

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 158 | Hormuz Day 158 | MOU VOID 16-JUL | PREP-CON 3 BROWN SKY | COMCON 4 INCREASED VIGILANCE | 04 AUGUST 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 3 GUARDED (held). See [WX-001](#) and [Section 10](#) for full detail.
Wildfire: see [WX-002 / Section 7B](#).

SWX-CON NSTR
Source: NOAA SWPC [swpc.noaa.gov](https://www.swpc.noaa.gov)

Publication (UTC)	04 AUG 2026 1600 UTC
Reporting Period	03-AUG-2026 1600Z through 04-AUG-2026 1600Z
Analyst / Watch Officer	Fortune Favors the Prepared -- OSINT Desk
PREP-CON Baseline	PREP-CON 3 -- BROWN SKY COMCON 4 -- INCREASED VIGILANCE WX-CON 3 GUARDED (escalation to 2 recommended - operator call, see Section 10) SWX-CON NSTR (SWPC WARK04 K-index 4 warning in force to 04-AUG 1500Z; below the G1 storm threshold)
Version	SOP v5.64 Addendum Registry v2.25 (54 of 56 mandatory live-pulled this cycle, 2 dispositioned by category - see Section 12) All audit scripts PASS

BOTTOM LINE UP FRONT

04 AUGUST 2026 | PREP-CON 3 BROWN SKY | COMCON 4 INCREASED VIGILANCE | SWX-CON NSTR
| Op Epic Fury / Hormuz Day 158 | Iran publicly denied that negotiations with the United States are under way, contradicting the US account; a merchant vessel was struck in the Strait with one crew member missing, and the IRGC attacked a US base in Kuwait.

THE CYCLE - QUICK LOOK

- **GEO-CF-IRAN:** Iran's foreign ministry stated on 03-AUG that it has no negotiations with the United States, contradicting the US account of talks in progress; Iran says it is dealing with Oman alone on a temporary corridor. The IRGC attacked a US base in Kuwait on 04-AUG with at least three drones, and the US military states 44 vessels have been diverted under the blockade. See GEO-CF-IRAN.
- **NUC-001:** IAEA Blackout Day 157 - no new IAEA statement or Board action, and Pickaxe Mountain remains unstruck. With Tehran denying a negotiating track, the denuclearisation agenda Trump described on 02-AUG has no confirmed forum. See NUC-001.
- **CYB-001:** CVE-2026-18577 (N-able N-central) was added to KEV on 03-AUG with an 06-AUG federal deadline; attackers take over the RMM server and pivot into managed endpoints via Cloudflare tunnels. Cisco FMC CVE-2026-20316 is now three days overdue. See CYB-001.
- **WX-001 / WX-002:** SPC Day 1 carries a SLIGHT risk for southeastern Arizona only, co-located with a WPC SLIGHT excessive rainfall area naming burn scars. The Spokane Area Fires reached 10,280 acres at 0%

containment and an arrest has been made for intentionally setting a fire that spread into Old Trails. See WX-001/WX-002.

- ▶ **SWX-001:** Geomagnetic conditions have fallen below storm level: SWPC WARK04 serial 5398 is an extended warning for K-index 4, valid to 04-AUG 1500Z. SWX-CON returns from 2 to NSTR. See SWX-001.
- ▶ **PHS-002:** DRC Ebola holds at 3,605 confirmed and 1,587 deaths (CFR 44%) as of 30-JUL, with epidemiological week 30 the worst of the outbreak at 567 cases and 296 deaths. Uganda declared its own outbreak over on 28-JUL. See PHS-002.
- ▶ **STSB-002:** Motive remains undetermined three days after the Twin Falls attack, with hundreds of witnesses still to be interviewed. The victim and the intervening armed civilian have been publicly identified. See STSB-002.

SECTION INDEX

SECTION	KEY ENTRIES / THREAT DRIVERS
SEC 2 - Market Indicators	Commodity tracker: Brent \$80.60/bbl and WTI \$76.95/bbl on 04-AUG, against a \$87.93 Brent close on 31-JUL - a 48-hour fall of \$7.33, or 8.3%. The OPEC Basket fell 10.04% in a single session.
SEC 3 - FLASH Events	GEO-CF-IRAN: Iran's foreign ministry denied on 03-AUG that any negotiations with the United States are under way, contradicting the US account. The IRGC struck a US base in Kuwait on 04-AUG; no US strike inside Iran has been announced since the 29-30 JUL wave. NUC-001: IAEA Blackout Day 157. No new IAEA statement or Board action was issued in the window. Pickaxe Mountain remains unstruck. SWX-001: Geomagnetic activity has fallen below storm level. SWPC WARK04 serial 5398, issued 04-AUG 0810 UTC, is an extended warning for K-index 4 valid to 04-AUG 1500Z. SWX-CON returns to NSTR. WX-001: SPC Day 1 (04-AUG) is SLIGHT for southeastern Arizona only, with severe wind gusts of 60-80 mph. Day 2 (05-AUG) is MARGINAL for Missouri into central Illinois, northeast New Mexico into the Texas Panhandle, and southeastern Arizona. Day 3 (06-AUG) carries no severe areas. Fire weather Day 1 is Elevated over the Great Basin and Colorado Plateau; Day 2 reads NO CRITICAL AREAS. PHS-002: Ebola PHEIC Day 81. WHO holds at 3,605 confirmed and 1,587 deaths in the DRC as of 30-JUL, a crude CFR of 44%. Epidemiological week 30 was the worst week of the outbreak at 567 cases and 296 deaths.
SEC 4A - Cyber / Technology	CYB-001 NEW 03-AUG: CVE-2026-18577 (N-able N-central, authentication bypass) was added to KEV with an 06-AUG remediation deadline. Cisco FMC CVE-2026-20316 is three days overdue; Fortinet CVE-2025-68686 is due 10-AUG.
SEC 4B - Physical / Geopolitical / IO	STSB-002: Motive remains undetermined. Twin Falls police report hundreds of witnesses still to be interviewed three days after the 01-AUG attack that killed three and wounded seven. MAR-001: The bulk carrier Minoan Pioneer was struck by a projectile 20 NM northeast of Al Khasab, Oman at 2200Z 03-AUG, losing all power with a fire in the accommodation area and one crew member missing. PHS-002: Ebola PHEIC Day 81. DRC 3,605 confirmed / 1,587 deaths (CFR 44%) as of 30-JUL per WHO. Uganda declared its outbreak over on 28-JUL at 20 confirmed and 2 deaths.
SEC 5 - Energy / Infrastructure / Supply Chain	FIN-001 Brent \$80.60/bbl and WTI \$76.95/bbl on 04-AUG against a \$87.93 Brent close on 31-JUL; equities closed at a record on 03-AUG on the same de-escalation read that Iran then denied. SC-001 MARAD 2026-001A, 2026-004 and 2026-006 all in force war-risk premium 7.5-10% of hull value
SEC 6 - Aviation / Transportation	AVN-001: EASA guidance is unchanged this cycle: AVOID AT ALL LEVELS for Bahrain, Kuwait, Qatar, the UAE and the Gulf of Oman west of 58 deg E; AVOID at all altitudes for Iran (OIIX), Iraq (Baghdad FIR) and Lebanon (Beirut FIR). Kuwait FIR remains closed to overflights. Iran claimed a drone attack on US facilities at Kuwait's

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SECTION	KEY ENTRIES / THREAT DRIVERS
	Ahmad Al-Jaber Air Base on 31-JUL, unconfirmed by Kuwait or CENTCOM. Marriott reported that the Iran conflict depressed travel demand in the quarter, the first named-carrier-adjacent demand signal this cycle. AVN-002 : NSTR. No current-cycle surface, rail or transit security incident was identified. Wildfire-driven road and area closures continue across eastern Washington.
SEC 7 - Meteorological / Severe Weather / Fire Weather + NWR	WX-001 : SPC Day 1 (04-AUG) SLIGHT - southeastern Arizona only, with 60-80 mph microburst gusts as storms congeal into small clusters late afternoon and evening. WX-002 : The Spokane Area Fires are the dominant national incident at 10,280 acres and 0% containment. An arrest was made on 03-AUG for intentionally setting a fire that spread into the Old Trails Fire; InciWeb still lists cause as under investigation. NPL holds at 5 of 5.
SEC 7B - Wildfire Report	WX-002 : The Spokane Area Fires reached 10,280 acres at 0% containment on 04-AUG. Nationally, 102 uncontained large fires and 29,201 personnel are committed, with 5,154,596 acres burned year to date.
SEC 7A - Space Weather and EMCOMM	SWX-001 : Geomagnetic activity fell below storm level. SWPC WARK04 serial 5398, issued 04-AUG 0810 UTC, extends a K-index 4 warning to 04-AUG 1500Z. Impacts are confined poleward of 65 degrees geomagnetic latitude.
SEC 7D - Tropical / Hurricane Weather	NSTR across all basins. The NHC 2-Day and 7-Day Graphical Tropical Weather Outlooks for the North Atlantic, Eastern Pacific and Central Pacific all read no disturbances, on a direct nhc.gov pull this cycle.
SEC 10 - PREP-CON Assessment	PREP-CON 3 BROWN SKY (Incident Probable) / COMCON 4 INCREASED VIGILANCE / WX-CON 3 GUARDED with an escalation recommendation to 2 pending operator confirmation / SWX-CON NSTR
SEC 12 - Source Registry	Registry v2.25 638 total sources swept 54 of 56 mandatory live-pulled fortunefavorstheprepared.com/dtr-source-registry/

GEOGRAPHIC IMPACT INDEX

REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
CONUS - Desert Southwest (AZ)	WX-001 SPC Day 1 (04-AUG) SLIGHT for southeastern Arizona: moderate buoyancy of 1000-2000 J/kg MLCAPE and very steep low-level lapse rates support microbursts with 60-80 mph gusts late afternoon and evening.
CONUS - Southern Arizona (compound hazard)	WPC Day 1 Excessive Rainfall Outlook, issued 0424 EDT 04-AUG, carries a SLIGHT RISK for portions of southern Arizona and names terrain features and burn scars as particularly vulnerable to flash flooding. This is co-located with the SPC severe area: the same ground carries both a wind and a flash-flood threat today. No Arizona NWR transmitters are out of service.
CONUS - Missouri / Illinois	SPC Day 2 (05-AUG) carries MARGINAL risk from Missouri into central Illinois, where around 1500 J/kg MUCAPE and 35 kt deep shear support scattered strong to severe storms with locally damaging gusts.
CONUS - Pacific Northwest (WA / OR / N ID)	WX-002 (Section 7B): The Spokane Area Fires reached 10,280 acres at 0% containment as of 04-AUG 0808 local - Old Trails 3,619, Autumn Lane 5,603, Fairview 1,056. An arrest was made 03-AUG for intentionally setting a fire that spread into Old Trails. Avista has begun restoring power; 31,713 Spokane County customers remain out, 13.18% of the county, and Washington leads the nation in outages.
CONUS - Tennessee	WX-002 Two Nashville-WFO transmitters remain OOS simultaneously - Shelbyville WXK63 and Lafayette WNG631. No severe-weather or wildfire hazard overlaps this gap today, so no HIGH-GAP ALERT is raised.

