

DAILY THREAT REPORT

Fortune Favors the Prepared | Intelligence Operations Division
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⚠ PREPAREDNESS CONDITION 3 -- BROWN SKY -- INCIDENT PROBABLE ⚠
Op Epic Fury Day 130 | Hormuz Day 130 | MOU Day 21 | PREP-CON 3 BROWN SKY | COMCON 4
INCREASED VIGILANCE | 07 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

Publication (UTC)	07 JUL 2026 / Cycle close 1530 UTC
Reporting Period	05-JUL-2026 1530Z through 07-JUL-2026 1530Z
Analyst / Watch Officer	Fortune Favors the Prepared -- OSINT Desk
FLASH Threshold	Risk Score >= 20 -- FLASH events this cycle (GEO-CF-IRAN: two vessels struck by projectiles off Limah, Oman incl. Qatari LNG carrier Al Rekayyat -- most severe MOU test since 26-29 JUN, Brent/WTI spike; GEO-003 Venezuela toll risen to 3,535 dead; PHS-002 Ebola confirmed cases risen to 1,561/506 deaths, CFR ~32%; CYB-001 Microsoft SharePoint KEV now overdue; ENR-002 both DOE 202(c) grid emergency orders expired, entry retired to closed-status)
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 130 Hormuz: Day 130 IAEA Blackout: Day 130 Ebola PHEIC: Day 53 World Cup: Day 28 R16-Final MOU Day 21 Cottonwood Fire Day 17 Venezuela EQ: Day 13 NPL: 4 of 5 (confirmed, gap closed) Brent: \$72.9 (spiked on Hormuz strikes)
Version	1.1 -- SOP v5.60 + Addendum Registry v2.25 638 total sources, 56 mandatory checked at sector level this cycle; NIFC NPL, AAA fuel, and IAEA/nuclear gaps all closed this cycle with live pulls -- no open sourcing gaps remain Standard 24-hr cycle 05-JUL through 07-JUL stale_entry_audit.py PASS (pre- and post-pack) cross_reference_audit.py v3 PASS (pre- and post-pack, 2 real inconsistencies found and resolved this cycle: a World-Cup day-counter split and a Brent-price split, each across several locations -- both fully reconciled before pack)

BOTTOM LINE UP FRONT

07 JULY 2026 | PREP-CON 3 BROWN SKY | COMCON 4 INCREASED VIGILANCE | Op Epic Fury / Hormuz Day 130 | MOU Day 21 | IAEA Blackout Day 130 | Ebola PHEIC Day 53 | NIFC NPL 4 (unverified this cycle) | World Cup Day 28 R16-Final | 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: TWO VESSELS STRUCK NEAR LIMAH, OMAN -- MOST SEVERE MOU TEST SINCE 26-29 JUN:** Qatari LNG carrier Al Rekayyat (Nakilat-owned, laden) hit by projectile/drone-or-missile 8nm east of Limah, Oman, 07-JUL, caught fire; a second vessel sustained structural damage in a separate strike same day; UKMTO confirms both, no casualties or environmental impact reported. Neither Iran nor UKMTO have formally attributed the strikes; Iranian state TV implied the LNG carrier ignored routing warnings. Qatar's FM called it an unacceptable violation of international law. Trump (at NATO summit, Ankara) warned Iran to make a deal or the U.S. will "finish the job." Doha talks remain suspended pending Khamenei's funeral (burial 09-JUL); no new round scheduled. Brent/WTI both spiked on the news after a multi-week decline. See GEO-CF-IRAN.

► **NUC-001: IAEA BLACKOUT DAY 130 -- 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 13 -- 3,535 confirmed dead as of 06-JUL, up from 2,954; four survivors rescued alive 11 days post-event; dedicated reconstruction ministry stood up this cycle. See GEO-003 for full detail.

► **PHS-002: PHS-002 EBOLA PHEIC DAY 53: DRC 1,561 confirmed (506 deaths, CFR ~32.4%) (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 1,561 confirmed (506 deaths, CFR ~32.4%) per ECDC 05-JUL update (data through 04-JUL); Uganda unchanged at ~20 confirmed/2 deaths. WHO's own 03-JUL DON separately reported 1,481 total confirmed (1,460 DRC + 20 Uganda + 1 France-linked) and 454 deaths with 229 recoveries as of 01-02-JUL -- the two publications are 2-3 days apart; ECDC figure is more recent, use it as primary and do not average the two. Geographic-spread

note from prior cycle (Tshopo/Haut-Uele, Kinshasa gathering ban) not independently re-verified this cycle -- carry forward with that caveat rather than as confirmed-current. Uganda Marburg death (Kyegegwa district, unrelated to Ebola) also not re-verified this cycle. International Medical Corps (Goma) has separately estimated containment could take 6+ months given ~20% of case-patients are healthcare workers. US: no confirmed cases; enhanced entry screening status at IAD/ATL/IAH/JFK not independently reverified this cycle. 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 28, R16-FINAL:** Round of 16 concludes today with the last two matches (Argentina-Egypt, Switzerland-Colombia); Quarterfinals begin 09-JUL. No new stadium-venue or fan-zone incident identified this cycle beyond the round transition. 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): Khamenei burial in Mashhad concludes 09-JUL, after which Doha talks may resume with no date yet confirmed -- today's strikes on two vessels near Limah, Oman (incl. Qatari LNG carrier Al Rekayyat) test whether the ceasefire holds through the funeral period -- NATO summit in Ankara ongoing, Trump expected to press Iran on a deal -- Labour leadership nominations open 09-JUL, close 16-JUL -- next ECDC Ebola weekly update due imminently and may again revise DRC/Uganda figures -- operator should re-run today's Hormuz strikes against the PREP-CON Triggers Annex v1.1 before next cycle's masthead confirms PREP-CON level. 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
SEC 2 - Market Indicators	Commodity tracker: Brent ~\$72.9/bbl (07-JUL, up from ~\$71.70 06-JUL -- reversal driven by today's Hormuz vessel strikes, not OPEC+/supply factors) WTI ~\$69.0 (07-JUL, up from ~\$68.40) AAA pump price \$3.79/gal (07-JUL, down from \$3.797 06-JUL, gradual continued decline) 25+ ships transited Hormuz Monday per Kpler, two-thirds via the Iran-approved northern corridor, only 3 of 25 used the Omani route with transponders on Saudi Aramco cut August Arab Light pricing to Asia by \$11/bbl (a \$1.50 discount to regional benchmark) ahead of today's strikes, reflecting softer pre-strike market conditions -- both dynamics are live simultaneously, do not present the OPEC+/supply-glut narrative as still the sole price driver this cycle
SEC 3 - FLASH Events	GEO-CF-IRAN: 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 21. NUC-001: IAEA Blackout Day 130, no new Grossi statement, Board action, or access breakthrough since the June 2026 safeguards report -- straight day-counter carryforward. GEO-003: Venezuela Day 13, 3,535 dead (up from 2,954) -- injury/displacement figures not independently re-verified this cycle, treat as stale

SECTION	KEY ENTRIES / THREAT DRIVERS
	pending fresh sitrep; posture remains recovery/reconstruction, reconstruction ministry (Gran Mision Venezuela Renace) newly stood up. WX-001 : SPC SLIGHT risk northern High Plains into Upper Midwest today; both PJM and Duke Energy 202(c) grid emergency orders have expired, no active grid emergency this cycle. Wildfire content: see WX-002/Sec 7B, Cottonwood Fire now 47% contained. PHS-002 : Ebola Day 53, DRC 1,561 confirmed (506 deaths, CFR ~32.4%, up from ~31%) (34 zones) / Uganda 20 confirmed / 1 France-linked -- 1,481 total, 454 deaths -- per WHO DON 03-JUL.
SEC 4A - Cyber / Technology	CYB-001 Cisco SD-WAN, Cisco UCM, PTC Windchill KEVs remain overdue; Ubiquiti UniFi cluster now overdue. TWO KEV deadlines now overdue: SimpleHelp OIDC 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.
SEC 4B - Physical / Geopolitical / IO	DOM-002 (WATCH tier, no delta this cycle): Burnham sole declared candidate, nominations open 9-JUL close 16-JUL. Belfast forward scaffold prosecution phase active, 12-JUL Twelfth approaching. STSB-001 : World Cup Day 28 R16-Final (R32 concluded 03-JUL as scheduled, R16 began 04-JUL). No new stadium-venue or fan-zone incident this cycle beyond round transition. PHS-002 : Ebola Day 53, DRC 1,561 confirmed (506 deaths, CFR ~32.4%, up from ~31%) / Uganda 20 confirmed -- 1,481 total confirmed, 454 deaths per WHO DON 03-JUL, no vaccine/treatment.
SEC 5 - Energy / Infrastructure / Supply Chain	FIN-001 Brent ~\$72.9 (07-JUL), up from \$71.70 (06-JUL) after two vessels were struck near Limah, Oman incl. Qatari LNG carrier Al Rekayyat / AAA pump price \$3.79/gal (07-JUL, down from \$3.797 06-JUL) / 25+ ships transited Hormuz Monday per Kpler, two-thirds via the Iran-approved corridor / Doha talks remain suspended pending Khamenei's funeral (burial 09-JUL), no new round scheduled. AVN: Gulf aviation status not independently reverified this cycle -- carrying forward. SC-001 MARAD 2026-008 active fertilizer/methanol/aluminum lag persists
SEC 6 - Aviation / Transportation	AVN-001 : 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. AVN-002 : World Cup Day 28, R16 concludes today (Argentina-Egypt, Switzerland-Colombia); QF begins 09-JUL. No venue weather issues today. Middle East airspace remains ELEVATED given today's Hormuz vessel strikes.
SEC 7 - Meteorological / Severe Weather / Fire Weather + NWR	WX-001 : 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. WX-002 : Cottonwood Fire 95,807 acres, 47% contained (source conflict from last cycle now resolved -- ABC4/InciWeb 06-JUL), nation's largest active fire; NPL 4 of 5 confirmed current (gap closed this cycle); no known reports of planned Public Safety Power Shutoffs this cycle.
SEC 7B - Wildfire Report	WX-002 : Cottonwood Fire 95,807 acres, 47% contained (source conflict from last cycle now resolved -- ABC4/InciWeb 06-JUL), nation's largest active fire; NPL 4 of 5 confirmed current (gap closed this cycle); no known reports of planned Public Safety Power Shutoffs this cycle.
SEC 7A - Space Weather and EMCOMM	SWX-001 : GOES-19 2MeV electron flux ALERT (ALTEF3) continued this cycle, prior-day max 1,936 pfu after a same-day cancel/reissue correction; Type II radio emission (ALTTP2) remains the most recent CME signature, no update this cycle. Prior cycle's G2 geomagnetic watch not independently reverified -- treat as expired. SWX-CON 2 WATCH.
SEC 7D - Tropical / Hurricane Weather	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).

