

MAGNET S2

WEEKLY OSINT INTELLIGENCE SNAPSHOT

DTG: 260802-1200Z | Reporting Period: 27 July – 2 August 2026 | United States Focus
www.magnethf.com

MAGCON STATUS

**MAGCON
LEVEL 3
ELEVATED**

MAGCON holds at Level 3 – ELEVATED. The dominant development this cycle is a hardening on the Hormuz axis: Iran's Foreign Ministry stated 27 July that no talks are currently underway with the US and that Tehran "will never allow the United States to determine the timing of war and peace," a harder line than last cycle's paused-negotiation framing. Attacks in and around Hormuz continue (12+ vessels struck since 6 July, 2 seafarers dead), and Saudi Arabia intercepted multiple Iraq-launched drones targeting Eastern Province oil facilities on 27 July. Separately, Houthi forces declared a formal maritime blockade of Saudi Arabia in the Bab el-Mandeb, attacked two Saudi VLCCs on 25 July, and cut regional shipping traffic by roughly a third — a material escalation beyond the "spillover risk" framing carried in the prior cycle. On the domestic front, PJM's 2028/2029 capacity auction (14 Jul) marked a second consecutive delivery year in which the entire RTO footprint fell short of its reliability requirement, and CISA added three new KEV entries this cycle, with the WordPress Core wp2shell RCE chain flagged last cycle now confirmed patched upstream (WP 7.0.2 / 6.9.5). The Israel–Lebanon framework remains on track, with a technical round scheduled in Rome 4–6 August. Four new regional Flock Safety ALPR flash reports (Regions 1, 5, 7, 10) were incorporated this cycle, detailing sharp state-by-state regulatory divergence and continuing federal/immigration data-access risk nationwide.

**TREND VS LAST REPORT (260726-1200Z):
WORSENING — MARITIME CHOKEPOINT /
DIPLOMATIC / GRID RELIABILITY / CYBER
SECTORS**

PRIMARY RISK DRIVERS

- Iran's Foreign Ministry stated 27 July there are no talks currently underway with the US, hardening from last cycle's paused-negotiation framing; Tehran stated it will "never allow the United States to determine the timing of war and peace"
- Houthi forces declared a formal maritime blockade of Saudi Arabia in the Bab el-Mandeb (~20 Jul); attacked two Saudi VLCCs 25 Jul; regional shipping traffic down ~34% to lowest level in months
- Saudi Arabia intercepted multiple drones launched from Iraq targeting Eastern Province and Riyadh-region oil facilities on 27 July; Saudi MoD attributes the attack to Iran-backed militias
- Continued Hormuz attacks: 12+ vessels struck since 6 July, 2 seafarers dead, 12+ injured per IMO; Iran reportedly forcing vessels toward its territorial waters
- Israel–Lebanon framework talks scheduled for a technical round in Rome, 4–6 August, to expand pilot-zone withdrawals and advance border-issue resolution; one pilot zone already handed to the Lebanese Armed Forces
- PJM's 2028/2029 Base Residual Auction (14 Jul) marked a second consecutive delivery year the entire RTO fell short of its reliability requirement — the first time that has happened even once in the capacity market's 18-year history, let alone twice; PJM will seek FERC approval for a special Backstop Procurement

- CISA KEV additions this cycle: CVE-2025-68686 (Fortinet FortiOS), CVE-2026-16812 (Arista VeloCloud Orchestrator On-Prem), CVE-2026-20316 (Cisco Secure Firewall Management Center); WordPress Core wp2shell chain (CVE-2026-63030 / CVE-2026-60137) flagged last cycle is now patched upstream (WP 7.0.2 / 6.9.5) with forced auto-updates pushed
- Four new regional MAGNET S2 Flock Safety ALPR flash reports incorporated this cycle (Regions 1, 5, 7, 10), documenting sharp state-by-state regulatory divergence and continuing undisclosed federal/immigration data-sharing risk nationwide
- magnethf.com/reports direct-fetch blocked this cycle by site robots.txt (ROBOTS_DISALLOWED); flash-report intake for this cycle relied on files provided directly by the approving authority

DELTA SUMMARY — CHANGES FROM LAST REPORT (260726-1200Z)