FORTUNE FAVORS THE PREPARED DAILY THREAT REPORT 04 AUGUST 2026	
REGION / THEMATIC	KEY ENTRIES / THREAT DRIVERS
CONUS - Nationwide Wildfire	WX-002 NPL 5 of 5, held since 18-JUL 0730 MDT - 102 uncontained large fires and 7 new large incidents; 44,722 fires and 5,154,596 acres YTD, running 128% and 137% of ten-year averages; 29,201 personnel committed nationally, 27 CIMTs and 2 NIMOs.
CONUS - Nationwide (All Regions)	CYB-001 NEW 03-AUG: CVE-2026-18577 (N-able N-central) added to KEV, federal deadline 06-AUG. Attackers gain remote administrative access to the RMM server and pivot into managed endpoints. Cisco FMC CVE-2026-20316 is three days overdue. CYB-003 : N-able N-central compromise - attackers register Cloudflare tunnels as Windows services for persistence, surviving reboot and route revocation CYB-001 : SharePoint/SimpleHelp/iCagenda/Balbooa exploitation continues, no new campaign cluster confirmed FIN-001 : Brent \$80.60/bbl and WTI \$76.95/bbl on 04-AUG against a \$87.93 Brent close 31-JUL - down \$7.33 or 8.3% across 48 hours, with the OPEC Basket off 10.04% in one session.
Middle East / Strait of Hormuz	GEO-CF-IRAN: Iran's foreign ministry denied on 03-AUG that negotiations with the United States are under way. The IRGC struck a US base in Kuwait on 04-AUG with at least three drones; no US strike inside Iran has been announced since 29-30 JUL.22% MAR-001 : Kpler recorded 106 Hormuz crossings by 96 distinct vessels over 27-JUL to 02-AUG, up about 8% week-on-week but violently volatile at 8 to 25 per day. On 02-AUG, seven of nine transits used Iran's Unilateral Scheme and none used the established traffic separation scheme.
Iran / Nuclear	NUC-001 IAEA Blackout Day 157 - no new IAEA statement or Board action in the window and no strike on a nuclear facility. Pickaxe Mountain remains unstruck.
DRC / Uganda	PHS-002 Ebola PHEIC Day 81: DRC 3,605 confirmed / 1,587 deaths, CFR 44% (WHO, data as of 30-JUL). Epidemiological week 30 was the outbreak's worst at 567 cases and 296 deaths. Uganda declared its outbreak over 28-JUL.
Idaho / Twin Falls	STSB-002 Motive remains undetermined three days on, with hundreds of witnesses still to be interviewed. The victim has been identified as a 23-year-old restaurant employee and the intervening armed civilian as a 35-year-old Kimberly, Idaho resident.
Strait of Hormuz / Gulf of Oman	MAR-001 The Liberian-flagged bulk carrier Minoan Pioneer was struck by an unknown projectile 20 NM northeast of Al Khasab, Oman at 2200Z 03-AUG. The projectile hit the engine room, causing a complete blackout and a fire in the accommodation area; one crew member is missing.
Space Environment	SWX-001 Geomagnetic activity fell below storm level. SWPC WARK04 serial 5398, issued 04-AUG 0810 UTC, extends a K-index 4 warning to 04-AUG 1500Z on a persistence condition. Impacts are confined poleward of 65 degrees geomagnetic latitude.

SECTION 2 - MARKET INDICATORS

COMMODITY TRACKER - WAR IMPACT vs. PRE-WAR BASELINE (28 FEB 2026)

COMMODITY	PRE-WAR (28 FEB)	CURRENT (04-AUG)	CHG vs PRE-WAR	CONSUMER / ANALYTICAL NOTE
Brent Crude (front)	~\$66/bbl	\$80.60/bbl (04-AUG)	+22%	48-HOUR DELTA: Brent settled \$89.03 on 30-JUL, closed \$87.93 on 31-JUL, fell to about \$83.77 on 03-AUG and stands at \$80.60 on 04-AUG - down \$7.33, or 8.3%, across the 48-hour window.Crude fell a further 4% today after a merchant vessel

FORTUNE FAVORS THE PREPARED DAILY THREAT REPORT 04 AUGUST 2026				
COMMODITY	PRE-WAR (28 FEB)	CURRENT (04-AUG)	CHG vs PRE-WAR	CONSUMER / ANALYTICAL NOTE
				was struck in the Strait and the IRGC attacked a US base in Kuwait, which is the dislocation of the cycle: the market is pricing the Oman corridor track and the OPEC+ increase over the kinetic picture. Figures are operator-supplied live quotes, not official ICE or NYMEX settles.
WTI Crude (front)	~\$63/bbl	\$76.95/bbl (04-AUG)	+22%	48-HOUR DELTA: WTI fell \$3.39 to \$76.95 on 04-AUG, a 4.22% session loss, having opened 03-AUG at \$86.21. WTI Midland stands at \$77.27 and the OPEC Basket at \$79.50, the latter off 10.04% in a single session - the largest move on the board.
Gasoline (natl avg)	~\$3.10/gal	\$4.0890/gal (AAA, 04-AUG)	+32%	AAA reports the national average for regular at \$4.0890/gal on 04-AUG, flat against \$4.09 on 30-JUL. EIA independently has US regular at \$4.096 on 27-JUL, agreeing to within a cent. The pump is flat while crude fell about 5%: retail lags crude by one to two weeks, so the pass-through has not begun.
Diesel (US No. 2)	~\$3.74/gal	\$5.313/gal (EIA, 27-JUL)	+42%	EIA has US on-highway diesel at \$5.313/gal for 27-JUL, up 17.9 cents week-on-week and \$1.508 year-on-year. West Coast diesel stands at \$6.067 and California at \$6.670. The 04-AUG EIA release had not posted at three separate checks this cycle; 27-JUL is the latest published figure.
Ocean Freight / Maritime	Rates rising sharply	War-risk premium for Hormuz transits holds at 7.5-10% of hull value against a pre-war 1-3% (Marsh via S&P Global), re-confirmed current 03-AUG. Six Saudi-flagged tankers are diverting via the Cape of Good Hope, adding six to seven days on US Gulf Coast legs and about thirty days on	Worsening	MARAD 2026-001A, 2026-004 and 2026-006 all remain in force; 2026-006 auto-expires 22-SEP-2026. The IMO recorded 62 confirmed maritime security incidents as of 27-JUL. Windward assesses 22 Chinese-linked vessels transited Bab el-Mandeb or called at Saudi ports between 20-JUL and 02-AUG without incident while four Saudi-linked tankers were struck in the same window.

FORTUNE FAVORS THE PREPARED DAILY THREAT REPORT 04 AUGUST 2026				
COMMODITY	PRE-WAR (28 FEB)	CURRENT (04-AUG)	CHG vs PRE-WAR	CONSUMER / ANALYTICAL NOTE
		a Taiwan leg. Baltic Dry and container spot rates were not re-pulled this cycle.		

SECTION 3 - FLASH EVENTS (Score >= 20)

GEO-CF-IRAN Op Epic Fury / Hormuz Day 158 TEHRAN DENIES NEGOTIATIONS ARE UNDER WAY IRGC STRIKES US BASE IN KUWAIT		FLASH UPDATED 27
Why This Cycle	Iran's foreign ministry stated on 03-AUG that it has no negotiations with the United States, directly contradicting the US account. The IRGC attacked a US base in Kuwait on 04-AUG with at least three drones.	
Summary	Foreign Ministry spokesman Esmaeil Baghaei told reporters on 03-AUG that Iran currently has no negotiations with the United States and no plans to host or send delegations in the coming days, saying Iran is dealing with Oman alone on a temporary two-way shipping corridor. President Trump maintained the same day that talks were under way, called Iranian leadership duplicitous on Truth Social, described this as Iran's last chance, and said he wants the Strait open literally by tomorrow. No US strike inside Iran has been announced since the 29-30 JUL wave, now a sixth consecutive night. The kinetic activity in the window came from the Iranian side: the IRGC attacked a US military base in Kuwait on 04-AUG using at least three drones, with heavy blasts also reported in Iraq's Basra province. This is distinct from the 31-JUL Iranian Army claim against Ahmad Al-Jaber, being a different service on a different date. Neither US nor Kuwaiti authorities had confirmed the strike at the time of writing. Blockade accounting resolved: the US military states that 44 vessels have been diverted under the blockade of Iran's southern ports, replacing the unreconciled 20 / 35 / 94 spread carried last cycle. US casualty figures are NOT restated this cycle: the standing 18 dead / 624 wounded pair could not be corroborated by any single source and appears to be a composite. Official counts run 13-15 killed with 365-543 wounded; one compiled tracker gives 22 and 624. The pair is withdrawn pending a single authoritative figure. Iran asserts permission-based transit on BOTH corridors. Fars reported on 02-AUG that vessels are held in the northern corridor inside Iranian territorial waters and may proceed only with the permission of Iran's armed forces, and Iranian authorities state the same condition governs the southern corridor through Omani waters - the route Washington maintains was opened to transit as of right. Qatar's prime minister convened GCC states on de-escalation, and President Pezeshkian said Iran will defend its territorial integrity but does not seek to widen the conflict.	
SALUTE	SIZE: No announced US strikes inside Iran through 04-AUG, a sixth consecutive night. One IRGC drone attack on a US base in Kuwait, at least three drones, 04-AUG. 44 vessels diverted under the US blockade. ACTIVITY: Iran's foreign ministry publicly denied any negotiating track with the United States while the US asserted talks were in progress. The IRGC conducted a drone attack on a US base in Kuwait. Diplomatic activity shifted to Oman, on a temporary two-way corridor, and to a Qatari-convened GCC de-escalation track. LOCATION: Kuwait: a US military base struck by IRGC drones on 04-AUG (unconfirmed by US or Kuwaiti authorities). Iraq: heavy blasts reported in Basra province. Strait of Hormuz and Gulf of Oman: see MAR-001. TIME: Baghaei denial 03-AUG. Trump Truth Social post and Oval Office remarks 03-AUG. IRGC Kuwait attack 04-AUG. No announced US strike inside Iran 30-JUL through 04-AUG.	

	EQUIPMENT: IRGC: at least three drones against the Kuwait base. US: no strike package announced in the window. Iranian forces continue to control transit permission on both Hormuz corridors. UNIT: IRGC (Kuwait attack, 04-AUG); Iranian Ministry of Foreign Affairs (Baghaei); the White House (Trump statements); Omani mediation channel; Qatari-convened GCC track.	
Analyst Assessment	The central claim of the last cycle did not hold. Washington asserted that negotiations would open 03-AUG and Tehran denied on the record that any negotiations exist, which means the pause now rests on an even weaker footing than the three that preceded it - not an unsigned framework but a disputed one. The escalation risk has also inverted: the only kinetic activity in this window came from the Iranian side, against a US base in a third country, while the US strike pause held. ISW assesses that an arrangement letting Iran control inbound traffic would still let Iran choose which vessels enter the Gulf, which is the correct frame for the Oman corridor track. LIKELIHOOD: Renewed US strikes inside Iran before the next cycle: roughly even chance -- the IRGC attack on a US base in Kuwait supplies a casus belli for resumption, but the US has absorbed comparable provocations during this pause without responding.CONFIDENCE: MODERATE. LIKELIHOOD: Verified physical reopening of the Strait to pre-war transit volumes before the next cycle: very unlikely -- Kpler recorded nine transits on 02-AUG of which none used the established traffic separation scheme, and Iran asserts permission-based control of both corridors.CONFIDENCE: LOW.	
ALT HYP	ALT A: A negotiating track exists despite Tehran's denial [roughly even chance]	
	SUPPORT	Trump stated on the record that talks were going on and described the perimeters of a deal; Oman is confirmed by both sides as an active channel on a temporary corridor; Qatar convened GCC states on de-escalation, which is consistent with an active track needing regional cover.
	DISCONFIRM	Iran's foreign ministry denied negotiations on the record and said no delegations would be hosted or sent in the coming days; no written instrument exists; the IRGC attacked a US base during the supposed negotiating window.
	CURRENT STATUS	Denial and assertion stand unreconciled. Assessed roughly even chance, confidence LOW.
	ALT B: The pause is a reload window on one or both sides rather than a diplomatic opening [roughly even chance]	
	SUPPORT	Trump stated the US remains ready to go at any time; no CENTCOM damage assessment of the 29-30 JUL wave has been published; the IRGC retained and used strike capability against Kuwait during the pause.
	DISCONFIRM	Omani mediation on a corridor is a concrete, narrow and verifiable subject rather than a stalling device; Gulf states are investing diplomatic capital in de-escalation.
	CURRENT STATUS	Neither side has withdrawn capability, and Iranian strike activity continued during the pause. Assessed roughly even chance, confidence MODERATE.
SOURCES	Reuters, 03-AUG and 04-AUG Iranian Ministry of Foreign Affairs (Baghaei), 03-AUG The National live coverage, 04-AUG Jerusalem Post, 04-AUG ISW Iran Update Special Report, 03-AUG Kpler daily monitoring, 02-AUG GlobalSecurity.org Iran War OPREP Day 157, 03-AUG	

