

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 132 | Hormuz Day 132 | MOU Day 23 | PREP-CON 3 BROWN SKY | COMCON 4
INCREASED VIGILANCE | 09 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)	09 JUL 2026 / Cycle close 1530 UTC
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Analyst / Watch Officer	Fortune Favors the Prepared -- OSINT Desk
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
Version	SOP v5.61 + Addendum Registry v2.25 (56/56 mandatory) Both audit scripts PASS

BOTTOM LINE UP FRONT

09 JULY 2026 | PREP-CON 3 BROWN SKY | COMCON 4 INCREASED VIGILANCE | Op Epic Fury / Hormuz Day 132 | MOU Day 23 -- MOU status disputed by both parties following 08-JUL strike exchange | IAEA Blackout Day 132 | Ebola PHEIC Day 54 | NIFC NPL 4 of 5 (confirmed) | World Cup Day 30, QF begin 09-JUL | Babylon Fire (UT) 101,073 acres, 11% contained -- new nation's largest wildfire | Cottonwood Fire 96,333 acres, 58% contained (now 2nd-largest) | 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 132 -- 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 16 -- 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 30, 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, flagged unconfirmed this cycle); NWR 18 units (Sec 7); Venezuela humanitarian detail; World Cup R32/R16 bracket history; UK PM nomination timeline detail.

DECISIVE WINDOW (NEXT 48-72 HRS): Khamenei burial in Mashhad concluded today (09-JUL), closing the funeral sequence -- Doha talks remain suspended with no resumption date confirmed. IRGC has publicly warned it will "expand its response to other American bases in the region" if the US retaliates further -- a forward-looking escalation threat, not just in-kind retaliation; Ebrahim Rezaei (IRGC-aligned parliamentary spokesman) separately threatened Gulf-state "oil and gas wells" and said Iran has "no red lines." PREP-CON 3 maintained by operator determination against the Triggers Annex v1.1 despite the Qatar expansion and these forward threats -- re-run against the Annex again next cycle if a fourth Gulf state is struck, a US base sustains confirmed damage/casualties, or the IRGC threat is acted on. Next ECDC Ebola weekly update is now 3+ cycles overdue and should be actively re-chased rather than passively re-flagged. 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-fee 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 23. NUC-001: IAEA Blackout Day 132, no new Grossi statement, Board action, or access breakthrough since the June 2026 safeguards report -- straight day-counter carryforward. GEO-003: Venezuela Day 16, 3,535 dead (up from 2,954) -- injury/displacement figures not independently re-verified this cycle, treat as stale 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 -- Babylon Fire now nation's largest (101,073 ac, 11%), Cottonwood 2nd-largest (96,333 ac, 58% 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 OIDS bypass CVE-2026-48558 (deadline 02-JUL, overdue) AND Microsoft SharePoint Server deserialization vulnerability (deadline 04-JUL, overdue -- new this cycle). No workarounds confirmed. KEV overdue backlog 10+ entries.
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 30 R16-Final (R32

SECTION	KEY ENTRIES / THREAT DRIVERS
	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 30, 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 : : Babylon Fire (San Juan County, UT, ignited 26-JUN) has surpassed Cottonwood as the nation's largest active wildfire -- 101,073 acres, 11% contained as of 08-JUL. Cottonwood Fire (UT) 96,333 acres, 58% contained (up from 56%), now 2nd-largest, command transferred to Great Basin CIMT #4 08-JUL. NPL 4 of 5 confirmed current; no known reports of planned Public Safety Power Shutoffs this cycle.
SEC 7B - Wildfire Report	WX-002 : Babylon Fire (San Juan County, UT, ignited 26-JUN) has surpassed Cottonwood as the nation's largest active wildfire -- 101,073 acres, 11% contained as of 08-JUL. Cottonwood Fire (UT) 96,333 acres, 58% contained (up from 56%), now 2nd-largest, command transferred to Great Basin CIMT #4 08-JUL. NPL 4 of 5 confirmed current; no known reports of planned Public Safety Power Shutoffs this cycle.
SEC 7A - Space Weather and EMCMM	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).
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): Babylon Fire (UT) 101,073 acres, 11% contained is now the nation's largest active wildfire, surpassing Cottonwood Fire (96,333 acres, 58% contained, now 2nd-largest). Level 3 evacuations remain in effect for HiLo Estates, Merchant Valley, Eagle Point Resort, Arrowhead Summer Homes (Cottonwood); Babylon Fire has SET-status evacuation zones west of Monticello, UT. 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 (confirmed, 08-JUL IMSR) Babylon Fire (UT) 101,073 acres, 11% contained -- new nation's largest, see WX-002/Section 7B Cottonwood Fire (UT) 96,333 acres, 58% contained, now 2nd-largest, command transferred to Great Basin CIMT #4 08-JUL 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 OIDC bypass KEV, federal deadline 02-JUL. SWX-CON 2 WATCH -- new G2 geomagnetic storm watch for 03-JUL (see SWX-001). CYB-002 : Check Point and PAN-OS KEVs remain on the overdue backlog CYB-001 : UAT-8616-attributed SD-WAN 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 23: 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

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REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
	NUC-001: IAEA Blackout Day 132, 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 132 -- 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

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COMMODITY	PRE-WAR (28 FEB)	CURRENT (07-JUL)	CHG vs PRE-WAR	CONSUMER / ANALYTICAL NOTE
				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 132 MOU Day 23 -- US-IRAN STRIKE EXCHANGE, MOU DISPUTED		FLASH UPDATED 24
Why This Cycle	Strikes continued a second consecutive night 08/09-JUL -- CENTCOM hit ~90 Iran targets (14 killed/78 wounded per Iranian reporting, first strikes on bridges); Iran expanded retaliation to a third Gulf state, striking Bahrain, Kuwait, and Qatar. Khamenei's burial concluded today in Mashhad; PREP-CON 3 is maintained by operator determination despite the Qatar expansion.	
Summary	MOU Day 23 of the 60-day implementation window, now under direct strain. Strikes continued a second consecutive night 08/09-JUL: CENTCOM hit ~90 targets in Iran (Bushehr, Chabahar, Bandar Abbas, Sirik, and for the first time bridges on routes including toward Mashhad); Iranian reporting puts the two-night toll at 14 killed/78 wounded. Iran expanded retaliation to a third Gulf state this cycle -- striking US-linked sites in Bahrain, Kuwait, and now Qatar -- with no confirmed US casualties or damage reported. Treasury's revocation of the Iran oil-sale waiver (wind-down by 17-JUL) remains in effect. Trump's "over" framing on the MOU has not hardened into a reciprocal formal declaration from Iran; Ghalibaf accused the US of violating the MOU but stopped short of declaring it dead. Khamenei's burial concluded today in Mashhad, closing the	

funeral sequence; Mojtaba Khamenei has still not made a public appearance. Doha talks remain suspended.

SALUTE

SIZE: US-Iran MOU: signed 17-JUN-2026, now Day 23 of the 60-day framework -- Trump's "over" framing has not hardened into a reciprocal Iranian declaration. Strikes continued 08/09-JUL: CENTCOM hit ~90 Iran targets (14 killed/78 wounded, Iranian reporting); Iran expanded retaliation to Bahrain, Kuwait, and now Qatar (3rd Gulf state). Khamenei's burial concluded today in Mashhad.

