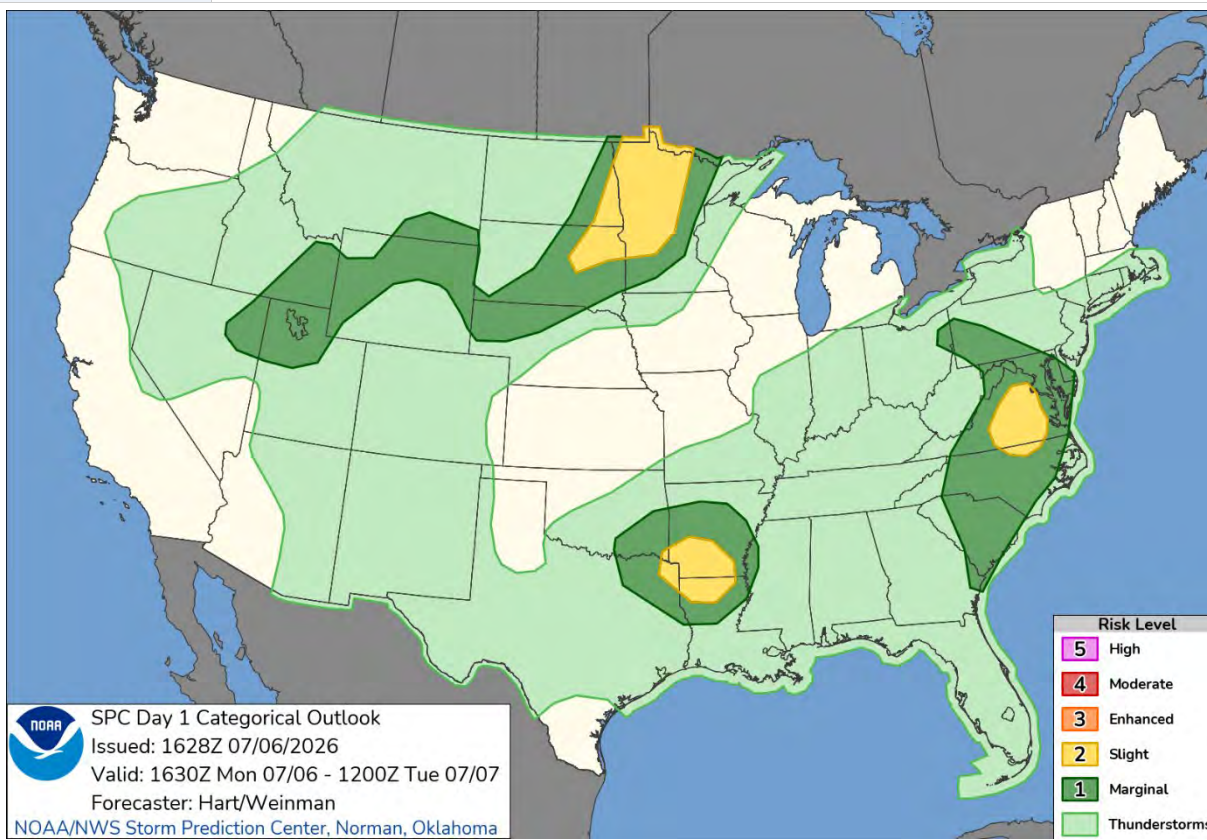
**TIME:** Day 1 SPC valid 011300Z-021200Z (01-JUL). Day 2 valid 021200Z-031200Z (02-JUL). Day 3 valid 031200Z-041200Z (03-JUL). Upper Midwest activity ongoing this morning; afternoon/evening development expected central High Plains and Northeast.

