

# DTR LITE -- Executive Brief

Fortune Favors the Prepared | Intelligence Operations Division  
 Wednesday, 02 July 2026 | Executive and director-level brief



## ⚠️ PREPAREDNESS CONDITION 3 -- BROWN SKY -- INCIDENT PROBABLE ⚠️

Wednesday, 02 July 2026 | Op Epic Fury Day 125 | Hormuz Day 125 | MOU Day 16 | IAEA Blackout Day 125 | Ebola PHEIC Day 48 | World Cup Day 23 | Venezuela EQ Day 8 | Belfast: fwd scaffold (no delta) | Brent \$70.65/bbl (48hr delta: down \$4.37/-5.8% from \$75.02 on 30-JUN)

## COMCON 4 -- INCREASED VIGILANCE (see CYB-001 below for full detail)

## WX-CON 3 CRITICAL (see WX-001 below for weather/heat detail; WX-002/Section 7B for wildfire)

## SWX-CON 2 WATCH (see below for full detail)

<b>Publication (UTC)</b>	02 JUL 2026 / Cycle close 1530 UTC
<b>Reporting Period</b>	30-JUN-2026 1530Z through 02-JUL-2026 1530Z
<b>SOP</b>	v5.58   ICD 203/206 Compliant   Registry v2.25 (reconciliation outstanding)   56/56 mandatory sources dispositioned

## BOTTOM LINE UP FRONT -- 02-JUL-2026 | PREP-CON 3 BROWN SKY | Op Epic Fury / Hormuz Day 125 | MOU Day 16 | IAEA Blackout Day 125 | Ebola PHEIC Day 48 | NPL 4 | World Cup Day 23 | Venezuela EQ Day 8 | UK PM CARETAKER

**PREP-CON 3 BROWN SKY** | WX-CON 3 CRITICAL (weather/heat only, see WX-001) | **SWX-CON 2 WATCH** | COMCON 4 INCREASED VIGILANCE | 18 NWR OOS/DEGRADED | Brent \$70.65/bbl (48hr delta -5.8%) | Cisco SD-WAN/UCM/PTC Windchill KEVs overdue, SimpleHelp KEV deadline TODAY (02-JUL)

### FLASH GEO-CF-IRAN MOU Day 16 Day 125

**DOHA INDIRECT TALKS CONTINUE 02-JUL -- NO DIRECT MEETING -- HORMUZ TOLL-FEE DISPUTE UNRESOLVED** -- Op Epic Fury Day 125 / Hormuz Day 125 / MOU Day 16. Doha indirect US-Iran talks continued 02-JUL via Qatari/Pakistani mediators with no direct meeting; Iran's Ghalibaf conditioned final-agreement talks on US implementation of MOU Clause 13. Hormuz toll-fee dispute and ~\$6B frozen-asset transfer remain unresolved. Burgenstock technical WG remains active (Gharibabadi leading four working groups); no new Grossi statement or IAEA Board action this cycle. IAEA Blackout Day 125: 440.9 kg 60%-HEU unverified since 28-FEB. Brent: \$70.65/bbl, down sharply from \$75.02 (30-JUN, 48hr delta -\$4.37/-5.8%) on Hormuz supply glut; JPMorgan cut year-end forecast to \$64. [GEO-CF-IRAN / NUC-001]

### FLASH VENEZUELA EQ Day 7 Recovery

**VENEZUELA M7.2+M7.5 EQ -- DAY 7 -- 2,295 CONFIRMED DEAD / 11,200+ INJURED / 43,200+ MISSING -- RESCUES CONTINUE PAST GOLDEN WINDOW** -- Day 8 since twin earthquakes 24-JUN (strongest in 125 years). 2,295 confirmed dead, 11,267 injured, nearly 50,000 missing as of 01-JUL. Rescue operations continue past the nominal 72-hour golden window -- a child was pulled alive after six days trapped, and multiple survivors have been rescued in the past 48 hours. USS Fort Lauderdale continues delivering supplies at La Guaira. Toll continues to climb given the scale of missing-persons reports. [GEO-003]

### FLASH CYB-001 KEV OVERDUE + NEW

**KEV OVERDUE CLUSTER -- CISCO SD-WAN, CISCO UCM, PTC WINDCHILL ALL OVERDUE, NO WORKAROUNDS + UBIQUITI UNIFI 9 DAYS OVERDUE + NEW CRITICAL SIMPLEHELP KEV DUE 02-JUL** -- Cisco SD-WAN, Cisco UCM, and PTC Windchill KEVs remain overdue with no workarounds; upgrade is the only remediation. Ubiquiti UniFi 3-CVE cluster is now 11 days overdue. CISA added a new critical KEV this cycle: SimpleHelp OIDC authentication bypass (CVE-2026-48558), federal deadline 02-

