

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 131 | Hormuz Day 131 | MOU Day 22 | PREP-CON 3 BROWN SKY | COMCON 4
INCREASED VIGILANCE | 08 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)	08 JUL 2026 / Cycle close 1530 UTC
Reporting Period	06-JUL-2026 1530Z through 08-JUL-2026 1530Z
Analyst / Watch Officer	Fortune Favors the Prepared -- OSINT Desk
FLASH Threshold	Risk Score ≥ 20 -- FLASH events this cycle (GEO-CF-IRAN: US-Iran direct strike exchange overnight 07/08-JUL -- CENTCOM struck 80+ Iran targets after Iran hit three tankers near Limah, Oman; Iran retaliated vs Kuwait/Bahrain; Treasury revoked Iran oil-sale waiver; Trump declared MOU "over"; Brent $\pm 8\%$; GEO-003 Venezuela toll unchanged at 3,535 dead, no new government update; PHS-002 Ebola confirmed cases unchanged at 1,561/506 deaths, CFR $\sim 32.4\%$, no new WHO/ECDC update; ENR-002 remains retired, confirmed no new grid emergency; CYB-001 downgraded from FLASH to WATCH/HIGH this cycle -- SharePoint/SimpleHelp KEVs remain overdue a second cycle but no longer meet the FLASH severity threshold)
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 131 Hormuz: Day 131 IAEA Blackout: Day 131 Ebola PHEIC: Day 54 World Cup: Day 29 QF-Eve MOU Day 22 Cottonwood Fire Day 18 Venezuela EQ: Day 14 NPL: 4 of 5 (confirmed 07-JUL 0730 MDT IMSR, re-pulled fresh) Brent: $\sim \$78$ /bbl, $\pm 8\%$ 48hr (from $\sim \$72$ 06-JUL on Iran strike exchange)
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

08 JULY 2026 | PREP-CON 3 BROWN SKY | COMCON 4 INCREASED VIGILANCE | Op Epic Fury / Hormuz Day 131 | MOU Day 22 -- MOU status disputed by both parties following 08-JUL strike exchange | IAEA Blackout Day 131 | Ebola PHEIC Day 54 | NIFC NPL 4 of 5 (confirmed) | World Cup Day 29, QF begin 09-JUL | Cottonwood Fire 96,284 acres, 56% contained (confirmed, up from 47% prior cycle) | ENR-002 remains retired -- no new grid emergency order identified this cycle

THE CYCLE - QUICK LOOK

► **GEO-CF-IRAN: US-IRAN DIRECT STRIKE EXCHANGE, MOU DECLARED "OVER":** Following the 07-JUL Limah/Oman tanker strikes (Al Rekayyat/Qatar, Wedyan/Saudi, Cyprus Prosperity/Liberia -- CENTCOM formally attributed all three to Iran), CENTCOM struck 80+ targets in Iran overnight 07/08-JUL (Qeshm Island, Bandar Abbas approaches, Bushehr military bases). Iran retaliated against Kuwait (drones/missiles intercepted, no injuries) and Bahrain (residential building damaged, no fatalities). Treasury revoked the Iran oil-sale waiver effective immediately (wind-down by 17-JUL); OFAC issued an amended Iran-related General License same day. Trump declared the MOU "over" while leaving the door open to continued talks; Iran called for a "crushing response." Khamenei burial concludes 09-JUL in Mashhad -- Doha talks remain suspended, now superseded by the MOU dispute rather than solely the funeral pause. Brent +~8pct to ~\$78/bbl. PREP-CON held at 3 -- non-CONUS trigger. See GEO-CF-IRAN.

► **NUC-001: IAEA BLACKOUT DAY 131 -- 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: DOWNGRADED FLASH-TO-WATCH/HIGH: SharePoint and SimpleHelp both remain overdue a second cycle -- no workarounds beyond patching; downgraded from FLASH since the underlying facts (still-unpatched, still-exploited) are unchanged in kind, just aging.** CVE-2026-45659 (SharePoint Server, CVSS 8.8, deserialization RCE): federal deadline was 04-JUL, now overdue; Storm-2603 (Warlock ransomware) confirmed exploiting. CVE-2026-48558 (SimpleHelp RMM, CVSS 10.0, OIDC auth bypass): federal deadline was 02-JUL, now overdue; TaskWeaver/Djinn Stealer malware deployed via this flaw. CISA added 3 new low-relevance KEVs 07-JUL (JoomShaper, Langflow, Joomlack) -- not elevated to standalone tracking. Prior-cycle Cisco SD-WAN/Ubiquiti/PTC Windchill cluster not independently re-verified this cycle -- superseded by the SharePoint/SimpleHelp cluster as the tracked mandatory item; cut rather than carried without justification. 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 14 -- toll unchanged at 3,535 dead, no new government update this cycle.** See GEO-003.

► **PHS-002: PHS-002 EBOLA PHEIC DAY 54: 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 29, 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 detail (Sec 7A); NWR 23 units (Sec 7); Venezuela humanitarian detail; World Cup R32 bracket; UK PM nomination timeline detail.

DECISIVE WINDOW (NEXT 48-72 HRS): 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 ~\$78/bbl (08-JUL, up from ~\$72 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 22. NUC-001: IAEA Blackout Day 131, no new Grossi statement, Board action, or access breakthrough since the June 2026 safeguards report -- straight day-counter carryforward. GEO-003: Venezuela Day 14, 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 56% contained. PHS-002 : Ebola Day 54, 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 29 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 54, 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 ~\$78 (08-JUL), up from ~\$72 (06-JUL) after the US-Iran strike exchange, following the 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 29, 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 96,284 acres, 56% 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 96,284 acres, 56% 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 (WATCH/HIGH, downgraded from FLASH): SharePoint and SimpleHelp KEVs remain overdue a second cycle -- ongoing enterprise triage recommended. 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 (WATCH/HIGH) overdue KEVs impact SharePoint/SimpleHelp-running 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 96,284 acres, 56% 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) 96,284 acres, 56% 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