SECTION	KEY ENTRIES / THREAT DRIVERS
SEC 10 - PREP-CON Assessment	PREP-CON 3 BROWN SKY (Incident Probable) / COMCON 4 INCREASED VIGILANCE -- see full trigger basis and scoring
SEC 12 - Source Registry	Registry v2.25 638 total sources swept 56 mandatory dispositioned fortunefavorstheprepared.com/dtr-source-registry/

GEOGRAPHIC IMPACT INDEX

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
CONUS - Appalachians / Mid-Atlantic / Northeast	WX-001 SPC Day 1 SLIGHT risk central High Plains and the Northeast (strong buoyancy, damaging wind gusts primary hazard); Day 2 SLIGHT extends into the Northeast; Day 3 SLIGHT southern SD into northern NE. CYB-001: Cisco SD-WAN, Cisco UCM, PTC Windchill KEVs remain overdue; new critical SimpleHelp KEV deadline TODAY (02-JUL) -- immediate enterprise triage required. NWR gaps in the region: ME-Sugarloaf Mtn WNG547 OOS.
CONUS - Gulf Coast (LA/MS/AL/FL Panhandle)	SPC Day 1: strong-to-severe pulse thunderstorms possible along the Southeast/Gulf Coast today given a hot, moist airmass (3000-4000 J/kg MLCAPE) under weak easterly flow -- localized 50-65 mph wet-microburst gusts the primary hazard. Ebola: IAH enhanced entry screening remains active.
CONUS - Illinois / Indiana	SPC Day 1: Severe threat shifts toward WI/Upper Midwest this afternoon. Day 2 SLIGHT N WI/UP Michigan. IL-Hillsboro KXI79 remains OOS; IN-Angola KXI94 DEGRADED. CYB-001 OVERDUE cluster impacts all enterprise networks 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.
CONUS - West / Sierra Nevada / N CA / SW OR	WX-002 (Section 7B): Cottonwood Fire 95,807 acres, 47% contained (up sharply from 23% five days ago, source conflict now resolved), nation's largest active fire; Level 3 evacuations remain in effect for HiLo Estates, Merchant Valley, Eagle Point Resort, Arrowhead Summer Homes, Utah state of emergency remains in effect. Critical fire weather continues across the Four Corners/Colorado Plateau. NWR: OR-Portland DEGRADED; NV-Owyhee DEGRADED. National Preparedness Level at PL4. Forward: dangerous multi-day heat wave and continued critical fire weather through the weekend.
CONUS - North Carolina	WX-002 NWR transmitter status nominal for the region this cycle. No region-specific severe weather or fire-weather delta identified for North Carolina today beyond the standing national NWR roster (see COMCON masthead).
CONUS - Nationwide Wildfire	WX-002 NPL 4 of 5 (raised 29-JUN) 37 uncontained large fires nationally Cottonwood Fire (UT) 95,807 acres, 47% contained (source conflict resolved this cycle), 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
CONUS - Nationwide (All Regions)	CYB-001 CYB KEV cluster remains overdue: Cisco SD-WAN, Cisco UCM, PTC Windchill, and the Ubiquiti UniFi 3-CVE cluster (now 15 days overdue) -- immediate upgrade required. New this cycle: critical SimpleHelp OIDS bypass KEV, federal deadline 02-JUL. SWX-CON 2 WATCH -- new G2 geomagnetic storm watch for 03-JUL (see SWX-001). CYB-002: Check Point and PAN-OS KEVs remain on the overdue backlog CYB-001: UAT-8616-attributed SD-WAN exploitation activity (same campaign, see full detail above), no new escalation

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
	confirmed this cycle FIN-001 : Brent ~\$72.9/bbl (07-JUL), 48hr delta up from \$71.70 (06-JUL) on today's Hormuz vessel strikes -- see ENR-001 for full detail
Middle East / Strait of Hormuz	GEO-CF-IRAN MOU Day 21: Doha talks concluded 01-JUL with positive progress but no breakthrough; next round deferred until after Khamenei's funeral (burial 09-JUL); Hormuz toll-free dispute and ~\$6B frozen-asset transfer remain unresolved NUC-001 : IAEA Blackout Day 130, 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 ~\$72.9/bbl, 48hr delta up from \$71.70 (06-JUL) on Hormuz vessel strikes PHS-002 : Ebola Day 53, DRC 1,561 confirmed (506 deaths, CFR ~32.4%, up from ~31%) (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
Iran / Nuclear	NUC-001 IAEA Blackout Day 130 -- Burgenstock technical WG active (Gharibabadi leading four working groups) -- inspection dispute persists, no new Grossi statement or Board action this cycle -- 440.9 kg 60%-HEU remains unverified since 28-FEB. IAEA Board resolution passed 10-JUN, 21-3, demanding cooperation -- no follow-on action to date.
DRC / Uganda	PHS-002 Ebola Day 53 PHEIC: DRC 1,561 confirmed (506 deaths, CFR ~32.4%) 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
Venezuela (Earthquake Recovery)	GEO-002 / GEO-003 GEO-003 VENEZUELA: Twin M7.2+M7.5 earthquakes 24-JUN 2200 UTC 3,535 confirmed dead as of 06-JUL (up from 2,954); injury/displacement figures not independently re-verified this cycle reconstruction ministry (Gran Mision Venezuela Renace) newly stood up, posture remains recovery/reconstruction strongest Venezuelan EQ in 125 yrs UKRAINE: no new US-household-relevant delta identified this cycle -- background watch only, not separately tracked as an active DTR entry.
Belfast / Northern Ireland / UK	DOM-002 UK/NI Domestic Watch (downgraded to WATCH tier, no delta this cycle): Belfast forward scaffold prosecution phase active (25 arrested/17 charged), 12-JUL Twelfth of July is the next elevated-risk window. UK Labour leadership: nominations open 9-JUL, close 16-JUL, unchanged since 22-JUN.
Space Environment	SWX-001 GOES-19 2MeV electron flux ALERT (ALTEF3) continued this cycle -- prior-day max 1,936 pfu, cited after a same-day cancel/reissue data-quality correction that did not lapse the underlying alert. Type II radio emission (ALTTP2, 05-JUL, 959 km/s) remains the most recent CME-associated signature, not reverified this cycle. Prior cycle's G2 geomagnetic watch/K5 alert not independently reverified this cycle -- treat as expired absent a fresh SWPC pull. 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 (07-JUL)	CHG vs PRE-WAR	CONSUMER / ANALYTICAL NOTE
Brent Crude (front)	~\$66/bbl	~\$72.9/bbl (07-JUL)	+17%	48-HOUR DELTA: up from \$71.70 (06-JUL) to ~\$72.9 (07-JUL), a ~1.6% jump reversing the prior multi-week decline. Driver: two vessels struck by projectiles near Limah, Oman today incl. Qatari LNG carrier Al Rekayyat -- the first renewed kinetic exchange since 26-29 JUN, overriding the OPEC+ supply-glut narrative that had been driving prices down. Doha talks remain suspended pending Khamenei's funeral (burial 09-JUL); no new round scheduled.
WTI Crude (front)	~\$63/bbl	~\$69.0/bbl (07-JUL, up from ~\$68.40 06-JUL on today's Hormuz strikes)	+17%	48-72 HOUR DELTA: tracking Brent's modest further easing. Tankers continue clearing Hormuz; Kuwait maintaining elevated production.
Gasoline (natl avg)	~\$3.10/gal	\$3.79/gal (AAA 07-JUL, down from \$3.797 06-JUL, gradual continued decline)	+25%	AAA retail figure \$3.79/gal (07-JUL), down from \$3.797 (06-JUL) -- gap closed this cycle with a live pull. Declining trajectory has been sustained for seven-plus consecutive weeks from the \$4.56 peak (21-MAY). Diesel running ~\$4.80/gal average 2026 per EIA. but non-oil (fertilizer, methanol) costs remain elevated.
Diesel (US No. 2)	~\$3.74/gal	~\$4.80/gal (01-JUL, EIA avg)	+34%+	Trucking and ag margins compressed. Declining with Brent as Hormuz normalizes. Fertilizer/methanol lag persists.
Ocean Freight / Maritime	Partial recovery	~75% prewar flows restored	Improving	MARAD 2026-008 remains active. Ocean freight routes improving but not fully normalized; Panama Canal and Suez Canal operating normally, though some carriers still route via Cape of Good Hope. DHL's dedicated Asia-US 777F service (launched 01-JUN in direct response to Hormuz disruption) continues operating. GPS jamming remains a standing ops issue across Gulf FIRs -- see AVN-001.

SECTION 3 - FLASH EVENTS (Score >= 20)

GEO-CF-IRAN | Op Epic Fury / Hormuz Day 130 | MOU Day 21 --
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 21 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	SIZE: US-Iran MOU: signed 17-JUN-2026, now Day 21 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. ACTIVITY: 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; 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: ~\$72.9/bbl (07-JUL), up from \$71.70 (06-JUL) on today's Hormuz vessel strikes. TIME: MOU signed 17-JUN-2026, now Day 21 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 130. 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 130 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). STALE CHANGELOG NOTE (not independently reverified this cycle, dates from an earlier cycle and was never refreshed -- flagging rather than silently carrying): last confirmed change chain runs Venezuela 1,450->1,719, Brent \$75.02(30-JUN)->\$71.70(02-JUL), NWR 31->18 OOS/DEGRADED. Current cycle status: Brent ~\$72.9 (07-JUL, up from \$71.70 06-JUL on Hormuz strikes); Venezuela 3,535 dead; NWR 18 OOS/DEGRADED unchanged in count, roster churned. Score maintained at FLASH reflecting: today's Hormuz vessel strikes; IAEA access modalities unresolved; national wildfire posture PL4 (unverified this cycle).

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 130 | 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 130.

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 130 of the blackout.