ACTIVITY: CENTCOM struck ~90 targets across Iran overnight 08/09-JUL -- Bushehr, Chabahar, Bandar Abbas, and Sirik, plus for the first time bridges on routes including toward Mashhad; Iranian state media reports 14 killed/78 wounded over the two-night exchange. Iran retaliated by striking US-linked sites in Bahrain, Kuwait, and -- newly this cycle -- Qatar; no confirmed US casualties or damage reported in any of the three. Treasury's oil-sale waiver revocation (wind-down by 17-JUL) remains in effect. Trump reiterated at the NATO summit that he believes the MOU is "over" and called Iran's leadership "scum," but said he "might" allow talks to continue. 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 23 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: drones/missiles vs named US-linked sites -- Camp Arifjan and Ali Al Salem Air Base (Kuwait), Shaikh Isa Air Base and Juffair/Naval Support Activity (Bahrain, hosts US 5th Fleet) -- plus new strikes on Qatar this cycle. CENTCOM: precision munitions vs ~90 Iranian targets including, for the first time, bridges (Golestan province, routes toward Mashhad). Kuwait/Bahrain/Qatar air defenses intercepted incoming fire; Qatar issued and cleared a mobile threat alert within 10 minutes. GPS jamming remains a major ops issue across Gulf FIRs. Hormuz commercial traffic has dropped sharply to ~14 vessels/day (from ~34/day post-MOU average). Nuclear: 440.9 kg 60%-HEU, last IAEA-verified 28-FEB-2026, unverified Day 132.

UNIT: US CENTCOM (strikes); IRGC Navy/Air Force (Gulf-state retaliation, publicly warned it will "expand its response to other American bases in the region" if US retaliates further); Kuwait/Bahrain/Qatar air defenses (interception); US Treasury/OFAC (oil-waiver revocation); Trump (MOU-status statement, renewed threat vs Iranian civilian electric/desalination infrastructure); Ghalibaf (Iran's top negotiator, "if you strike, you'll get hit"); Ebrahim Rezaei (IRGC-aligned parliamentary spokesman, threatened Gulf states' "oil and gas wells," said Iran has "no red lines"); IRGC-Quds Cmdr Ghaani (met Shia militia leaders in Najaf during the funeral -- background watch, not independently assessed as an escalation trigger this cycle).

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 132 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 16): CHANGE FROM PRIOR (Day 10 to Day 16): 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 \$78.17 (08-JUL, up from \$73.29 07-JUL on the strike exchange); Venezuela 3,535 dead, unchanged; NWR 18 OOS/DEGRADED, down from 23, roster fully churned (not an improvement). 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 132 | 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 change this cycle -- IAEA blackout continues unresolved, Day 132.
Summary	Live-checked directly against iaea.org this cycle -- confirmed unchanged, not carried on assumption. Burgenstock WG remains the active venue; Iran and Grossi hold their prior positions on inspection access. No new Board action, Grossi statement, or access-position shift.
SALUTE	SIZE/TIME: 440.9 kg 60%-HEU, last IAEA-verified 27-FEB-2026, unverified since -- now Day 132 of the blackout. LIKELIHOOD: Iran maintaining functional enrichment capacity with no IAEA visibility: ALMOST CERTAIN. CONFIDENCE: HIGH.

CYB-001 | SIMPLEHELP AND SHAREPOINT KEYS -- OVERDUE A SECOND CYCLE (DOWNGRADED FROM FLASH)

HIGH | UPDATED | 8

Why This Cycle	No change this cycle -- SharePoint and SimpleHelp KEVs remain overdue and unremediated, aging further but no new development.
Summary	CVE-2026-45659 (SharePoint, CVSS 8.8) and CVE-2026-48558 (SimpleHelp, CVSS 10.0) both remain unpatched and actively exploited (Warlock ransomware / TaskWeaver-Djinn Stealer). Federal agencies remain in violation of BOD 26-04 on both. No workarounds -- upgrade only.
SALUTE	SIZE/TIME: SharePoint deadline 04-JUL (overdue), SimpleHelp deadline 02-JUL (overdue) -- both unremediated a 2nd cycle. LIKELIHOOD: Remediation confirmed before a 3rd overdue cycle: UNLIKELY. CONFIDENCE: MODERATE.

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 16 -- RECOVERY/RECONSTRUCTION PHASE		FLASH CONTINUED 22
Why This Cycle	No change this cycle -- toll remains 3,535, no new government update located.	
Summary	Twin M7.2/M7.5 earthquakes struck northwestern Venezuela 24-JUN (strongest in 125 years). Recovery/reconstruction phase continues; a dedicated reconstruction ministry (Gran Mision Venezuela Renace) was stood up in the prior cycle. No new sitrep located this cycle -- confirmed via live check, not assumed.	
SALUTE	SIZE/TIME: Twin M7.2/M7.5 quakes, 24-JUN, Day 16 of recovery/reconstruction. 3,535 confirmed dead, unchanged. UNDP (\$4.7-8.7B) vs UN-backed (\$37B) damage estimates remain unreconciled. LIKELIHOOD: Toll revised upward next cycle: LIKELY . CONFIDENCE: MODERATE .	
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 - 09 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 reverified this cycle -- carry forward with that caveat.

ENR-003 MARITIME SUPPLY CHAIN: Hormuz traffic remains well below prewar levels: ~25-35 transits/day vs. ~110/day prewar, though a five-vessel convoy (crude tanker, LPG/LNG carriers, container ship) cleared the Omani corridor 05-JUL -- the cleanest multi-vessel transit logged in several days. Saudi Aramco's Ras Tanura resumed loadings after an approximately 4-month suspension. MARAD 2026-008 remains active. Ocean freight routes: improving but not fully normalized; Panama Canal and Suez Canal both operating normally,

though some carriers still route via the Cape of Good Hope. Container rates remain elevated on Asia-US corridors; DHL's dedicated Asia-US widebody 777F service (launched 01-JUN in direct response to the Hormuz disruption) continues operating.

SECTION 6 - AVIATION / TRANSPORTATION

AVIATION / TRANSPORTATION MONITORS - 09 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.