TOPIC	DELTA FROM 260726-1200Z
Strait of Hormuz / Iran Talks	WORSENING. Iran FM (27 Jul) states no talks underway with US; hardened rhetoric on “timing of war and peace.” Hormuz attacks continue (12+ vessels since 6 Jul, 2 dead). Saudi intercepted Iraq-launched drones targeting oil facilities 27 Jul. Retain “paused, not resolved” language per standing correction.
Bab el-Mandeb / Red Sea	WORSENING — NEW ESCALATION. Houthis declared formal maritime blockade of Saudi Arabia (~20 Jul), beyond prior “spillover risk” framing. Two Saudi VLCCs attacked 25 Jul. Traffic down ~34%, lowest in months. Saudi tankers turning back rather than transiting.
Israel–Lebanon Framework	ONGOING. Technical round scheduled in Rome, 4–6 Aug, to expand pilot zones and resolve border issues. One pilot zone already handed to LAF. Hezbollah continues to reject the framework.
CISA KEV Catalog	NEW. Three additions this cycle: Fortinet FortiOS (27 Jul), Arista VeloCloud On-Prem (27 Jul), Cisco Secure FMC hardcoded password (29 Jul). WordPress Core wp2shell chain flagged last cycle now confirmed patched upstream.
PJM Grid Reliability	NEW. 2028/2029 BRA cleared 138,318 MW UCAP + 10,864 MW FRR but fell short of reliability requirement for the second consecutive delivery year — an unprecedented reliability-adequacy inflection point. PJM to seek FERC approval for Backstop Procurement.
Flock Safety ALPR (Flash Reports)	NEW. Four regional flash reports incorporated (Region 1 CT/ME/MA/NH/RI/VT; Region 5 IL/IN/MI/MN/OH/WI; Region 7 IA/KS/MO/NE; Region 10 WA/OR/ID/AK). See Flash Report Digest section below for summary.
Delaney Hall (Newark ICE Facility)	NO CHANGE. No material developments since the 2 June NJ DOH lawsuit against GEO Group and ongoing Menocal v. GEO forced-labor litigation. No August court action identified this cycle.
Section 702 / FISA	NO CHANGE. Coalition advocacy letter (29 Jul) urging Congress toward Section 702 safeguards; no status change. Certifications remain valid through March 2027 regardless of statute sunset timing.

NO CHANGE:

- MAGCON level holds at 3 – ELEVATED
- Delaney Hall (Newark ICE facility) oversight litigation remains ongoing; no August developments identified
- Section 702 certifications remain valid through March 2027 independent of statute sunset status
- FIFA World Cup 2026 remains closed as an active watch item (closed last cycle)
- Panama Canal transit remains ROUTINE; normal operations
- America 250 watch-item status unchanged pending Roger's direction on reinstatement
- magnethf.com/reports direct-fetch remains blocked by site robots.txt; flash-report intake continues via direct file provision

SECTOR THREAT LEVELS

SECTOR	LEVEL	NOTES
Terrorism / Extremism	ELEVATED	No new incidents identified this cycle; standing posture carried forward pending confirmation of domestic threat reporting.
Cyber Activity	ELEVATED	3 new CISA KEV additions this cycle; WordPress Core wp2shell chain (flagged last cycle) now patched upstream with forced auto-updates.
Critical Infrastructure	ELEVATED	PJM 2nd consecutive reliability-requirement shortfall; Backstop Procurement to be sought via FERC.
Energy / Fuel Sector	HIGH	Active Hormuz attacks and Bab el-Mandeb blockade both directly affecting Gulf crude flows and global pricing.
Education Sector	ROUTINE	No significant developments identified this cycle.
Civil Unrest	ELEVATED	Delaney Hall (Newark) oversight/litigation remains an open, standing friction point; no new incidents this cycle.
Transportation Systems	HIGH	Bab el-Mandeb traffic down ~34%; Hormuz transit under continued attack; Saudi tankers turning back from chokepoint.
Supply Chain / Logistics	HIGH	Saudi crude cargo diversions; regional shipping disruption compounding Gulf chokepoint risk.
Food / Fertilizer Security	ELEVATED	Gulf shipping disruption continues to affect fertilizer/ag trade lanes transiting the region.