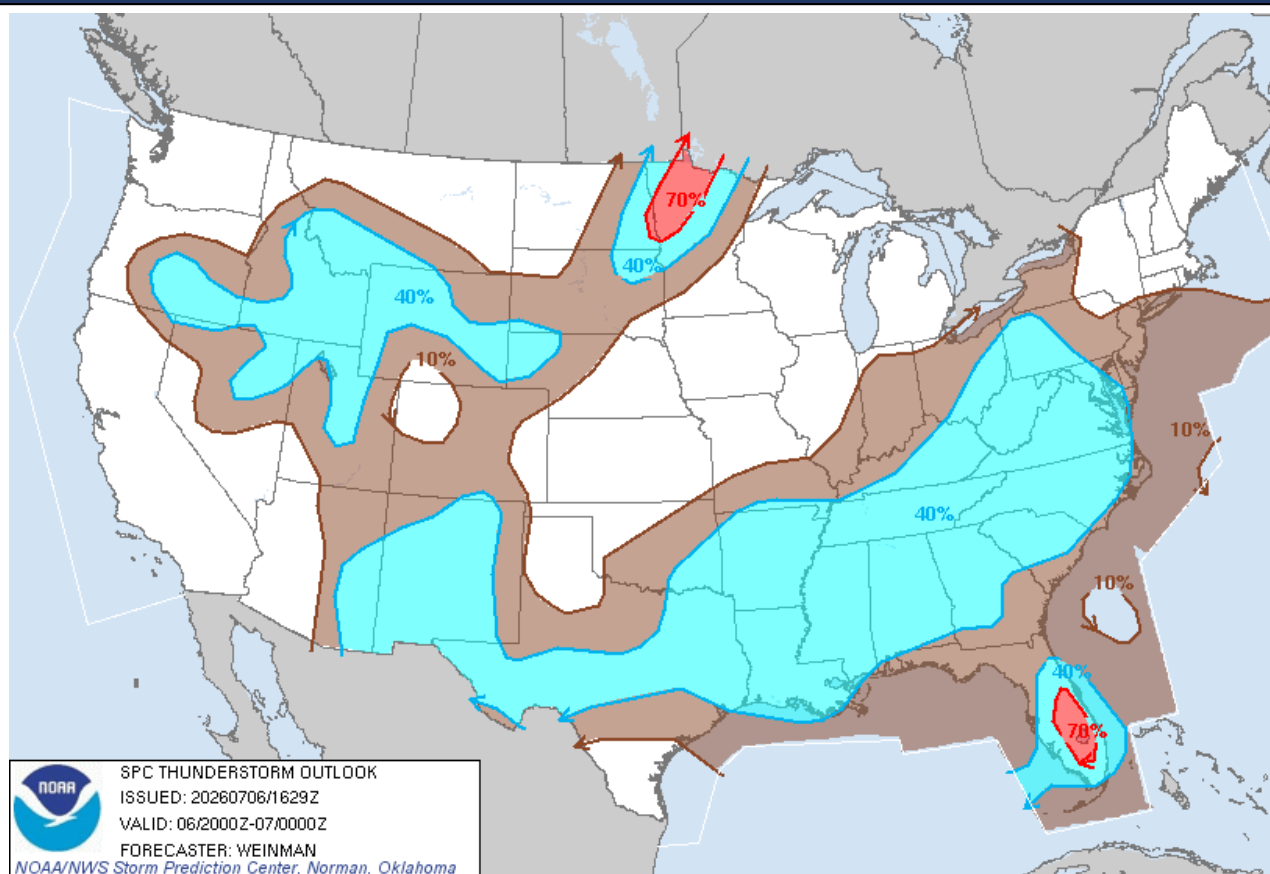
**EQUIPMENT:** NWR transmitter roster: 18 OOS/DEGRADED (14 OOS / 4 DEGRADED) as of 06-JUL 1125Z -- count unchanged from 02-JUL cycle though station composition differs (this cycle: AK/Cape Gull, AK/Kotzebue, AR/Fountain Hill, CO/Colorado Springs, GA/Baxley, IL/Hillsboro, IN/Angola, KS/Ulysses, ME/Sugarloaf Mtn, MI/Petoskey, MN/Gun Flint Lake, NM/Artesia, NM/Roswell, NM/Carlsbad, OR/Coos Bay, OR/Portland, TN/Shelbyville, TX/Brownsville) -- see COMMS Watch for full roster with frequencies/call signs. 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 0731 AM CDT 06-JUL-2026, valid 061300Z-071200Z): SLIGHT risk eastern Dakotas/western Minnesota -- widely scattered severe thunderstorms capable of large-to-very-large hail and severe wind gusts possible this afternoon/evening as a shortwave trough and attendant cold front move through a warm, moist airmass (MLCAPE 2,000-3,000+ J/kg); supercells possible early, transitioning to a more linear/upscale mode with severe gusts the primary hazard as the system matures. SLIGHT risk also carried for central Virginia into far north-central North Carolina (hot, moist boundary layer near a lee trough, MLCAPE 1,500-2,500 J/kg; weak forcing/shear but outflow-dominant clusters capable of 50-65 mph wet-microburst gusts). Additional risk areas: isolated to scattered thunderstorms northern Great Basin into southern Montana/northern Wyoming (supercell/bowing structures possible); scattered-to-numerous thunderstorms Lower Mississippi Valley (weak shear limits organization, isolated marginally severe hail possible). Source: NOAA SPC [spc.noaa.gov](https://spc.noaa.gov).