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
	exploitation activity (same campaign, see full detail above), no new escalation confirmed this cycle FIN-001 : Brent ~\$78/bbl (08-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 22: US-Iran direct strike exchange overnight 07/08-JUL supersedes the Hormuz toll-free framing -- CENTCOM struck 80+ Iran targets, Iran retaliated vs Kuwait/Bahrain, oil-sale waiver revoked, MOU declared "over" by Trump NUC-001 : IAEA Blackout Day 131, Burgenstock WG active, no new Grossi statement this cycle AVN-001 : Gulf aviation status not independently reverified this cycle ENR-001 : Brent ~\$78/bbl, +-8pct 48hr delta on the strike exchange PHS-002 : Ebola Day 54, DRC 1,561 confirmed (506 deaths, CFR ~32.4%), no new update this cycle WX-001 : SPC outlooks per operator-supplied text, see Section 7
Iran / Nuclear	NUC-001 IAEA Blackout Day 131 -- 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 54 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	~\$78/bbl (08-JUL)	+18%	48-HOUR DELTA: up from ~\$72 (06-JUL) to ~\$78 (08-JUL), a ~8pct jump, the sharpest of the cycle. Driver: 07-JUL Limah/Oman tanker strikes followed by the 08-JUL US-Iran direct strike exchange (CENTCOM vs 80+ Iran targets, Iran retaliation vs Kuwait/Bahrain, oil-waiver revocation) -- overriding the OPEC+ supply-glut narrative that had been driving prices down for weeks. Doha talks remain suspended, now superseded by the MOU dispute.
WTI Crude (front)	~\$63/bbl	~\$74/bbl (08-JUL, up from ~\$69 06-JUL on the strike exchange)	+18%	48-72 HOUR DELTA: Tracking Brent's sharp reversal on the strike exchange; tanker traffic risk elevated pending clarity on whether the informal stand-down resumes.
Gasoline (natl avg)	~\$3.10/gal	\$3.796/gal (AAA 08-JUL, up from \$3.790 07-JUL -- essentially flat, has not yet caught up to the Brent spike)	+25%	AAA retail figure \$3.796/gal (08-JUL), essentially flat vs \$3.790 (07-JUL) -- pump prices have not yet caught up to the ~8pct Brent spike from the strike exchange; expect lagged upward pressure next cycle if the price holds. Diesel running ~\$4.80/gal average 2026 per EIA.
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 131 MOU Day 22 -- US-IRAN STRIKE EXCHANGE, MOU DISPUTED		FLASH UPDATED 24
Why This Cycle	CENTCOM struck 80+ Iran targets overnight 07/08-JUL after Iran hit three tankers near Limah, Oman on 07-JUL; Iran retaliated against Kuwait and Bahrain; Trump declared the MOU "over" and Treasury revoked the Iran oil-sale waiver.	
Summary	MOU Day 22 of the 60-day implementation window, now under direct strain. On 07-JUL, Iran struck three tankers near Limah, Oman (Al Rekayyat/Qatar, Wedyan/Saudi, Cyprus Prosperity/Liberia); CENTCOM formally attributed all three to Iran. Overnight 07/08-JUL, CENTCOM struck 80+ targets in Iran (Qeshm Island, Bandar Abbas approaches, Bushehr military bases). Iran retaliated with drones/missiles against Kuwait (intercepted, no injuries) and Bahrain (residential building damaged, no fatalities). Treasury revoked the Iran oil-sale waiver effective immediately, with wind-down required by 17-JUL. Trump told reporters at the NATO summit in Ankara he believes the MOU is "over," though he said negotiators may continue talking; Iran's military leadership pledged a "crushing response." Khamenei's funeral concludes with burial in Mashhad 09-JUL -- Doha talks remain suspended, now superseded by the MOU dispute rather than solely the funeral pause.	
SALUTE	SIZE: US-Iran MOU: signed 17-JUN-2026, now Day 22 of the 60-day framework -- status disputed by both sides. 07-JUL: Iran struck three tankers near Limah, Oman. Overnight 07/08-JUL: CENTCOM struck 80+ targets in Iran. Iran retaliated vs Kuwait and Bahrain same day. Treasury revoked the Iran oil-sale waiver. Trump declared the MOU "over" at the NATO summit in Ankara while leaving room for talks to continue. ACTIVITY: Iran struck three tankers off Limah, Oman on 07-JUL -- Al Rekayyat (Qatari LNG), Wedyan (Saudi crude), Cyprus Prosperity (Liberian-flagged); no casualties or environmental impact reported, per UKMTO. Overnight 07/08-JUL, CENTCOM struck 80+ targets across Iran including Qeshm Island, Bandar Abbas-area coastal defense, and two military bases in Bushehr province; no deaths/injuries reported by Iranian state media. Iran retaliated with drones/missiles against Kuwait (intercepted by air defenses, no injuries) and Bahrain (residential building near the international airport damaged, no fatalities). Treasury revoked the Iranian oil-sale waiver same day, effective immediately, wind-down required by 17-JUL; OFAC issued an amended Iran-related General License. Trump told reporters at the NATO summit in Ankara he believes the MOU is "over" and called Iran's leadership "scum," but said he "might" allow talks to continue, calling them potentially "a waste of time." Iran's military leadership pledged a "crushing response." Khamenei's funeral concludes with burial in Mashhad 09-JUL -- Doha talks remain suspended, now superseded by the MOU dispute. LOCATION: Hormuz/Gulf of Oman: 07-JUL tanker strikes near Limah, Oman; 08-JUL CENTCOM strikes on Qeshm Island/Bandar Abbas/Bushehr. Kuwait and Bahrain: Iranian retaliatory strikes 08-JUL, both intercepted/limited-damage. Doha, Qatar: talks suspended, superseded by MOU dispute. Mashhad, Iran: Khamenei burial 09-JUL. Brent crude: ~\$78/bbl, up from ~\$72 (06-JUL), +~8pct on the strike exchange. TIME: MOU signed 17-JUN-2026, now Day 22 of the 60-day framework -- status disputed. Limah/Oman strikes: 07-JUL. CENTCOM strikes: overnight 07/08-JUL. Kuwait/Bahrain retaliation: 08-JUL, same day. Oil waiver revoked: effective 08-JUL, wind-down by 17-JUL. Khamenei burial: 09-JUL, Mashhad. Hormuz physical normalization: 9-12 months under an optimistic scenario (IATA/IEA), now less certain given the strike exchange. EQUIPMENT: IRGC: projectiles/drones vs. tankers (Limah, Oman, 07-JUL); drones/missiles vs. Kuwait and Bahrain (08-JUL). CENTCOM: precision munitions vs. 80+ Iranian targets (air defense, coastal surveillance, SAM, anti-ship cruise missile, drone-launch sites). Kuwait/Bahrain air defenses: intercepted incoming fire. 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 131.	

UNIT: US CENTCOM (strikes); IRGC/IRGC Navy (tanker strikes, Kuwait/Bahrain retaliation); Kuwait and Bahrain air defenses (interception); US Treasury/OFAC (oil-waiver revocation); Trump (MOU-status statement, Ankara); Gharibabadi (Iran's Burgenstock/Doha technical-team lead); 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 131 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 14): CHANGE FROM PRIOR (Day 10 to Day 14): 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 transmitter roster 31 down to 18 as of 07-JUL. Current cycle status: Brent ~\$78 (08-JUL, up from ~\$72 06-JUL on the strike exchange); Venezuela 3,535 dead, unchanged; NWR 23 OOS/DEGRADED, up from 18, 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 131 | 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 131.

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 131 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 22. IAEA Blackout: Day 131 (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 22 -- 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 | SIMPLEHELP AND SHAREPOINT KEYS -- OVERDUE A SECOND CYCLE (DOWNGRADED FROM FLASH)**HIGH | UPDATED | 8****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 OI DC 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-2026-45659 (Microsoft SharePoint Server, deserialization RCE, CVSS 8.8, Site Member-level auth required, Storm-2603/Warlock ransomware confirmed exploiting) -- federal deadline 04-JUL, now overdue. CVE-2026-48558 (SimpleHelp RMM, OI DC authentication bypass, CVSS 10.0, TaskWeaver/Djinn Stealer malware deployed) -- federal deadline 02-JUL, now overdue. No workarounds for either -- upgrade only. Federal agencies remain in violation of BOD 26-04 on both entries. CISA added 3 new KEVs 07-JUL (JoomShaper, Langflow, Joomlack) -- low relevance, not elevated to standalone tracking. Prior-cycle Cisco SD-WAN/Cisco UCM/PTC Windchill/Ubiquiti cluster not independently re-verified this cycle -- cut rather than carried without justification.