FORTUNE FAVORS THE PREPARED DAILY THREAT REPORT 04 AUGUST 2026		
NUC-001 IAEA BLACKOUT DAY 157 NO NEW IAEA STATEMENT OR BOARD ACTION PICKAXE MOUNTAIN UNSTRUCK		FLASH UPDATED 24
Why This Cycle	No IAEA statement or Board action was issued in the window and no nuclear facility was struck. With Tehran denying a negotiating track, the denuclearisation agenda described on 02-AUG has no confirmed forum.	
Summary	The blackout is unchanged at Day 157, with no IAEA access to any struck enrichment facility. The Agency assesses Iran's enriched-uranium stockpile remains in country and largely under rubble at the struck sites.	
SALUTE	SIZE/TIME: 440.9 kg of 60%-enriched UF ₆ , last IAEA-verified 27-FEB-2026 and unverified for 157 days, sufficient for roughly ten weapons if further enriched to 90%. Pickaxe Mountain has never been inspected and was not struck in the 29-30 JUL wave.	
Analyst Assessment	The blackout is now the longest-running unresolved element of the conflict and it is drifting out of the negotiating frame rather than into it. Denuclearisation was named as a deal component on 02-AUG, but Tehran's 03-AUG denial that any negotiations exist removes the forum in which that component could be tabled. The operative risk is not a nuclear breakout - both US and Iranian officials state enrichment has stopped - but the steady normalisation of a 157-day inspection gap over a stockpile sufficient for roughly ten weapons.	
ALT HYP	ALT A: Denuclearisation enters a negotiating agenda as a substantive item rather than rhetoric [unlikely]	
	SUPPORT	Trump named denuclearisation alongside Hormuz when describing the deal on 02-AUG and repeated that a deal is close on 03-AUG.
	DISCONFIRM	Iran denied on 03-AUG that any negotiations exist, so there is no forum in which the item could be tabled; Iran has consistently treated IAEA access as a final-deal deliverable rather than an interim step.
	CURRENT STATUS	Day 157, no access, no IAEA statement, and no confirmed negotiating forum. Assessed unlikely, confidence MODERATE.
	ALT B: Iran has covertly resumed enrichment despite the absence of visibility [unlikely]	
	SUPPORT	The Agency has no access to any struck facility and cannot confirm status; Pickaxe Mountain has never been inspected and Israeli officials allege expanded activity there; 440.9 kg of 60%-enriched material remains unverified since 28-FEB.
	DISCONFIRM	The US Director of National Intelligence and Iran's ambassador to the IAEA independently state that enrichment has not resumed; the IAEA reports no satellite evidence of renewed enrichment at Natanz or Fordow; roughly 6,000 centrifuges at Natanz were destroyed and the site is assessed about 75% damaged.
	CURRENT STATUS	No evidence of resumed enrichment, and no visibility either. Assessed unlikely, confidence LOW.
CYB-001 NEW KEV CVE-2026-18577 (N-ABLE N-CENTRAL) DUE 06-AUG CISCO FMC THREE DAYS OVERDUE		HIGH UPDATED 9
Why This Cycle	CISA added CVE-2026-18577 (N-able N-central) to KEV on 03-AUG with an 06-AUG federal deadline. Cisco FMC CVE-2026-20316 passed its 01-AUG deadline and is now three days overdue.	

Summary	CVE-2026-18577 is an authentication bypass in the N-able N-central remote monitoring and management platform, CVSS 8.2, and is an incomplete patch for CVE-2026-18556 - which widens the affected range to every build before 2026.3.1.7. Attackers gain remote administrative access to the N-central server, then abuse the built-in Take Control feature to pivot into managed endpoints. Persistence is established by registering Cloudflare tunnels as Windows services, which is outbound-only, requires no inbound firewall rule, survives reboot, and survived revocation of the N-central route. Indicators include svchost.exe running from a user Documents folder and a registered service named Cloudflared. N-able shipped hotfix 2026.3.1.7 on 02-AUG and confirms a limited number of customers compromised; Huntress reports exploitation ongoing and 55.6% of its partners and customers not yet patched as of 03-AUG. Finland's NCSC issued an advisory on 02-AUG. See CYB-003 for the downstream managed-endpoint exposure.	
SALUTE	SIZE/TIME: One new KEV this cycle (CVE-2026-18577, N-able N-central, deadline 06-AUG, two days out). Cisco FMC CVE-2026-20316 overdue by three days since 01-AUG. Fortinet CVE-2025-68686 due 10-AUG, six days out. Governing directive is BOD 26-04.	
Analyst Assessment	The N-able flaw is the most consequential cyber item of the cycle because of where it sits rather than what it is. Compromising a remote monitoring and management server converts a single intrusion into access across every managed customer estate behind it, and the Cloudflare-tunnel persistence survives both reboot and revocation of the vendor route. A federal deadline two days out against a vendor-reported 55.6% unpatched rate means the exposure window closes on paper well before it closes in practice.	
ALT HYP	ALT A: A further KEV addition occurs before the next cycle [likely]	
	SUPPORT	Cisco, Fortinet, Microsoft and N-able are all under active exploitation pressure; CISA added three entries in the week to 02-AUG plus CVE-2026-18577 on 03-AUG.
	DISCONFIRM	Additions have been running at three to four per week rather than daily; no further vendor advisory carrying evidence of active exploitation was published in the window.
	CURRENT STATUS	Catalogue count NOT stated this cycle: the 1,274 figure carried previously is a third-party count of the non-Microsoft subset, not CISA's total, and no verified total was obtained. Assessed likely, confidence MODERATE.
	ALT B: The N-able flaw is exploited against a US federal network before the 06-AUG deadline [roughly even chance]	
	SUPPORT	Exploitation is already confirmed in the wild against managed service providers; 55.6% of one vendor's monitored estate was unpatched three days before the deadline; compromise of an RMM server cascades to every managed endpoint behind it.
	DISCONFIRM	The deadline has not yet passed, so federal remediation is still inside its window; N-able describes the confirmed victim set as limited; BOD 26-04 prioritises exactly this class of publicly exploited flaw.
	CURRENT STATUS	Due 06-AUG, exploitation confirmed in the wild, no reported federal compromise. Assessed roughly even chance, confidence MODERATE.

SECTION 4A - CYBER & INFORMATION SECURITY

Iran-affiliated ICS/OT campaign -- NSTR this cycle. Checked against CISA advisories this cycle: no update to joint advisory AA26-097A since the 22-JUL revision, and no new ICS advisory had posted at pull time.

CYB-003 -- N-ABLE DOWNSTREAM MANAGED-ENDPOINT EXPOSURE. The operational significance of CVE-2026-18577 is not the RMM server but what sits behind it. A compromised N-central instance gives an attacker the vendor's own Take Control channel into every managed customer endpoint, which is a supply-chain position rather than a single-target one. N-able published six attacker IP addresses; Huntress identified four of them as Mullvad or NordVPN exit nodes, so IP blocking is of limited value and hunting should key on the service-name and process-path indicators instead. Organisations running N-central should treat every managed endpoint as in scope until the hotfix is confirmed applied and the Cloudflared service indicator is cleared.

SECTION 4B - PHYSICAL / GEOPOLITICAL / IO

STSB-002 TWIN FALLS ID MASS SHOOTING (01-AUG) MOTIVE UNDETERMINED AT DAY 3 VICTIM IDENTIFIED		FLASH NEW 21
Why This Cycle	Motive remains undetermined three days after the attack, with hundreds of witnesses still to be interviewed. The victim and the intervening armed civilian have now been publicly identified.	
Summary	Three people were killed and seven wounded outside an In-N-Out Burger in Twin Falls, Idaho at about 1429 MDT on 01-AUG; the 24-year-old suspect died of a self-inflicted gunshot wound after an off-duty Idaho State Police trooper and an armed private citizen returned fire. This product does not name the perpetrator. One victim has been identified as a 23-year-old restaurant employee, and the intervening armed civilian as a 35-year-old resident of Kimberly, Idaho. A second officer-involved shooting occurred during the search with no injuries and is being investigated by Jerome Police Department. The FBI is assisting. Police have publicly corrected online misinformation that named an uninvolved person as the shooter.	
SALUTE	SIZE/TIME: Three killed and seven wounded at a quick-service restaurant with a drive-through, 01-AUG at about 1429 MDT, Twin Falls, Idaho. Motive undetermined at Day 3.	
SOURCES	Twin Falls Police Department, 02-AUG and 03-AUG ABC News, 02-AUG NBC News, 03-AUG KTVB, 03-AUG Idaho Statesman, 03-AUG College of Southern Idaho statement, 03-AUG	
Analyst Assessment	Three days without a published motive, against hundreds of witnesses still to be interviewed, is consistent with an investigation that has no ideological or targeting thread to follow rather than one withholding a finding. The operationally durable lesson does not depend on motive: an off-duty officer and an armed civilian independently engaged and displaced the attacker within the first minutes, and the casualty count stopped rising at that point. The secondary lesson is informational - police had to publicly correct online misidentification of an uninvolved person, now a routine feature of the first 48 hours after a mass-casualty attack.	
ALT HYP	ALT A: The attack was directed at a specific individual rather than indiscriminate [roughly even chance]	
	SUPPORT	A witness describes the shooter firing on a specific vehicle and then focusing solely on the armed bystander engaging him; the attack began outside rather than inside the restaurant; the shooter moved through the drive-through rather than the dining room.

	DISCONFIRM	Ten people were struck across a wide area, which is inconsistent with a single-target attack; the weapon was an AR-pattern rifle used in a crowded public setting at lunchtime; police have indicated no known relationship between the shooter and any victim; motive remains undetermined.
	CURRENT STATUS	Motive undetermined at Day 3, hundreds of witnesses still to be interviewed. The standing judgement that motive would not be published before this cycle resolved correct. Assessed roughly even chance, confidence LOW.
	ALT B: This attack forms part of a wider pattern against quick-service restaurant sites [very unlikely]	
	SUPPORT	The site had opened only eight days earlier and carried elevated footfall; quick-service drive-throughs concentrate immobilised people with no access control, which is a recognised soft-target profile.
	DISCONFIRM	Police assess the suspect acted alone and have identified no co-conspirators; no claim of responsibility or ideological material has been reported; no comparable incident at a similar site has been identified in the reporting window; the shooter is deceased.
	CURRENT STATUS	Single incident, lone actor assessed, no co-conspirators identified. Assessed very unlikely, confidence MODERATE.