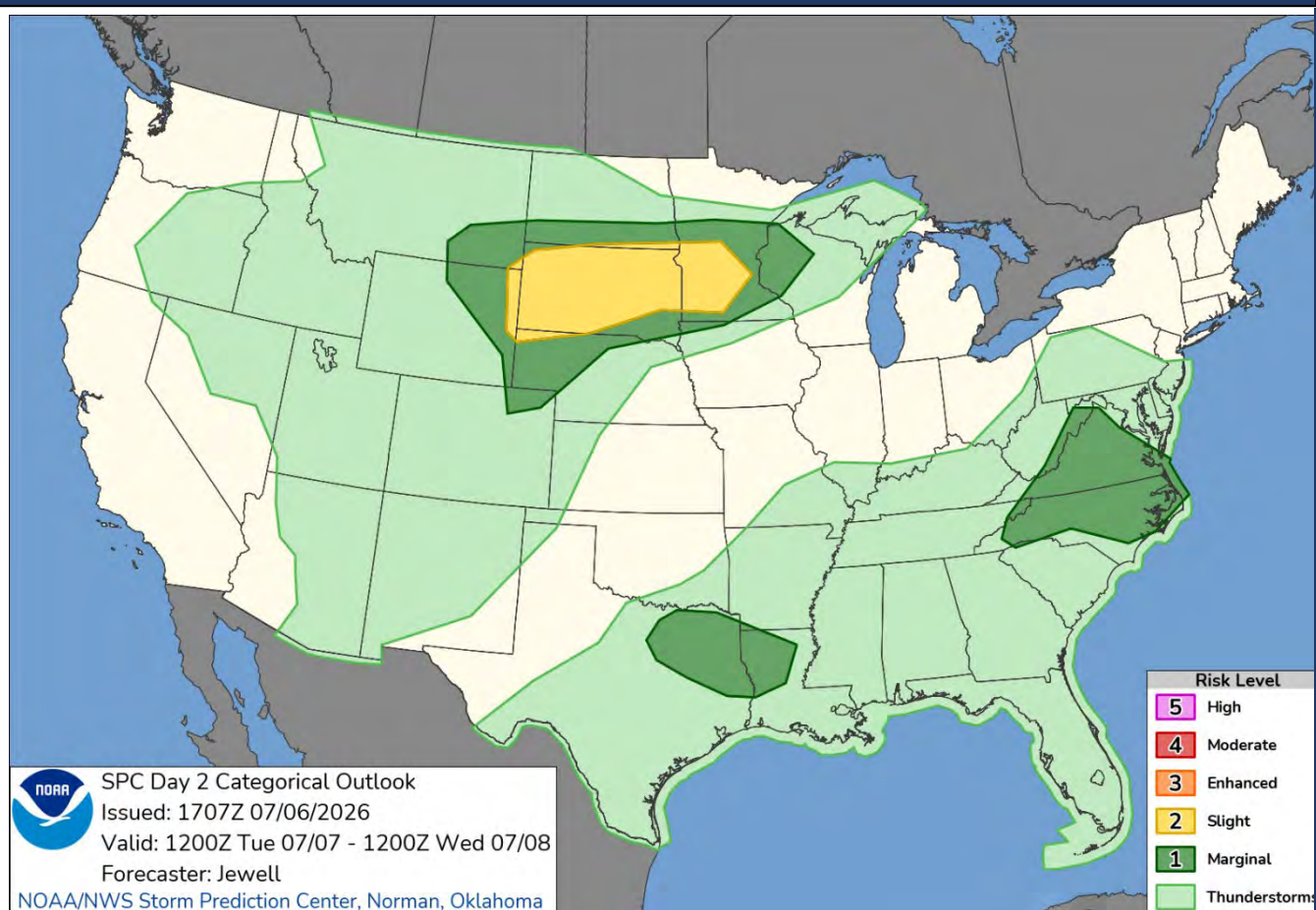




### SPC Day 2 Convective Outlook

SPC Day 2 Convective Outlook (issued 1210 AM CDT 06-JUL-2026, valid 071200Z-081200Z): SLIGHT risk central and eastern South Dakota into southwestern Minnesota - strong thunderstorms possible late Tuesday through Tuesday night, with increasing potential for an organized cluster producing severe wind gusts as it propagates eastward near the nose of a strengthening nocturnal boundary-layer jet. SLIGHT risk also carried for areas east of the Blue Ridge Mountains (upscale-growing cluster with damaging-wind risk, propagating toward the coast) and the northeast Texas/northern Louisiana area (clustering storms with potential for a few strong downbursts). Source: NOAA SPC [spc.noaa.gov](https://spc.noaa.gov).





### Analyst Assessment

**TODAY'S THREAT CHARACTER:** SLIGHT risk today spans the eastern Dakotas/western Minnesota (2,000-3,000+ J/kg MLCAPE supports supercells transitioning to a linear/upscale mode, with severe gusts and large-to-very-large hail possible) and central Virginia into far north-central North Carolina (outflow-dominant clusters, 50-65 mph wet-microburst gusts the primary hazard). This is down from ENHANCED two cycles ago. Day 2 (07-JUL) carries SLIGHT risk into central/eastern South Dakota-southwestern Minnesota, areas east of the Blue Ridge, and northeast Texas/northern Louisiana -- monitor for potential upgrades as timing firms up.

**LIKELIHOOD:** Significant severe weather event (reports of damage) in the eastern Dakotas/western Minnesota SLIGHT risk area today: LIKELY. **CONFIDENCE:** MODERATE.

**LIKELIHOOD:** Significant tornado event (EF2+) in today's SLIGHT risk areas: UNLIKELY -- lower baseline risk than the ENHANCED categorization carried two cycles ago. **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 | COTTONWOOD FIRE (UT) -- NATION'S LARGEST | 3 FIREFIGHTERS KILLED KNOWLES FIRE (CO)

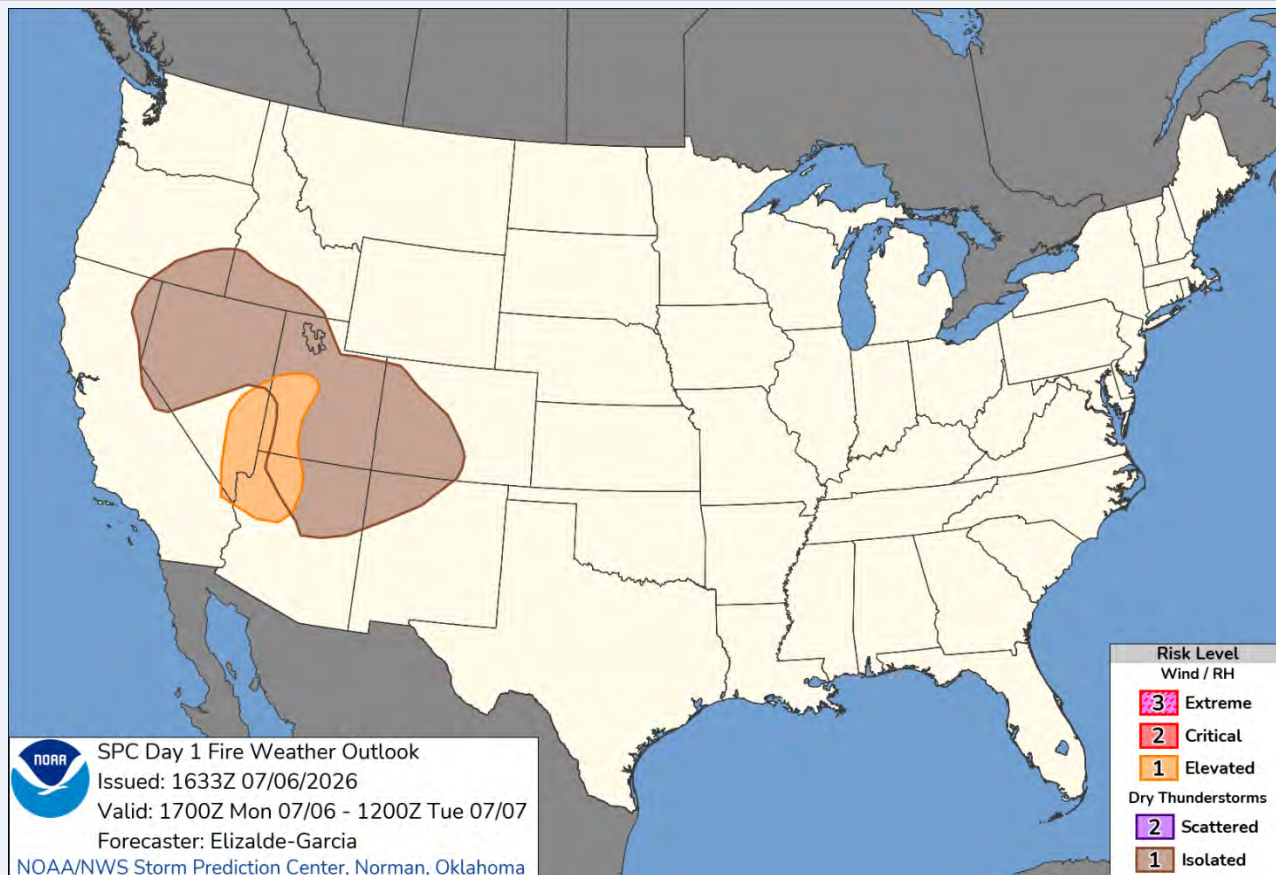
FLASH | ACTIVE | 22

## 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 fire/acreage totals not independently reverified this cycle -- last confirmed as of 30-JUN -- both well above the 10-year average. Source: NIFC National Fire News, nifc.gov/fire-information/nfn.