ACTIVITY: CVE-2026-45659: authenticated attacker with Site Member permissions triggers deserialization, executes arbitrary code. Storm-2603 deploying Warlock ransomware; a second, unrelated actor observed in the same victim networks using DLL side-loading. CVE-2026-48558: unauthenticated OI DC flow manipulation bypasses auth entirely; ~14,000 SimpleHelp servers externally exposed, ~1,000 estimated directly vulnerable. Detection: SharePoint -- unexpected admin account creation, ransomware file markers. SimpleHelp -- unexpected technician account registrations, OI DC login bypass attempts in server logs. point: both KEVs give an attacker persistent, credentialed access to enterprise document stores (SharePoint) or downstream MSP-managed client environments (SimpleHelp) -- not a single-host compromise.

LOCATION: SharePoint Server is deployed enterprise-wide as the backbone of document sharing and intranet collaboration -- compromise exposes sensitive business documents and

integrates with enterprise identity infrastructure. SimpleHelp is widely deployed by MSPs for remote monitoring/management; a single compromised server gives an attacker reach across every client organization that provider manages, and malicious activity can appear to originate from a trusted source.

TIME: SimpleHelp deadline (02-JUL) is now 6 days overdue; SharePoint deadline (04-JUL) is now 4 days overdue. Both remain unremediated for a second full cycle running.

EQUIPMENT: On-prem Microsoft SharePoint Server (Subscription Edition, 2019, 2016); SimpleHelp RMM server software used by MSPs and IT teams for remote endpoint management.

UNIT: CISA; Microsoft MSRC/Incident Response; SimpleHelp vendor advisory; Arctic Wolf; SOCRadar.

Analyst Assessment

FOUR-VECTOR PATTERN: TWO-VECTOR PATTERN: enterprise collaboration/document infrastructure (SharePoint) plus MSP remote-management tooling (SimpleHelp) -- both give an attacker durable, credentialed access to environments beyond the single host initially compromised, rather than a one-off opportunistic hit. Both deadlines have now lapsed for a full second cycle with confirmed active exploitation (Storm-2603/Warlock on SharePoint; TaskWeaver/Djinn Stealer on SimpleHelp), which argues for treating unpatched instances of either as a live incident-response matter, not routine patch backlog.

REMEDiation GAP: Microsoft's own May Patch Tuesday release notes omitted CVE-2026-45659 entirely; the security bulletin was not published until 27-MAY, weeks after the patch had already shipped -- a disclosure failure that widened the undetected-exploitation window industry-wide. Any organization running on-prem SharePoint or SimpleHelp that has not patched or isolated affected servers should treat this as an active incident-response situation, not a routine patch-management item.

GEOPOLITICAL CONTEXT: The active US-Iran strike exchange (see GEO-CF-IRAN) raises the standing question of whether IRGC-nexus or MOIS-affiliated actors could piggyback on unrelated criminal SharePoint/SimpleHelp exploitation for opportunistic access -- Iran has a documented pattern of escalating cyber operations during confrontation periods, including the CISA-FBI-NSA joint ICS/OT advisory from April 2026 (see Section 4A background watch). No attribution linking Storm-2603 or the SimpleHelp campaign to Iran has been made by CISA or Microsoft; both are tracked as financially-motivated criminal activity.

DEADLINE POSTURE: TWO KEVs OVERDUE THIS CYCLE, BOTH SECOND-CYCLE: SimpleHelp (CVE-2026-48558, deadline 02-JUL, now 6 days overdue) and SharePoint (CVE-2026-45659, deadline 04-JUL, now 4 days overdue). Federal agencies remain in violation of BOD 26-04 on both. Conduct compromise assessment before patching -- do not assume a clean patch resolves prior exploitation. Sectors at risk: any organization running on-prem SharePoint, and any MSP-managed environment running SimpleHelp RMM.

LIKELIHOOD: Unpatched SharePoint Server CVE-2026-45659 instances experience continued exploitation this week: VERY LIKELY -- no workaround exists; Storm-2603/Warlock exploitation already confirmed; low privilege bar (Site Member) for initial access.

CONFIDENCE: HIGH.

LIKELIHOOD: Unpatched SimpleHelp RMM servers experience continued exploitation within 7 days: VERY LIKELY -- unauthenticated OIDC bypass, ~1,000 directly vulnerable servers estimated exposed, TaskWeaver/Djinn Stealer malware already confirmed deployed.

CONFIDENCE: HIGH.

LIKELIHOOD: A third distinct actor piggybacks on either KEV within 7 days given public exploitation reporting: ROUGHLY EVEN CHANCE -- KEV listing and active-exploitation reporting typically accelerate copycat activity, but no second-actor reporting has emerged yet beyond the SharePoint case's documented dual-intrusion. **CONFIDENCE:** MODERATE.

ALT HYP

ALT A: Both KEVs are independent, financially-motivated criminal exploitation with no state linkage [likely]

Storm-2603 is a known ransomware affiliate (Warlock) with a documented pattern of exploiting on-prem SharePoint flaws for initial access dating to mid-2025; TaskWeaver/Djinn

Stealer are credential-harvesting tools consistent with criminal infostealer campaigns, not espionage tradecraft; neither Microsoft nor CISA has attributed either campaign to a state actor.

✓ **Supporting Evidence:** Storm-2603's toolset and objectives (ransomware deployment, credential theft) match its historical criminal profile exactly; a second, unrelated actor observed in the same SharePoint victim networks further indicates an opportunistic, crowded criminal target rather than a coordinated single-actor operation.

✗ **Ruling-Out Evidence:** The presence of a second, unattributed actor in the same SharePoint victim networks means at least one exploiting party's motives and affiliation remain genuinely unknown.

ALT B: A nation-state actor (possibly Iran-nexus, given the active strike exchange) opportunistically piggybacks on the unpatched population [possible, unconfirmed]

KEV backlog history (Check Point, PAN-OS) demonstrates that federal agencies routinely miss KEV deadlines; SD-WAN complexity and management-plane sensitivity can slow emergency patching cycles; MSP-tooling exploits like SimpleHelp create broad downstream exposure and maximize criminal ROI; VPN auth bypass (Check Point) is a classic ransomware initial-access vector.

✓ **Supporting Evidence:** Iran has a documented pattern of escalating cyber operations against US critical infrastructure during periods of confrontation (CISA-FBI-NSA joint ICS/OT advisory, April 2026); a large unpatched population of internet-facing SharePoint and SimpleHelp servers would be an attractive opportunistic access vector for any actor, state or criminal, during the current GEO-CF-IRAN escalation.

✗ **Ruling-Out Evidence:** No technical indicator (malware family, infrastructure, TTP) in either the SharePoint or SimpleHelp campaigns matches known Iran-nexus tooling; both campaigns' observed objectives (ransomware, credential/infostealer) are financially rather than intelligence-motivated.