MAR-001 -- HORMUZ MERCHANT SHIPPING ATTACKS RESUMED. The Liberian-flagged bulk carrier Minoan Pioneer was struck by an unknown projectile approximately 20 nautical miles northeast of Al Khasab, Oman at 2200Z on 03-AUG, per UKMTO. The projectile struck the engine room, causing a complete blackout and a fire in the accommodation area; one crew member is missing. The distress call was received by the Panama-flagged tanker Suriname Prosperity. Two near-misses preceded it on 02-AUG in Omani waters - the VLCC Egypt Prosperity and the Aframax On Pride, both reporting explosions and warning shots, both unscathed. The targeting pattern continues to concentrate on vessels using the Omani-shore route rather than Iran's declared corridor. Kpler recorded 106 Hormuz crossings by 96 distinct vessels over 27-JUL to 02-AUG, up about 8% week-on-week but volatile between 8 and 25 per day; on 02-AUG seven of nine transits used Iran's Unilateral Scheme and none used the established traffic separation scheme. Kpler advises treating both chokepoints as contested rather than normalised.

SECTION 5 - ENERGY / INFRASTRUCTURE / SUPPLY CHAIN

ENERGY / INFRASTRUCTURE MONITORS - 04 AUGUST 2026

ENR-001 OIL / ENERGY PRICES: Brent stands at \$80.60/bbl and WTI at \$76.95/bbl on 04-AUG, against a \$87.93 Brent close on 31-JUL and about \$83.77 on 03-AUG - a 48-hour fall of \$7.33, or 8.3%. The OPEC Basket fell \$8.87 to \$79.50, a 10.04% single-session loss and the largest move on the board. Natural gas \$2.666, RBOB gasoline \$2.856/gal, heating oil \$3.773/gal. Figures are operator-supplied live quotes rather than official ICE or NYMEX settles. OPEC+ agreed a further increase on 02-AUG completing restoration of the 2023 cuts; Turkey and Iraq extended their pipeline agreement by a year; Kazakhstan resumed CPC intake.

ENR-002 GRID / PUBLIC SAFETY POWER SHUTOFFS: PSPS RESTORATION UNDER WAY. Avista has begun restoring power after the Public Safety Power Shutoffs implemented from about 1300 PDT on 01-AUG across selected eastern Washington, northern Idaho and eastern Oregon circuits. Thousands remain without electricity or natural gas because of fire-damaged infrastructure. Washington now ranks first in the nation for both total outages and percentage of customers affected: 31,713 Spokane County customers are out, 13.18% of the county, with Avista accounting for 30,578. Peak impact was around 43,000 customers.

MAR-001 MARITIME SUPPLY CHAIN: See MAR-001 in Section 4B for the Minoan Pioneer strike. Kpler recorded 106 Hormuz crossings by 96 distinct vessels over the week to 02-AUG. Bab el-Mandeb ran 20 vessels on 03-AUG, steady on the previous day, with 12 exits and 8 entries and most transponders on.

SECTION 6 - AVIATION / TRANSPORTATION

AVIATION / TRANSPORTATION MONITORS - 04 AUGUST 2026

AVN-001 MIDDLE EAST / HORMUZ AIRSPACE: No change to EASA guidance this cycle. Conflict Zone Information Bulletins remain AVOID AT ALL LEVELS for Bahrain, Kuwait, Qatar, the UAE and the Gulf of Oman west of 58 deg E. GNSS interference across Gulf FIRs persists as a standing condition with no new NANU or NAVCEN advisory in the window. The FAA reported seven US airports with active delays or ground stops at 04-AUG 0126Z, all weather-attributed; no systemic NAS event.

AVN-002 SURFACE / RAIL / TRANSIT: NSTR. No current-cycle surface, rail or transit security incident was identified. Wildfire-driven road and area closures continue across eastern Washington.

SECTION 7 - METEOROLOGICAL WEATHER / SEVERE WEATHER / FIRE WEATHER

WX-001 | SLIGHT RISK TODAY - SOUTHEASTERN ARIZONA ONLY | COMPOUND WIND AND FLASH-FLOOD HAZARD

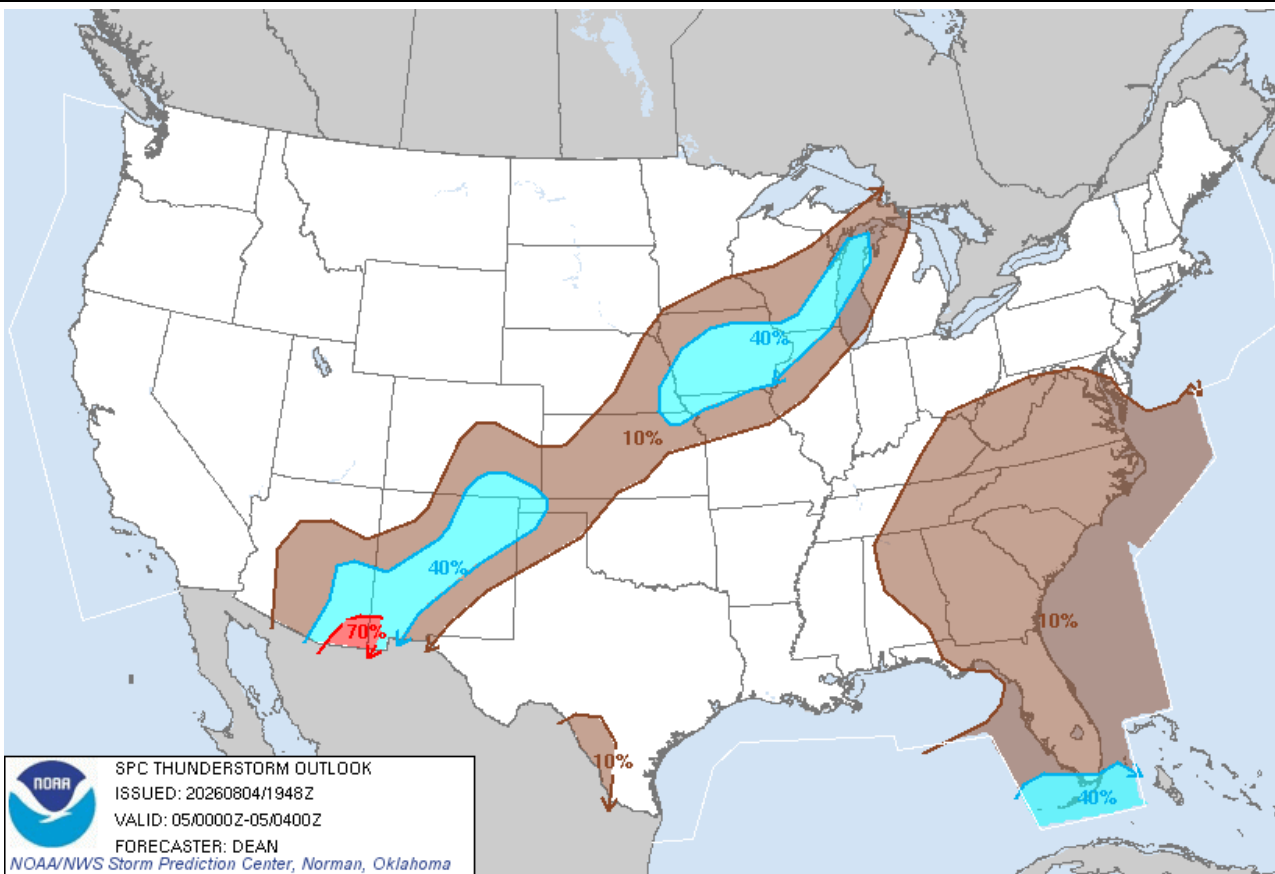
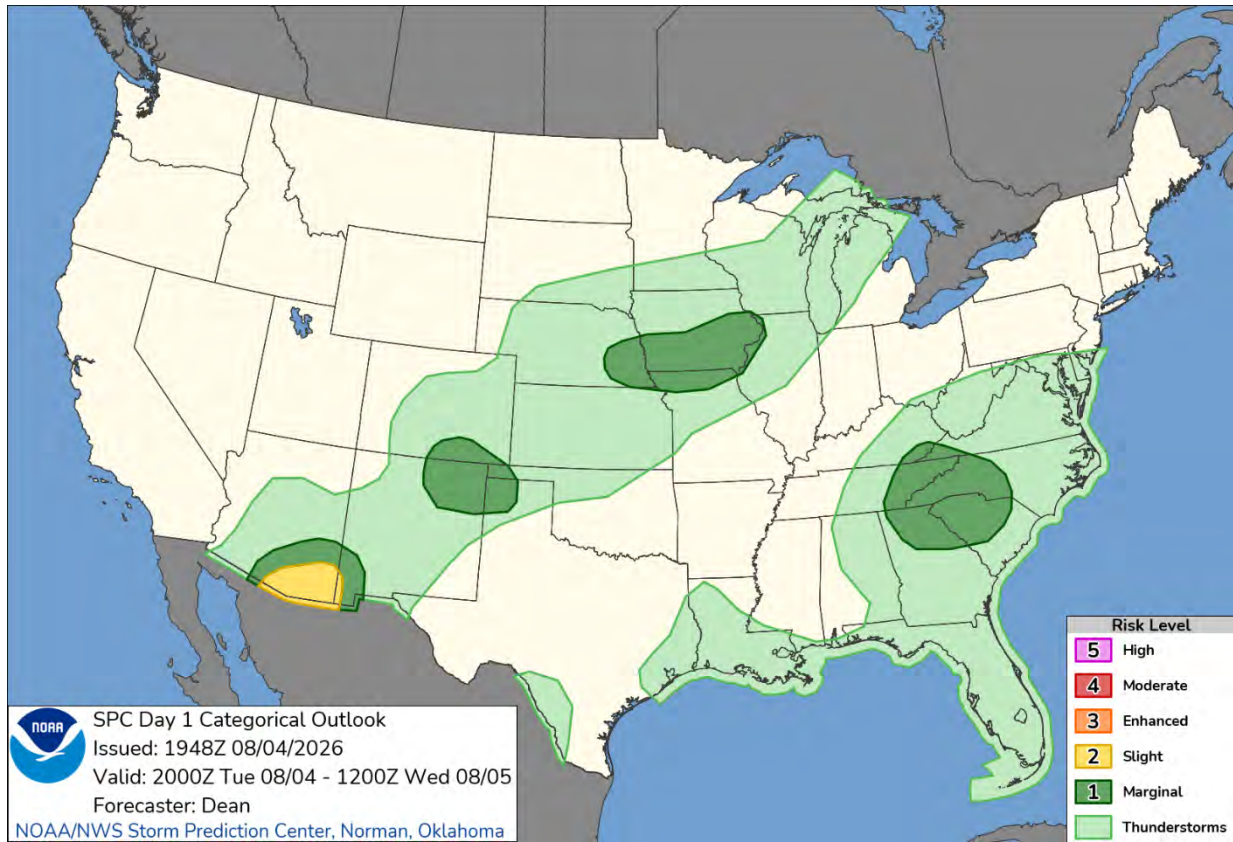
FLASH | ACTIVE | 20

Summary

SLIGHT risk today (04-AUG) in one area only: southeastern Arizona. A flattened mid to upper-level ridge over the Desert Southwest and a moderate belt of easterlies across Sonora feed a seasonably moist airmass that reaches 1000-2000 J/kg MLCAPE by mid-afternoon. Steep 700-500 mb lapse rates near 8 deg C/km over very steep low-level lapse rates give strong evaporative cooling, so the risk is microbursts and 60-80 mph gusts as storms congeal into a small cluster or two moving west across southeast Arizona late afternoon and evening. Two non-categorical areas also carry risk: the Sangre de Cristos and adjacent plains near the Raton Mesa into the Oklahoma and Texas Panhandles for isolated severe gusts and marginally severe hail, and the western Carolinas east of a mid-level low over northern Georgia for isolated wind damage. The same southern Arizona ground carries a WPC SLIGHT excessive rainfall risk today, with burn scars named as vulnerable to flash flooding - a compound hazard rather than a wind story alone.