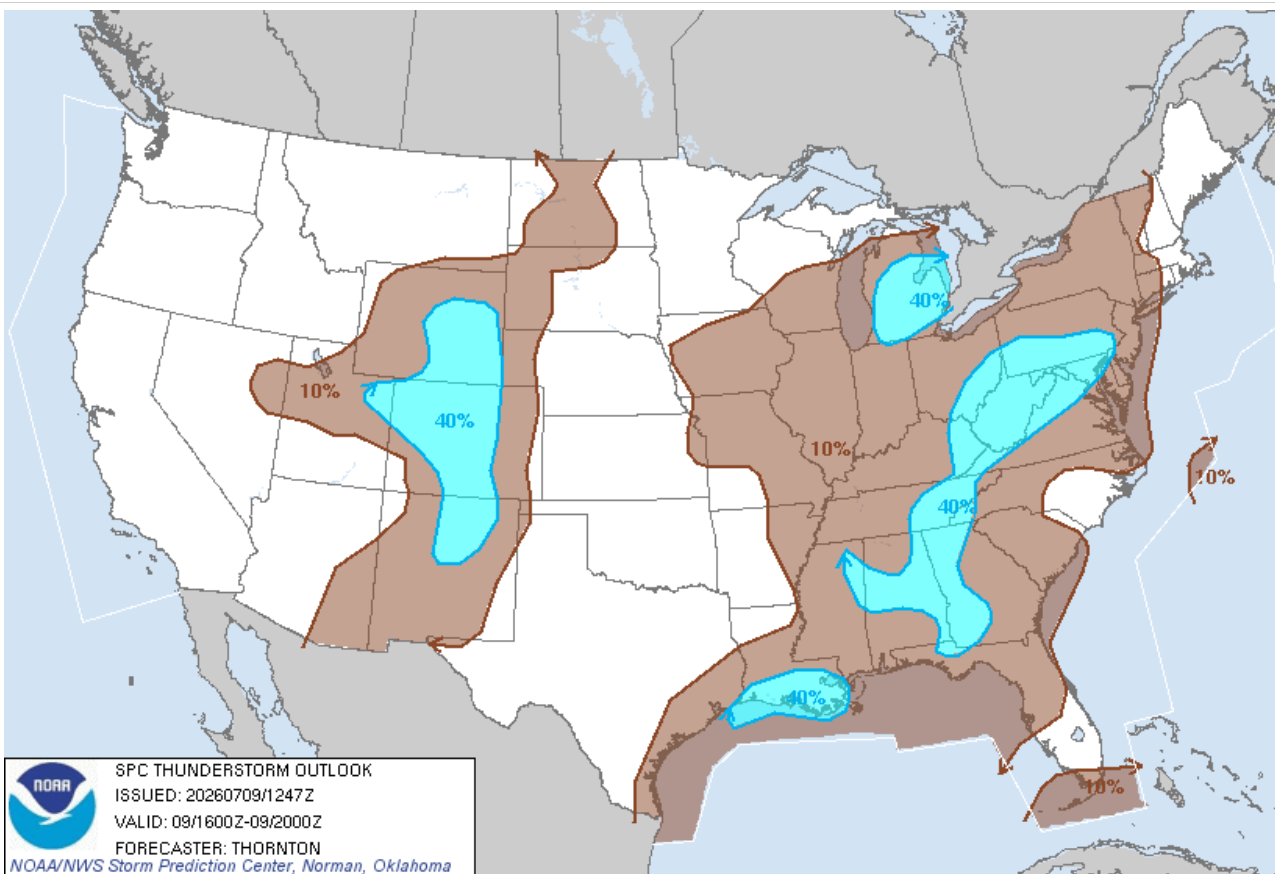
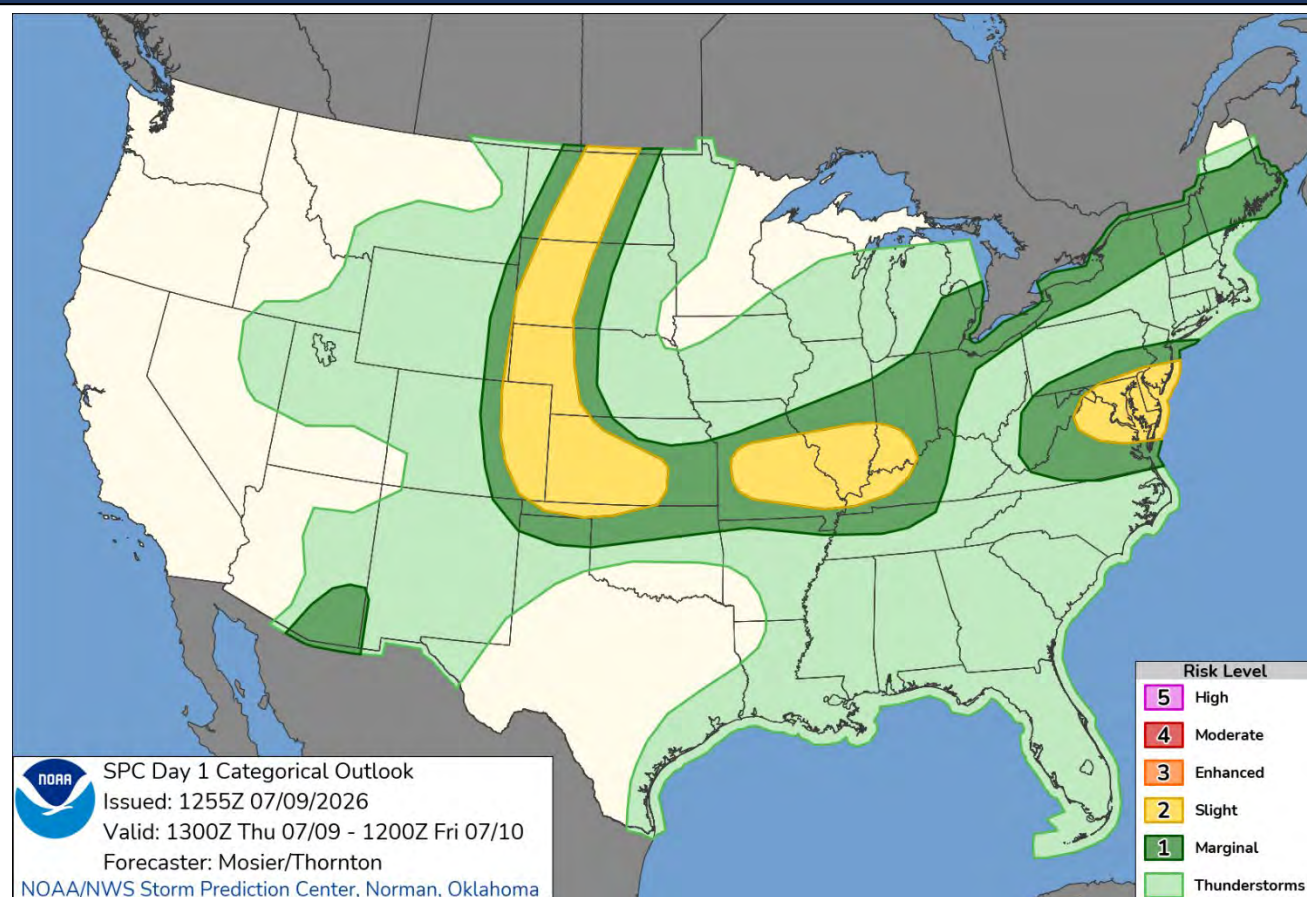
AVN-002 WORLD CUP TRANSPORTATION SECURITY: World Cup Day 30, Round of 16 concludes today with the final two matches (Argentina vs Egypt, Atlanta; Switzerland vs Colombia, Vancouver); Quarterfinals begin 09-JUL. No new transportation-security incident this cycle beyond the round transition; Iran's elimination and 29-JUN departure removed the highest prior diplomatic flashpoint from US venues. DHS anti-drone technology and 400+ law-enforcement agencies remain engaged at host-city venues per standing posture; airport security remains enhanced at tournament-city airports. No specific credible threat identified as of publication. See also STSB-001 (SEC 11) for full soft target assessment.