SOURCES

CISA KEV Catalog (09-JUN additions) | CISA KEV Catalog -- CVE-2026-45659 addition (01-JUL) | CISA KEV Catalog -- CVE-2026-48558 addition | SecurityWeek -- CISA SharePoint KEV warning | Arctic Wolf -- SimpleHelp CVE-2026-48558 advisory | Threat-Modeling.com -- Vulnerability Intelligence Report 06-JUL | CybelAngel -- Weekly Cyber Roundup (Storm-2603 attribution)

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: prior cycles had this background-watch item sharing the CYB-001 identifier with the KEV-cluster entry (now WATCH/HIGH tier, downgraded from FLASH this cycle) -- corrected; this background item is unnumbered/standing watch and does not share an ID with any scored 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 14 -- RECOVERY/RECONSTRUCTION PHASE

FLASH | CONTINUED | 22

Why This Cycle	Toll update only -- unchanged at 3,535, no new government figure 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: Toll update only -- unchanged at 3,535, no new government figure this cycle. ACTIVITY: Day 14. Toll remains 3,535 dead, no update since 06-JUL. Posture unchanged: recovery/reconstruction. 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 14 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 14+): 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 - 08 JULY 2026**

ENR-001 OIL / ENERGY PRICES: Brent ~\$78/bbl (08-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: ~\$72 (06-JUL) to ~\$78 (08-JUL), roughly +8pct -- 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 verified 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

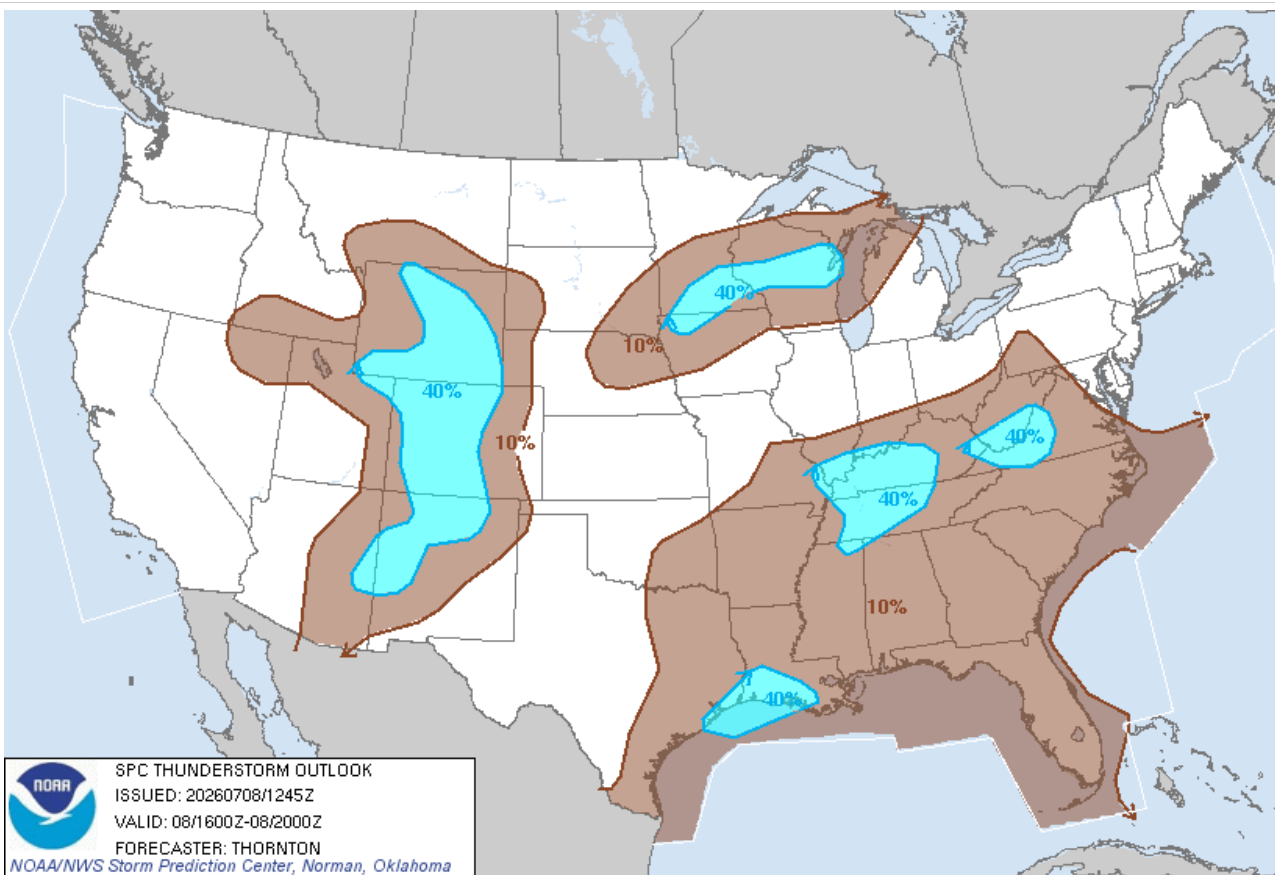
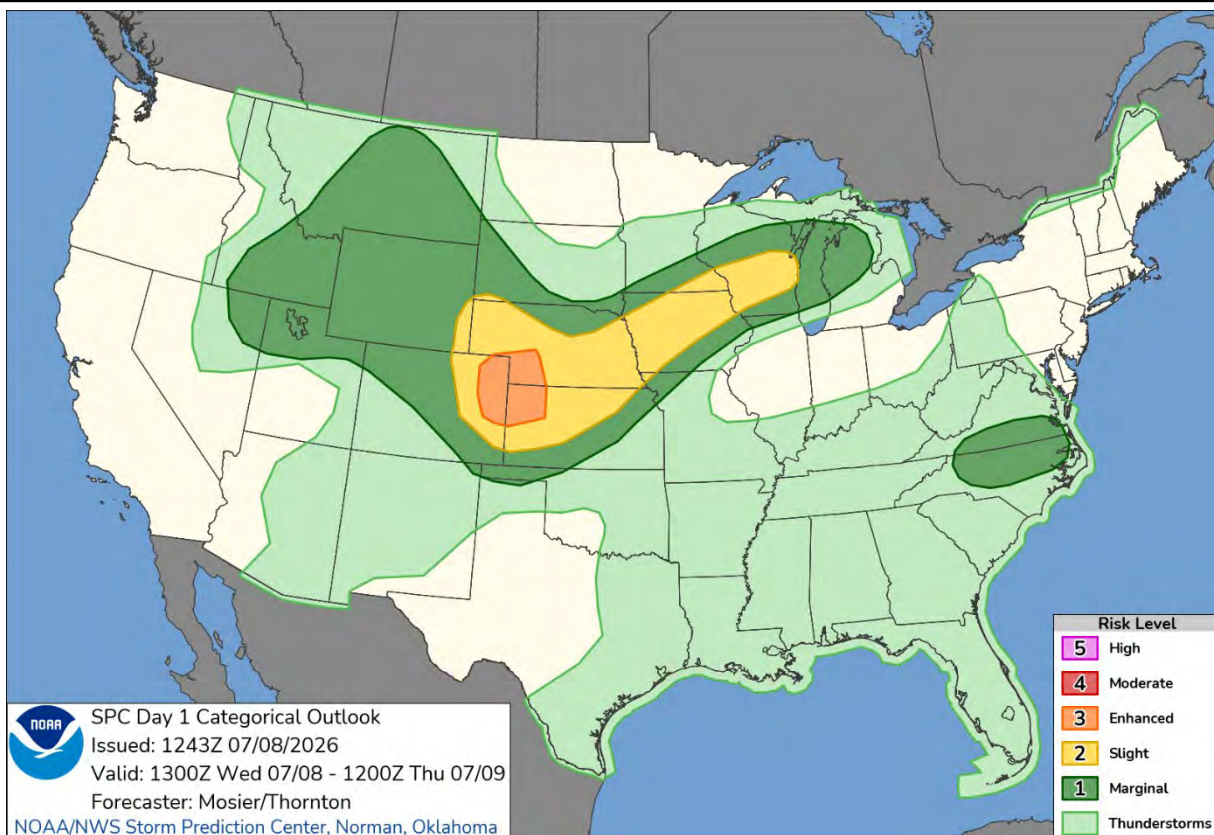
AVIATION / TRANSPORTATION MONITORS - 08 JULY 2026

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 29, 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.