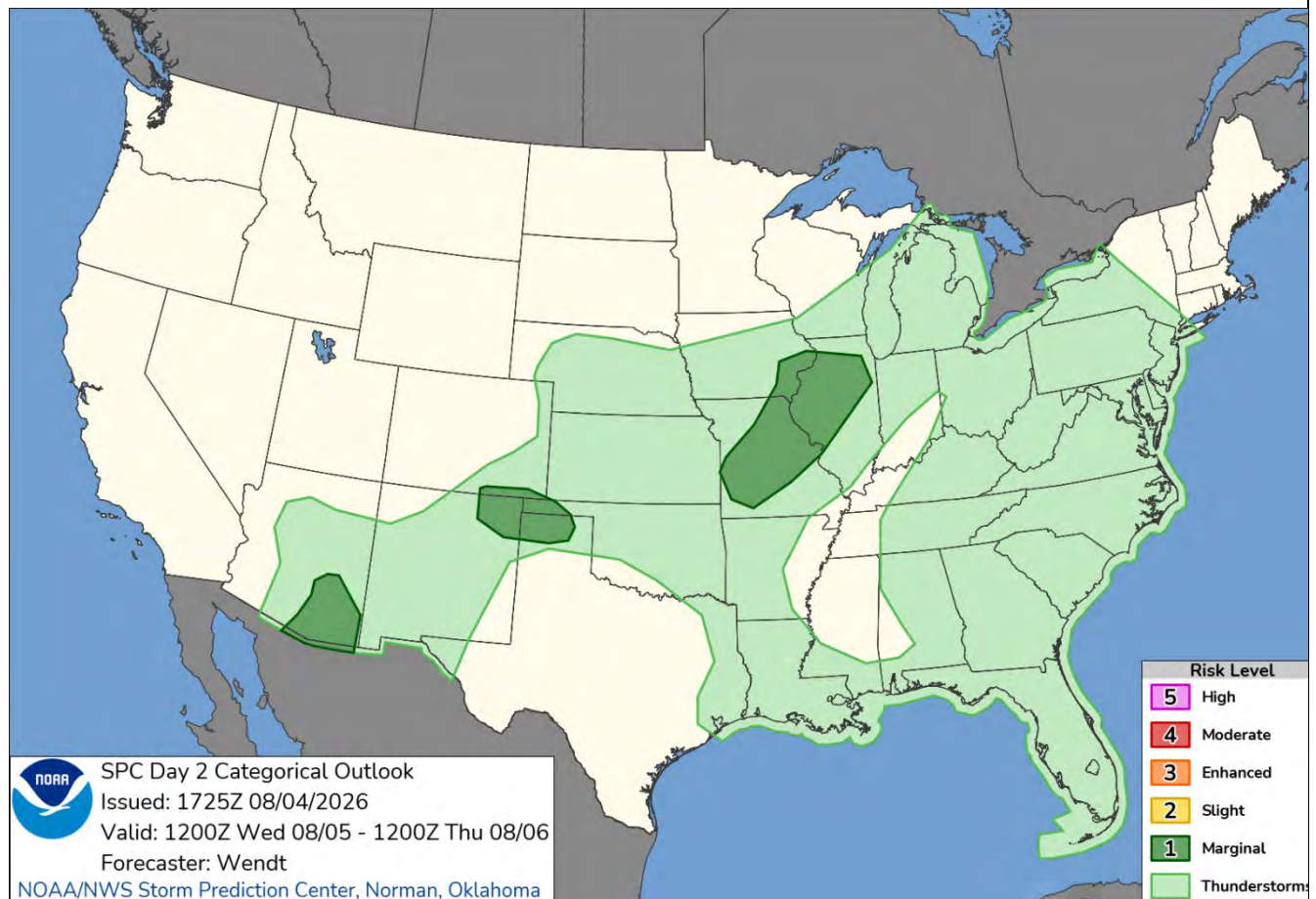
SPC Day 1
Convective
Outlook

SPC Day 1 Convective Outlook, 0735 AM CDT Tue Aug 04 2026, valid 041300Z-051200Z. SLIGHT RISK of severe thunderstorms for southeast Arizona; scattered severe wind gusts possible during the late afternoon and evening.



**SPC Day 2
Convective
Outlook**

SPC Day 2 Convective Outlook, 1256 AM CDT Tue Aug 04 2026, valid 051200Z-061200Z. MARGINAL RISK from Missouri into Illinois, over northeast New Mexico into the Texas Panhandle, and over southeast Arizona.

**SPC Day 3
Convective
Outlook**

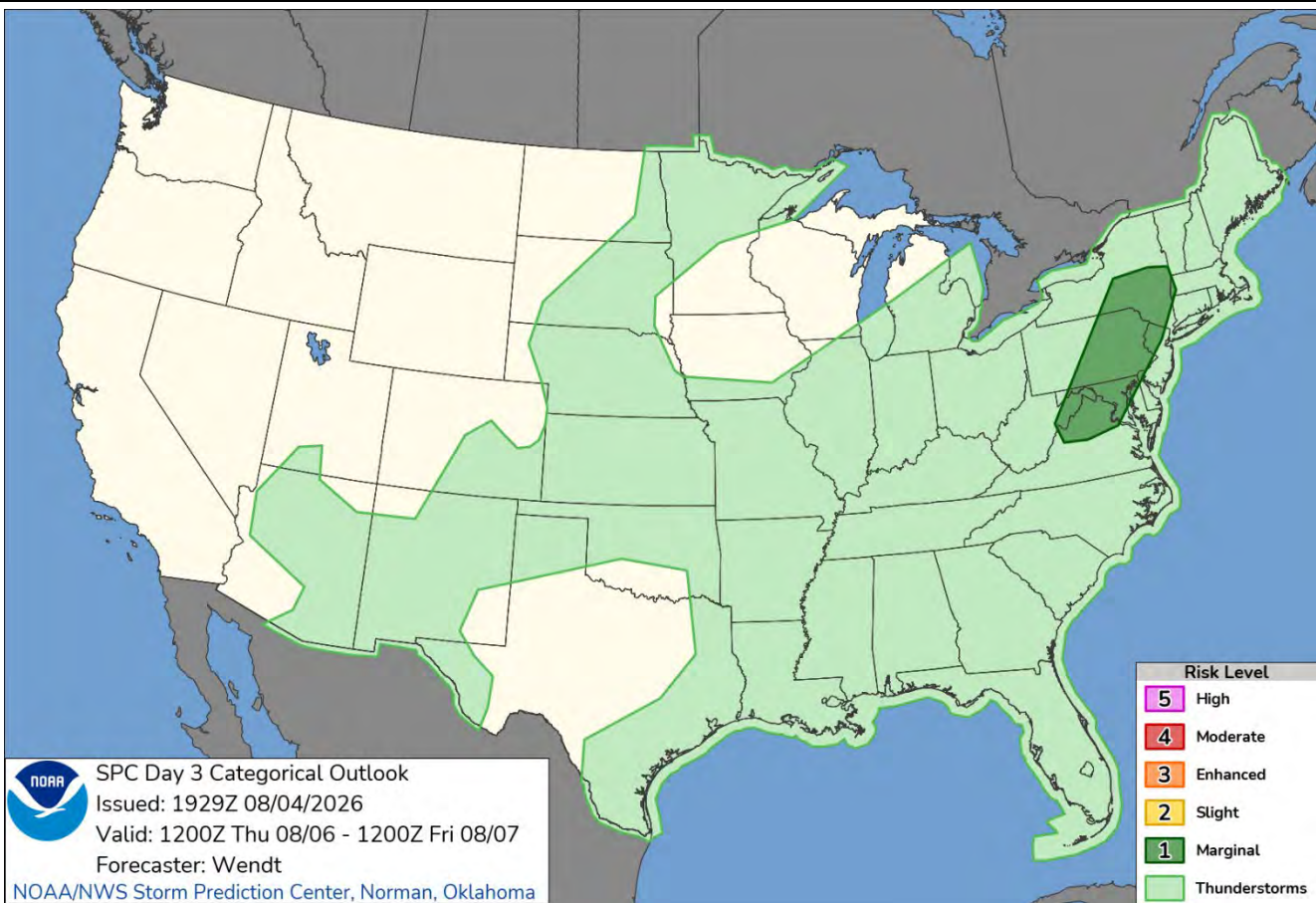
SPC Day 3 Convective Outlook, 0230 AM CDT Tue Aug 04 2026, valid 061200Z-071200Z. NO SEVERE THUNDERSTORM AREAS FORECAST; a few strong storms possible from the central Plains into the Northeast with locally strong gusts. SPC deferred any potential small Marginal areas to later updates given low predictability.

**Analyst
Assessment**

TODAY'S THREAT CHARACTER: One SLIGHT area rather than two, and it is a wet-microburst regime rather than a shear-driven one. The operationally important feature today is not the severe risk in isolation but its co-location with the WPC SLIGHT excessive rainfall area over southern Arizona, where terrain and burn scars are explicitly named. Burn-scar debris flow and 60-80 mph outflow are different hazards with different protective actions arriving on the same ground in the same afternoon. No Arizona NWR transmitters are out of service, so warning dissemination over the compound-hazard area is intact.

LIKELIHOOD: Reports of damaging wind gusts in the southeast Arizona SLIGHT area today: likely -- SPC forecasts 60-80 mph microburst gusts with ample evaporative cooling potential and storms congealing into clusters. **CONFIDENCE:** MODERATE.

LIKELIHOOD: A flash-flood emergency on a southern Arizona burn scar today: unlikely -- WPC carries SLIGHT rather than MODERATE risk, though rain rates above one inch per hour over receptive terrain make localised flash flooding likely somewhere in the area. **CONFIDENCE:** MODERATE.

**ALT HYP****ALT A: The southeast Arizona SLIGHT area is upgraded before the event [very unlikely]****SUPPORT**

Moisture flux anomalies exceed four standard deviations on GFS and MUCAPE reaches 1000-2500 J/kg, which is the high end of what this regime supports.

DISCONFIRM

SPC frames the hazard as scattered severe wind gusts from microbursts, which is a ceiling rather than a floor; deep-layer shear is weak and no organised mode is forecast.

CURRENT STATUS

SLIGHT, issued 0735 CDT 04-AUG. Assessed very unlikely, confidence MODERATE.

ALT B: The compound flash-flood hazard produces more consequential impacts than the wind hazard [roughly even chance]**SUPPORT**

WPC explicitly names terrain features and burn scars as particularly vulnerable; rain rates above one inch per hour over hydrophobic burn-scar soils generate debris flows at far lower thresholds than normal ground.

DISCONFIRM

The SLIGHT excessive rainfall area is broad and the burn-scar footprint within it is small; most of the area will see beneficial rather than damaging rainfall.

CURRENT STATUS

Both SLIGHT areas issued 04-AUG and co-located. Assessed roughly even chance, confidence MODERATE.