SALUTE

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

ACTIVITY: This cycle (05-JUL through 07-JUL): IAEA/nuclear sources live-checked directly (iaea.org chronology, Board reports page, ANS/ISIS/Arms Control Association coverage) -- gap closed. No new Board action, Grossi statement, or access-position shift found even accounting for today's Hormuz vessel strikes; most recent Board action remains the 10-JUN resolution and 04-JUN safeguards report (GOV/2026/33). Confirmed unchanged, not carried on assumption. Burgenstock technical WG (resumed 29-JUN, Gharibabadi leading four working groups: Sanctions Termination, Nuclear Affairs, Reconstruction/Economic Development, Monitoring/Implementation) remains the active venue; sessions continue in Switzerland. Iran FM Baghaei's position stands: access conditioned on final agreement and sanctions removal. Grossi's counter stands: MOU text is unambiguous, inspection mandatory "in all letters." 440.9 kg 60%-HEU at Isfahan remains unverified since 28-FEB. MOU signed 17-JUN does not itself create IAEA access -- Iran FM Araghchi has confirmed this; the MOU's Article 5 defers the disposal/verification mechanism to Phase 2 mutual agreement. Arms Control Association assesses that even starting from zero HEU, Iranian nuclear breakout would likely take under 12 months. IAEA Board resolution passed 10-JUN, 21-3 (Russia, China, Niger against), demanding cooperation -- no follow-on Board action this cycle. Fordow assessed largely intact;

Isfahan tunnel complex received 18 blue transport casks on flatbed trucks 9-JUN-2025 per Bulletin of the Atomic Scientists satellite analysis, assessed as a potential HEU repository.

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

TIME: Burgenstock WG resumed: 29-JUN-2026. MOU signed: 17-JUN-2026. MOU Day 21. IAEA Blackout: Day 130 (since 28-FEB-2026). 60-day roadmap expires mid-August.

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

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

Analyst Assessment

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

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

MOU DAY 21 -- VERIFICATION GAP UNCHANGED: The MOU is now signed and in force. It does not restore IAEA access. The 440.9 kg of 60%-enriched HEU remains unverified and unaccounted. The MOU's own text defers the disposal mechanism to Phase 2 mutual agreement. Until Phase 2 produces a verification framework, the IAEA blackout continues regardless of MOU status. Saudi Arabia has conditioned Phase 2 nuclear acceptance on IAEA verification guarantees the agency can no longer provide -- this is a structural constraint on Phase 2 success independent of US-Iran goodwill.

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

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

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

ALT HYP

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

Burgenstock WG now active with Nuclear Affairs as one of four working groups; Gharibabadi leads the Iranian delegation; both sides have economic incentive to show progress toward a final deal; a verified down-blend removes the domestic political liability of visibly holding bomb-grade material during negotiations.

✓ **Supporting Evidence:** Burgenstock WG now active with Nuclear Affairs as one of four tracks; both sides have economic incentive to show progress; Grossi has publicly stated inspections will happen per MOU text.

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

ALT B: Enrichment activity continued and stockpile has grown beyond the 27-FEB-2026 baseline [roughly even chance]

Fordow and Isfahan underground halls are both assessed as largely intact and operational; 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 16 days overdue, no new exploitation reporting. SimpleHelp (overdue since 02-JUL) and Microsoft SharePoint (overdue since 04-JUL) both remain unremediated for a second cycle; no new KEV additions identified this week beyond the existing tracked cluster.
Summary	Ubiquiti UniFi 3-CVE cluster is now 16 days overdue, no new exploitation reporting confirmed. CVE-2026-48558 (SimpleHelp OIDC bypass, allows forged-identity-token session takeover, in some configs bypassing MFA) remains overdue since 02-JUL. CVE-2026-45659 (Microsoft SharePoint Server deserialization, CVSS 8.8) remains overdue since 04-JUL; coverage this week notes Microsoft's own May Patch Tuesday release log omitted this CVE, only updating the advisory 27-MAY, which widened the undetected-exploitation window -- detection content industry-wide remains limited. 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.

ALT HYP	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 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.
SOURCES	✓ 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.
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. Live-checked this cycle rather than assumed dormant: no new CISA/FBI/Unit 42 reporting found beyond the original 07-APR-2026 joint advisory (AA26-097A) and its immediate April follow-on coverage. Genuinely still dormant, confirmed, not carried on assumption. No current-cycle delta. 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. Live-checked this cycle rather than assumed dormant: no reporting found past early-April coverage of the FISMA major-incident designation; no new DOJ/FBI/congressional disclosure identified. Genuinely still dormant, confirmed, not carried on assumption. No current-cycle delta after 15 consecutive cycles. 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 13 -- RECOVERY/RECONSTRUCTION PHASE

FLASH | CONTINUED | 22

Why This Cycle	Confirmed toll rose to 3,535 dead as of 06-JUL (Reuters/government), up from 2,954 on 05-JUL; four survivors were pulled alive from rubble in Caraballeda 11 days post-event. Interim President Rodriguez stood up a dedicated reconstruction ministry this cycle.
Summary	Twin M7.2/M7.5 earthquakes struck northwestern Venezuela 24-JUN 2200 UTC. Confirmed toll as of 06-JUL: 3,535 dead (Reuters); injury and displacement figures not independently re-verified this cycle, treat prior 16,592-injured/10,700-housed figures as stale pending fresh sitrep. Four survivors (2 adults, 2 children) were rescued alive from the OPP Caribe complex, Caraballeda, La Guaira, the night of 05-JUL -- roughly 11 days post-event, a notable outlier survival window. Interim President Delcy Rodriguez announced a cabinet reshuffle 06-JUL: a new transport minister and a newly created reconstruction body, Gran Mision Venezuela Renace, led by former minister Jacqueline Farias. OCHA confirms search-and-rescue coordination has formally transferred to Venezuela's Civil Protection agency as international USAR teams withdraw. Reconstruction cost estimates diverge sharply by source and remain unreconciled: UNDP's preliminary estimate is ~\$6.7B direct damage; Provea's separate estimate of ~\$37B (~40% of GDP) covers total economic loss and reconstruction, not the same metric -- do not conflate the two figures in the same sentence without the qualifier.
SALUTE	SIZE: Twin M7.2/M7.5 earthquakes, 24-JUN 2200 UTC -- strongest Venezuelan EQ in 125 years. 3,535 confirmed dead as of 06-JUL (up from 2,954); injury/displacement figures not independently re-verified this cycle, treat prior 16,592-injured figure as stale. ACTIVITY: Recovery/reconstruction operations underway; debris removal has replaced search-and-rescue as the operational tempo. 856 damaged buildings (190 collapsed) and nearly 900 aftershocks recorded since the mainshocks. LOCATION: La Guaira state hit hardest (6,655 displaced across 20 shelters); Simon Bolivar International Airport heavily damaged. Nationwide: 10,700 people housed across 79 temporary camps (capacity ~14,600, some being expanded). TIME: Day 13 since the mainshocks. Posture shifted from search-and-rescue to recovery/reconstruction; isolated post-golden-window rescues (8+ days) are now outliers, not the operational tempo. EQUIPMENT: USS Fort Lauderdale logistics support status not independently reverified this cycle. PROVEA estimates losses/reconstruction costs at approximately \$37B, roughly 40% of current GDP. UNIT: Government of Venezuela (lead); PROVEA (loss estimate); US military (USS Fort Lauderdale, logistics); international NGOs (camp operations).

Analyst Assessment

RECOVERY PHASE STATUS: Toll rose to 3,535 dead as of 06-JUL, up from 2,954 -- backlog processing continuing, not new harm. Four survivors were pulled alive from rubble in Caraballeda 11 days post-event, a notable outlier. New this cycle: interim President Rodriguez stood up a dedicated reconstruction ministry (Gran Mision Venezuela Renace) and reshuffled the transport portfolio; OCHA confirms search-and-rescue coordination has formally transferred to Venezuela's Civil Protection agency. Injury/displacement figures (16,592/10,700) not independently re-verified this cycle -- carry forward with that caveat rather than as confirmed-current.

CHANGE FROM PRIOR: GEO-003 Venezuela toll rose from 2,954 to 3,535 confirmed dead on continued backlog processing; four survivors rescued alive 11 days post-event; a dedicated reconstruction ministry was newly stood up this cycle; injury/displacement figures not independently re-verified this cycle.

LIKELIHOOD: Additional survivor rescues from rubble (Day 13+): VERY UNLIKELY -- operational tempo has moved decisively to debris removal/recovery; no rescue reported in 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 - 07 JULY 2026**

ENR-001 OIL / ENERGY PRICES: Brent ~\$72.9/bbl (07-JUL) -- up ~1.6% from prior close \$71.70, reversing a multi-week decline after two vessels were struck by projectiles near Limah, Oman today, including Qatari LNG carrier Al Rekayyat. 48-HOUR DELTA: \$71.70 (06-JUL) to ~\$72.9 (07-JUL), roughly +1.6% -- material and driven by the strikes, not by supply fundamentals. WTI ~\$69.0 (07-JUL), up from ~\$68.40. AAA national average \$3.79/gal (07-JUL), down from \$3.797 (06-JUL) -- gap closed this cycle. FORWARD: Iran's Hormuz tolling-fee position (hardened last cycle) remains unresolved and is now compounded by today's kinetic incident; NATO summit (Ankara) has Hormuz/Iran on this week's agenda with Trump attending.

ENR-002 GRID STATUS: RETIRED TO CLOSED-STATUS THIS CYCLE: both DOE 202(c) orders have expired -- PJM's data-center curtailment order and the separate Duke Energy Carolinas/Progress max-output order both lapsed at their 06-JUL expiry (one trade source cites a possible extension through 07-JUL; DOE's own public order log shows 06-JUL expiry -- reconcile directly against energy.gov before treating either version as confirmed). No new 202(c) order identified this cycle. Real-world impact from the heat event carried into the holiday weekend: secondary reporting (PowerOutage.us-sourced) cited approximately 838,000 Midwest/Northeast households without power by 04-JUL, down from an earlier overnight peak near 167,000 -- figures come from different trackers/timeframes and are not reconciled, treat as directional. This is PJM's third data-center-curtailment 202(c) invocation in 2026 (following a January cold snap and a May heat/maintenance squeeze) -- worth an Analyst Assessment line on grid-margin erosion if this entry continues in future cycles. Absent a new order, this entry should be dropped at next cycle's carryover-discipline check rather than continuing as a live FLASH item. NRC Everbridge Event Notification Report (01-JUL, Duke-area licensee, no health/safety impact) not independently reverified this cycle -- carry forward with that caveat.

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 - 07 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.