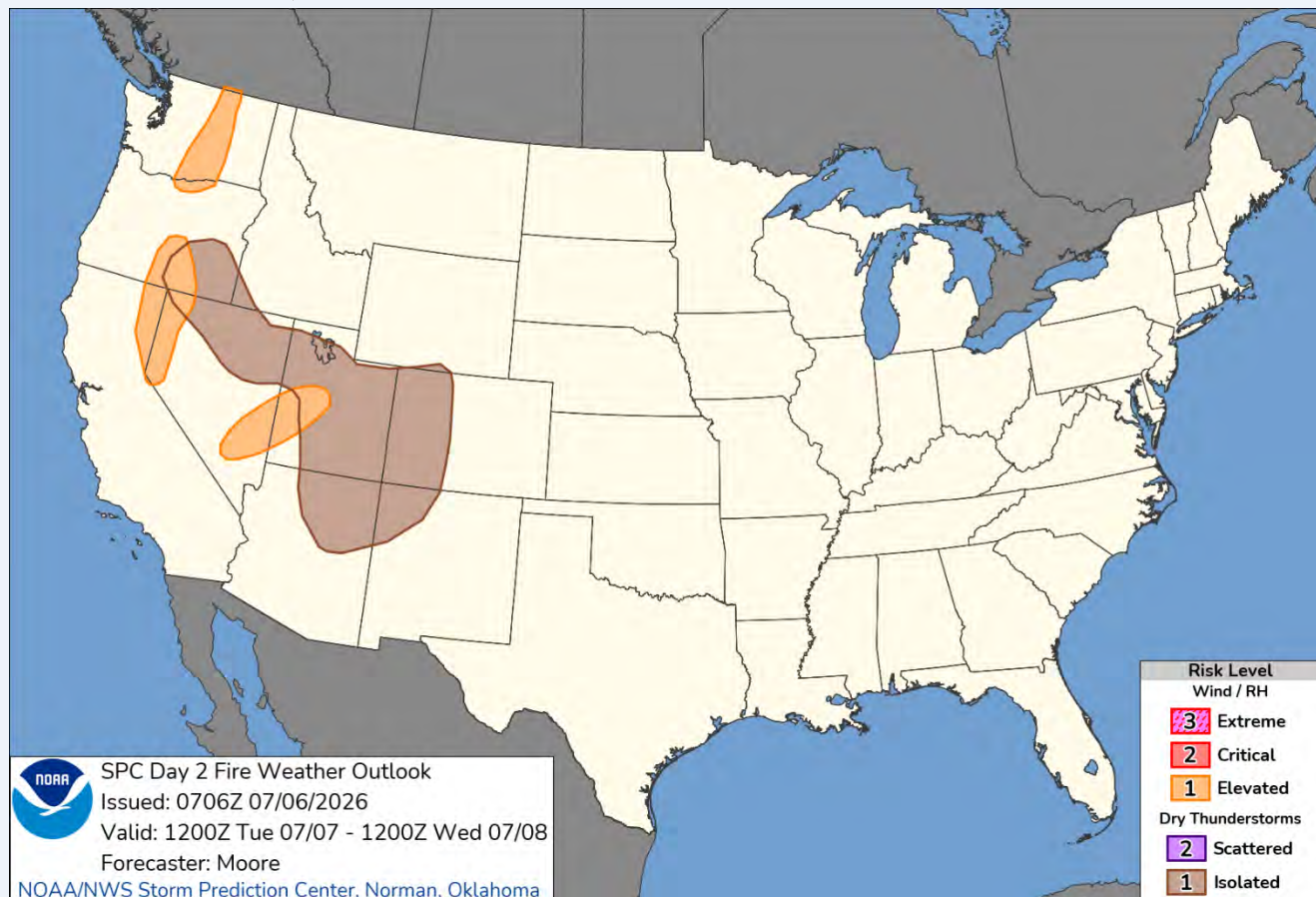
## SPC Fire Weather Day 1

SPC Day 1 Fire Weather Outlook (valid 061200Z-071200Z, issued 0120 AM CDT 06-JUL-2026): ELEVATED fire weather conditions across eastern Nevada into Utah and Arizona -- modest surface pressure falls will drive increasing southerly winds (sustained near 15 mph, gusts 20-30 mph) with RH falling near 15% as temperatures climb into the 90s. Dry thunderstorm potential also present: an upper ridge over the Four Corners with an embedded shortwave over the northern Great Basin will promote thunderstorm chances across the Great Basin and dry/windy conditions across NV/UT/AZ; wet thunderstorms are favored across northern CA into southern OR, transitioning to predominantly dry thunderstorms with southeastward extent toward the Four Corners, where lightning ignition risk is elevated given very dry fuels outside the recent northern NV/southern OR precipitation cores. Source: NOAA SPC spc.noaa.gov.



**SPC Fire Weather  
Day 2**

SPC Day 2 Fire Weather Outlook (valid 071200Z-081200Z, issued 0206 AM CDT 06-JUL-2026): Fire weather concerns continue Tuesday across the West, driven by dry thunderstorm potential and dry/windy conditions. A slight eastward shift of the upper ridge (Four Corners into the central Rockies) establishes a west/southwest flow regime favorable for downslope flow off the northern Sierra Nevada and Cascades -- driest/windiest conditions expected northeast CA/northwest NV (sustained winds 15-20 mph, RH 10-15%). Eastern Nevada into western Utah: another day of dry/windy conditions, 10-15% RH minimums, winds near 15 mph. Continued mid-level moisture spreading east/northeast from the western Great Basin toward the Four Corners/central Rockies will support dry thunderstorm potential across a broad area, with isolated dry-lightning risk if rainfall is more limited than forecast. Source: NOAA SPC [spc.noaa.gov](https://www.spc.noaa.gov).