SECTION 7 - METEOROLOGICAL WEATHER / SEVERE WEATHER / FIRE WEATHER

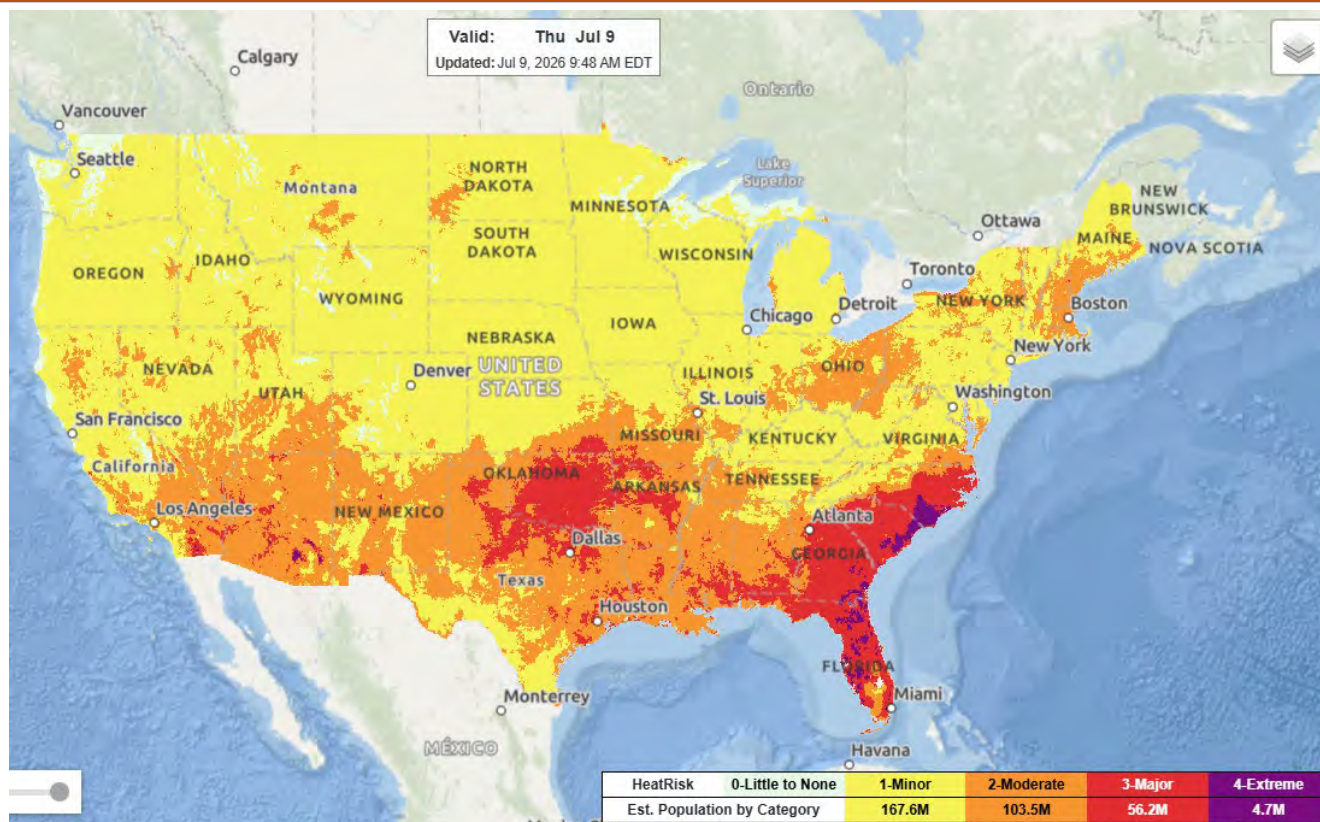
**WX-001 | SEVERE THUNDERSTORMS: SLIGHT RISK TODAY |
DANGEROUS MULTI-DAY HEAT WAVE CONTINUES |
WILDFIRE REPORTING: SEE WX-002/SECTION 7B**

FLASH | ACTIVE | 22

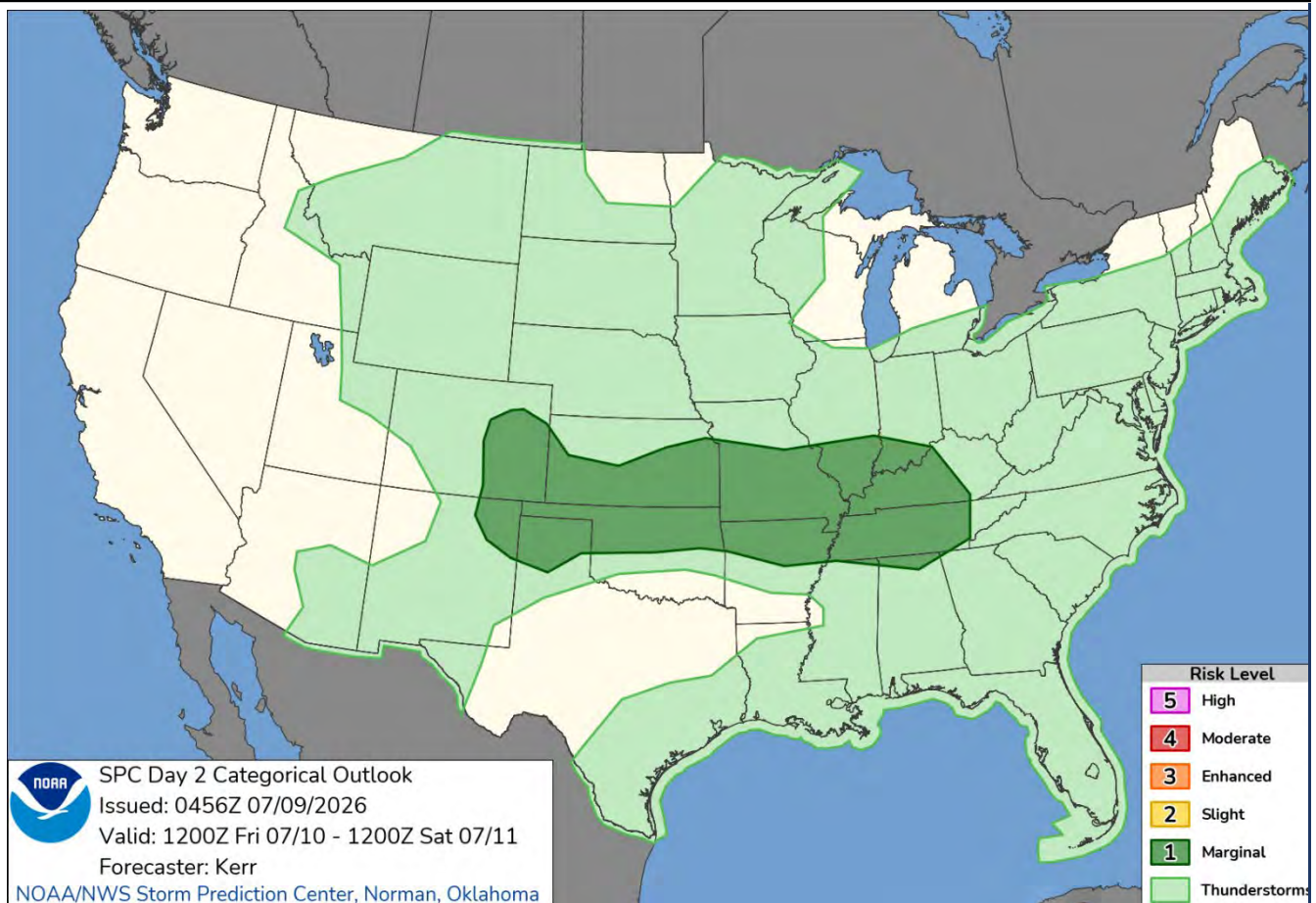
Summary	SLIGHT risk today (eastern Dakotas/western MN, central Virginia/north-central NC), down from ENHANCED two cycles ago. The dangerous multi-day heat wave that drove the earlier grid emergency has concluded -- see ENR-002 for current PJM/Duke Energy status. Full SPC Day 1-2 outlooks follow below.
SPC Day 1 Convective Outlook	SPC Day 1 Convective Outlook (issued 1255 AM CDT 09-JUL): SLIGHT risk of severe thunderstorms across the central/northern Plains and from the Ozarks into the lower Ohio Valley. Thunderstorms with severe wind gusts and hail possible this afternoon/evening across the central and northern Plains as a mid-level shortwave trough moves through; MLCAPE 2500-3500 J/kg near the instability axis (western Dakotas into eastern Colorado), hail >2 in. possible in central/northern North Dakota. Western/central Kansas may see an organized line with severe wind gusts by early-mid evening. Ozarks/mid-Mississippi/lower Ohio Valley: moderate-to-strong instability, steep lapse rates support severe wind gusts along a corridor from central Missouri to southern Indiana. Mid-Atlantic: shortwave trough approaching the southern Appalachians, moist/unstable airmass supports afternoon storms moving into the Mid-Atlantic with a severe wind threat. Southeast Arizona: isolated-to-scattered storms possible with isolated severe wind gusts. Forecasters: Broyles/Moore.