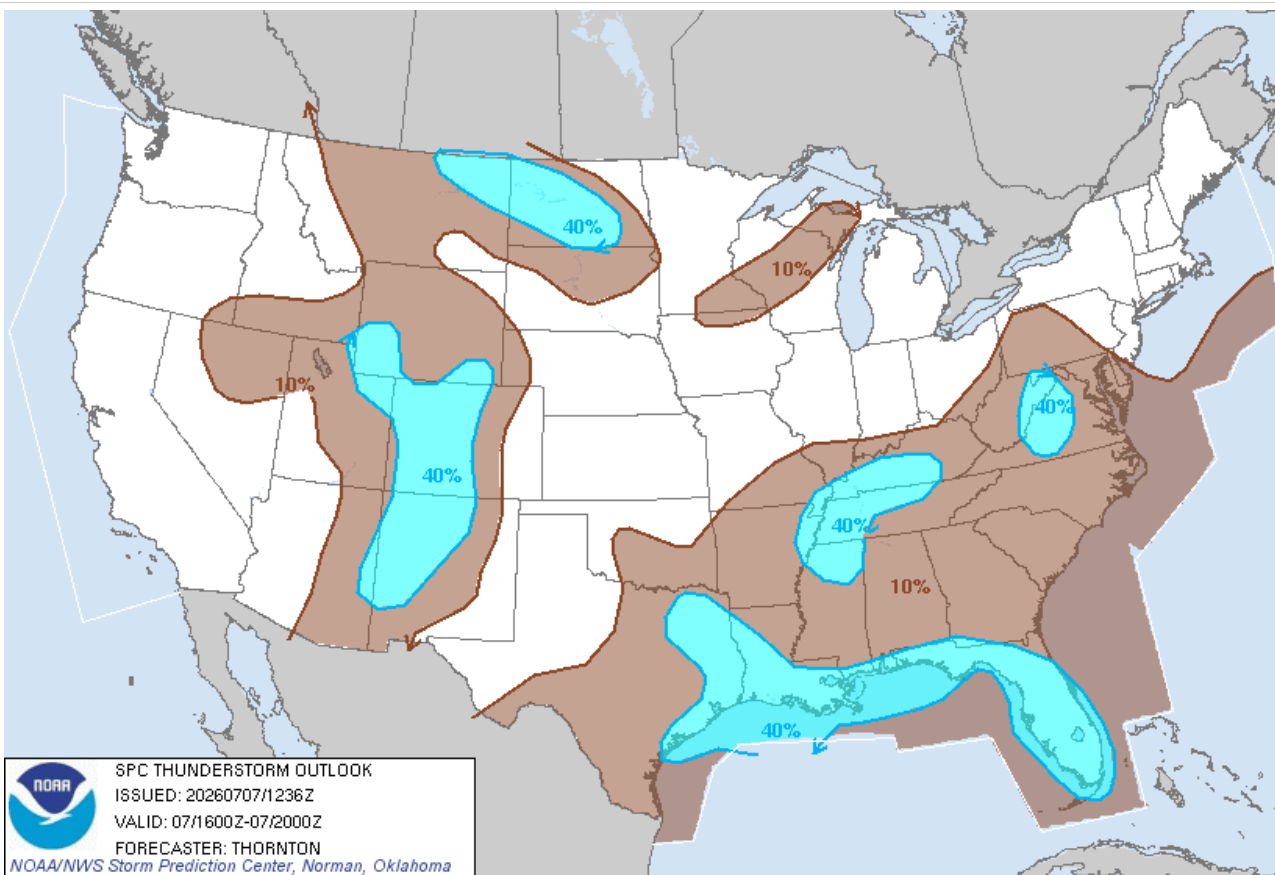
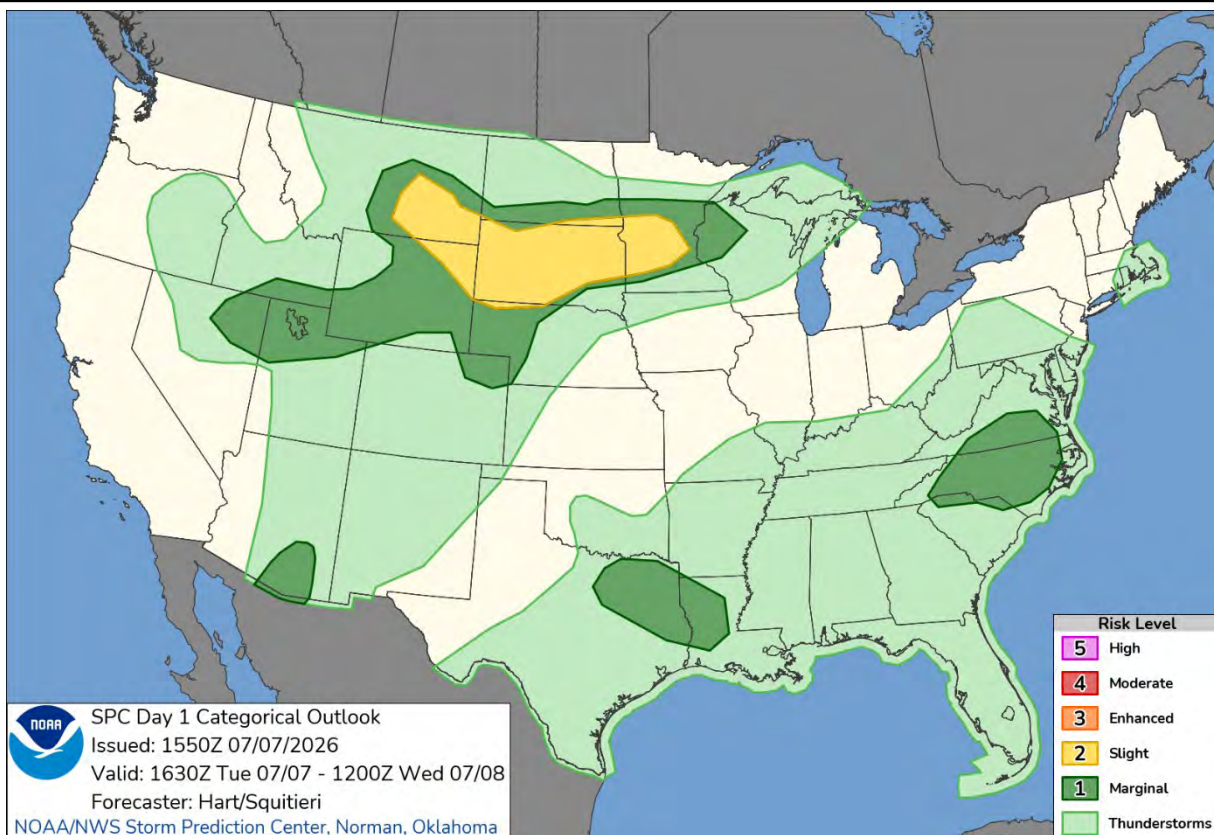
AVN-002 WORLD CUP TRANSPORTATION SECURITY: World Cup Day 28, Round of 16 concludes today with the final two matches (Argentina vs Egypt, Atlanta; Switzerland vs Colombia, Vancouver); Quarterfinals begin 09-JUL. No new transportation-security incident this cycle beyond the round transition; Iran's elimination and 29-JUN departure removed the highest prior diplomatic flashpoint from US venues. 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

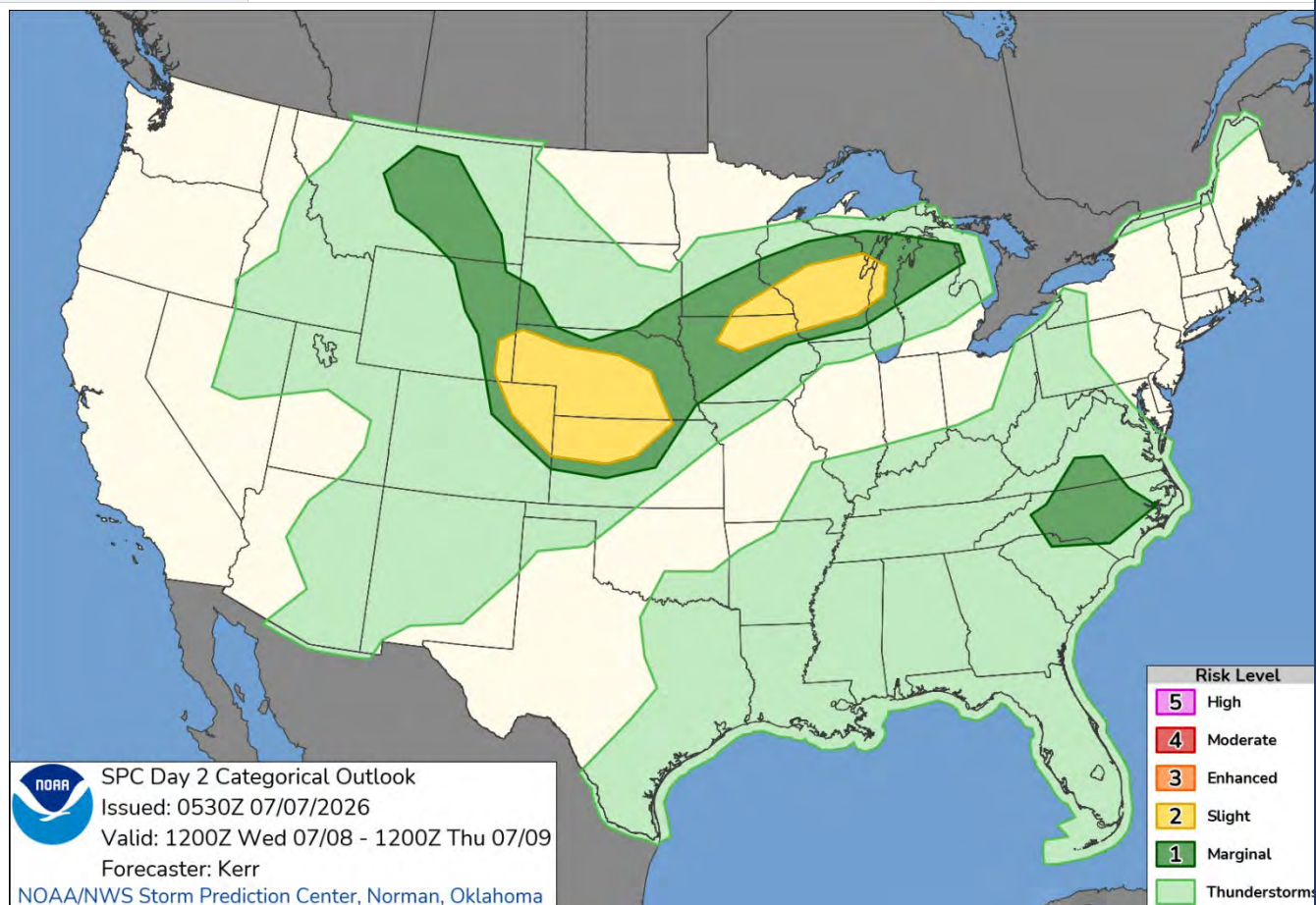
FLASH | ACTIVE | 22

Summary	SLIGHT risk today (eastern Dakotas/western MN, central Virginia/north-central NC), down from ENHANCED two cycles ago. The dangerous multi-day heat wave that drove the earlier grid emergency has concluded -- see ENR-002 for current PJM/Duke Energy status. Full SPC Day 1-2 outlooks follow below.
SPC Day 1 Convective Outlook	SPC Day 1 Convective Outlook (issued 1246 AM CDT 07-JUL-2026, valid 071200Z-081200Z): SLIGHT risk northern High Plains into the Upper Midwest (ND/SD/MN) -- widely scattered to scattered severe storms capable of large hail and severe wind gusts, with an evening/overnight transition to one or more MCSs along a strengthening low-level jet, severe wind gusts becoming the predominant hazard. Isolated severe wind gusts also possible: southern Mid-Atlantic into the Carolinas (weak shear limits organization but steep low-level lapse rates support sporadic damaging gusts); the Sabine River Valley/ArkLaTex (increasing storm coverage, loosely organized cold pool); and the Great Basin (weak mid-level disturbance NV/UT, deep well-mixed boundary layer). Source: NOAA SPC spc.noaa.gov.