**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 not independently reverified this cycle -- last confirmed 4 as of 29-JUN-2026 (source: [nifc.gov/fire-information/nfn](https://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.

|                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           | <b>ALASKA:</b> Multiple fires in the Galena Zone (BLM) area including Kopschesut; structures threatened. SE Alaska: 12 Juneau-cluster NWR transmitters DEGRADED further compounds wildfire alerting in AK.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Analyst Assessment</b> | <p><b>SEASON TRAJECTORY:</b> At 195% of the 10-year average for acres burned with NPL at 2 of 5, the 2026 fire season is running significantly above historical norms. Sustained drought across the Southeast (99% in drought) and Southwest, combined with above-normal temperatures, supports continued elevated risk. The season peak in the Rocky Mountain and Pacific Northwest regions typically arrives July-August; current indicators suggest that peak may arrive earlier or with greater intensity.</p> <p><b>IPAWS/NWR GAPS IN FIRE COUNTRY:</b> The NM triple-gap NWR outage (all three transmitters covering Chaves/Eddy/Lincoln counties OOS) is specifically notable given Seven Cabins Fire activity in Lincoln County and active fire restrictions. Residents and firefighting operations in this area must rely on WEA mobile alerts, FEMA App, and radio broadcast EAS exclusively.</p> <p><b>DRY-THUNDERSTORM IGNITION WATCH:</b> 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.</p> <p><b>LIKELIHOOD:</b> New fire starts in the eastern Great Basin / central Rockies critical-fuel zone over the next 48 hours: <b>LIKELY</b>. <b>CONFIDENCE:</b> MODERATE.</p> <p><b>LIKELIHOOD:</b> National Preparedness Level escalation to NPL 4 before end of June: <b>ROUGHLY EVEN CHANCE</b>. <b>CONFIDENCE:</b> MODERATE.</p> |
| <b>SOURCES</b>            | NIFC National Situation Report   SPC Fire Weather Outlook   InciWeb Active Incidents   USFS Active Fire Mapping Program                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

**NWR TRANSMITTER OUTAGE STATUS - 06 JULY 2026**

Source: Operator-supplied roster 06-JUL | NOAA NWR (noaa\_nwr T1) | As of 06-JUL-2026 1125Z | 18 transmitters affected (14 OOS / 4 DEGRADED)

**⚠ 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 for a third consecutive cycle. (2) AK CLUSTER RESOLVED: the 11-station Juneau-area DEGRADED cluster and Saint Paul Island OOS from 02-JUL have fully cleared; AK footprint is back down to two stations (Cape Gull DEGRADED, Kotzebue DEGRADED). (3) STATUS CHANGE: IN-Angola KXI94 moved from DEGRADED to OUT OF SERVICE (Northern Indiana coverage further reduced). (4) RETURNED TO ROSTER: AR-Fountain Hill, CO-Colorado Springs, and OR-Coos Bay (all OOS) reappear after clearing on 02-JUL -- confirm with operator whether this reflects a new outage or a reporting gap. (5) RESOLVED FROM 02-JUL ROSTER: CA-Santa Ana, CT-Meriden, NV-Owyhee, NY-Albany, TX-Rio Grande City, TX-Uvalde, WA-Yakima. 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 | WNG529   | Cape Gull        | 162.500 | Kodiak AK (WSO) | DEGRADED       | Kodiak Island area coverage reduced     |
| AK | KWN30    | Kotzebue         | 162.550 | Fairbanks AK    | DEGRADED       | NW Arctic Borough reduced coverage      |
| AR | KGG86    | Fountain Hill    | 162.475 | Jackson MS      | OUT OF SERVICE | Ashley County zero primary NWR coverage |
| CO | WXM56    | Colorado Springs | 162.475 | Pueblo CO       | OUT OF SERVICE | El Paso County reduced coverage         |



| FORTUNE FAVORS THE PREPARED   DAILY THREAT REPORT   06 JULY 2026 |          |                |         |                                  |                |                                           |
|------------------------------------------------------------------|----------|----------------|---------|----------------------------------|----------------|-------------------------------------------|
| ST                                                               | Callsign | Location       | Freq    | WFO                              | Status         | Counties / Notes                          |
| GA                                                               | WXM65    | Baxley         | 162.525 | Jacksonville FL                  | OUT OF SERVICE | Appling County zero primary NWR coverage  |
| IL                                                               | KXI79    | Hillsboro      | 162.425 | St. Louis MO                     | OUT OF SERVICE | Montgomery/Bond/Fayette/Macoupin counties |
| IN                                                               | KXI94    | Angola         | 162.425 | Northern Indiana IN              | OUT OF SERVICE | Status change this cycle: DEGRADED to OOS |
| KS                                                               | WXN81    | Ulysses        | 162.450 | Dodge City KS                    | OUT OF SERVICE | Grant/Stanton/Haskell counties            |
| ME                                                               | WNG547   | Sugarloaf Mtn  | 162.450 | Gray/Portland ME                 | OUT OF SERVICE | Western Maine coverage gap                |
| MI                                                               | WNG572   | Petoskey       | 162.475 | Gaylord ME                       | OUT OF SERVICE | Northern Michigan coverage gap            |
| MN                                                               | KXI45    | Gun Flint Lake | 162.525 | Duluth MN                        | OUT OF SERVICE | Cook County / Boundary Waters gap         |
| NM                                                               | WXN24    | Artesia        | 162.425 | Midland/Odessa TX                | OUT OF SERVICE | NM triple-gap, persists                   |
| NM                                                               | WWG36    | Roswell        | 162.450 | Albuquerque NM                   | OUT OF SERVICE | NM triple-gap, persists                   |
| NM                                                               | WWF37    | Carlsbad       | 162.475 | Midland/Odessa TX                | OUT OF SERVICE | NM triple-gap, persists                   |
| OR                                                               | KIH32    | Coos Bay       | 162.400 | Medford OR                       | OUT OF SERVICE | Southern Oregon coast coverage gap        |
| OR                                                               | KIG98    | Portland       | 162.550 | Portland OR                      | DEGRADED       | Metro Portland reduced coverage           |
| TN                                                               | WXX63    | Shelbyville    | 162.475 | Nashville TN                     | OUT OF SERVICE | Bedford County coverage gap               |
| TX                                                               | WWG34    | Brownsville    | 162.550 | Brownsville/Rio Grande Valley TX | DEGRADED       | Rio Grande Valley reduced coverage        |