GLOBAL CHOKEPOINT WATCH

CHOKEPOINT	STATUS	ASSESSMENT
Strait of Hormuz	HIGH	Talks-denial statement 27 Jul; continued attacks (12+ vessels since 6 Jul, 2 dead). "Paused, not resolved" — not improving this cycle.
Bab el-Mandeb / Red Sea	CRITICAL	Formal Houthi blockade declared; 2 Saudi VLCCs attacked 25 Jul; traffic down ~34%, lowest in months. Upgraded from ELEVATED last cycle.
Panama Canal	ROUTINE	Stable. Normal operations; no reporting of disruption this cycle.
Strait of Malacca	ELEVATED	Stable. SE Asia energy stress from Hormuz/Bab el-Mandeb disruption persists; no direct incidents.

KEY INCIDENTS

STRAIT OF HORMUZ — Talks Denial and Continued Attacks

Iran's Foreign Ministry stated on 27 July that no negotiations are currently underway with the United States, and that Tehran "will never allow the United States to determine the timing of war and peace." This statement represents a hardening from the paused-negotiation framing carried in prior cycles under the 17 June 14-point MOU's initial 60-day talks window.

Separately, the Saudi Defense Ministry reported intercepting several drones launched from Iraq targeting petroleum facilities in the Eastern Province and Riyadh region on 27 July, attributing the attack to Iran-backed militias and reserving the right to respond "at the appropriate time and place."

Attacks in and around the Strait of Hormuz continue: a dozen ships have been attacked since 6 July, resulting in 2 seafarer deaths and 12+ injuries per the International Maritime Organization; Iran is reportedly attempting to force vessels to transit through its territorial waters.

Assessment: this cycle's developments represent a worsening, not an improvement, of the Hormuz posture. The standing "paused, not resolved" language correction remains in force and should not be softened based on the absence of a new large-scale strike.

BAB EL-MANDEB / RED SEA — Formal Houthi Blockade of Saudi Arabia

Houthi forces declared a formal maritime blockade/embargo of Saudi Arabia around 20 July, deploying missiles and drones near the Bab el-Mandeb Strait per U.S. Navy-led Joint Maritime Information Center reporting. This is a materially different posture than the "spillover risk" language used to describe Bab el-Mandeb exposure in prior cycles.

Two Saudi Very Large Crude Carriers were attacked on 25 July. Ship-tracking data showed a roughly 34% decline in Bab el-Mandeb traffic compared to the prior day, with several Saudi-cargo tankers turning around before reaching the strait rather than proceeding.

Assessment: this is an active, ongoing disruption rather than a risk indicator. The Global Chokepoint Watch status for Bab el-Mandeb is upgraded to CRITICAL this cycle to reflect the confirmed blockade and attacks, distinct from the elevated-but-not-active posture of prior reporting.

PJM GRID RELIABILITY — Second Consecutive Reliability Shortfall

PJM Interconnection's 2028/2029 Base Residual Auction, announced 14 July, secured 138,318 MW of unforced capacity generation plus 10,864 MW UCAP from Fixed Resource Requirement areas — but this marks the second consecutive delivery-year auction in which the entire RTO footprint fell short of its own reliability requirement, the first time this has occurred even once in the capacity market's 18-year history.

PJM has stated it will seek FERC approval for a special "Backstop Procurement" to address the shortfall. Separately, a late-June heat event drove PJM's third- and fourth-highest peak electricity demand on record (161–162 GW), requiring maximum-generation alerts and emergency conditions.

Assessment: this is a genuine reliability-adequacy inflection point for the PJM footprint (13 states plus DC), driven substantially by data-center load growth, and warrants continued tracking as a standing coverage item going forward.

CYBER — New KEV Additions; WordPress Core Patch Confirmed

CISA added three new vulnerabilities to the KEV catalog this cycle: CVE-2025-68686 (Fortinet FortiOS, information exposure) and CVE-2026-16812 (Arista VeloCloud Orchestrator On-Prem, OS command injection) on 27 July; and CVE-2026-20316 (Cisco Secure Firewall Management Center, hardcoded password) on 29 July.

The WordPress Core "wp2shell" pre-authentication RCE chain (CVE-2026-63030 / CVE-2026-60137) flagged as directly relevant to magnethf.com's own platform last cycle is now confirmed patched in WordPress 7.0.2 / 6.9.5, with WordPress.org having enabled forced automatic updates across affected supported installations. Roger's confirmation of magnethf.com's own patch status remains an open item (see Emerging Indicators).