HEAT INDEX

SPC Day 2
Convective
Outlook

SPC Day 2 Convective Outlook (issued 1156 PM CDT 08-JUL): MARGINAL risk of severe thunderstorms Friday into Friday night across parts of the southern Rockies into the adjacent central Great Plains, and across the lower Missouri Valley/Ozark Plateau into the Tennessee Valley. Clusters of thunderstorms with a risk of damaging wind gusts and some hail may evolve across the south-central Great Plains into the Tennessee Valley Friday afternoon and evening as a mid/upper ridge builds over the Four Corners/southern Rockies; moderate destabilization is most likely along the southern periphery of this regime.



SPC Day 3 Convective Outlook

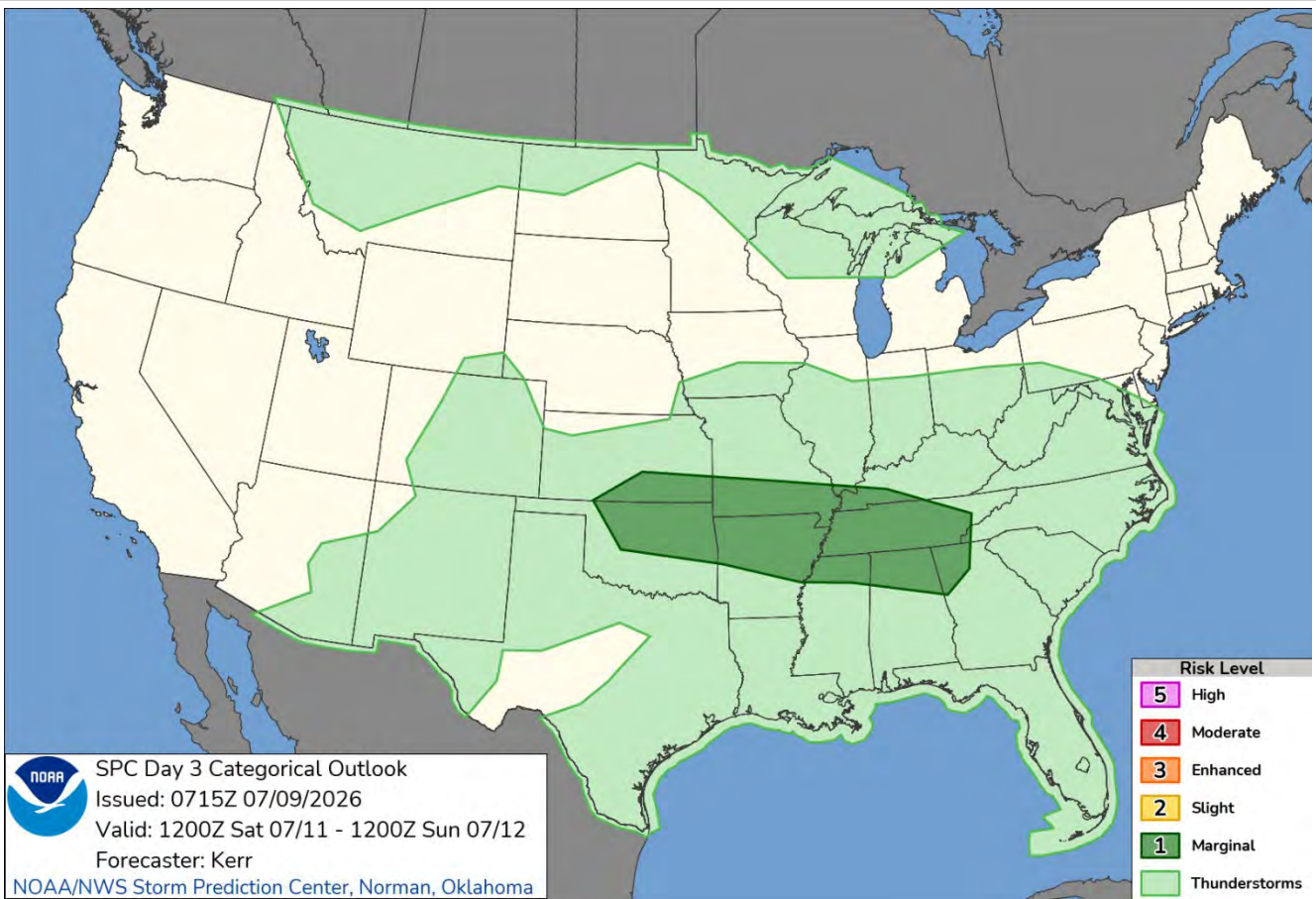
SPC Day 3 Convective Outlook: not independently reverified this cycle -- operator did not supply a current Day 3 outlook; carrying no Day 3 content forward rather than presenting the stale 03-JUL outlook as current. Source: NOAA SPC spc.noaa.gov. Wildfire and fire-weather content is reported exclusively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