**SPC Day 2
Convective
Outlook**

SPC Day 2 Convective Outlook (issued 1230 AM CDT 07-JUL-2026, valid 081200Z-091200Z): SLIGHT risk Wednesday afternoon into Wednesday night, central Great Plains and Upper Midwest -- clusters of strong thunderstorms with potential for severe hail and wind; isolated tornado potential in a WI/southeast MN/northeast IA supercell corridor ahead of a cold front. Source: NOAA SPC [spc.noaa.gov](https://www.spc.noaa.gov).

**SPC Day 3
Convective
Outlook**

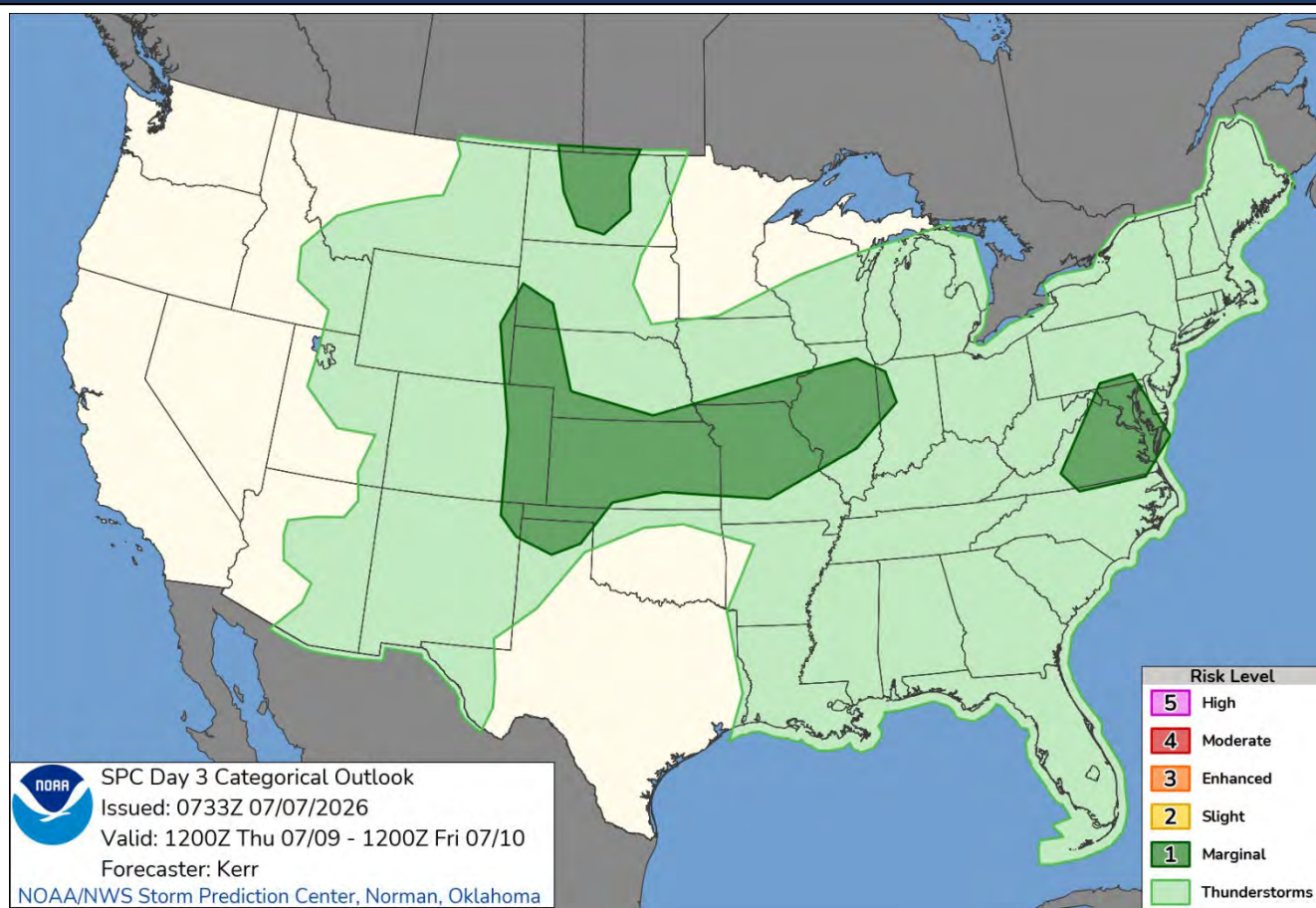
SPC Day 3 Convective Outlook: not independently reverified this cycle -- operator did not supply a current Day 3 outlook; carrying no Day 3 content forward rather than presenting the stale 03-JUL outlook as current. Source: NOAA SPC [spc.noaa.gov](https://www.spc.noaa.gov). Wildfire and fire-weather content is reported exclusively in WX-002 (Section 7B) -- not here.