CYBER / INFRASTRUCTURE KEV BULLETIN — PATCH IMMEDIATELY

CVE	VENDOR / PRODUCT	SEVERITY	NOTES
CVE-2026-63030 / CVE-2026-60137	WordPress Core ("wp2shell")	CRITICAL	Pre-auth RCE chain (batch API interpretation conflict + SQL injection); CVSS 9.8 combined. Patched in WP 7.0.2 / 6.9.5; forced auto-updates pushed. Confirm magnethf.com's own core version has taken the update.
CVE-2025-68686	Fortinet FortiOS	HIGH	Exposure of sensitive information to an unauthorized actor. Added to KEV 27 Jul. Apply vendor patch immediately.
CVE-2026-16812	Arista VeloCloud Orchestrator (On-Prem)	HIGH	OS command injection. Added to KEV 27 Jul. Apply vendor patch immediately.
CVE-2026-20316	Cisco Secure Firewall Management Center	ELEVATED	Use of hard-coded password vulnerability; allows low-

FLASH REPORT DIGEST — FLOCK SAFETY ALPR SERIES

Four new regional flash reports were incorporated this cycle, supplementing the Nationwide (260720-2000Z) and Region 8 (260720-2000Z) baselines already reflected in the prior snapshot. Full reports are available via standard MAGNET S2 distribution; summarized below.

REGION 1 (CT/ME/MA/NH/RI/VT) — DTG 260722-1800Z

Sharpest regulatory divide of any region reviewed: ME/NH/VT carry meaningful statutory ALPR restrictions; CT enacted new retention/sharing limits in 2026 (30→21-day retention, warrant required for outside access) after one town's system was searched 590,000 times in nine weeks; MA and RI have no ALPR-specific statute.

Massachusetts' *Commonwealth v. McCarthy* (2020) precedent establishes that a sufficiently dense ALPR network can independently invade a state constitutional privacy right — a legal exposure vector not identified in other regions.

Windsor, CT voted to permanently remove its 16 Flock cameras; Southbury, CT was simultaneously advancing a new 5-camera contract — illustrating that statutory reform and municipal contract decisions move independently.

REGION 5 (IL/IN/MI/MN/OH/WI) — DTG 260728-0245Z

Statute does not guarantee compliance: Illinois' statutory bar on immigration-related sharing (625 ILCS 5/2-130) was circumvented via informal CBP access per a 2025 Secretary of State audit; Minnesota's criminal-use-only restriction was circumvented during "Operation Metro Surge."

Dane County, WI defunded its Flock contract 32-1, physically covered cameras when Flock did not remove them by deadline, then funded a different vendor — indicating vendor-specific distrust rather than rejection of ALPR technology.

Michigan legislators are this week demanding MDOT end a Master Maintenance MOU permitting Border Patrol's Detroit Sector to install surveillance equipment, including ALPR cameras, on state trunkline property.

REGION 7 (IA/KS/MO/NE) — DTG 260728-0250Z

Defined by legislative stalemate: Iowa's reform bill died at session's end after a late amendment would have shielded resulting audit logs from public-records law; a comparable Missouri bill's enactment status remains unresolved.

Kansas has no substantive use/retention statute per its own nonpartisan legislative research office, contradicting a national advocacy source's broader classification — an unresolved sourcing conflict flagged for members to treat Kansas as effectively unregulated pending resolution.

Nebraska has the region's only comprehensive statute yet local reporting alleges federal immigration access has occurred despite it; a documented Lenexa, KS misuse case (non-Flock vendor) shows the underlying legal gap, not any single vendor, is the operative regional risk factor.

REGION 10 (WA/OR/ID/AK) — DTG 260727-1800Z

Washington's Driver Privacy Act (SB 6002) is the region's first binding statute; 8 WA agencies (including Yakima PD) were found to have enabled 1:1 Border Patrol data sharing in 2025 — Yakima renewed its contract in June 2026 regardless.

Oregon (Eugene/Springfield) shows the "cameras kept scanning after public shutdown announcements" pattern documented nationally — a public cancellation should not be treated as confirmation that collection has stopped without transparency-portal verification.

