

MAGNET S2 WEEKLY SNAPSHOT

WEEKLY OSINT INTELLIGENCE REPORT

DTG: 260503-1200Z | Reporting Period: 26 April – 02 May 2026 | United States Focus

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MAGCON STATUS

MAGCON LEVEL 3 – ELEVATED

The threat environment remains elevated. Iranian-affiliated cyber actors continue targeting U.S. critical infrastructure. The Strait of Hormuz crisis has entered a new diplomatic phase with active but stalled negotiations, while the physical blockade remains largely intact. Domestic fuel and supply chain impacts are accelerating. No confirmed coordinated attack on the U.S. homeland has been reported.

TREND VS LAST WEEK: WORSENING – ENERGY / ECONOMIC SECTOR

PRIMARY RISK DRIVERS

- ▶ Iranian-affiliated APT actors actively exploiting U.S. industrial control systems across water, energy, and government sectors (CISA AA26-097A, confirmed this reporting period)
- ▶ Strait of Hormuz blockade entering tenth week; diplomatic stalemate deepening with U.S. expected to reject Iran's latest 14-point proposal
- ▶ National average gasoline price reached \$4.39/gallon — up 47% since 28 February; diesel near record highs at \$5.57/gallon
- ▶ Lone-actor and small-cell domestic extremism threat remains persistent

DELTA SUMMARY – CHANGES FROM LAST REPORT (260426-1200Z)

WHAT CHANGED THIS WEEK:

- ▶ ▶ DIPLOMACY EMERGED AS NEW VARIABLE — Iran submitted a 14-point peace proposal via Pakistan on approximately 30 April. Iran proposes reopening the Strait and ending hostilities, with nuclear talks deferred to a later phase. Trump indicated on 02 May that he was "not satisfied" and would likely reject the proposal. A senior Iranian military officer stated on 02 May that renewed fighting was "likely." This represents a significant new development not present last week.
- ▶ ▶ VESSEL SEIZURES CONFIRMED AND NAMED — The IRGC seizure of the bulk carrier Epaminondas (24 April) was confirmed by open-source imagery and Iranian state media. Last week's report referenced only generic disruption. IRGC-seized vessel count and named incidents are now verifiable.
- ▶ ▶ FUEL PRICES REACHED CONSUMER THRESHOLD — National average gas crossed \$4.39/gallon with diesel at \$5.57/gallon. AAA data shows a 27-cent jump in one week. An NC State economist warned prices could remain elevated for three to five years due to infrastructure damage. U.S. gasoline stocks fell for the 11th consecutive week.
- ▶ ▶ GPS JAMMING INCREASE NEAR HORMUZ — Maritime intelligence sources report increased GPS jamming events near Khor Fakkan, adding navigational risk for vessels in the wider Gulf region. Not reported last week.
- ▶ ▶ DARK VESSEL ACTIVITY SURGED — Windward Maritime AI data shows dark AIS activity in the Persian Gulf reached 170 events during the week of 26 April–02 May. Gulf-wide vessel presence remains high at approximately 902 vessels. AIS spoofing by sanctioned tankers off Basrah also confirmed.
- ▶ ▶ LEBANON CEASEFIRE DESTABILIZING — Hezbollah and Israel traded strikes on 01–02 May despite a declared ceasefire. Iran has stated talks with Washington cannot resume unless the Lebanon ceasefire holds. This linkage creates additional diplomatic risk not tracked last week.
- ▶ ▶ TRANSPORTATION SECTOR THREAT UPGRADED — Based on fuel supply stress, record diesel prices, logistics disruption, and maritime GPS jamming, Transportation sector threat elevated from ROUTINE to ELEVATED this reporting period.

NO CHANGE:

- ▶ MAGCON level holds at 3 – ELEVATED
- ▶ Cyber Activity, Critical Infrastructure, Supply Chain remain ELEVATED
- ▶ Civil Unrest remains ROUTINE
- ▶ No confirmed coordinated domestic attack

SECTOR THREAT LEVELS

Terrorism / Extremism: **ELEVATED**

Cyber Activity: **ELEVATED**

Critical Infrastructure: **ELEVATED**

Energy / Fuel Sector: **CRITICAL**

Civil Unrest: **ROUTINE**

Transportation Systems: **ELEVATED** [UPGRADED from ROUTINE]

Supply Chain / Logistics: **ELEVATED**

Food / Fertilizer Security: **ELEVATED**

GLOBAL CHOKEPOINT WATCH

Strait of Hormuz: **CRITICAL / EFFECTIVELY CLOSED** [WORSENING – diplomatic stalemate; renewed fighting assessed as likely]

Bab el-Mandeb / Red Sea: **ELEVATED** [STABLE – Houthi threat persists; Cape rerouting continues]

Panama Canal: **ROUTINE** [STABLE]

Strait of Malacca: **ELEVATED** [NEW ENTRY – Indonesian toll proposal raised and retracted; precedent risk noted]

KEY INCIDENTS

STRAIT OF HORMUZ – Diplomatic Stalemate; Renewed Hostilities Assessed as Likely

Iran submitted a 14-point peace proposal to the U.S. via Pakistan on approximately 30 April 2026. The proposal would reopen the Strait and end active hostilities, while deferring nuclear negotiations to a later phase. On 02 May, Trump said he was "not satisfied" and expected to reject the proposal. A senior Iranian military official stated the same day that renewed fighting was "likely." The U.S. has enforced 48 naval intercepts of Iranian-flagged vessels under its port blockade over the past 20 days. Traffic through the Strait remains at approximately 5–10% of pre-war levels.