**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.

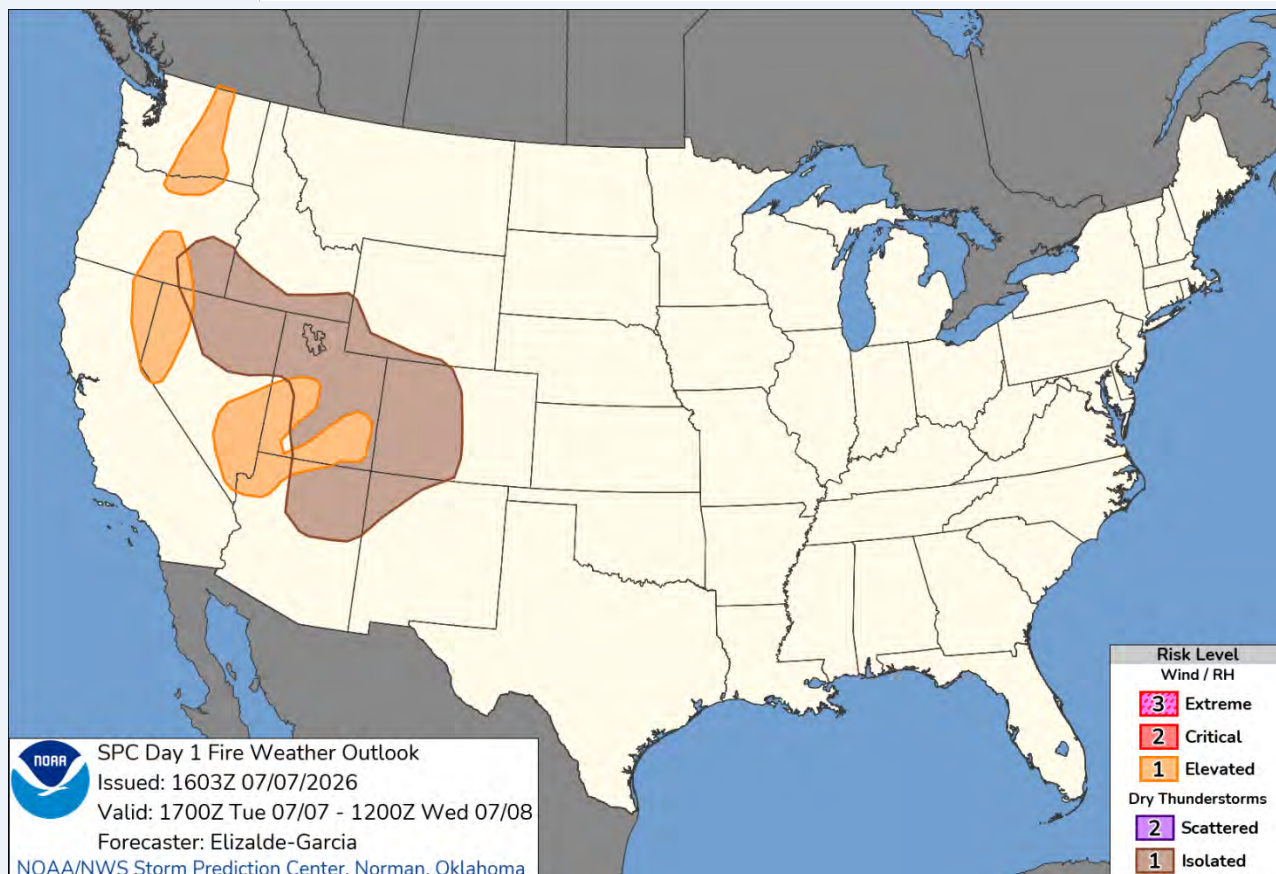
**SOURCES**

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**

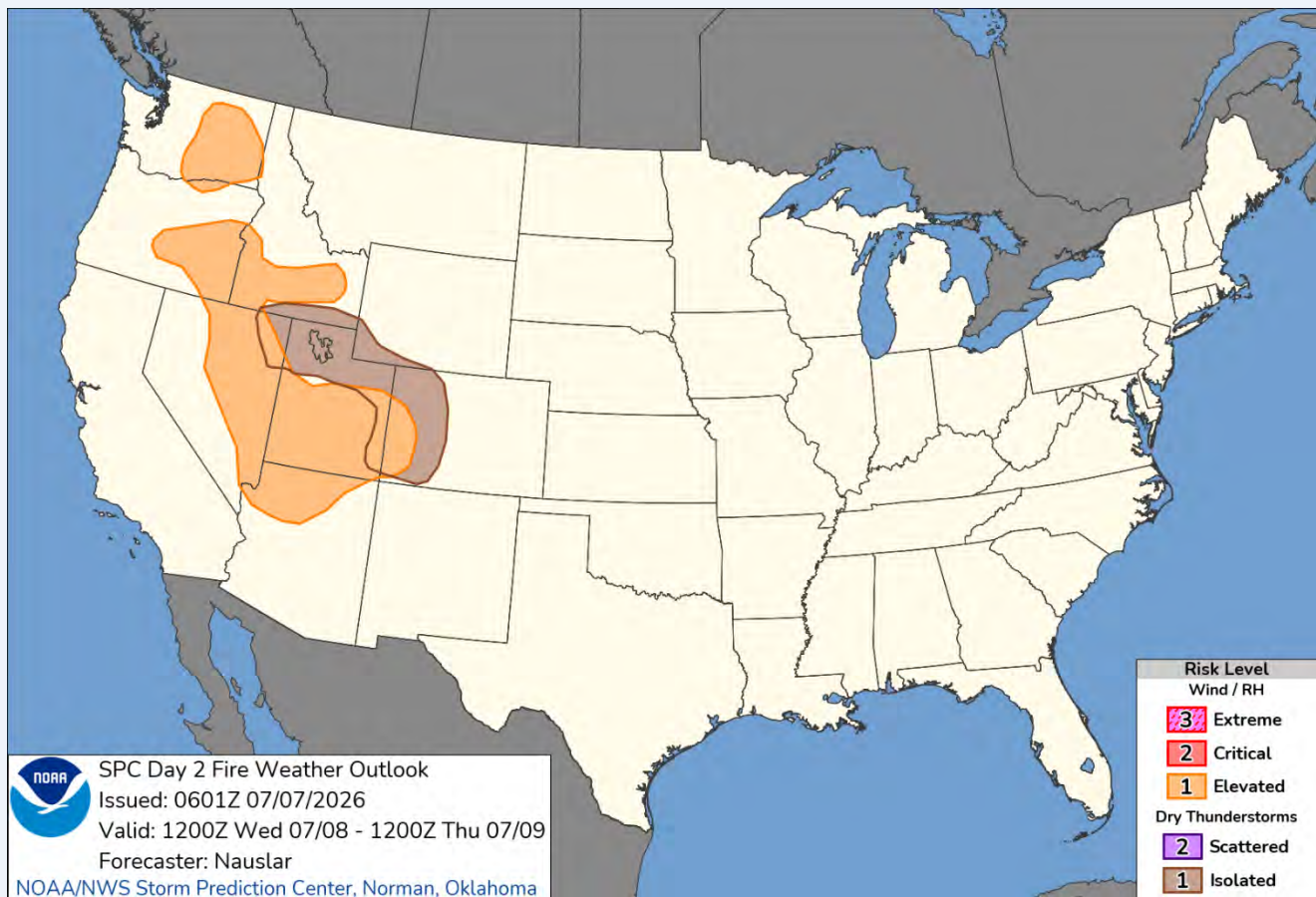
Summary	Cottonwood Fire (UT) remains the nation's largest active wildfire, 95,807 acres, 47% contained as of 06-JUL (ABC4/InciWeb) -- containment source conflict from last cycle is resolved. NPL confirmed 4 of 5 this cycle (gap closed) -- 35 uncontained large fires nationally, 37,209 fires/3.3M+ acres YTD. Full status detail follows below.
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 071200Z-081200Z, issued 1259 AM CDT 07-JUL-2026): Isolated to scattered mixed wet/dry thunderstorms across the northern Great Basin extending to the Four Corners; PWAT 0.5-0.9" with mostly mid-level moisture and

a deep well-mixed boundary layer will limit precipitation and support potentially severe outflow winds, aided by a weak mid-level disturbance moving across the Great Basin. Wetter storms favored central/northeast Oregon into northern Utah. Westerly sustained winds 12-20 mph (gusts 20-30) with RH 12-25% likely Cascade Gaps into the Columbia Basin and south-central Oregon along the Sierra Front; southwest sustained winds 12-20 mph (gusts 20-30) with RH 5-15% across the southern Great Basin. Smoke from Colorado/Four Corners fires could locally inhibit thunderstorm development. Source: NOAA SPC spc.noaa.gov.



SPC Fire Weather Day 2

SPC Day 2 Fire Weather Outlook (valid 081200Z-091200Z, issued 0101 AM CDT 07-JUL-2026): Wednesday -- upper-level trough moves into southwest Canada, flattening the ridge over the West; a weak Pacific cold front moves through the Northwest into the northern Great Basin. Westerly sustained winds 12-20 mph (gusts 20-30) with RH 12-25% likely central/eastern Washington. Ahead of the front, west-southwest sustained winds 12-20 mph (gusts 20-30) with RH 5-15% expected Great Basin into the Four Corners, following multiple days of lightning with holdover-fire risk given near-record-dry fuels in UT/CO where multiple large active fires already show pyroCb history. Isolated to scattered mixed wet/dry thunderstorms likely NE Nevada/southern Idaho extending to the West Slope. Source: NOAA SPC 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 4 of 5, confirmed current per NIFC IMSR 06-JUL 0730 MDT (source: nifc.gov/fire-information/nfn | ID: nifc | T1) -- gap closed this cycle. 35 uncontained large fires nationally, 274 new fires reported (moderate initial-attack activity), 10 CIMTs committed. 7-Day Significant Fire Potential: Great Basin (GBCC) carries the heaviest load at PL4, 17 incidents, 365,001 cumulative acres. Operator to verify current-day NIFC 7-day graphic for the newest outlook window. fire behavior, smoldering; numerous structures threatened; area/road/trail closures; complex IMT. Bear Fire (Gila NF, 18 mi SE of Quemado): ~150 acres, running/flanking/spotting, structures threatened. NM triple-gap NWR (Artesia WXN24 / Roswell WWG36 / Carlsbad WWF37 all OOS) leaves Chaves and Eddy counties without primary NWR alerting during active fire season.

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

ALASKA: Multiple fires in the Galena Zone (BLM) area including Kopshehut; structures threatened. SE Alaska: 12 Juneau-cluster NWR transmitters DEGRADED further compounds wildfire alerting in AK.

Analyst Assessment

SEASON TRAJECTORY: At 195% of the 10-year average for acres burned with NPL at 2 of 5, the 2026 fire season is running significantly above historical norms. Sustained drought across the Southeast (99% in drought) and Southwest, combined with above-normal temperatures, supports continued elevated risk. The season peak in the Rocky Mountain and Pacific Northwest regions typically arrives July-August; current indicators suggest that peak may arrive earlier or with greater intensity.

IPAWS/NWR GAPS IN FIRE COUNTRY: The NM triple-gap NWR outage (all three transmitters covering Chaves/Eddy/Lincoln counties OOS) is specifically notable given Seven Cabins Fire activity in Lincoln County and active fire restrictions. Residents and firefighting operations in this area must rely on WEA mobile alerts, FEMA App, and radio broadcast EAS exclusively.

DRY-THUNDERSTORM IGNITION WATCH: The Day 2 (13-JUN) SPC Fire Weather highlights mostly dry, high-based thunderstorms over the southern/eastern Great Basin into the central Rockies, with inverted-V soundings favoring strong/erratic outflow gusts and lightning ignitions on critically dry fuels. This is the primary new-start mechanism to watch over the next 48 hours, layered on the elevated-to-critical Day 1 conditions already present across the eastern Great Basin and central Rockies.

LIKELIHOOD: New fire starts in the eastern Great Basin / central Rockies critical-fuel zone over the next 48 hours: **LIKELY**. **CONFIDENCE:** MODERATE.

LIKELIHOOD: National Preparedness Level escalation to NPL 4 before end of June: **ROUGHLY EVEN CHANCE**. **CONFIDENCE:** MODERATE.

SOURCES

NIFC National Situation Report | SPC Fire Weather Outlook | InciWeb Active Incidents | USFS Active Fire Mapping Program

NWR TRANSMITTER OUTAGE STATUS - 07 JULY 2026

Source: Operator-supplied roster 07-JUL | NOAA NWR (noaa_nwr T1) | As of 07-JUL-2026 (operator-supplied) | 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
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

FORTUNE FAVORS THE PREPARED | DAILY THREAT REPORT | 07 JULY 2026

ST	Callsign	Location	Freq	WFO	Status	Counties / Notes
ME	WNG547	Sugarloaf Mtn	162.450	Gray/Portland ME	OUT OF SERVICE	Western Maine coverage gap
MI	WNG572	Petoskey	162.475	Gaylord MI	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	WXK63	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.

SECTION 7B - WILDFIRE

WILDFIRE STATUS - 07 JULY 2026 | NIFC NPL not independently reverified this cycle (last confirmed: 4 of 5, raised 29-JUN) -- second consecutive cycle unverified, flag for mandatory pull next cycle per SOP Sec 7B/WX-002 sources row | national large-fire count/personnel/CIMT figures not independently reverified this cycle -- carrying forward pending fresh NIFC/InciWeb pull

COTTONWOOD FIRE (UT): ACTIVE -- near Beaver, UT (Fishlake NF); Great Basin Complex IMT5, 1,289 personnel assigned. 95,807 acres, 47% contained as of 06-JUL (ABC4/InciWeb) -- last cycle's 23-42% containment source conflict is now resolved; containment nearly doubled from 23% (03-JUL) as crews shifted to mop-up/handline-tie-in (Cork Ridge, LeBaron, Anderson Meadows, Little Twist burn scar). Structure loss holds at ~150 destroyed, ~130 threatened structures saved (unchanged, confirm before next cycle if still current). Level 3 evacuation orders remain in effect for HiLo Estates, Merchant Valley, Eagle Point Resort, Arrowhead Summer Homes; SR-153 closed both directions; Fishlake NF closures remain in effect through 31-DEC-2026 absent rescission. A community meeting was scheduled 6pm 07-JUL at Beaver High School. Statewide context from last cycle (Utah 390+ wildfires, 300,000+ acres, record-low snowpack) not independently reverified this cycle -- carry forward with that caveat. Iron Fire, Grapevine Fire, Kane Springs Fire, Pocket Fire, Lytle Fire, Garred Road Fire, Starry Fire: status not independently reverified this cycle -- carrying forward pending fresh NIFC/InciWeb pull.

FIRE-002 SHORE FIRE (CA): RETIRED THIS CYCLE - entry removed. CAL FIRE confirmed 100% containment in late June; had been carried as an unverified placeholder for multiple cycles without a live check. Will not reappear absent a new incident.