Idaho's dominant dispute concerns Flock's AI-training data license rather than federal sharing; Alaska remains a confirmed intelligence gap, not a confirmed low-risk state.

EMERGING INDICATORS — WATCH ITEMS FOR NEXT CYCLE

- Outcome of the Israel–Lebanon Rome technical round, 4–6 August — watch for pilot-zone expansion announcements and Hezbollah response
- Whether the US–Iran talks-denial statement (27 Jul) holds through the next cycle, or whether backchannel Omani-mediated contact resumes
- Further Bab el-Mandeb attacks or an expansion of the Houthi blockade beyond Saudi-flagged/Saudi-cargo vessels
- Confirmation of magnethf.com's own WordPress Core patch status against CVE-2026-63030 / CVE-2026-60137
- PJM's FERC filing for Backstop Procurement authority following the second consecutive reliability-requirement shortfall
- Resolution of the Kansas ALPR regulatory-status discrepancy (KLRD vs. national advocacy-source classification) flagged in the Region 7 flash report
- Any further Illinois or Minnesota immigration-enforcement-related ALPR search disclosures, per the documented current-period pattern in both states

- Confirmed status of Missouri HB 658 and any renewed Iowa ALPR reform language in the next legislative session

VERIFIED STATUS

CONFIRMED ✓

- Houthis forces declared a formal maritime blockade of Saudi Arabia in the Bab el-Mandeb [Al Jazeera, CNBC]
- Two Saudi VLCCs were attacked in the Bab el-Mandeb on 25 July [Al Jazeera]
- PJM's 2028/2029 Base Residual Auction fell short of the RTO reliability requirement for the second consecutive delivery year [PJM official release, 14 Jul]
- CVE-2026-63030 and CVE-2026-60137 (WordPress Core wp2shell chain) are patched upstream in WP 7.0.2 / 6.9.5 with forced auto-updates enabled [WordPress.org, Tenable, CISA KEV]
- The Israel–Lebanon Rome technical round is scheduled for 4–6 August [U.S. State Department via multiple outlets]
- Iran's Foreign Ministry stated 27 July that no talks are currently underway with the US [CNN]

NOT CONFIRMED ✗

- Whether magnethf.com's own WordPress Core installation has applied the wp2shell patch — pending Roger's direct confirmation
- Confirmed enactment status of Missouri HB 658 (ALPR restriction bill) — flagged intelligence gap in Region 7 flash report
- Confirmed scale of Alaska Flock Safety ALPR deployment — flagged intelligence gap in Region 10 flash report; absence of reporting is not confirmation of low risk
- Kansas's actual ALPR regulatory-protection level — unresolved conflict between KLRD's official position (no substantive statute) and a national advocacy source's broader classification

OPERATOR GUIDANCE

- Standing MAGNET-wide digital-footprint reduction guidance (from the Nationwide and regional Flock Safety ALPR flash reports) remains in effect: migrate primary MAGNET-activity devices to de-googled/de-Apple builds, avoid cellular payments, use offline login-free navigation (e.g., Magic Earth), and restrict background location permissions on non-essential apps.
- PACE tier guidance: treat smartphone-based Primary/Alternate coordination as inherently more exposed than MAGNET HF/NBEMS, JS8Call, and VarAC BBS channels; favor Contingency/Emergency-tier radio coordination where operational sensitivity is a factor, particularly for movement through the Yakima Valley (WA) and Eugene/Springfield (OR) corridors identified as elevated-confidence federal-data-sharing exposure zones.
- Members transiting Gulf-shipping-adjacent supply chains or planning fuel-dependent logistics should expect continued price volatility tied to the Hormuz/Bab el-Mandeb disruption; this is not yet reflected as a resolved or improving condition.
- Report any confirmed new Region 1/5/7/10 federal/ICE/CBP data-sharing disclosure, or resolution of the Kansas regulatory-status discrepancy, through standard S2 intake channels.
- Confirm magnethf.com's own WordPress Core patch status against CVE-2026-63030 / CVE-2026-60137 before next publish cycle.