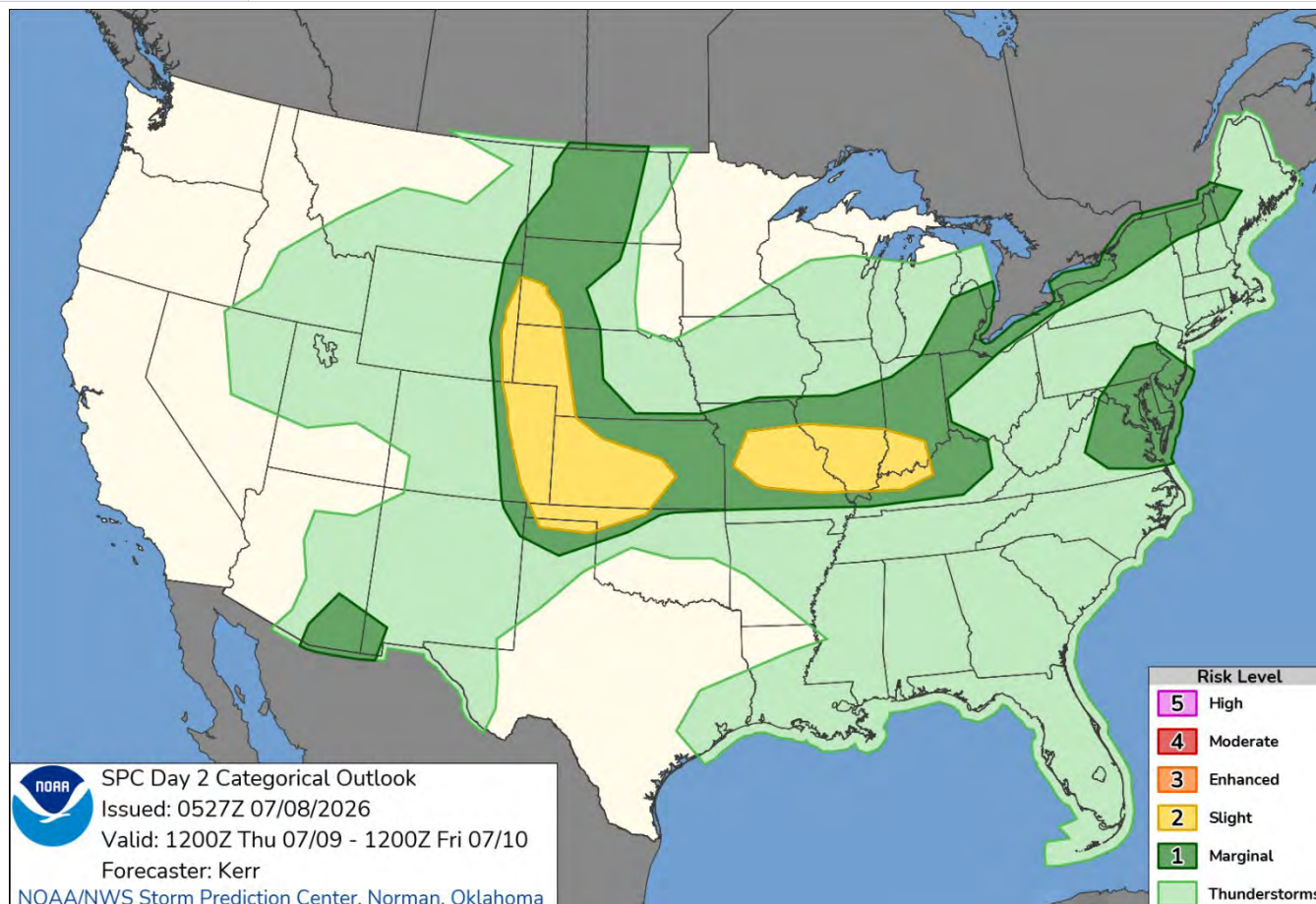
SECTION 7 - METEOROLOGICAL WEATHER / SEVERE WEATHER / FIRE WEATHER

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	NWS Storm Prediction Center Norman OK, 1257 AM CDT Wed Jul 08 2026. SLIGHT risk of severe thunderstorms from parts of the central Plains into the mid Missouri and upper Mississippi Valleys. Thunderstorms with severe wind gusts and hail possible this afternoon/evening across the central Plains and from the Missouri Valley into the upper Mississippi Valley; isolated severe gusts also possible in the northern High Plains and from North Carolina into southern Virginia. A cold front advancing into the central Plains/mid Missouri Valley will be the primary focus for initiation, with a 30pct damaging-wind-swath probability added for southern Nebraska this evening. (Forecaster: SPC Norman)	



**SPC Day 2
Convective
Outlook**

NWS Storm Prediction Center Norman OK, 1227 AM CDT Wed Jul 08 2026. SLIGHT risk of severe thunderstorms Thursday into Thursday night across the central Great Plains and lower Missouri Valley into the lower Ohio Valley. Scattered strong-to-severe thunderstorm clusters possible, primary hazard severe wind gusts with some hail; a damaging-wind swath is possible in the lower Missouri/Ohio Valley corridor and off the Front Range into the central Great Plains, aided by CAPE on the order of 2000+ J/kg. Isolated severe risk also flagged for the northern High Plains and North Carolina/southern Virginia, and thunderstorm development is probable Thursday afternoon in southeastern Arizona/southwestern New Mexico. (Forecaster: Kerr)