NATIONAL OUTLOOK: NIFC NPL confirmed current this cycle: 4 of 5 (unchanged since 29-JUN), per IMSR 06-JUL 0730 MDT -- 35 uncontained large fires nationally, 274 new fires reported nationwide (a notable increase in initial attack), 10 CIMTs and 0 NIMOs committed. YTD: 37,209 fires, 3.3M+ acres burned nationally. Great Basin (GBCC) is the most heavily committed geographic area at PL4 -- 17 incidents, 365,001 cumulative acres, 4,277 personnel. Gap from the prior two cycles is now closed. SOURCES per §0.117: NIFC National Fire News nifc.gov/fire-information/nfn (NPL source of record, T1); NIFC IMSR nifc.gov/nicc

files/sitreprt.pdf (used this cycle); SPC Fire Wx spc.noaa.gov/products/fire_wx/; InciWeb inciweb.wildfire.gov; USFS Fishlake NF fs.usda.gov.

SECTION 7C - SPACE WEATHER & EMCOMM

**SWX-001 | SWX-CON 2 WATCH | GOES-19 ELECTRON FLUX ALERT
CONTINUED (DATA-QUALITY CORRECTION ISSUED) | TYPE II RADIO
EMISSION**
WATCH | UPDATED | 2

SWPC Status (07- JUL 0507Z)	UPDATED. GOES-19 2MeV electron flux ALERT (ALTEF3) remains continued: original alert issued 06-JUL 1150Z (threshold reached 1149Z, prior-day max 625 pfu); a continuation (serial 3710, 07-JUL 0503Z) cited a prior-day max of 1,936 pfu, was cancelled 3 minutes later (serial 3711, 0506Z) as an incorrect value, then immediately re-issued (serial 3712, 0507Z) restating 1,936 pfu as valid. Net effect: the alert condition itself remains continued/active; the correction/cancellation was a data-quality footnote, not a stand-down -- use 1,936 pfu as the current cited prior-day max. Separately, a Type II radio emission alert (ALTTP2, serial 1512, issued 05-JUL 1822Z, begin time 1626Z, estimated velocity 959 km/s) remains the most recent CME-associated radio signature; no update or cancellation located this cycle -- re-verify SWPC main/HF/real-time solar wind feeds directly next cycle rather than carrying this serial forward indefinitely. Prior cycle's G2 geomagnetic watch and R2 radio blackout are not independently reverified this cycle -- treat as resolved/expired absent a fresh SWPC pull. Source: NOAA SWPC swpc.noaa.gov .
Why This Cycle	NOAA SWPC issued a new G2 (Moderate) geomagnetic storm WATCH for 03-JUL (WATA30, superseding all prior watches) with G1 conditions active today -- this is an escalation from yesterday's flare-driven blackout, not a continuation of the same event.
Summary	A new G2 (Moderate) geomagnetic storm WATCH has been issued for 03-JUL (WATA30), superseding all prior watches; G1 conditions are active today, 01-JUL. Extended K-index warnings remain active: K5 through 1800Z, K4 through 2100Z, with an ALERT-level K5 threshold reached at 0259 UTC. A Type IV radio emission alert began 2055 UTC 30-JUN. This supersedes yesterday's flare-driven R2 radio blackout event, which has resolved; today's driver is the geomagnetic storm progression toward 03-JUL, not a continuation of yesterday's flare. SWX-CON should reflect an active WATCH posture ahead of the 03-JUL peak.
Operational Impacts	HF RADIO: No HF degradation associated with this event. ALTEF3 is a radiation belt electron event, not a geomagnetic or X-ray event. HF conditions are within normal seasonal parameters. No solar flare or X-ray enhancement noted. Standard propagation expected on all HF bands. GPS / NAVIGATION: No ionospheric GPS degradation associated with this ALTEF3 event. Quiet geomagnetic conditions mean GNSS accuracy is within normal parameters. No polar route HF or navigation issues expected. POWER GRID: Weak-to-moderate GIC (geomagnetically induced current) risk under the new G2 watch for 03-JUL -- power grid fluctuations can occur, with high-latitude power systems potentially experiencing voltage alarms. No GIC risk from today's G1 conditions alone. Grid operations normal at present. SATELLITE OPERATIONS: PRIMARY RISK THIS CYCLE: Surface charging and deep dielectric charging on satellites at geosynchronous orbit. Sustained high-energy electron flux (>1000 pfu Day 6) increases risk of electrostatic discharge events on GEO satellites. Satellite operators should monitor for anomalous charging signatures. GOES-19 is the primary SWPC monitoring asset. LEO satellites experience elevated drag only during geomagnetic storms -- not applicable this event. AURORA: Aurora possible at high latitudes today under G1 conditions (northern tier US, e.g. northern Michigan and Maine). If the G2 (Moderate) watch for 03-JUL verifies, aurora may become visible as far south as New York, Wisconsin, and Washington state.

HF / COMMS Assessment	HF radio propagation can fade at higher latitudes if the G2 watch verifies 03-JUL. EMCOMM operators: monitor SWPC for confirmation as 03-JUL approaches; no special band selection required today under G1 conditions. This is a new watch cycle, not a continuation of a prior multi-day event -- treat the 03-JUL window as the operative planning horizon.
Analyst Assessment	PRIMARY CONCERN THIS CYCLE: The new G2 watch for 03-JUL is a geomagnetic storm risk relevant to power grid operators, HF communications, and satellite operators alike -- broader than the prior electron-flux-only satellite concern. No action required for ground-based emergency communicators today under G1 conditions; monitor toward 03-JUL for confirmation. DURATION AND PERSISTENCE: This is a newly issued watch (WATA30, serial 277), not a persistence event -- the prior ALTEF3 electron-flux alert has effectively lapsed and this cycle's driver is a fresh geomagnetic storm forecast. SWPC's 3-day outlook shows G1 today, none tomorrow (02-JUL), G2 on 03-JUL -- monitor swpc.noaa.gov for any upgrade or downgrade as the window approaches. CURRENT STATUS: CHANGE FROM PRIOR: G2 (Moderate) geomagnetic storm watch newly issued for 03-JUL, superseding all prior watches -- this is an escalation from the prior cycle's flare-driven R2 blackout assessment, not a continuation. G1 active today. Extended K5 warning through 1800Z, K4 through 2100Z. ALERT-level K5 threshold reached 0259 UTC. Type IV radio emission alert active since 2055 UTC 30-JUN. SWX-CON updated to WATCH posture ahead of 03-JUL. LIKELIHOOD: G2 (Moderate) geomagnetic storm verifies as forecast on 03-JUL: LIKELY -- NOAA SWPC has issued a formal watch (WATA30); current K-index trajectory and Type IV radio emission are consistent with continued geomagnetic activity. CONFIDENCE: LOW. LIKELIHOOD: GEO satellite anomaly or ground power-grid voltage alarm attributable to the 03-JUL G2 event: ROUGHLY EVEN CHANCE -- G2-class storms have historically produced isolated high-latitude grid and satellite effects. CONFIDENCE: LOW.
SOURCES	NOAA SWPC main portal SWPC Real-Time Solar Wind SWPC Planetary K-index GPSJam real-time interference map SWPC HF Radio Impacts SpaceWeatherLive

SECTION 7D - TROPICAL / HURRICANE WEATHER

NSTR -- No Atlantic or Eastern/Central Pacific tropical cyclone formations or disturbances as of 06-JUL.	
Status	NHC 2-Day and 7-Day Graphical Tropical Weather Outlooks show "Disturbances: None" across the Atlantic, Eastern Pacific, and Central Pacific basins as of 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).
Sources	NOAA NHC (nhc.noaa.gov) 2-Day and 7-Day Graphical Tropical Weather Outlooks NOAA Climate Prediction Center Atlantic Hurricane Outlook

SECTION 8 - AGRICULTURE / FOOD & SUPPLY CHAIN

AGRICULTURAL IMPACT: NATIONAL FIRE SEASON AT PL4, SOUTHEAST DROUGHT RECORD SEVERITY, HORMUZ-DRIVEN FERTILIZER/FUEL COST PRESSURE ON 2026 HARVEST -- SEE WX-002 (SECTION 7B) FOR FIRE OPERATIONAL DETAIL		ELEVATED UPDATED 10
Why This Cycle	National wildfire posture at PL4 continues to remove grazing/farmland acreage and strain rural infrastructure; the Southeast drought remains at record severity for the recorded period;	

Summary	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. The national wildfire posture (PL4, Cottonwood Fire still the nation's largest active fire -- see WX-002/Section 7B for full operational detail) continues to remove grazing and agricultural land from production in the affected Western states and strain rural firefighting and utility resources. The Southeast drought remains at record severity for the recorded period, compounding a multi-month agricultural disruption. Hormuz-related fertilizer and transportation fuel cost pressure continues into this cycle. \$0.117 SOURCES: NIFC National Fire News (nifc.gov/fire-information/nfn); USDA ERS Food Price Outlook.
Analyst Assessment	COMPOUNDING STRUCTURE: The combination of drought, above-average fire season, Hormuz-driven fertilizer cost increases, and elevated fuel costs (transportation and mechanized agriculture) creates a structural compounding risk to 2026 harvest projections that will not resolve within this cycle. SOUTHEAST DROUGHT SEVERITY: The SE drought at record levels (records to 1895) for the Sep 2025 - Mar 2026 period represents an exceptional multi-month agricultural disruption. Combined with reduced NWR coverage across the Southeast (NC Ellerbe OOS, GA Baxley OOS), the region has compound infrastructure and informational gaps. GLOBAL FOOD SECURITY TRAJECTORY: The WFP's March forecast assumed oil prices remaining near \$100/bbl through June -- that assumption did not hold: Brent has fallen sharply since but spiked back to ~\$72.9/bbl (07-JUL, see ENR-001) on today's Hormuz vessel strikes, still 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.
SOURCES	NIFC National Situation Report USDA ERS Food Price Outlook World Bank commodity prices USDA NIDIS Drought Monitor