SOURCE LIST

- [1] [B2] CNN — US pauses new strikes, Iran says no current negotiations with the US (27 Jul 2026) — <https://edition.cnn.com/2026/07/27/world/live-news/iran-war-trump>
- [2] [A1] House of Commons Library — US-Iran ceasefire and nuclear talks in 2026 (background/MOU framework) — <https://commonslibrary.parliament.uk/research-briefings/cbp-10637/>
- [3] [B2] CNBC — Houthis deploy missiles and drones to attack ships in southern Red Sea (22 Jul 2026) — <https://www.cnbc.com/2026/07/22/houthis-red-sea-bab-el-mandeb-saudi-oil-iran.html>
- [4] [B2] Al Jazeera — Yemen's Houthis declare naval blockade of Saudi Arabia: What to know — <https://www.aljazeera.com/news/2026/7/20/yemens-houthis-declare-naval-blockade-of-saudi-arabia-what-to-know>
- [5] [B2] Al Jazeera — Yemen's Houthis claim attack on two Saudi oil tankers — <https://www.aljazeera.com/news/2026/7/22/yemens-houthis-claim-attack-on-two-saudi-oil-tankers>
- [6] [B2] The Hill — Red Sea shipping slows after Houthi attacks on Saudi Arabia — <https://thehill.com/policy/international/5991796-houthi-saudi-arabia-attacks-bab-el-mandeb-strait/>
- [7] [A1] PJM Interconnection — Official news release, 2028/2029 Base Residual Auction results (14 Jul 2026) — <https://www.pjm.com/-/media/DotCom/about-pjm/newsroom/2026-releases/20260714-pjm-capacity-auction-procures-138318-mw-of-generation-resources.pdf>
- [8] [B2] RTO Insider — PJM Capacity Auction Clears at Max Price, Falls Short of Reliability Requirement — <https://www.rtoinsider.com/121911-pjm-capacity-auction-clears-max-price-falls-short-reliability-requirement/>

- [9] [A1] CISA — CISA Adds Two Known Exploited Vulnerabilities to Catalog (27 Jul 2026) — <https://www.cisa.gov/news-events/alerts/2026/07/27/cisa-adds-two-known-exploited-vulnerabilities-catalog>
- [10] [A1] CISA — CISA Adds One Known Exploited Vulnerability to Catalog (29 Jul 2026) — <https://www.cisa.gov/news-events/alerts/2026/07/29/cisa-adds-one-known-exploited-vulnerability-catalog>
- [11] [A1] CISA — CISA Adds Four Known Exploited Vulnerabilities to Catalog (21 Jul 2026; WordPress Core) — <https://www.cisa.gov/news-events/alerts/2026/07/21/cisa-adds-four-known-exploited-vulnerabilities-catalog>
- [12] [B1] Tenable — wp2shell: WordPress Core Pre-Auth RCE FAQ — <https://www.tenable.com/blog/wp2shell-cve-2026-63030-cve-2026-60137-frequently-asked-questions-about-remote-code-execution>
- [13] [B2] Yahoo News / Israel National News — Rome to host US-led talks between Israel and Lebanon at the start of August — <https://www.israelnationalnews.com/news/430859>
- [14] [B2] Al Jazeera — Lebanon, Israel hold talks in Rome on implementing framework deal — <https://www.aljazeera.com/news/2026/7/14/lebanon-israel-hold-talks-in-rome-on-implementing-framework-deal>
- [15] [C3] MAGNET S2 — Flash Report: Flock Safety Nationwide ALPR Expansion (DTG 260720-2000Z) — internal MAGNET distribution
- [16] [C3] MAGNET S2 — Flash Report: Flock Safety ALPR — Region 1 (DTG 260722-1800Z) — internal MAGNET distribution
- [17] [C3] MAGNET S2 — Flash Report: Flock Safety ALPR — Region 5 (DTG 260728-0245Z) — internal MAGNET distribution
- [18] [C3] MAGNET S2 — Flash Report: Flock Safety ALPR — Region 7 (DTG 260728-0250Z) — internal MAGNET distribution
- [19] [C3] MAGNET S2 — Flash Report: Flock Safety ALPR — Region 8 (DTG 260720-2000Z) — internal MAGNET distribution
- [20] [C3] MAGNET S2 — Flash Report: Flock Safety ALPR — Region 10 (DTG 260727-1800Z) — internal MAGNET distribution