**SPC Day 3
Convective
Outlook**

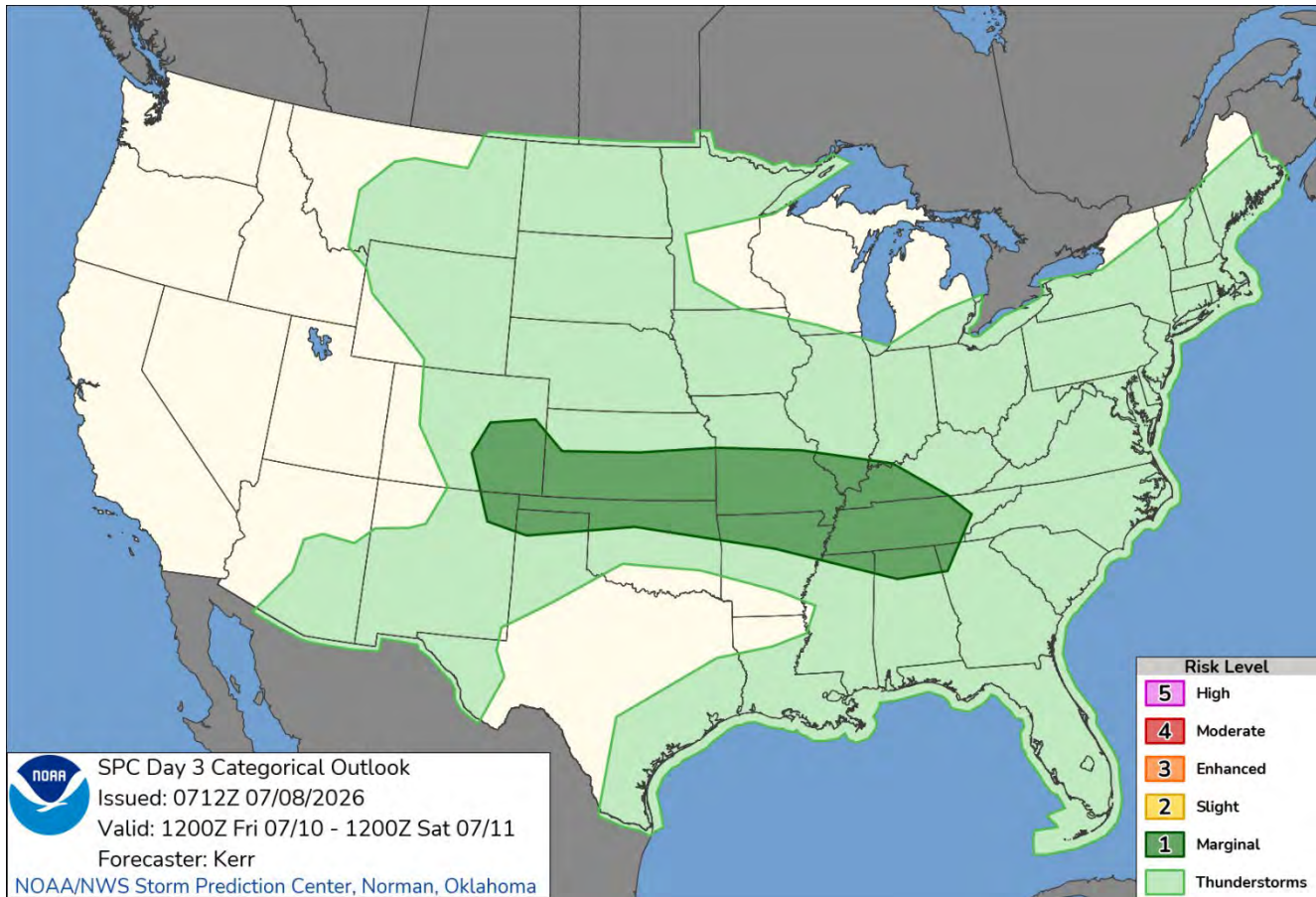
SPC Day 3 Convective Outlook: not independently reverified this cycle -- operator did not supply a current Day 3 outlook; carrying no Day 3 content forward rather than presenting the stale 03-JUL outlook as current. Source: NOAA SPC spc.noaa.gov. Wildfire and fire-weather content is reported exclusively 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)

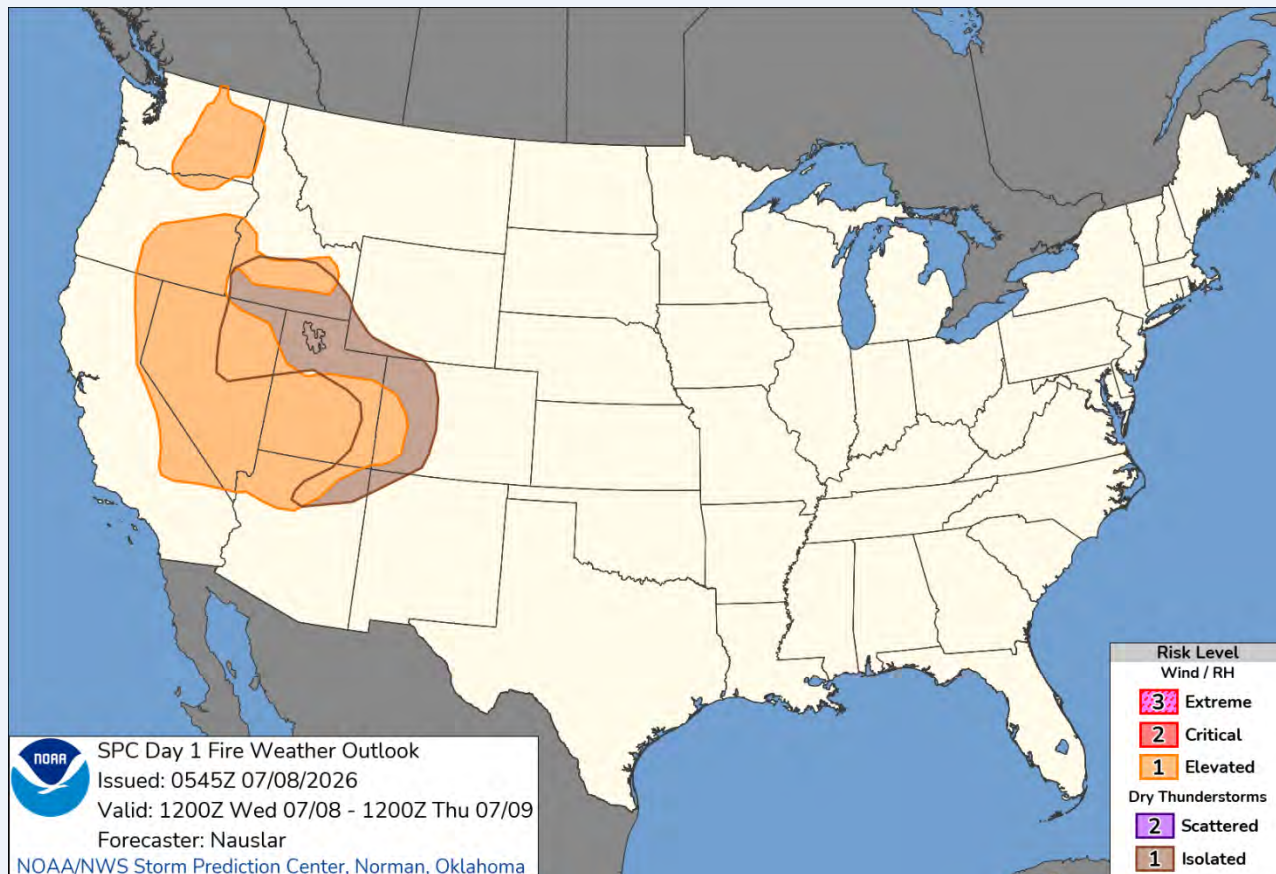
WX-002 | SEC 7B MANDATORY FIRE WEATHER | COTTONWOOD FIRE (UT) -- NATION'S LARGEST | 3 FIREFIGHTERS KILLED KNOWLES FIRE (CO)