SECTION 9 - PUBLIC HEALTH

PHS-002 EBOLA BUNDIBUGYO PHEIC DAY 53 DRC/UGANDA -- NO VACCINE / NO TREATMENT		HIGH UPDATED 14
Why This Cycle	ECDC's 05-JUL update (data through 04-JUL) puts DRC at 1,561 confirmed cases and 506 deaths, CFR ~32.4% -- up from 1,460/452 (~31%) last cycle. Uganda case count is essentially flat this cycle at ~20 confirmed/2 deaths -- no material change.	
Summary	Bundibugyo ebolavirus PHEIC declared 17-MAY-2026 -- Day 53 as of 06-JUL. DRC 1,561 confirmed (506 deaths, CFR ~32.4%) 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. MSF: 'Never before has an Ebola outbreak recorded so many cases so soon after declaration.' True scale is likely higher given limited healthcare infrastructure and ongoing insecurity that hinder detection and response. KEY TREATMENT GAP: no vaccines or medications are licensed for Bundibugyo virus; existing Ebola therapeutics (mAb114, REGN-EB3) and vaccines were developed for Zaire ebolavirus, a different strain, which materially complicates response. WORLD CUP NEXUS: DRC and Uganda not participating nations. US entry restrictions remain for non-citizens recently in affected countries (routed through IAD/ATL/IAH/JFK). France EU	

	import confirms EU healthcare system exposure -- second EU/EEA import after German case (US healthcare worker). Travelers at World Cup from affected regions remain a theoretical import vector but risk assessed VERY LOW per CDC/ECDC. US RESTRICTIONS remain in effect (entry limits on non-citizens recently in affected countries; routing of citizens/residents through designated airports). US CDC risk to the US population: LOW -- extremely low likelihood of transmission, though impact would be high if cases arrive. No US cases to date. RESPONSE: Africa CDC and WHO continental response plan active. ADDITIONAL CDC ACTIVE ALERTS this cycle: mandatory quarantine imposed on cruise-ship hantavirus passengers; respiratory viruses (COVID-19, flu, RSV) at LOW activity nationally.
SALUTE	SIZE: DRC: 1,561 confirmed cases, 506 deaths, CFR ~32.4% (up from ~31%), per ECDC 05-JUL (data through 04-JUL). Uganda: ~20 confirmed, 2 deaths, essentially flat. WHO's own 03-JUL DON separately cited 1,481 total confirmed (incl. 1 France-linked) -- figures are 2-3 days apart, do not average; ECDC is more recent. ACTIVITY: Bundibugyo ebolavirus disease outbreak; per WHO DON 03-JUL, case count and death toll both rose materially since the 19-JUN DON (+564 cases / +220 deaths). A dedicated WHO-Africa CDC Continental Incident Management Support Team stood up in Kampala this week. LOCATION: Primary outbreak: 34 health zones across DRC. Secondary: Uganda (20 confirmed, cross-border spread). Imported: 1 healthcare worker case in France, contacts under surveillance. TIME: PHEIC declared 17-MAY-2026, now Day 53. WHO sitrep gap is 6+ days as of this cycle; ECDC's next weekly update was due 06-JUL. EQUIPMENT: No approved vaccine or specific treatment for the Bundibugyo strain. US enhanced entry screening remains active at IAD/ATL/IAH/JFK. UNIT: WHO (lead, DON reporting); Africa CDC (Continental IMST, Kampala); DRC Ministry of Health; ECDC (EU monitoring, France case).
Analyst Assessment	WORLD CUP INTERSECTION: The World Cup opens June 11 and runs through July 19 across 16 cities in US/Canada/Mexico. DRC and Uganda are not participating nations. However, the CDC DHS travel restrictions on Ebola-region nationals entering the US may create friction for fans traveling from or through the region. Monitor for any case export to tournament host cities. LISTERIA NOTE: The requesón/soft ricotta Listeria outbreak is a direct household preparedness concern. Listeria is particularly dangerous for pregnant women, elderly, immunocompromised individuals. Avoid consuming requesón or soft ricotta until recall status is clarified. LIKELIHOOD: Ebola cases detected in US in next 30 days: VERY UNLIKELY (CDC assessed LOW risk). CONFIDENCE: MODERATE.
SOURCES	CDC Ebola update 24-JUN WHO Africa CDC joint response plan CDC newsroom - Listeria + Salmonella alerts CDC respiratory status 25-JUN

SECTION 10 - OPERATIONAL CONDITIONS ASSESSMENT

PREP-CON 3 BROWN SKY Incident Probable REVIEW PENDING LAST ASSESSED 01-	PREP-CON 3 -- BROWN SKY (Incident Probable). Drivers this cycle: two vessels struck by projectiles off Limah, Oman today incl. a Qatari LNG carrier -- the first renewed kinetic exchange in the strait since the 26-29 JUN mutual strikes (see GEO-CF-IRAN); Doha talks remain suspended pending Khamenei's funeral, no new round scheduled; Venezuela earthquake recovery ongoing, toll risen to 3,535 (see GEO-003); Ebola PHEIC cases and CFR both risen this cycle (see PHS-002); Cottonwood Fire now 47% contained, improving (see WX-002/Sec 7B); both PJM and Duke Energy 202(c) grid emergency orders have expired, no active grid emergency this cycle. FLAG FOR
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JUL, FLAGGED
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ASSESSMENT
07-JUL

ANALYST: the 06-JUL rationale for holding at PREP-CON 3 explicitly cited the absence of renewed kinetic exchange as the reason PREP-CON 4 (Incident Possible) triggers were not met -- that condition no longer holds as of today's strikes. This entry recommends the operator re-run today's strikes against the PREP-CON Triggers Annex v1.1 before the next cycle confirms the level; this build does not unilaterally escalate absent that determination. 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-free dispute and asset-transfer standoff remain unresolved; IAEA access remains unrestored (Day 130 blackout); the national wildfire posture is at PL4 with active fatalities this week; a dangerous multi-day heat wave is straining the PJM grid toward a potential all-time demand record. De-escalation to PREP-CON 4 would require the Hormuz/asset dispute to resolve and the national fire/heat posture to ease meaningfully. Neither condition is met today.

MOVEMENT ASSESSMENT

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

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

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

LIKELIHOOD: Hormuz/asset dispute resolves and PREP-CON de-escalates to 4 within the week: ROUGHLY EVEN CHANCE. **CONFIDENCE:** MODERATE.

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

COMCON 4
INCREASED
VIGILANCE
OPERATOR
CONFIRMED

COMCON 4 (Increased Vigilance) DTR-ASSESSED 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 OIHC 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 Labour leader at close of nominations and PM around 17-19-JUL. If contested, a winner is expected before Parliament's 1-Sep return. Belfast: forward scaffold riots began 9-JUN following a stabbing attack; peak violence ran 9-11-JUN; prosecution phase is now active (25 arrested / 17 charged). 12-JUL Twelfth of July marching season is the next elevated-risk window. EQUIPMENT: Rioters: petrol/incendiary devices, vehicles, construction site projectiles. PSNI: water cannon, AEPs (plastic bullets). UNIT: PSNI; UK National Police (200+ deployed); Scotland Police (90 deployed); Active Club network; counter-protest coalition (Amnesty, trade unions, civil society).	
Analyst Assessment	DE-ESCALATION SIGNAL: The 13-JUN counter-protests are the dominant signal this cycle. Large-scale public rejection of riots is historically the most reliable predictor of violence subsiding. Trajectory is toward de-escalation. However the Active Club network remains intact; trial proceedings will generate flashpoints; and structural conditions (economic deprivation, online far-right organizing) are unchanged. ACTIVE CLUB SIGNIFICANCE: Confirmation of Active Club orchestration is significant beyond Belfast. Active Clubs are a decentralized global neo-Nazi model designed for rapid mobilization and cross-jurisdiction replication. Monitor for replication attempts in other UK cities and potentially US cities with similar demographic and economic profiles.	

ALT HYP	LIKELIHOOD: Further organized anti-immigration violence Belfast next 7 days: UNLIKELY given counter-protest momentum and arrests. CONFIDENCE: MODERATE. LIKELIHOOD: Active Club replication another UK/European city next 30 days: ROUGHLY EVEN CHANCE. CONFIDENCE: MODERATE.
	ALT A: De-escalation holds; criminal process prevents recurrence [likely]
	Counter-protest dominance 13-JUN; 17 charged; PSNI elevated posture; community and political leadership unified.
	✓ Supporting Evidence: Active Club network intact; Alodid trial proceedings create recurring flashpoints; structural conditions unchanged.
	✗ Ruling-Out Evidence: Counter-protest precedent is historically most reliable predictor; Belfast has absorbed worse without sustained recurrence.
	ALT B: Recurrence during Alodid trial or another triggering incident [unlikely]
	Active Club explicitly calling for replication; trial dates will generate media coverage; Southampton/Scottish spread shows contagion.
	✓ Supporting Evidence: 17 charged creates deterrent; PSNI elevated; counter-protest movement demonstrated organizational capacity.
	✗ Ruling-Out Evidence: Near-term recurrence in days assessed as unlikely; trial proceedings (weeks/months) are more plausible recurrence trigger.
SOURCES	Al Jazeera 13-JUN anti-racism rally Belfast PBS - Belfast stabbing riots explainer NBC News - Musk amplification ABC News - extra officers deployed

STSB-001 FIFA WORLD CUP DAY 28, R16 CONCLUDES TODAY SAN PEDRO SQUARE FAN-ZONE INCIDENTS -- NO STADIUM-VENUE INCIDENTS		HIGH UPDATED 16
Why This Cycle	No new stadium-venue or fan-zone incident this cycle beyond the Round of 32 to Round of 16 transition, which concluded/began on schedule (03-JUL/04-JUL).	
Summary	World Cup Day 28, Round of 16 concludes today (Argentina-Egypt, Switzerland-Colombia); Quarterfinals begin 09-JUL. San Pedro Square fan-zone incidents (a homicide 28-JUN, stabbings/unlawful assembly 01-JUN) and Iran's elimination/departure (29-JUN) remain the last confirmed security-relevant developments -- no update to that record this cycle. FBI: active FIFA website spoofing and 300+ malicious domains remain confirmed threats.	
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-laundering, or filler phrasing for assessments the evidence justifies. Genuinely mixed evidence is stated directly with the split explained. This applies to all state actors equally.

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

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

ANTI-BIAS DISCIPLINE - SOURCE-SYMMETRIC SKEPTICISM

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

ICD 203 / ICD 206 ANALYTIC STANDARDS CONFORMANCE (SOP v5.57 §0.113)

This product is produced in conformance with ICD 203 (Analytic Standards) and ICD 206 (Sourcing Requirements for Disseminated Analytic Products). Standards applied this cycle: (1) Likelihood and confidence stated as separate dimensions on all forward-looking judgments. (2) Estimative language drawn exclusively from the ICD 203 7-term ladder (almost no chance / very unlikely / unlikely / roughly even chance / likely / very likely / almost certain). Forbidden hedges (might, maybe, possibly, perhaps) not used. (3) Every FLASH/HIGH scored entry includes minimum 2 alternative hypotheses with supporting and disconfirming evidence using altHypCard() format. (4) Changed judgments carry CHANGE FROM PRIOR notation in body text. (5) Friday sweep: all 629 registry sources checked per SOP daily sweep requirement; all 56 mandatory sources individually dispositioned. (6) NPL stated in Sec 7B per SOP §0.117.

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

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

SECTION 13 - CLOSING

END OF REPORT

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

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