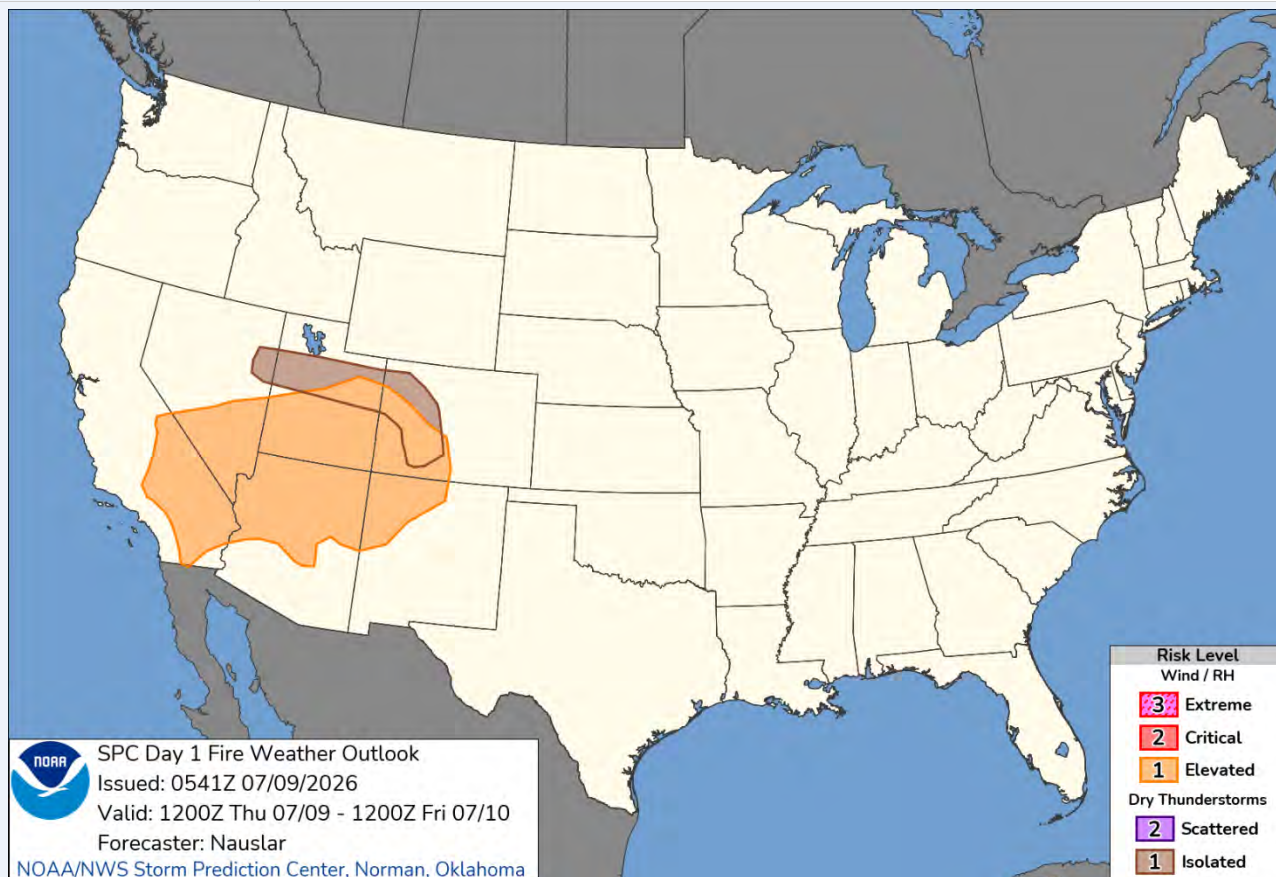
**SOURCES**

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 FIRE WEATHER | BABYLON FIRE (UT) NEW NATION'S LARGEST, COTTONWOOD 2ND
FLASH | ACTIVE | 22

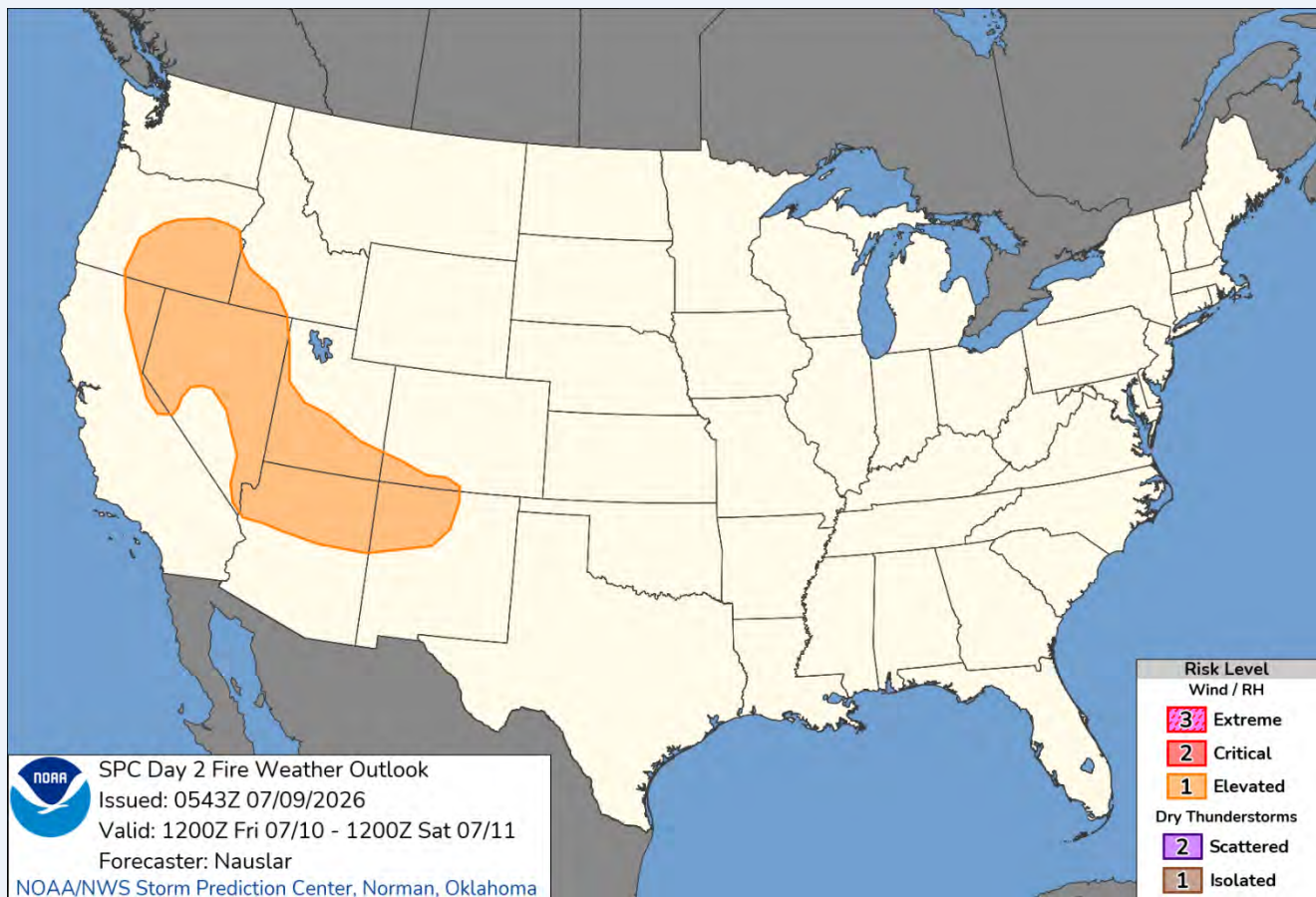
Summary	Babylon Fire (UT, San Juan County) has surpassed Cottonwood as the nation's largest active wildfire -- 101,073 acres, 11% contained as of 08-JUL. Cottonwood Fire (UT) is now 2nd-largest -- 96,333 acres, 58% contained as of 08-JUL (up from 56%), command transferred from Great Basin CIMT #5 to CIMT #4 08-JUL 0600. NPL confirmed 4 of 5 (08-JUL IMSR). Full status detail follows below.
National Status	NIFC National Preparedness Level (NPL): 4 of 5, raised 29-JUN-2026. Source: NIFC National Fire News (nifc.gov/fire-information/nfn) ID: nifc T1. 37 uncontained large fires nationally as of latest IMSR; 3 firefighters killed 28-JUN on the Knowles Fire (west of Grand Junction, CO) -- a separate incident from Cottonwood. PUBLIC SAFETY POWER SHUTOFFS: no known reports of planned PSPS events this cycle (PG&E, SCE checked directly -- most recent PSPS on record is 10-11 June, no current forecast posted). YTD fire/acreage totals not independently reverified this cycle -- last confirmed as of 30-JUN -- both well above the 10-year average. Source: NIFC National Fire News, nifc.gov/fire-information/nfn.
SPC Fire Weather Day 1	SPC Day 1 Fire Weather Outlook (issued 1241 AM CDT 09-JUL): An upper low moves into southwest Canada as an upper high holds near the southern California coast. West-southwest sustained winds 12-20 mph, gusts 20-40 mph, minimum RH 5-15% expected