**SOURCES:** Source: [weather.gov/nwr/outages](https://weather.gov/nwr/outages).

| SECTION 7B - WILDFIRE                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>WILDFIRE STATUS - 06 JULY 2026   NIFC NPL not independently reverified this cycle (last confirmed: 4 of 5, raised 29-JUN)   national large-fire count/personnel/CIMT figures not independently reverified this cycle -- carrying forward from 02-JUL pending fresh NIFC/InciWeb pull</b></p> <p><b>COTTONWOOD FIRE (UT):</b> ACTIVE -- near Beaver, UT (Fishlake NF); Great Basin Complex IMT5. ~94,800 acres, stable (minimal growth this cycle, consistent with mop-up phase). Structure loss holds at 150 (unchanged, no new destruction reported). CONTAINMENT % UNVERIFIED THIS CYCLE: sources conflict -- 42% per incident-command synthesis (02-JUL) vs. 23% per a separate aggregator (03-JUL); InciWeb blocks automated verification. DO NOT PUBLISH A CONTAINMENT FIGURE until confirmed directly against InciWeb or Great Basin IMT5 -- this is a genuine cross-source conflict, not a stale carryover. Statewide context (new this cycle): Utah has seen 390+ wildfires and 300,000+ acres burned in 2026 against a record-low winter snowpack (lowest in 150+ years) per Wildfire Explorer, 05-JUL. Iron Fire, Grapevine Fire, Kane Springs Fire, Pocket Fire, Lytle Fire, Garred Road Fire, Starry Fire: status not independently reverified this cycle -- carrying forward from 02-JUL pending fresh NIFC/InciWeb pull.</p> <p><b>FIRE-002 SHORE FIRE (CA):</b> Status not independently reverified this cycle -- carrying forward from 02-JUL (last confirmed status per IMSR 18-JUN) pending fresh NIFC/InciWeb pull.</p> |



**NATIONAL OUTLOOK:** NIFC NPL and national large-fire/personnel/CIMT/YTD figures not independently reverified this cycle -- last confirmed 02-JUL (NPL 4 of 5, raised 29-JUN); a fresh NIFC National Fire News / InciWeb pull is needed before next cycle to close this gap. 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](https://nifc.gov/fire-information/nfn) (NPL source of record); NIFC IMSR [nifc.gov/nicc-files/sitreprt.pdf](https://nifc.gov/nicc-files/sitreprt.pdf); SPC [spc.noaa.gov/products/fire\\_wx/](https://spc.noaa.gov/products/fire_wx/).

## SECTION 7C - SPACE WEATHER &amp; EMCOMM

| SWX-001   SWX-CON 2 WATCH   GOES-19 ELECTRON FLUX EXCEEDED 1000 pfu   R2 RADIO BLACKOUT (RESOLVED)   K4 GEOMAGNETIC |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | WATCH   UPDATED   2 |
|---------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| <b>SWPC Status (02-JUL 1245Z)</b>                                                                                   | SUPERSEDED. NOAA SWPC issued a new G2 (Moderate) geomagnetic storm WATCH (WATA30, serial 277) at 1240 UTC 02-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 <a href="https://swpc.noaa.gov">swpc.noaa.gov</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                     |
| <b>Why This Cycle</b>                                                                                               | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                     |
| <b>Summary</b>                                                                                                      | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                     |
| <b>Operational Impacts</b>                                                                                          | <p><b>HF RADIO:</b> 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.</p> <p><b>GPS / NAVIGATION:</b> 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.</p> <p><b>POWER GRID:</b> 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.</p> <p><b>SATELLITE OPERATIONS:</b> PRIMARY RISK THIS CYCLE: Surface charging and deep dielectric charging on satellites at geosynchronous orbit. Sustained high-energy electron flux (&gt;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.</p> <p><b>AURORA:</b> 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.</p> |                     |
| <b>HF / COMMS Assessment</b>                                                                                        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Analyst Assessment</b> | <p><b>PRIMARY CONCERN THIS CYCLE:</b> 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.</p> <p><b>DURATION AND PERSISTENCE:</b> 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.</p> <p><b>CURRENT STATUS:</b> 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.</p> <p><b>LIKELIHOOD:</b> G2 (Moderate) geomagnetic storm verifies as forecast on 03-JUL: <b>LIKELY</b> -- NOAA SWPC has issued a formal watch (WATA30); current K-index trajectory and Type IV radio emission are consistent with continued geomagnetic activity. <b>CONFIDENCE:</b> LOW.</p> <p><b>LIKELIHOOD:</b> GEO satellite anomaly or ground power-grid voltage alarm attributable to the 03-JUL G2 event: <b>ROUGHLY EVEN CHANCE</b> -- G2-class storms have historically produced isolated high-latitude grid and satellite effects. <b>CONFIDENCE:</b> LOW.</p> |
| <b>SOURCES</b>            | 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 06-JUL. |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Status</b>                                                                                            | NHC 2-Day and 7-Day Graphical Tropical Weather Outlooks show "Disturbances: None" across the Atlantic, Eastern Pacific, and Central Pacific basins as of 06-JUL -- confirmed via a fresh NHC check this cycle. 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). |
| <b>Sources</b>                                                                                           | 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 &amp; SUPPLY CHAIN