	JUL -- SimpleHelp is widely deployed by MSPs, creating broad downstream exposure. Federal agencies remain in violation of BOD 26-04. Conduct compromise assessment before patching. [CYB-001]
<b>FLASH WILDFIRE NPL 4 Cottonwood (Sec 7B)</b>	<b>COTTONWOOD FIRE 98,800 ACRES 4% CONTAINED -- NATION'S LARGEST -- FIRST CONTAINMENT PROGRESS SINCE IGNITION -- NPL 4 -- 3 FIREFIGHTERS KILLED KNOWLES FIRE CO 28-JUN</b> -- Cottonwood Fire: 93,918 acres, 19% contained as of 02-JUL -- first containment progress since ignition. Beaver County UT, Fishlake National Forest. Level 3 evacuations remain in effect; Utah state of emergency continues. National Preparedness Level raised to PL4 amid a broader national wildfire surge (Parsnip Peak NV, Willow CO, Sawmill/Wild Goose UT also showing extreme fire behavior). Three US Forest Service/Wildland Fire Service firefighters were killed 28-JUN on the Knowles Fire (CO), a separate incident. No known reports of planned Public Safety Power Shutoffs this cycle. This is a weather-independent report -- see WX-001 for today's severe thunderstorm outlook. [WX-002/Section 7B]
<b>HIGH EBOLA PHEIC Day 48</b>	<b>EBOLA PHEIC DAY 48 -- DRC 1,333 CONFIRMED (34 HEALTH ZONES) / UGANDA 20 CONFIRMED -- WHO SITREP GAP NOW 6+ DAYS -- CONTINENTAL IMST STOOD UP KAMPALA -- NO VACCINE / NO TREATMENT</b> -- DRC: 1,333 confirmed (399 deaths, CFR 26%) across 34 health zones. Uganda: 20 confirmed / 2 deaths (all linked to DRC). Figures per WHO/Africa CDC, 27-JUN -- the newest available data. WHO-Africa CDC Continental Incident Management Support Team (IMST) stood up in Kampala this week. WHO/ECDC sitrep gap is now 6+ days as of 01-JUL. No approved vaccine or specific treatment for the Bundibugyo strain; the PARTNERS trial is ongoing. US enhanced entry screening remains active at IAD/ATL/IAH/JFK. [PHS-002]
<b>WATCH SWX SWX-CON 2 G2 Watch 03-JUL</b>	<b>SWX-CON 2 WATCH -- NEW G2 GEOMAGNETIC STORM WATCH FOR 03-JUL</b> -- NOAA SWPC issued a new G2 (Moderate) geomagnetic storm watch for 03-JUL (WATA30), superseding all prior watches; G1 conditions are active today. Extended K5 warning through 1800Z, K4 through 2100Z; an ALERT-level K5 threshold was reached at 0259 UTC. Weak-to-moderate GIC/grid risk possible if G2 verifies; aurora may become visible as far south as NY/WI/WA. 18 NWR transmitters OOS/DEGRADED (14 OOS / 4 DEGRADED, down from 31 on 30-JUN). Source: NOAA SWPC swpc.noaa.gov. [SWX-001]
<b>WATCH UK PM DOM-002 Labour Race</b>	<b>UK PM LABOUR -- BURNHAM SOLE DECLARED CANDIDATE, NO DELTA THIS CYCLE -- NOMINATIONS OPEN 9-JUL / CLOSE 16-JUL -- BELFAST WATCH DOWNGRADED, NO CURRENT-CYCLE DELTA</b> -- Burnham remains the sole declared candidate; situation is static since 22-JUN. Nominations open 9-JUL, close 16-JUL. If uncontested, PM by 17-19-JUL; if contested, a winner is expected before Parliament's 1-Sep return. Belfast forward scaffold prosecution phase remains active (25 arrested/17 charged); 12-JUL Twelfth of July marching season is the next elevated-risk window. This entry has been downgraded from HIGH to WATCH tier after 13 consecutive cycles with no verifiable daily delta. [DOM-002]
<b>WATCH WORLD CUP Day 23 R32 Concludes 03-JUL</b>	<b>WORLD CUP DAY 23 R32 -- NO CONFIRMED PHYSICAL SECURITY INCIDENTS THROUGH DAY 22 -- IRAN ELIMINATED, DEPARTED 29-JUN -- R32 CONCLUDES 03-JUL, R16 BEGINS 04-JUL</b> -- No confirmed physical security incidents through Day 22. Iran was eliminated and departed 29-JUN, removing the tournament's single highest diplomatic-flashpoint fixture. Today's matches: Mexico 2-0 Ecuador (completed), England-DR Congo (Atlanta), Belgium-Senegal (Seattle). FBI: active FIFA website spoofing attacks and 300+ malicious domains remain confirmed threats. Tournament venues fall under the active multi-day heat wave -- see Heat Warning box. [STSB-001]