SOURCES

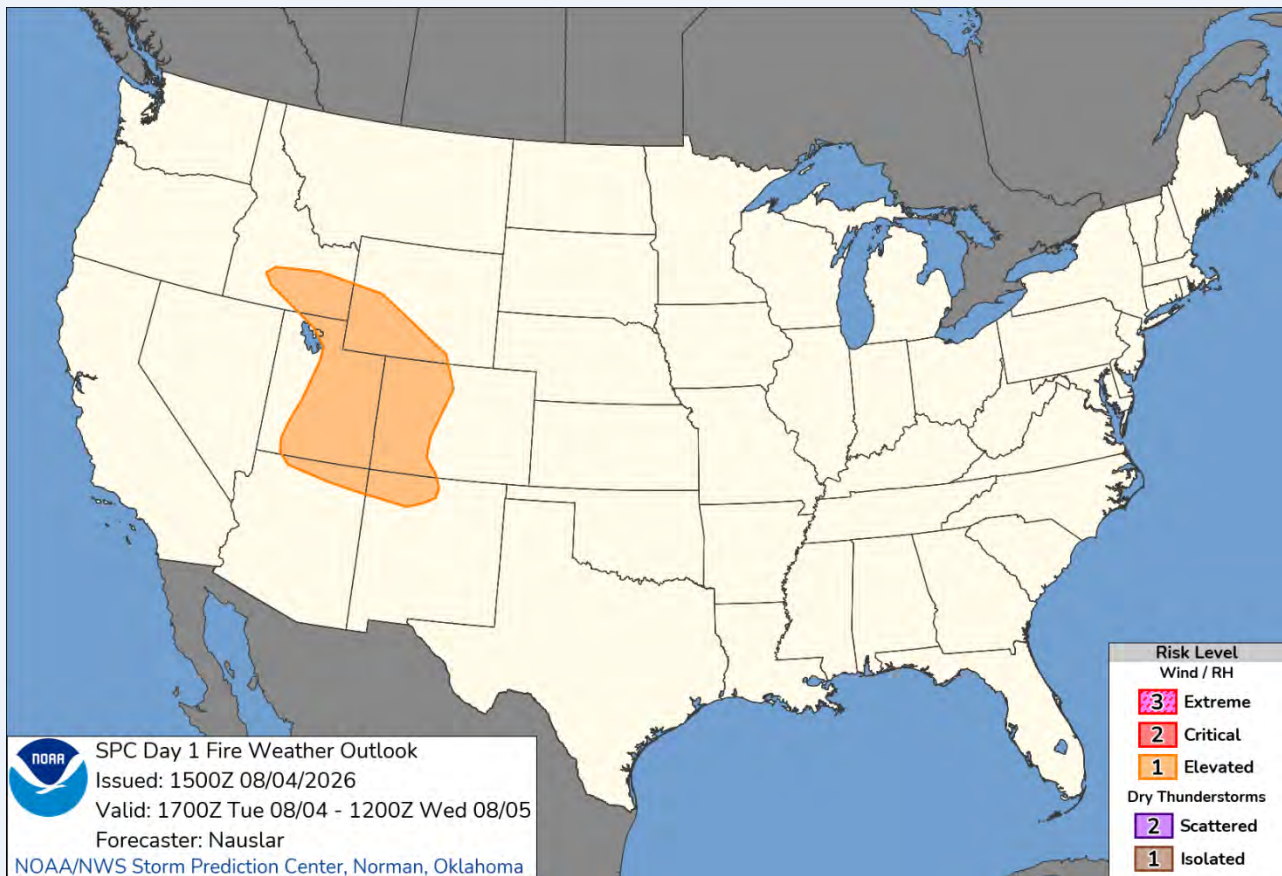
NOAA SPC Day 1 Outlook | NOAA SPC Day 2 Outlook | NWS Tucson AZ | NOAA WPC Excessive Rainfall Outlook | NWS Phoenix AZ | [airnow.gov](https://www.airnow.gov)

SECTION 7B - WILDFIRE REPORT (SEPARATE FROM METEOROLOGICAL WEATHER -- SEE SECTION 7 FOR WX-001)

WX-002 | SEC 7B FIRE WEATHER | SPOKANE AREA FIRES 10,280 ACRES 0% CONTAINED | ARSON ARREST | NPL 5 OF 5

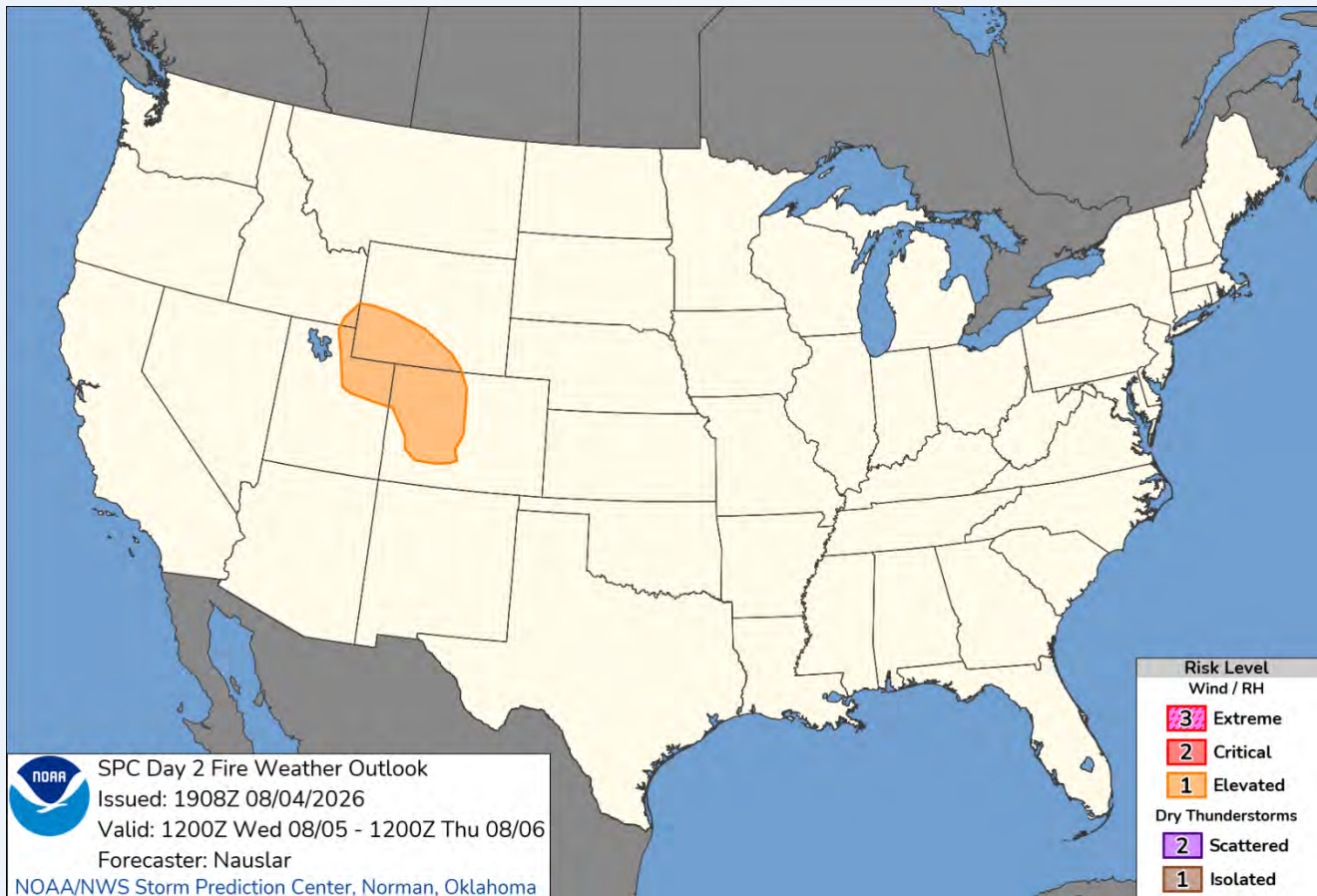
FLASH | ACTIVE | 24

Summary	The Spokane Area Fires are the dominant national incident. Three fires west and north of Spokane - Old Trails, Autumn Lane and Fairview - reached 10,280 combined acres at 0% containment as of 04-AUG 0808 local, up from 8,026 acres in the 03-AUG IMSR. An arrest was made on 03-AUG for intentionally setting a fire that spread into the Old Trails Fire; InciWeb continues to list cause as under investigation, and the two statements are reported separately here because they have not been reconciled by any authority.
National Status	NIFC National Preparedness Level (NPL): 5 of 5, the maximum, held since 18-JUL 0730 MDT and confirmed via direct NIFC pull this cycle. Source: nifc.gov/fire-information/nfn .
SPC Fire Weather Day 1	SPC Day 1 Fire Weather Outlook, 1235 AM CDT Tue Aug 04 2026, valid 041200Z-051200Z. NO CRITICAL AREA. Elevated highlights are maintained across portions of the Great Basin and Colorado Plateau, where strong daytime mixing gives RH of 5-15% with sustained westerly winds of 12-20 mph gusting to 30 amid receptive fuels. Farther west, hot, dry and unstable conditions are expected along a thermal trough from northern California into western Oregon and Washington, but lighter winds preclude fire weather highlights there.



SPC Fire Weather Day 2	SPC Day 2 Fire Weather Outlook, 1236 AM CDT Tue Aug 04 2026, valid 051200Z-061200Z. NO CRITICAL AREAS. Locally elevated concerns may emerge across southeast Idaho into portions of the Colorado Plateau where terrain-driven winds
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combine with RH of 5-15%, and again in the northern California into western Oregon and Washington thermal trough.



**Active Fire Areas
 (InciWeb / local IMT
 04-AUG 0808 local;
 NIFC IMSR 03-AUG
 0730 MDT)**

SPOKANE AREA FIRES (WA): 10,280 acres, 0% contained, as of 04-AUG 0808 local - Old Trails 3,619, Autumn Lane 5,603, Fairview 1,056 (components sum to 10,278; the two-acre difference against the stated total is a rounding artefact and is not smoothed here). Autumn Lane is now the largest of the three, having grown from 3,351 acres in the 03-AUG IMSR. Structure loss is unresolved: InciWeb states an unconfirmed estimate of at least 600 structures impacted and has ordered damage assessment crews, while officials give 700 to 1,100 and Spokane County Fire District 3 states 640 lost in Old Trails alone against the IMSR's 550 for that fire. Evacuation figures also remain unreconciled at 60,000 within city limits, 65,000 people, 65,000 families and 67,000 per the incident commander. No confirmed deaths or injuries; more than 200 missing-person reports cleared with about a dozen open. California Interagency IMT 7 holds command, the first CAL FIRE team activated to Washington. Over 4,000 personnel from 12 states and Australia are committed; 26 drone incursions over fire operations were recorded on 02-AUG and a TFR is in force.

NATIONAL: SEC 7B MANDATORY FIELDS (\$0.117): NPL 5 of 5, held since 18-JUL 0730 MDT per NIFC (source: nifc.gov/fire-information/nfn). 7-Day Significant Fire Potential, per the NIFC IMSR Predictive Services Discussion of 03-AUG: a weakening cold front stalls from the central Great Basin into the central Rockies with west winds of 25-35 mph and RH of 4-15%, producing elevated to locally critical conditions; over 100 deg F with very low RH across California, the southern Great Basin, the West Slope and the Southwest; the southern Plains at or above 105 deg F. The graphical 7-Day Significant Fire Potential product is a map viewer with no machine-readable text and was not separately parsed.