across inland southern California and the southern Great Basin into the Four Corners, strongest along/east of the southern Sierra during the afternoon/evening. Elevated conditions possible on the Snake River Plain near a weakening Pacific front. Given recent lightning, active large wildfires, and near-record dry fuels, holdover/growth risk on existing large fires is a concern for Nevada, Utah, and western Colorado. Isolated-to-scattered dry thunderstorms likely from northeast Nevada into western Colorado, with deep pyroconvection on active large fires a concern. Elevated conditions possible in the Carolinas/eastern Georgia (ERC above 90th percentile) but shower/thunderstorm potential precludes an Elevated designation at this time.



SPC Fire Weather Day 2

SPC Day 2 Fire Weather Outlook (issued 1243 AM CDT 09-JUL): An upper trough deepens offshore the Pacific Northwest as the upper high shifts east over southern California; onshore gradient strengthens as a Pacific front moves into the Northwest. Dry/breezy conditions expected across much of the Great Basin into the Four Corners -- west-southwest sustained winds 12-20 mph, minimum RH 8-20%, from central/eastern Oregon to the Four Corners, strongest across the Sierra Front/northwest Nevada into southeast Oregon/southwest Idaho. Locally elevated conditions extend into central/northern Utah, western Colorado, and southeast/eastern Idaho. Isolated high-based showers/thunderstorms possible over southeast Idaho, northern Utah, and northwest Colorado with little rainfall reaching the ground.



Active Fire Areas (08-JUL IMSR / InciWeb)

NEBRASKA: Babylon Fire (San Juan County, UT, ~25 mi SW of Monticello; Bears Ears NM/Manti-La Sal NF): ignited 26-JUN; 101,073 acres, 11% contained as of 08-JUL -- now the nation's largest active wildfire, surpassing Cottonwood. 5 structures destroyed; SET-status evacuation zones west of Monticello; Blue Mountain Rd/Harts Draw Rd/Hwy 211 containment features being reinforced. Most significant new-evacuation incident this cycle. **NEBRASKA:** South Fork Fire (Soldier Creek Wilderness) status not independently reverified this cycle -- carrying forward from 14-JUN pending fresh check.

NEW MEXICO: SEC 7B MANDATORY FIELDS (\$0.117): NPL 4 of 5, confirmed current per NIFC IMSR 08-JUL 0730 MDT (source: nifc.gov/fire-information/nfn | ID: nifc | T1). Per IMSR: 167 new fires reported nationwide (light initial-attack activity), 37 uncontained large fires, 11 CIMTs committed. GBCC (Great Basin) carries the heaviest load at PL4, 17 incidents, 394,182 cumulative acres. 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 -- unchanged, persists across multiple cycles.

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 146% of the 10-year average for acres burned nationally (3.4M+ acres YTD) with NPL confirmed at 4 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 1 (09-JUL) SPC Fire Weather highlights isolated-to-scattered dry thunderstorms from northeast Nevada into western Colorado, with deep pyroconvection risk on active large fires (including Babylon and Cottonwood) a specific concern. This is the primary new-start/growth mechanism to watch over the next 24-48 hours, layered on elevated-to-critical Day 1 conditions across the southern Great Basin/Four Corners.

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 remaining at NPL 4 through this cycle: **ALMOST CERTAIN** -- confirmed current per 08-JUL IMSR. **CONFIDENCE:** MODERATE.

SOURCES

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

NWR TRANSMITTER OUTAGE STATUS - 09 JULY 2026

Source: NOAA NWR (noaa_nwr T1) | as of 09-JUL 1200 UTC (18 transmitters -- full roster reconciled vs 08-JUL, see delta note)

⚠ 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 CONTRACTS: roster shrinks from 5 to 2 Alaska stations this cycle (Cape Gull, Kotzebue) -- Mt. McArthur, Mt. Robert Barron, Point Pigot, and Zarembo Island, all listed 08-JUL, have cleared; Cape Gull reappears after clearing 07-JUL. (3) REAPPEAR THIS CYCLE: Fountain Hill AR, Colorado Springs CO, Coos Bay OR, and Brownsville TX (degraded) all return after clearing between 07-JUL and 08-JUL -- confirm with operator whether these reflect renewed outages or reporting-gap reappearances. (4) CLEARED SINCE 08-JUL: Mt. McArthur AK, Mt. Robert Barron AK, Point Pigot AK, Zarembo Island AK, Santa Ana CA, Leyden MA, Statesville NC, Owyhee NV, Ozona TX, Rio Grande City TX. (5) STATUS CHANGE: IN-Angola KXI94 moved from DEGRADED back to OUT OF SERVICE. Net roster size: 18 affected transmitters, down from 23 on 08-JUL -- do not read the lower count as improvement; membership churned substantially, it is not the same 18 as any prior cycle. Emergency managers in all affected counties: verify alternate alerting pathways (WEA, NOAA Weather App, EAS broadcast radio) are operational.