**PRACTITIONER POSTURE -- 72-HOUR DECISION TRIGGERS**

- 1. GEO-CF-IRAN / MOU Day 16 -- Doha / Hormuz / IAEA:** Doha indirect talks continue with no resolution. Tripwires: Hormuz toll-fee dispute resolution or collapse; frozen-asset transfer status; renewed direct kinetic exchange.
- 2. Venezuela Day 8 -- Recovery Operations:** Day 7 recovery operations; 2,295 dead, nearly 50,000 missing, toll still climbing. Tripwires: formal PAHO/WHO damage assessment; death toll revision.
- 3. Cyber -- KEV Cluster Overdue + New SimpleHelp KEV:** Cisco SD-WAN/UCM/Windchill and Ubiquiti UniFi remain overdue, no workarounds. New SimpleHelp KEV due 02-JUL. Conduct compromise assessment before patching.
- 4. Wildfire -- PL4 National Posture:** Cottonwood 93,918 acres, 19% contained -- first progress since ignition. NPL 4. 3 firefighters killed Knowles Fire (CO). See WX-002/Section 7B. Tripwire: new large fire starts under continued critical fire weather.
- 5. Ebola PHEIC Day 48 -- WHO Sitrep Gap:** WHO sitrep gap now 6+ days. Continental IMST stood up in Kampala. Tripwire: next WHO/Africa CDC sitrep publication.
- 6. World Cup Day 23 / R32 Concludes 03-JUL:** R16 begins 04-JUL. Iran's departure removed the top flashpoint. Burnham remains sole Labour candidate; nominations open 9-JUL.

NUMBER STRIP -- CURRENT-CYCLE MOVING VALUES

<p><b>BRENT CRUDE</b>  <b>\$73.61/bbl</b>                  vs ~\$74.43 (48-72hr delta) --                  steadied after steepest                  quarterly decline since 2020</p>	<p><b>PUMP AVG (NAT)</b>  <b>~\$4.00/gal</b>                  EIA estimate, not                  independently AAA-                  reverified this cycle</p>	<p><b>NWR AFFECTED</b>  <b>18</b>                  down from 31 on 30-JUN --                  net improvement</p>	<p><b>VENEZUELA</b>  <b>2,295 dead</b>                  Day 7   nearly 50,000                  missing</p>	<p><b>EBOLA PHEIC</b>  <b>1,333 confirmed</b>  <b>(399 deaths, CFR</b>  <b>26%)</b>                  DRC 34 zones   Uganda 20                    Day 47</p>
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KEY JUDGMENTS

**KJ-1 US-IRAN MOU (Op Epic Fury Day 125 / MOU Day 16):**

MOU Day 16: the MOU remains signed and in force with no renewed kinetic exchange this cycle. Doha indirect talks continued 02-JUL via Qatari/Pakistani mediators, no direct US-Iran meeting. Burgenstock technical WG remains active under Gharibabadi. Hormuz toll-fee dispute and ~\$6B frozen-asset transfer remain the primary unresolved issues driving Brent's trajectory.

**LIKELIHOOD:** Hormuz toll-fee dispute resolves and Brent stabilizes below \$75 through the week: **ROUGHLY EVEN CHANCE.** **CONFIDENCE:** MODERATE.

*CHANGE FROM PRIOR: Doha talks continued 02-JUL with no resolution (was: talks pending). Brent fell sharply to \$70.65 (48hr delta from \$75.02 on 30-JUN: -\$4.37/-5.8%). NWR count improved to 18 OOS/DEGRADED (was: 31).*

**KJ-2 IAEA VERIFICATION BLACKOUT (Day 125):**

440.9 kg 60%-HEU -- last IAEA-verified 28-FEB-2026; unverified since, now Day 125 of the blackout. 60-day MOU window expires mid-August. Burgenstock WG remains active -- Nuclear Affairs is one of four working groups but inspection access is not the immediate agenda item. Iran FM Baghaei: no clear schedule for IAEA access. No new Grossi statement or IAEA Board action this cycle.

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

*CHANGE FROM PRIOR: no new fact identified this cycle beyond the day-counter progression -- inspection dispute position remains structurally unchanged.*

**KJ-3 EBOLA PHEIC TRAJECTORY (Day 47):**

DRC 1,333 confirmed (399 deaths, CFR 26%) across 34 health zones; Uganda 20 confirmed / 2 deaths -- per WHO/Africa CDC, 27-JUN, the newest available data. WHO/ECDC sitrep gap is now 6+ days. Continental IMST stood up in Kampala this week. Bundibugyo strain has no approved vaccine or treatment.

**LIKELIHOOD:** WHO sitrep gap resolves with a published update within the next cycle: **ROUGHLY EVEN CHANCE.** **CONFIDENCE:** MODERATE.

*CHANGE FROM PRIOR: DRC confirmed count rose to 1,274 (was 1,155); sitrep gap widened to 6+ days; Continental IMST stood up in Kampala.*

ANALYTICAL STANDARDS & SOURCE REGISTRY

Produced under ICD 203/206 analytic standards | Master Source Registry v2.25 (638 sources -- docx/HTML/SESSION OPENER reconciliation outstanding) | Likelihood: \$0.55 estimative ladder | Confidence: HIGH / MODERATE / LOW | All FLASH/HIGH entries carry likelihood, confidence, and minimum two alternative hypotheses.

Full source registry: [fortunefavorstheprepared.com/analytical-standards](https://fortunefavorstheprepared.com/analytical-standards) | [fortunefavorstheprepared.com/dtr](https://fortunefavorstheprepared.com/dtr)

END

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*Semper Paratus, Semper Gumby.*

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