NORTHWEST AREA (most active GACC): 51 incidents, 2,242,669 cumulative acres and 19,276 personnel committed. Other major Washington incidents as of 04-AUG:

	Sinlahekin 102,934 acres 5% contained, Little Giant 59,346 acres 0%, Modrite 51,142 acres 17%, Ptarmigan 15,952 acres 0%, Kaiser Canyon 136,422 acres 38% with an FMAG authorised. Little Giant has grown 54% against the 03-AUG IMSR figure of 38,530 acres. Aspen Acres in Colorado carries 915 structures lost, the largest structure loss on the national board. Australian and New Zealand augmentation - one 15-member IMT and 59 fireline personnel - is committed to the Northwest Area, and MAFFS C-130s are staged at Klamath Falls and Redding. NWR COVERAGE NOTES - NO HIGH-GAP ALERT THIS CYCLE: Three multi-station clusters persist - Midland/Odessa WFO (Artesia WXN24, Carlsbad WWF37), Nashville WFO (Shelbyville WXX63, Lafayette WNG631) and Fort Worth-Dallas WFO (Dallas KEC56, Mineral Wells WNG651, both new this cycle). None overlaps an active wildfire or severe-weather hazard today: the Day 1 Elevated fire weather area lies over the Great Basin and Colorado Plateau, and the Day 1 SLIGHT convective area is southeastern Arizona, where no transmitters are out. The New Mexico alert raised last cycle is withdrawn on that test. Note also that the New Mexico grouping is a state artefact: Roswell WWG36 sits under Albuquerque, not Midland/Odessa.									
Analyst Assessment	SEASON TRAJECTORY: At 44,722 fires and 5,154,596 acres burned nationally year to date, running 128% and 137% of ten-year averages with NPL held at 5 of 5 since 18-JUL, the season remains well above historical norms. 141,847 acres burned in the latest 24-hour reporting period. The year-to-date figures carried last cycle exceeded NIFC's own current totals and could not both be true; the current NIFC publication is what is reported here. STRUCTURE-LOSS SIGNIFICANCE: Structure loss remains the most consequential feature of this incident, and the authoritative source is openly uncertain: InciWeb labels its own at-least-600 estimate unconfirmed and has ordered damage assessment crews. A range of 600 to 1,100 inside a metropolitan area still represents the largest single-incident structure loss of the season outside Aspen Acres. FIRE-WEATHER TRAJECTORY: Fire weather is easing while the fire is not. SPC carries NO CRITICAL AREA on both Day 1 and Day 2, yet the complex grew 28% overnight and Autumn Lane nearly doubled. Hotter weather is forecast to return on 05-AUG, which is the point at which containment lines built under favourable conditions will be tested. LIKELIHOOD: New significant fire starts driven by a critical fire-weather event over the next 48 hours: unlikely -- SPC Day 1 and Day 2 Fire Weather Outlooks both read NO CRITICAL AREAS.CONFIDENCE: MODERATE. LIKELIHOOD: National Preparedness Level remaining at 5 through the next cycle: almost certain -- 102 uncontained large fires and 29,201 personnel committed, both higher than last cycle.CONFIDENCE: HIGH.									
SOURCES	NIFC National Situation Report SPC Fire Weather Outlook InciWeb Active Incidents USFS Active Fire Mapping Program									
ALT HYP	<table><tr><td colspan="2">ALT A: Spokane Area Fires growth is arrested within 72 hours as fire weather eases [roughly even chance]</td></tr><tr><td>SUPPORT</td><td>SPC Day 1 and Day 2 Fire Weather Outlooks both read NO CRITICAL AREAS; cooler temperatures and higher humidities on 02-AUG allowed significant gains on Old Trails and Fairview; over 4,000 personnel and two federal IMTs are committed.</td></tr><tr><td>DISCONFIRM</td><td>The complex grew from 8,026 to 10,280 acres in about 26 hours and Autumn Lane nearly doubled; all three fires remain at 0% containment; hotter weather returns 05-AUG.</td></tr><tr><td>102 uncontained large fires, 7 new large</td><td>10,280 acres combined, 0% contained, at least 600 structures lost. Assessed roughly even chance, confidence LOW.</td></tr></table>		ALT A: Spokane Area Fires growth is arrested within 72 hours as fire weather eases [roughly even chance]		SUPPORT	SPC Day 1 and Day 2 Fire Weather Outlooks both read NO CRITICAL AREAS; cooler temperatures and higher humidities on 02-AUG allowed significant gains on Old Trails and Fairview; over 4,000 personnel and two federal IMTs are committed.	DISCONFIRM	The complex grew from 8,026 to 10,280 acres in about 26 hours and Autumn Lane nearly doubled; all three fires remain at 0% containment; hotter weather returns 05-AUG.	102 uncontained large fires, 7 new large	10,280 acres combined, 0% contained, at least 600 structures lost. Assessed roughly even chance, confidence LOW.
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102 uncontained large fires, 7 new large	10,280 acres combined, 0% contained, at least 600 structures lost. Assessed roughly even chance, confidence LOW.									

incidents, 27 CIMTs and 2 NIMOs committed; 29,201 personnel committed nationally; international augmentation committed to the Northwest Area.

ALT B: National Preparedness Level drops below 5 before the next cycle [very unlikely]

SUPPORT

Two large fires were contained in the latest reporting period; the national fire-weather picture is easing to Elevated with no critical areas.

DISCONFIRM

102 uncontained large fires, 7 new large incidents, 27 CIMTs and 2 NIMOs committed; 29,201 personnel; international augmentation committed to the Northwest Area.

CURRENT STATUS

NPL 5 of 5 held since 18-JUL. Assessed very unlikely, confidence HIGH.

NWR TRANSMITTER OUTAGE STATUS - 04 AUGUST 2026

Source: NOAA NWR (noaa_nwr T1) | as of Tue, 04 Aug 2026 1125 UTC (operator-supplied timestamped feed, treated as authoritative per SOP) | 23 stations OOS/DEGRADED (20 OOS / 3 DEGRADED)

ST	Callsign	Location	Freq	WFO	Status
AK	KWN30	Kotzebue	162.550	Fairbanks AK	DEGRADED
AK	KJY73	Saint Paul Island	162.525	Anchorage AK	OUT OF SERVICE
CA	WWG21	Santa Ana	162.450	San Diego CA	OUT OF SERVICE
GA	WXM65	Baxley	162.525	Jacksonville FL	OUT OF SERVICE
GA	WXJ72	Summerville	162.450	Peachtree City GA	OUT OF SERVICE
IL	KXI79	Hillsboro	162.425	St. Louis MO	OUT OF SERVICE
IN	KXI94	Angola	162.425	Northern Indiana IN	DEGRADED
KS	WXN81	Ulysses	162.450	Dodge City KS	OUT OF SERVICE
MI	WZ2560	Cannonsburg	162.550	Grand Rapids MI	OUT OF SERVICE
MI	WNG572	Petoskey	162.475	Gaylord MI	OUT OF SERVICE
MN	KXI45	Gunflint Lake	162.525	Duluth MN	OUT OF SERVICE
NM	WXN24	Artesia	162.425	Midland/Odessa TX	OUT OF SERVICE
NM	WWF37	Carlsbad	162.475	Midland/Odessa TX	OUT OF SERVICE
NM	WWG36	Roswell	162.450	Albuquerque NM	OUT OF SERVICE
NV	WNG731	Owyhee	162.450	Elko NV	DEGRADED
NY	WXL34	Albany	162.550	Albany NY	OUT OF SERVICE
OR	WNG674	Florence	162.500	Portland OR	OUT OF SERVICE

FORTUNE FAVORS THE PREPARED DAILY THREAT REPORT 04 AUGUST 2026					
ST	Callsign	Location	Freq	WFO	Status
TN	WNG631	Lafayette	162.525	Nashville TN	OUT OF SERVICE
TN	WXK63	Shelbyville	162.475	Nashville TN	OUT OF SERVICE
TX	WWG40	Bay City	162.425	Houston/Galveston TX	OUT OF SERVICE
TX	KEC56	Dallas	162.400	Fort Worth-Dallas TX	OUT OF SERVICE
TX	WNG651	Mineral Wells	162.525	Fort Worth-Dallas TX	OUT OF SERVICE
TX	WNG601	Rio Grande City	162.425	Brownsville/Rio Grande Valley TX	OUT OF SERVICE

SOURCES: weather.gov/nwr/outages

SECTION 7B - WILDFIRE
NPL 5 of 5, held since 18-JUL. 102 uncontained large fires, 7 new large incidents, 27 CIMTs and 2 NIMOs committed, 29,201 personnel committed nationally. 44,722 fires and 5,154,596 acres year to date, 128% and 137% of ten-year averages. Initial attack activity was light at 102 fires. SPOKANE AREA FIRES (WA): ACTIVE, 0% contained. Old Trails 3,619 acres, Autumn Lane 5,603 acres, Fairview 1,056 acres - 10,280 acres combined as of 04-AUG 0808 local. Arrest made 03-AUG for intentionally setting a fire that spread into Old Trails; official cause remains under investigation. LITTLE GIANT FIRE (WA): ACTIVE, 0% contained, 59,346 acres north of Lake Wenatchee in Chelan County - grown 54% against the 03-AUG IMSR figure of 38,530 acres. NATIONAL OUTLOOK: NPL 5 of 5, held since 18-JUL. 102 uncontained large fires, 7 new large incidents, 27 CIMTs and 2 NIMOs committed, 29,201 personnel. 44,722 fires and 5,154,596 acres year to date, 128% and 137% of ten-year averages. Initial attack activity was light at 102 fires.

SECTION 7C - SPACE WEATHER & EMCOMM

SWX-001 SWX-CON NSTR K-INDEX 4 WARNING IN FORCE, BELOW STORM THRESHOLD		WATCH UPDATED 6
SWPC Status	NOAA SWPC Space Weather Message Code WARK04, Serial Number 5398, issued 2026 Aug 04 0810 UTC -- EXTENDED WARNING: Geomagnetic K-index of 4 expected. Extension to Serial Number 5397. Valid from 2026 Aug 02 1237 UTC, now valid until 2026 Aug 04 1500 UTC. Warning condition: Persistence.	
Why This Cycle	Geomagnetic activity has fallen below storm level. The G2 scored last cycle has ended and SWX-CON returns from 2 to NSTR, with a K-index 4 warning still in force to 04-AUG 1500Z.	
Summary	The partial-halo CME from the 30-JUL long-duration M1.9 flare in Active Region 4492 has passed and been absorbed. Activity has decayed to an unsettled-to-active geomagnetic field at K4, one step below the Kp5 threshold that defines G1 Minor storm conditions. SWPC has extended rather than escalated its warning, on a persistence condition, twice - serial 5397 at 03-AUG 2355 UTC and serial 5398 at 04-AUG 0810 UTC.	
Operational Impacts	IMPACT SUMMARY: Impacts are confined primarily poleward of 65 degrees geomagnetic latitude - a much smaller footprint than the 55 degrees of the G2 period. SWPC states weak power grid fluctuations can occur, and aurora may be visible at high latitudes such as Canada and Alaska. There is no satellite drag or spacecraft orientation impact stated at this level, and no radiation storm. The aurora visibility carried last cycle - as far south as New York, Wisconsin and Washington state - no longer applies and should not be repeated to household audiences.	

FORTUNE FAVORS THE PREPARED DAILY THREAT REPORT 04 AUGUST 2026																	
HF / COMMS Assessment	No R-scale radio blackout is in force. At K4 SWPC states no HF impact; the HF fading advised for high latitudes during the G2 period has ended. The SWPC radio dashboards returned no data on direct pull this cycle, so the operator-supplied WARK04 product is the authority.																
Analyst Assessment	This is a de-escalation on observed data, not a lapse in monitoring. The distinction that matters operationally is that K4 is an active geomagnetic field, not a quiet one: SWPC has extended its warning twice on persistence rather than cancelling it, so the condition is decaying slowly rather than having cleared. The impact footprint has contracted from 55 to 65 degrees geomagnetic latitude, which removes the continental United States from the stated aurora and grid-fluctuation area entirely. LIKELIHOOD: Conditions remain below G1 through the next cycle: likely -- the driving CME has passed, activity has decayed through two extension cycles, and no new Earth-directed eruption has been reported.CONFIDENCE: MODERATE. LIKELIHOOD: Escalation to G2 or above before the next cycle: unlikely -- no further Earth-directed CME has been identified and the current warning is a persistence extension rather than an onset.CONFIDENCE: MODERATE.																
SOURCES	NOAA SWPC main portal SWPC Real-Time Solar Wind SWPC Planetary K-index GPSJam real-time interference map SWPC HF Radio Impacts SpaceWeatherLive																
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SECTION 7D - TROPICAL / HURRICANE WEATHER

NSTR across all basins this cycle. The National Hurricane Center 2-Day and 7-Day Graphical Tropical Weather Outlooks for the North Atlantic, Eastern Pacific and Central Pacific all read no disturbances.