STRAIT OF HORMUZ – IRGC Seizure of Epaminondas Confirmed

The IRGC seizure of the bulk carrier Epaminondas on 24 April 2026 was confirmed by Iranian state television and open-source vessel tracking. A second vessel, MSC Francesca, was also reported seized. War-risk insurers continue to decline coverage regardless of announced ceasefire windows.

UNITED STATES – Gasoline and Diesel Prices Hit Consumer Threshold

AAA confirmed the national average gasoline price reached \$4.39/gallon during the reporting period, up 27 cents in a single week and 47% above the pre-war baseline. Diesel is at \$5.57/gallon, approaching the June 2022 record of \$5.81. U.S. gasoline inventories fell for the 11th consecutive week. Economists warn that oil infrastructure damage could sustain elevated prices for three to five years. Diesel shortages are directly impacting farming and freight.

UNITED STATES – Cyber: Iranian APT PLC Campaign Confirmed Active

CISA Advisory AA26-097A confirmed that since at least March 2026, Iranian-affiliated APT actors have been exploiting internet-facing Rockwell Automation/Allen-Bradley PLCs across U.S. government, water/wastewater, and energy infrastructure. Observed effects include configuration wiping, sensor tampering, and HMI disruption. EPA, FBI, and NSA co-signed the advisory, indicating multi-agency confirmation of ongoing activity.

GLOBAL – Maritime Dark Activity and GPS Jamming Increase

Windward Maritime AI intelligence reporting for the period documents dark AIS activity surging to 170 events in the Persian Gulf, AIS spoofing by sanctioned tankers off Basrah, and increased GPS jamming near Khor Fakkan.

Approximately 153 million barrels of Iranian oil remain in floating storage west of Hormuz. These patterns indicate active sanctions evasion and elevated navigational hazard throughout the Gulf region.

LEBANON – Ceasefire Violations; Risk of Regional Escalation

Hezbollah and Israeli forces exchanged strikes on 01–02 May despite a declared ceasefire in Lebanon. Iran has explicitly linked U.S.-Iran diplomatic progress to Lebanon ceasefire stability. Simultaneous deterioration on both fronts raises the risk of cascading escalation that could collapse the current fragile pause in direct U.S.-Iran hostilities.

CYBER / INFRASTRUCTURE

Industrial Control Systems – Active Iranian Exploitation Confirmed

CISA AA26-097A provides specific indicators of compromise, TTPs, and affected device families. Operators running Rockwell Automation / Allen-Bradley PLCs on internet-accessible networks should treat this as an active incident requiring immediate remediation, not a forward warning. Sectors confirmed affected: Government/Municipal Services, Water and Wastewater, Energy.

Enterprise and Individual Targeting – Phishing and Credential Attacks Ongoing

Phishing, credential harvesting, and MFA abuse remain the primary threat vectors for U.S. businesses and individuals. Nation-state affiliated actors tied to both Iran and PRC-linked groups are actively targeting personnel in sensitive positions. CISA's mandatory CIRCIA incident reporting rule expected to be finalized this month.

EMERGING INDICATORS

- ▶ Trump expected to reject Iran's 14-point proposal; Iranian military assessed renewed hostilities as "likely" — watch for escalation signals in the Gulf week of 04–10 May
- ▶ U.S. gasoline stocks in 11th consecutive weekly decline; summer demand season begins May–June — additional price increases probable
- ▶ Diesel at \$5.57/gallon approaching record highs; freight and agricultural sector stress will increase
- ▶ Hezbollah-Israel ceasefire violations increasing; Iran has linked diplomatic progress to Lebanon stability — dual-front risk
- ▶ Dark vessel activity and GPS jamming in the Gulf are expanding, not contracting, despite ceasefire rhetoric
- ▶ Indonesian Strait of Malacca toll proposal (retracted) signals potential for chokepoint politicization to spread globally
- ▶ ICS/SCADA scanning and probing of exposed U.S. systems ongoing per CISA advisory

VERIFIED STATUS

X NOT CONFIRMED: No coordinated terrorist attack campaign within the continental United States during the reporting period.

X NOT CONFIRMED: No nationwide U.S. critical infrastructure failure resulting from cyber attack.

✓ CONFIRMED: Iranian-affiliated APT actors actively disrupting U.S. industrial PLCs. (CISA AA26-097A / EPA-FBI-NSA joint advisory)

✓ CONFIRMED: IRGC seizure of vessels Epaminondas and MSC Francesca. (Iranian state media / vessel tracking)

✓ CONFIRMED: National average U.S. gasoline at \$4.39/gallon; diesel at \$5.57/gallon as of 01 May 2026. (AAA / Trading Economics)

✓ CONFIRMED: Iran submitted 14-point peace proposal via Pakistan; U.S. expected to reject. Trump stated 02 May he was "not satisfied." (Reuters / CNBC / Al Jazeera)

OPERATOR GUIDANCE

- ▶ Immediately audit internet-facing PLCs and OT devices. Review CISA AA26-097A indicators of compromise against your network. Treat as active, not potential.
- ▶ Report suspicious cyber activity — phishing, MFA abuse, anomalous ICS behavior — to CISA Incident Reporting ([cisa.gov](https://www.cisa.gov)) or IC3.gov.

- ▶ Monitor local fuel prices and diesel availability. Operators dependent on freight or generator fuel should assess contingency sourcing.
- ▶ Watch diplomatic developments closely this week. A U.S. rejection of Iran's proposal may rapidly shift the maritime situation; be prepared for sudden shipping rate or fuel price movement.
- ▶ Do not rely on unofficial safe passage communications for maritime operations. IRGC permissioning and vessel seizures remain active.
- ▶ Maintain awareness at public venues and symbolic locations consistent with the persistent lone-actor threat.

Submit reports through established MAGNET situational awareness channels. To Learn More About MAGNET, Visit www.MAGNETHF.COM

SOURCE LIST

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