|                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                        |                                |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|
| <b>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</b> |                                                                                                                                                                                                                                                                                        | <b>ELEVATED   UPDATED   10</b> |
| <b>Why This Cycle</b>                                                                                                                                                                                          | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Summary</b>            | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Analyst Assessment</b> | <p><b>COMPOUNDING STRUCTURE:</b> The combination of drought, above-average fire season, Hormuz-driven fertilizer cost increases, and elevated fuel costs (transportation and mechanized agriculture) creates a structural compounding risk to 2026 harvest projections that will not resolve within this cycle.</p> <p><b>SOUTHEAST DROUGHT SEVERITY:</b> The SE drought at record levels (records to 1895) for the Sep 2025 - Mar 2026 period represents an exceptional multi-month agricultural disruption. Combined with reduced NWR coverage across the Southeast (NC Ellerbe OOS, GA Baxley OOS), the region has compound infrastructure and informational gaps.</p> <p><b>GLOBAL FOOD SECURITY TRAJECTORY:</b> The WFP's March forecast assumed oil prices remaining near \$100/bbl through June -- that assumption did not hold: Brent has fallen sharply since and now sits at \$71.70/bbl (06-JUL, see ENR-001), well below the WFP's scenario threshold. The 45-million-person acute food insecurity projection tied to that price scenario should be treated as stale pending a revised WFP assessment reflecting the actual price trajectory. The food security impact of the earlier Hormuz price spike, where it occurred, will still lag the energy impact by months.</p> |
| <b>SOURCES</b>            | 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 52   DRC/UGANDA -- NO VACCINE / NO TREATMENT |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | HIGH   UPDATED   14 |
|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| <b>Why This Cycle</b>                                                             | WHO's 03-JUL DON confirmed DRC case count rose to 1,460 (452 deaths, CFR ~31%, up from ~26%) -- a genuine deterioration in the fatality rate, not just a case-count increase. A dedicated WHO-Africa CDC Continental Incident Management Support Team stood up this week in Kampala.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                     |
| <b>Summary</b>                                                                    | <p>Bundibugyo ebolavirus PHEIC declared 17-MAY-2026 -- Day 52 as of 06-JUL. DRC 1,460 confirmed (452 deaths, CFR ~31%) across 34 health zones; Uganda 20 confirmed / 2 deaths (all linked to DRC) -- figures per WHO DON, 03-JUL, 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 06-JUL (last confirmed WHO data 03-JUL) -- 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. <b>MSF: 'Never before has an Ebola outbreak recorded so many cases so soon after declaration.'</b> 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</p> |                     |

|                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           | 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.                             |
| <b>Analyst Assessment</b> | <p><b>WORLD CUP INTERSECTION:</b> The World Cup opens June 11 and runs through July 19 across 16 cities in US/Canada/Mexico. DRC and Uganda are not participating nations. However, the CDC DHS travel restrictions on Ebola-region nationals entering the US may create friction for fans traveling from or through the region. Monitor for any case export to tournament host cities.</p> <p><b>LISTERIA NOTE:</b> The requesón/soft ricotta Listeria outbreak is a direct household preparedness concern. Listeria is particularly dangerous for pregnant women, elderly, immunocompromised individuals. Avoid consuming requesón or soft ricotta until recall status is clarified.</p> <p><b>LIKELIHOOD:</b> Ebola cases detected in US in next 30 days: VERY UNLIKELY (CDC assessed LOW risk). <b>CONFIDENCE:</b> MODERATE.</p> |
| <b>SOURCES</b>            | 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

|                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>PREP-CON 3</b><br/>BROWN SKY<br/>Incident<br/>Probable</p> <p>STABLE  <br/>ASSESSED 01-<br/>JUL</p> | <p><b>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-fee 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.</b> 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 free of any stadium-venue incident through Day 23 of Round of 32, though San Jose's San Pedro Square fan zone has seen two separate incidents this week (see STSB-001). Case against de-escalating to PREP-CON 4: Hormuz toll-fee dispute and asset-transfer standoff remain unresolved; IAEA access remains unrestored (Day 129 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.</p> <p><b>MOVEMENT ASSESSMENT</b></p> <p><b>SUPPORTS DE-ESCALATION TO 4:</b> If the Hormuz toll-fee 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.</p> <p><b>SUPPORTS HOLDING AT 3 (today):</b> Hormuz/asset dispute unresolved, PL4 national fire posture with active fatalities, record-threatening grid demand under the heat wave. All</p> |
|-----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|



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/](https://fortunefavorstheprepared.com/preparedness-book-of-knowledge-2/planning/preparedness-conditions-prep-con/)

**COMCON 4  
INCREASED  
VIGILANCE  
OPERATOR  
CONFIRMED**

COMCON 4 (Increased Vigilance) DTR-ASSESSED 02-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**

**Why This Cycle**

No new development this cycle -- Burnham remains the sole declared Labour candidate and the Belfast prosecution phase is unchanged since last report; carried at WATCH tier with the 12-JUL Twelfth of July marching season as the next elevated-risk window to watch for.

**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

|                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                           | <p>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.</p> <p><b>EQUIPMENT:</b> Rioters: petrol/incendiary devices, vehicles, construction site projectiles. PSNI: water cannon, AEPs (plastic bullets).</p> <p><b>UNIT:</b> PSNI; UK National Police (200+ deployed); Scotland Police (90 deployed); Active Club network; counter-protest coalition (Amnesty, trade unions, civil society).</p>                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Analyst Assessment</b> | <p><b>DE-ESCALATION SIGNAL:</b> 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.</p> <p><b>ACTIVE CLUB SIGNIFICANCE:</b> 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.</p> <p><b>LIKELIHOOD:</b> Further organized anti-immigration violence Belfast next 7 days: UNLIKELY given counter-protest momentum and arrests. <b>CONFIDENCE:</b> MODERATE.</p> <p><b>LIKELIHOOD:</b> Active Club replication another UK/European city next 30 days: ROUGHLY EVEN CHANCE. <b>CONFIDENCE:</b> MODERATE.</p> |
| <b>ALT HYP</b>            | <p><b>ALT A: De-escalation holds; criminal process prevents recurrence [likely]</b></p> <p>Counter-protest dominance 13-JUN; 17 charged; PSNI elevated posture; community and political leadership unified.</p> <p>✓ <b>Supporting Evidence:</b> Active Club network intact; Alodid trial proceedings create recurring flashpoints; structural conditions unchanged.</p> <p>✗ <b>Ruling-Out Evidence:</b> Counter-protest precedent is historically most reliable predictor; Belfast has absorbed worse without sustained recurrence.</p> <p><b>ALT B: Recurrence during Alodid trial or another triggering incident [unlikely]</b></p> <p>Active Club explicitly calling for replication; trial dates will generate media coverage; Southampton/Scottish spread shows contagion.</p> <p>✓ <b>Supporting Evidence:</b> 17 charged creates deterrent; PSNI elevated; counter-protest movement demonstrated organizational capacity.</p> <p>✗ <b>Ruling-Out Evidence:</b> Near-term recurrence in days assessed as unlikely; trial proceedings (weeks/months) are more plausible recurrence trigger.</p>                                       |
| <b>SOURCES</b>            | <p>Al Jazeera 13-JUN anti-racism rally Belfast   PBS - Belfast stabbing riots explainer   NBC News - Musk amplification   ABC News - extra officers deployed</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