FLASH | ACTIVE | 22

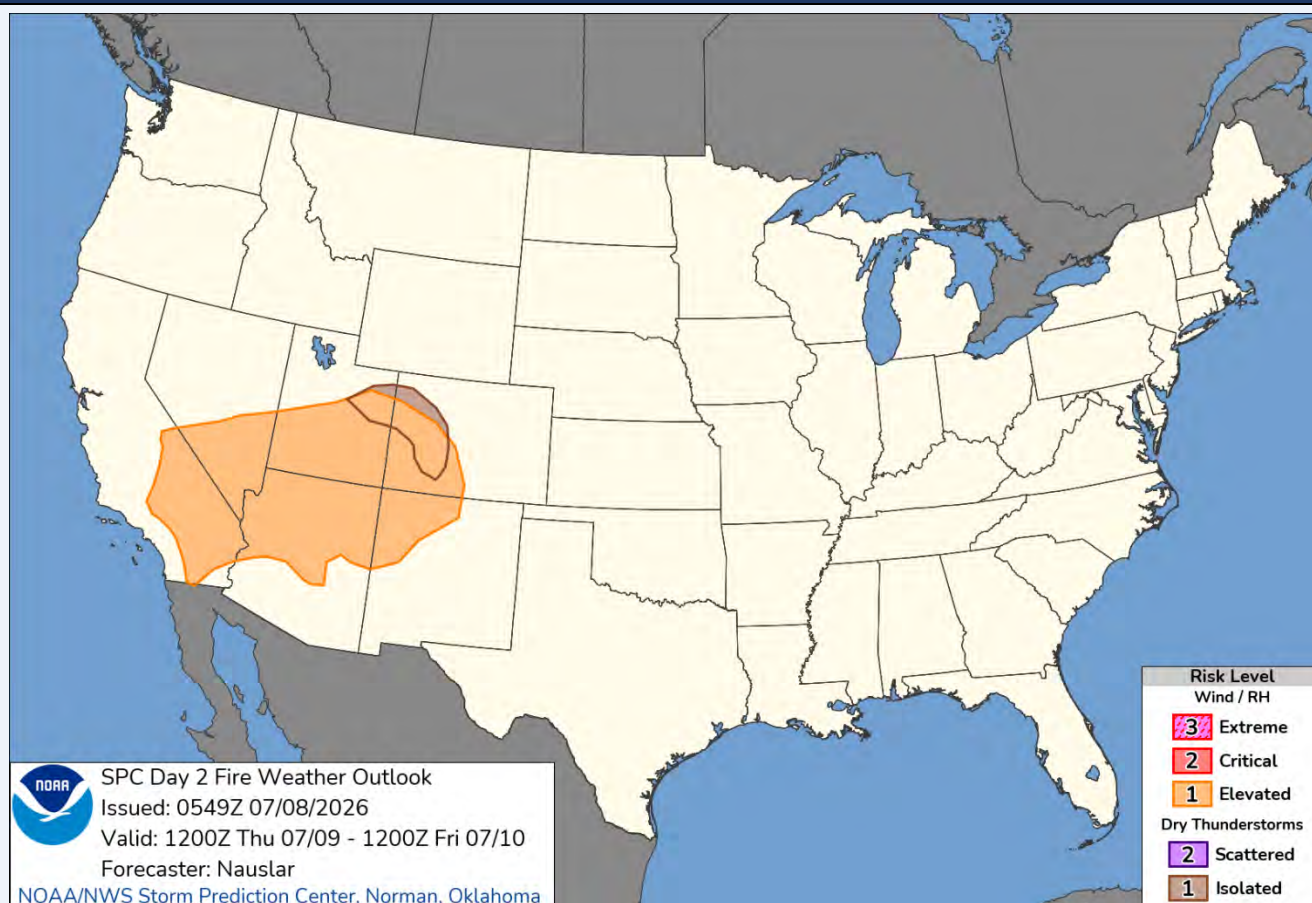
Summary	Cottonwood Fire (UT) remains the nation's largest active wildfire, 96,284 acres, 56% contained as of 06-JUL (ABC4/InciWeb) -- containment source conflict from last cycle is resolved. NPL confirmed 4 of 5 this cycle (gap closed) -- 35 uncontained large fires nationally, 37,209 fires/3.3M+ acres 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**

NWS Storm Prediction Center Norman OK, 1245 AM CDT Wed Jul 08 2026. Upper-level trough moving into southwest Canada; upper high shifting off the southern California coast. West-southwest flow spreads over the West with embedded disturbances. Dry Pacific cold front pushes through the Northwest into the northwest Great Basin/northern Rockies -- west-northwest winds 12-20 mph, gusts 20-30 mph, minimum RH 12-25pct. Ahead of the front, west-southwest winds 12-20 mph/gusts 20-30 mph overlap a dry airmass (RH 5-15pct) across the Great Basin into southeast California, northern Arizona, and far western Colorado. Isolated to scattered mixed wet/dry thunderstorms likely northern Great Basin into the Four Corners; fuels remain receptive despite some wetting rain. (Forecaster: Nauslar)

**SPC Fire Weather
Day 2**

NWS Storm Prediction Center Norman OK, 1249 AM CDT Wed Jul 08 2026. Westerly flow aloft continues across the West; upper high suppressed off the southern California coast. Shortwave trough tracks central California toward the Four Corners. Pacific cold front stalls/weakens over the northern Great Basin/northern Rockies. Broad area of elevated winds/RH develops across the southern Great Basin, Four Corners, and interior southern California -- west-southwest winds 12-20 mph/gusts 20-30 mph, minimum RH 5-15pct. Isolated mostly-dry thunderstorms likely in western Colorado/eastern Utah. Holdovers and growth on active large wildfires in the Four Corners region are a concern given recent lightning and very dry fuels.



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 - 08 JULY 2026

Source: NOAA NWR (noaa_nwr T1) | as of Wed, 08 Jul 2026 09:43:18 GMT

▲ HIGH-GAP ALERT - ACTIVE HAZARD OVERLAP: (1) NM TRIPLE-GAP PERSISTS: Artesia WXN24 / Roswell WWG36 / Carlsbad WWF37 all still OUT OF SERVICE -- Chaves/Eddy counties remain at zero primary NWR coverage during active fire season, unchanged across multiple consecutive cycles. (2) AK CLUSTER EXPANDS: roster grew from 2 to 5 Alaska stations this cycle (Kotzebue, Mt. McArthur, Mt. Robert Barron, Point Pigot, Zarembo Island) -- Cape Gull, listed 07-JUL, has cleared. (3) NEW THIS CYCLE: Santa Ana CA, Leyden MA, Statesville NC, Owyhee NV, Ozona TX, and Rio Grande City TX all newly appear -- confirm with operator whether these reflect new outages or reporting-gap reappearances. (4) CLEARED SINCE 07-JUL: Fountain Hill AR, Colorado Springs CO, Coos Bay OR, Brownsville TX (prior DEGRADED entry). (5) STATUS CHANGE: IN-Angola KXI94 moved from OUT OF SERVICE back to DEGRADED. Net roster size: 23 affected transmitters, up from 18 on 07-JUL. 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	KWN30	Kotzebue	162.550	Fairbanks AK	DEGRADED	Regional coverage reduced
AK	KZZ95	Mt. McArthur	162.525	Juneau AK	DEGRADED	Juneau-area coverage reduced
AK	KZZ87	Mt. Robert Barron	162.450	Juneau AK	DEGRADED	Juneau-area coverage reduced
AK	KZZ93	Point Pigot	162.450	Anchorage AK	OUT OF SERVICE	Anchorage-area coverage gap
AK	KZZ91	Zarembo Island	162.450	Juneau AK	DEGRADED	Juneau-area coverage reduced
CA	WWG21	Santa Ana	162.450	San Diego CA	OUT OF SERVICE	San Diego-area coverage gap
GA	WXM65	Baxley	162.525	Jacksonville FL	OUT OF SERVICE	Persists from 07-JUL
IL	KXI79	Hillsboro	162.425	St. Louis MO	OUT OF SERVICE	Persists from 07-JUL
IN	KXI94	Angola	162.425	Northern Indiana IN	DEGRADED	Northern Indiana coverage reduced