Status	Direct nhc.gov pull this cycle. All three basins clear, with no tropical cyclone active and no formation expected through the seven-day period.
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 PL5 (MAXIMUM) WITH 5.15M ACRES BURNED YTD, CRUDE OFF 8.3% OVER 48 HOURS

ELEVATED | UPDATED | 10

Why This Cycle	Crude fell 8.3% across the 48-hour window, easing the input-cost channel for the first time in several cycles, while the fire season added 141,847 acres in the latest 24-hour reporting period.
Summary	The national wildfire posture remains at PL5, the maximum, with 44,722 fires and 5,154,596 acres burned year to date - 128% and 137% of ten-year averages. The higher year-to-date figures carried last cycle exceeded NIFC's own totals and are not repeated.
Analyst Assessment	COMPOUNDING STRUCTURE: Drought, an above-normal fire season past 5.15 million acres, and elevated fuel costs continue to compound, but the crude channel has reversed direction this cycle. RANGELAND AND LIVESTOCK EXPOSURE: The acreage added is heavily weighted toward Washington and the Northwest Area, which alone carries 2,242,669 cumulative acres and 51 incidents, where the dominant exposure is rangeland and livestock rather than row crop. INPUT COST TRAJECTORY: Brent fell \$7.33 or 8.3% across the 48-hour window to \$80.60, and diesel - the input that actually drives agricultural margins - remains at \$5.313/gal per EIA for 27-JUL, up \$1.508 year-on-year. Diesel has not followed crude down, so the margin compression persists regardless of the crude move. Prior-cycle scenarios built on a rising crude path should not be treated as current absent a revised outlook.
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 81 | WORST WEEK OF THE OUTBREAK | UGANDA DECLARES ITS OUTBREAK OVER

HIGH | UPDATED | 16

Why This Cycle	WHO figures are unchanged at 3,605 confirmed and 1,587 deaths as of 30-JUL, but epidemiological week 30 was the worst week of the outbreak at 567 cases and 296 deaths. Uganda declared its own outbreak over on 28-JUL.
Summary	Bundibugyo ebolavirus PHEIC declared 17-MAY-2026, now Day 81. WHO's figures as of 30-JUL are 3,605 confirmed cases and 1,587 deaths in the DRC, a crude CFR of 44%, across five provinces and 49 of 140 health zones - the largest Ebola outbreak ever recorded in the DRC. Cumulative across all locations is 3,626 confirmed and 1,589 deaths. Epidemiological week 30 recorded 567 cases and 296 deaths, the highest weekly figures of the outbreak. Uganda's Ministry of Health declared its outbreak over on 28-JUL at 20 confirmed cases and 2 deaths, 15

	imported and 5 locally acquired, with the last confirmed case on 21-JUN; the declaration came 12 days after the last discharge, counting the 42-day interval from the 16-JUN discharge of the last Ugandan national rather than the 16-JUL discharge of a Congolese national, and that methodological difference is reported here rather than resolved. WHO's weekly external situation report had not posted at pull time this cycle. This product standardises on the WHO series; DRC national situation reports run a different and lower count.												
SALUTE	SIZE/TIME: DRC 3,605 confirmed and 1,587 deaths (CFR 44%) as of 30-JUL; Uganda closed at 20 confirmed and 2 deaths on 28-JUL; five provinces and 49 of 140 health zones. 651 recovered in the DRC. Note WHO's own text states 654 recovered while its listed components sum to 672; the DRC figure is used.												
SOURCES	WHO Disease Outbreak News DON614 (30-JUL) ECDC Ebola epidemiological update (03-AUG) ACLED Great Lakes conflict monitoring CDC Bundibugyo virus guidance												
Analyst Assessment	The headline figures being unchanged is an artefact of the reporting calendar, not of the outbreak. Week 30 was the worst week recorded at 567 cases and 296 deaths, so the next WHO update should be expected to move sharply rather than incrementally. Uganda's closure removes the only cross-border chain brought under control, but it was declared 12 days after the last discharge on a 42-day count taken from an earlier date, so treat it as provisional. The binding constraint is access, not epidemiology: ACLED assesses spread is concentrated inside conflict areas where over 120 armed groups operate and health infrastructure is being actively degraded.												
ALT HYP	ALT A: Reported case growth reflects improved detection rather than accelerating transmission [very unlikely] <table> <tr> <td>SUPPORT</td><td>Decentralised testing has been expanded during the response; case counts commonly rise when laboratory capacity is added.</td></tr> <tr> <td>DISCONFIRM</td><td>Week 30 produced 567 cases and 296 deaths, the worst week of the outbreak, with deaths rising proportionally at a stable 44% CFR - detection artefacts do not raise deaths.</td></tr> <tr> <td>CURRENT STATUS</td><td>Week 30 the worst on record at 567 cases and 296 deaths. Assessed very unlikely, confidence HIGH.</td></tr> </table> ALT B: Conflict-driven access denial is the primary constraint on containment [likely] <table> <tr> <td>SUPPORT</td><td>ACLED assesses Ebola's spread is concentrated within conflict areas, with Allied Democratic Forces expansion in Ituri undermining health infrastructure and complicating humanitarian access; over 120 armed groups operate across Ituri, North Kivu, South Kivu and Tanganyika, and Ebola has been detected in South Kivu territory under M23 control.</td></tr> <tr> <td>DISCONFIRM</td><td>Vaccine and therapeutic limitations against the Bundibugyo species are an independent constraint that would bind even with full access; some armed groups have shown willingness to permit humanitarian response to bolster their own legitimacy.</td></tr> <tr> <td>CURRENT STATUS</td><td>Outbreak concentrated in provinces with active armed conflict. Assessed likely, confidence MODERATE.</td></tr> </table>	SUPPORT	Decentralised testing has been expanded during the response; case counts commonly rise when laboratory capacity is added.	DISCONFIRM	Week 30 produced 567 cases and 296 deaths, the worst week of the outbreak, with deaths rising proportionally at a stable 44% CFR - detection artefacts do not raise deaths.	CURRENT STATUS	Week 30 the worst on record at 567 cases and 296 deaths. Assessed very unlikely, confidence HIGH.	SUPPORT	ACLED assesses Ebola's spread is concentrated within conflict areas, with Allied Democratic Forces expansion in Ituri undermining health infrastructure and complicating humanitarian access; over 120 armed groups operate across Ituri, North Kivu, South Kivu and Tanganyika, and Ebola has been detected in South Kivu territory under M23 control.	DISCONFIRM	Vaccine and therapeutic limitations against the Bundibugyo species are an independent constraint that would bind even with full access; some armed groups have shown willingness to permit humanitarian response to bolster their own legitimacy.	CURRENT STATUS	Outbreak concentrated in provinces with active armed conflict. Assessed likely, confidence MODERATE.
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SECTION 10 - OPERATIONAL CONDITIONS ASSESSMENT

PREP-CON 3
BROWN SKY
Incident
Probable**PREP-CON 3 -- BROWN SKY (Incident Probable) HELD THIS CYCLE****MOVEMENT ASSESSMENT**

SUPPORTS DE-ESCALATION TO 4: The US strike pause has now held six consecutive nights and crude has fallen 8.3% over 48 hours. If an instrument is signed and Strait transit normalises, the case for 4 becomes strong.

SUPPORTS HOLDING AT 3 (today): Tehran denied on the record that negotiations exist, so the pause rests on a disputed rather than merely unsigned basis, and the IRGC struck a US base in Kuwait during the pause.

SUPPORTS ESCALATION TO 2: Not met. No CONUS casualty, no strike on Pickaxe Mountain, no confirmed cyber attack on US critical infrastructure. The Kuwait strike is outside CONUS and remains unconfirmed by US authorities.

LIKELIHOOD: PREP-CON moves to 4 within the week: unlikely -- the negotiating track is now disputed by one of the two parties, and Iranian strike activity continued during the pause. **CONFIDENCE:** MODERATE.

WX-CON ESCALATION RECOMMENDATION - OPERATOR CALL: this cycle continues to recommend WX-CON move from 3 GUARDED to 2, and the basis has strengthened. The Spokane Area Fires grew 28% in about 26 hours to 10,280 acres at 0% containment, national uncontained large fires rose from 99 to 102, and committed firefighting strength rose by more than 1,200 against the prior cycle. This updates the standing recommendation in place; it is not a new entry.

COMCON 4
INCREASED
VIGILANCE
OPERATOR
CONFIRMED

COMCON 4 (Increased Vigilance) held. No CONUS communications degradation identified this cycle. Geomagnetic activity has fallen below storm level with impacts confined poleward of 65 degrees geomagnetic latitude, and no R-scale radio blackout is in force. Twenty-three NWR transmitters remain OOS or DEGRADED, but no cluster overlaps an active hazard today.

SECTION 11 - DOMESTIC UNREST / SOFT TARGET

STSB-002 -- TWIN FALLS, IDAHO MASS SHOOTING (01-AUG). Three killed and seven wounded outside an In-N-Out Burger at about 1429 MDT on 01-AUG; the suspect died of a self-inflicted gunshot wound. Motive remains undetermined at Day 3 with hundreds of witnesses still to be interviewed. DHS NTAS carries no current advisory: the most recent bulletin on file dates from 22-JUN-2025 and has expired, which is notable in the sixth month of an armed conflict.

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 are stated as separate dimensions on every forward judgement, using only the §0.55 likelihood ladder. (2) Every scored entry carries at least two alternative hypotheses with supporting and disconfirming evidence. (3) Sourcing is stated inline with retrieval dates. (4) 54 of 56 mandatory sources were live-pulled this cycle. (5) Two figures are withheld for want of provenance rather than carried forward unverified. (6) The operator supplied two NWRtransmitter lists this cycle; the timestamped 04-AUG 1125 UTC feed (23 stations) is used as authoritative and the untimestamped list is discarded as a prior-cycle roster, per the standing rule.

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

THREAT AREAS ASSESSED	STANDING REGISTRY	CITATIONS THIS CYCLE	TIER 1 PRIMARY	TIER 2 SECONDARY	MONDAY ROLLUP SWEEP
31	638 v2.25 56 mandatory	54	31	18	638 ALL SOURCES

03-AUG 1600Z through 04-AUG-2026 1600Z, a standard 24-hour cycle. Registry v2.25 carries 638 sources; 54 of 56 mandatory sources were live-pulled this cycle and 2 (repeaterbook, radioreference) were dispositioned by category as standing directories with no daily publication - declared rather than claimed as pulls. Two figures are withheld for want of provenance: the KEV catalogue total, because the 1,274 figure carried previously counts the non-Microsoft subset rather than CISA's catalogue, and the US casualty pair, because 18 dead / 624 wounded could not be corroborated by any single source. Crude prices are operator-supplied live quotes rather than official ICE or NYMEX settles. Baltic Dry and container spot rates were not re-pulled.

SECTION 13 - CLOSING

END OF REPORT

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- **Soft Target Security Brief (STSB)** - Soft-target security monitoring
- **AI & Infrastructure Threat Brief (AITB)** - Bi-weekly AI/data center/infrastructure intelligence
- **DTR Business Editions** - Healthcare (DTRB_HC), Banking & Finance (DTRB_BF), Construction & Manufacturing (DTRB_MFG), Transportation & Logistics (DTRB_TL)

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Semper Paratus, Semper Gumby.