ST	Callsign	Location	Freq	WFO	Status	Counties / Notes
AK	WNG529	Cape Gull	162.500	Kodiak AK (WSO)	DEGRADED	Reappears (cleared 08-JUL)
AK	KWN30	Kotzebue	162.550	Fairbanks AK	DEGRADED	Persists from 08-JUL
AR	KGG86	Fountain Hill	162.475	Jackson MS	OUT OF SERVICE	Reappears (cleared 08-JUL)
CO	WXM56	Colorado Springs	162.475	Pueblo CO	OUT OF SERVICE	Reappears (cleared 08-JUL)
GA	WXM65	Baxley	162.525	Jacksonville FL	OUT OF SERVICE	Persists from 08-JUL
IL	KXI79	Hillsboro	162.425	St. Louis MO	OUT OF SERVICE	Persists from 08-JUL

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ST	Callsign	Location	Freq	WFO	Status	Counties / Notes
IN	KXI94	Angola	162.425	Northern Indiana IN	OUT OF SERVICE	Status change: DEGRADED (08-JUL) -> OOS
KS	WXN81	Ulysses	162.450	Dodge City KS	OUT OF SERVICE	Persists from 08-JUL
ME	WNG547	Sugarloaf Mtn	162.450	Gray/Portland ME	OUT OF SERVICE	Persists from 08-JUL
MI	WNG572	Petoskey	162.475	Gaylord MI	OUT OF SERVICE	Persists from 08-JUL
MN	KXI45	Gun Flint Lake	162.525	Duluth MN	OUT OF SERVICE	Persists from 08-JUL
NM	WXN24	Artesia	162.425	Midland/Odessa TX	OUT OF SERVICE	Chaves/Eddy triple-gap persists
NM	WWG36	Roswell	162.450	Albuquerque NM	OUT OF SERVICE	Chaves/Eddy triple-gap persists
NM	WWF37	Carlsbad	162.475	Midland/Odessa TX	OUT OF SERVICE	Chaves/Eddy triple-gap persists
OR	KIH32	Coos Bay	162.400	Medford OR	OUT OF SERVICE	Reappears (cleared 08-JUL)
OR	KIG98	Portland	162.550	Portland OR	DEGRADED	Persists from 08-JUL
TN	WXK63	Shelbyville	162.475	Nashville TN	OUT OF SERVICE	Persists from 08-JUL
TX	WWG34	Brownsville	162.550	Brownsville/Rio Grande Valley TX	DEGRADED	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 -- now 2nd-largest nationally -- near Beaver, UT (Fishlake NF); command transferred from Great Basin CIMT5 to CIMT4 08-JUL 0600, 1,252 personnel assigned. 96,333 acres, 58% contained as of 08-JUL (up from 56%) -- containment continuing to build 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 (09-JUL 1120Z)	ALTK04/WARK04 serial 5381: Geomagnetic K-index 4 threshold reached 09-JUL 1120 UTC, active warning valid through 10-JUL 1200 UTC -- supersedes serial 5380 (expired 08-JUL 1200 UTC), not a carryover. ALTEF3 (GOES-19 2MeV electron flux alert): no continuation notice located in this cycle's feed -- treat as unconfirmed/lapsed pending a fresh pull, not carried forward as active.
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 BUNDIBUGYO PHEIC DAY 54 DRC/UGANDA -- NO VACCINE / NO TREATMENT		HIGH UPDATED 14
Why This Cycle	No change this cycle -- figures unchanged since the 05-JUL ECDC update; the reporting gap has now widened to 3+ consecutive cycles.	
Summary	Bundibugyo ebolavirus PHEIC declared 17-MAY-2026, now Day 54. DRC/Uganda case counts and CFR confirmed unchanged via a live ECDC/WHO check this cycle -- the underlying reporting gap, not new transmission control, explains the plateau. No approved vaccine or treatment exists for this strain.	

SALUTE	SIZE/TIME: DRC 1,561 confirmed/506 deaths (CFR ~32.4%), Uganda ~20 confirmed/2 deaths -- unchanged, PHEIC Day 54. No approved vaccine/treatment for Bundibugyo strain. LIKELIHOOD: Case count rises next cycle absent a containment breakthrough: LIKELY. 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, gap now 3+ cycles (see PHS-002); Babylon Fire now nation's largest at 101,073 ac/11% contained, Cottonwood 2nd-largest at 96,333 ac/58% (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 stands per operator instruction; this build does not unilaterally change the level absent that determination.** PREP-CON 3 (Incident Probable) is held this cycle by explicit operator determination. FLAG (per PREP-CON rationale-invalidation protocol): a second consecutive night of direct US-Iran kinetic exchange has in fact occurred 08/09-JUL, and the IRGC has publicly threatened to expand its response to additional US bases in the region -- this directly meets the plain-language trigger for escalation consideration. The operator has reviewed this against the Triggers Annex v1.1 and held PREP-CON at 3 rather than 2 because the exchange remains non-CONUS and no US casualty or CONUS-facing effect has been confirmed; this is a MAINTAINED PENDING ANALYST REVIEW determination, not a silent carryforward. Case against de-escalating to PREP-CON 4: Hormuz remains disrupted (commercial traffic down to ~14 vessels/day from ~34/day post-MOU); IAEA access remains unrestored (Day 132 blackout); the national wildfire posture is at NPL 4 with two fires now over 96,000 acres. De-escalation to PREP-CON 4 would require the Gulf exchange to de-escalate and Hormuz traffic to normalize. Neither condition is met today.

MOVEMENT ASSESSMENT

SUPPORTS DE-ESCALATION TO 4: If the Gulf strike exchange de-escalates, Hormuz traffic normalizes, and the national fire posture eases (both Babylon and Cottonwood reach higher containment), the basis for holding PREP-CON 3 erodes meaningfully. Monitor the Gulf exchange and NPL status as the primary triggers for re-assessment.

SUPPORTS HOLDING AT 3 (today): Direct US-Iran kinetic exchange ongoing a 2nd night with IRGC threatening further expansion; Hormuz traffic down ~60% from post-MOU average; NPL 4 national fire posture with two fires over 96,000 acres. All Incident-Probable-tier triggers remain active. BROWN SKY is the correct posture until the Gulf exchange de-escalates and the fire posture eases.

SUPPORTS ESCALATION TO 2: Renewed direct kinetic exchange between US and Iran has in fact occurred (2nd consecutive night, 08/09-JUL) -- this trigger is PARTIALLY MET but held non-escalatory pending a CONUS-facing effect or confirmed US casualty; escalation would also follow confirmed CONUS comms degradation (COMCON move to 3) or a confirmed cyber attack on critical infrastructure -- neither of those two is currently met.

LIKELIHOOD: Gulf exchange de-escalates and PREP-CON moves to 4 within the week: UNLIKELY given the IRGC's stated intent to expand targeting if struck again.

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 09-JUL-2026. Governing rule -- level reflects highest-severity domain in degradation. 18 NWR transmitters OOS/DEGRADED (13 OOS / 5 DEGRADED, down from 23 on 08-JUL -- roster fully churned, not an improvement). 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 OIDC bypass KEV was added this cycle with a 02-JUL federal deadline. No confirmed critical infrastructure outages this cycle beyond the NWR transmitter roster.

SECTION 11 - DOMESTIC UNREST / SOFT TARGET

DOM-002 UK/NI DOMESTIC WATCH		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 30, 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 30, 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

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