FORTUNE FAVORS THE PREPARED DAILY THREAT REPORT 07 JULY 2026						
ST	Callsign	Location	Freq	WFO	Status	Counties / Notes
KS	WXN81	Ulysses	162.450	Dodge City KS	OUT OF SERVICE	Persists from 07-JUL
MA	WXM68	Leyden	162.425	Albany NY	OUT OF SERVICE	New this cycle
ME	WNG547	Sugarloaf Mtn	162.450	Gray/Portland ME	OUT OF SERVICE	Persists from 07-JUL
MI	WNG572	Petoskey	162.475	Gaylord MI	OUT OF SERVICE	Persists from 07-JUL
MN	KXI45	Gunflint Lake	162.525	Duluth MN	OUT OF SERVICE	Persists from 07-JUL
NC	KJY85	Statesville	162.525	Greenville-Spartanburg SC	OUT OF SERVICE	New this cycle
NM	WXN24	Artesia	162.425	Midland/Odessa TX	OUT OF SERVICE	Chaves/Eddy county gap persists
NM	WWF37	Carlsbad	162.475	Midland/Odessa TX	OUT OF SERVICE	Chaves/Eddy county gap persists
NM	WWG36	Roswell	162.450	Albuquerque NM	OUT OF SERVICE	Chaves/Eddy county gap persists
NV	WNG731	Owyhee	162.450	Elko NV	DEGRADED	New this cycle
OR	KIG98	Portland	162.550	Portland OR	DEGRADED	Persists from 07-JUL
TN	WXK63	Shelbyville	162.475	Nashville TN	OUT OF SERVICE	Persists from 07-JUL
TX	WXL44	Ozona	162.500	San Angelo TX	OUT OF SERVICE	New this cycle
TX	WNG601	Rio Grande City	162.425	Brownsville/Rio Grande Valley TX	OUT OF SERVICE	New this cycle

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. 96,284 acres, 56% 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)

Space Weather Message Code WARK04, Serial 5380, issued 2026 Jul 08 0529 UTC: WARNING, Geomagnetic K-index of 4 expected, valid 0528-1200 UTC, onset conditions. Impact area primarily poleward of 65 deg geomagnetic latitude -- weak power grid fluctuations possible, aurora visible at high latitudes (Canada/Alaska). No fresher ALTEF3 continuation message located in this cycle's sweep -- flagged as a gap, not assumed unchanged from 07-JUL.

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; Hormuz-related fertilizer and fuel cost pressure continues to compound into 2026 harvest cost projections. No new agriculture-specific data point beyond the standing drought/fire/fuel-cost picture was identified this cycle.	
Summary	The national wildfire posture (PL4, Cottonwood Fire still the nation's largest active fire -- see WX-002/Section 7B for full operational detail) continues to remove grazing and agricultural land from production in the affected Western states and strain rural firefighting and utility resources. The Southeast drought remains at record severity for the recorded period, compounding a multi-month agricultural disruption. Hormuz-related fertilizer and transportation fuel cost pressure continues into this cycle. \$0.117 SOURCES: NIFC National Fire News (nifc.gov/fire-information/nfn); USDA ERS Food Price Outlook.	
Analyst Assessment	COMPOUNDING STRUCTURE: The combination of drought, above-average fire season, Hormuz-driven fertilizer cost increases, and elevated fuel costs (transportation and mechanized agriculture) creates a structural compounding risk to 2026 harvest projections that will not resolve within this cycle. SOUTHEAST DROUGHT SEVERITY: The SE drought at record levels (records to 1895) for the Sep 2025 - Mar 2026 period represents an exceptional multi-month agricultural disruption. Combined with reduced NWR coverage across the Southeast (NC Ellerbe OOS, GA Baxley OOS), the region has compound infrastructure and informational gaps. GLOBAL FOOD SECURITY TRAJECTORY: The WFP'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 ~\$78/bbl (08-JUL, see ENR-001) on the US-Iran strike exchange, following the 07-JUL 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 BUNDIRUGYO PHEIC DAY 54 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 54 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 54. 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-
JUL, FLAGGED
FOR RE-
ASSESSMENT
07-JUL

PREP-CON 3 -- BROWN SKY (Incident Probable) CONFIRMED HELD BY OPERATOR. Drivers this cycle: US-Iran direct strike exchange overnight 07/08-JUL -- CENTCOM vs 80+ Iran targets, Iran retaliation vs Kuwait/Bahrain, oil-waiver revoked, MOU declared "over" by Trump (see GEO-CF-IRAN); Venezuela toll unchanged at 3,535, no new update (see GEO-003); Ebola PHEIC cases unchanged at 1,561/506, no new update (see PHS-002); Cottonwood Fire now 56% contained, improving (see WX-002/Sec 7B); both PJM and Duke Energy 202(c) grid emergency orders remain expired, no active grid emergency this cycle. **OPERATOR DETERMINATION:** despite the strike-exchange escalation, PREP-CON is held at 3 rather than escalated to 2 -- the triggering events (Hormuz, Gulf states) are non-CONUS and do not meet the PREP-CON Triggers Annex v1.1 threshold for a CONUS-facing incident-possible escalation. This determination is now final for 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-fee dispute and asset-transfer standoff remain unresolved; IAEA access remains unrestored (Day 131 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-fee dispute resolves, frozen assets transfer, and the national fire/heat posture eases, the basis for holding PREP-CON 3 erodes meaningfully. Monitor Doha outcome and PL4 status as the primary triggers for re-assessment.

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. 23 NWR transmitters OOS/DEGRADED (10 OOS / 13 DEGRADED, up from 18 on 07-JUL -- roster worsened). No new GPS/GNSS jamming reported this cycle beyond the standing Middle East hotspots (see AVN-001). SharePoint and SimpleHelp KEVs remain overdue with active exploitation history; a new critical SimpleHelp OICD 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		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. LIKELIHOOD: Further organized anti-immigration violence Belfast next 7 days: UNLIKELY given counter-protest momentum and arrests. CONFIDENCE: MODERATE. LIKELIHOOD: Active Club replication another UK/European city next 30 days: ROUGHLY EVEN CHANCE. CONFIDENCE: MODERATE.	

ALT HYP

ALT A: De-escalation holds; criminal process prevents recurrence [likely]

Counter-protest dominance 13-JUN; 17 charged; PSNI elevated posture; community and political leadership unified.

✓ **Supporting Evidence:** Active Club network intact; Alodid trial proceedings create recurring flashpoints; structural conditions unchanged.

✗ **Ruling-Out Evidence:** Counter-protest precedent is historically most reliable predictor; Belfast has absorbed worse without sustained recurrence.

ALT B: Recurrence during Alodid trial or another triggering incident [unlikely]

Active Club explicitly calling for replication; trial dates will generate media coverage; Southampton/Scottish spread shows contagion.

✓ **Supporting Evidence:** 17 charged creates deterrent; PSNI elevated; counter-protest movement demonstrated organizational capacity.

✗ **Ruling-Out Evidence:** Near-term recurrence in days assessed as unlikely; trial proceedings (weeks/months) are more plausible recurrence trigger.

SOURCES

Al Jazeera 13-JUN anti-racism rally Belfast | PBS - Belfast stabbing riots explainer | NBC News - Musk amplification | ABC News - extra officers deployed

STSB-001 | FIFA WORLD CUP DAY 29, 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 29, 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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Semper Paratus, Semper Gumby.