## STSB-001 | FIFA WORLD CUP DAY 27 R16 | SAN PEDRO SQUARE FAN-ZONE INCIDENTS -- NO STADIUM-VENUE INCIDENTS

HIGH | UPDATED | 16

## SALUTE

**SIZE:** Round of 32, Day 23 (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:** CORRECTION: two incidents confirmed at San Jose's San Pedro Square fan-gathering site -- a homicide (28-JUN, unrelated to any match in progress) and an unlawful-assembly/stabbing incident following Mexico's win (01-JUL, 40,000+ crowd, two stabbings, multiple arrests). No incident has occurred inside a ticketed stadium venue to date. 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. CORRECTION THIS CYCLE: San Jose's San Pedro Square fan zone has seen two incidents this week -- a 28-JUN homicide (unconnected to any match) and a 01-JUL unlawful-assembly/stabbing incident following Mexico's win (40,000+ crowd). No stadium-venue incident has occurred; the risk pattern is specific to this one high-density, lightly-secured fan-gathering site, not a tournament-wide trend. 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 inside a ticketed World Cup stadium venue today: VERY UNLIKELY. **CONFIDENCE:** MODERATE. **LIKELIHOOD:** further disorder at San Jose's San Pedro Square fan zone around future high-stakes match outcomes: LIKELY. **CONFIDENCE:** MODERATE (two escalating incidents at the same specific venue in four days; ALT HYP -- the 28-JUN homicide had no connection to any match in progress, so the two incidents may not share a common driver).

**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-launders, 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/](https://fortunefavorstheprepared.com/analytical-standards/)

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

**SECTION 13 - CLOSING**



**END OF REPORT**

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

**PRODUCT FAMILY:**

- **DTR Full** - Enterprise-tier daily threat intelligence (this product)
- **DTR Lite** - Free-tier daily summary
- **Daily Preparedness Brief (DPB)** - Action-oriented daily brief for households
- **COMMS Watch** - Communications intelligence periodic
- **Soft Target Security Brief (STSB)** - Soft-target security monitoring
- **AI & Infrastructure Threat Brief (AITB)** - Bi-weekly AI/data center/infrastructure intelligence
- **DTR Business Editions** - Healthcare (DTRB\_HC), Banking & Finance (DTRB\_BF), Construction & Manufacturing (DTRB\_MFG), Transportation & Logistics (DTRB\_TL)

**► COMPLETE YOUR EMERGENCY PLAN****Area-Specific Assessment Report (ASAR)**

- most of the area intelligence you need to complete your emergency plan. Saves ~15 hours of research. A 12-section intelligence assessment tailored to YOUR home, business, or facility. [fortunefavorstheprepared.com/asar/](https://fortunefavorstheprepared.com/asar/)

**Learn more:** [fortunefavorstheprepared.com/dtr/](https://fortunefavorstheprepared.com/dtr/)

*Semper Paratus, Semper Gumby.*

## FORTUNE FAVORS THE PREPARED · TRAINING CURRICULUM

**Most preparedness content teaches you what to buy.  
We teach you how to operate.**

**Now LIVE**

COM-01 PACE Planning

INT-01 Analysis of Competing Hypotheses FREE

INT-02 Radio Traffic Situational Awareness

INT-03 SALUTE and SPOT Reporting

INT-04 Elicitation Tradecraft - collecting information through conversation

INT-08 Reading Your Ground: Pattern of Life Analysis for Community Intelligence FREE

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

MED-01 MARCH-PAWS Rapid Assessment FREE

MED-02 Medical History as Preparedness Skill

MED-03 DCAP-BTLS Secondary Trauma Assessment

MED-06 Patient Care Documentation

PLN-01 Community Situational Awareness FREE

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

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

SEC-03 Watching the Watchers (Surveillance Detection)

SEC-06 Applied OPSEC: Analytical Method and Field Application

**Releasing this week (currently in beta testing):**

INT-06 MDCOA - Most Dangerous Course of Action

COM-03 COMSEC

PLN-04 PREP-CON Readiness Conditions

Training no one else is teaching.

Right now, full access to everything behind the paywall is **\$11.95/month**. Price increase coming -  
Subscribe before the deadline and you lock in **\$11.95**

<https://fortunefavorstheprepared.com/curriculum/>

*Semper Paratus, Semper Gumby*

TRAINING  
ACCESS

RATE  
LOCK-IN

FORTUNE FAVORS THE PREPARED · TRAINING CURRICULUM

**Most preparedness content teaches you what to buy.**

**We teach you how to operate.**

**Now LIVE**

MED-01 MARCH-PAWS Rapid Assessment

INT-01 Analysis of Competing Hypotheses - keeping bias out of threat assessment, vetting decisions, and operational analysis.

INT-02 Radio Traffic Situational Awareness

INT-03 SALUTE and SPOT Reporting

INT-04 Elicitation Tradecraft - collecting information through conversation

TRAINING  
ACCESS

RATE  
LOCK-IN

**Releasing this week (currently in beta testing):**

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

MED-

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

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

SEC-03 Watching the Watchers (Surveillance Detection)

**Coming soon:**

SEC-03 Digital Security

Training no one else is teaching.

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

[Fortunefavorstheprepared.com](https://fortunefavorstheprepared.com)

*Semper Paratus, Semper Gumby*