

MAGNET S2

WEEKLY OSINT INTELLIGENCE SNAPSHOT

DTG: 260920-1800Z | Reporting Period: 13–20 September 2026 | United States Focus

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MAGCON STATUS

MAGCON LEVEL 3 ELEVATED

MAGCON holds at Level 3 – ELEVATED per standing operator direction. This cycle's dominant development is a nationwide diesel-price spike: U.S. retail diesel reached record nominal levels during the fall harvest – a national average of \$6.29/gal (Reuters, 18 Sep, up 68% year-over-year), with AAA data placing the average at \$6.39/gal (17 Sep). The driver is constrained global refining capacity – Russian and Middle Eastern diesel exports down roughly two-thirds from 2025 levels – combined with U.S. distillate inventories at their lowest seasonal level since at least 1982. Farmers, independent truckers and refrigerated freight carriers are absorbing sharply higher operating costs; food-price effects are assessed as likely but delayed. Source reporting characterizes this as economic disruption rather than physical shortage, and does not by itself justify a MAGCON change. Separately, CISA KEV additions were markedly lighter this cycle – 3 new entries (Cisco ISE, Acronis Backup, Linux Kernel) versus 11 last cycle – though last cycle's Cisco Firewall Management Center (CVSS 10.0) and Citrix NetScaler authentication-bypass entries remain unresolved active-exploitation watch items with no follow-on impact reporting identified this sweep. The September 11 25th-anniversary commemorations, the Charlie Kirk assassination one-year anniversary, and GSX 2026 (Atlanta, 14–16 Sep) all concluded within this window without incident. Government funding, Section 702/FISA, PJM grid conditions, and America 250 remain unchanged. Internationally, the Iran-Oman Hormuz safe-corridor deal remains unsigned as of this DTG (last reporting, 7 Sep, described it as in its “final stage”); Hormuz transit stays suppressed at an estimated ~7M barrels/day versus ~20M pre-war – a contributing factor to the domestic fuel-price picture, tracked here for that reason only.

TREND VS LAST WEEK: STABLE – ENERGY/ECONOMIC WORSENING (RECORD DIESEL PRICES) / CYBER KEV VOLUME LIGHTER / TRANSPORTATION-MASS GATHERINGS IMPROVED (9/11 & GSX 2026 CONCLUDED, NO INCIDENT) / NO CHANGE (SECTION 702, GOVERNMENT FUNDING, AMERICA 250, PJM GRID, DELANEY HALL, TYLER ROBINSON TRIAL) / HORMUZ UNCHANGED (BRIEF MENTION ONLY)

PRIMARY RISK DRIVERS

- **WORSENING** — Energy/Economic (Diesel Prices): U.S. retail diesel reached record nominal levels this week — \$6.29/gal national average (Reuters, 18 Sep, +68% YoY), \$6.31 (Barron's, 16 Sep), \$6.39 AAA average (KCRG-TV, 17 Sep). Driver is constrained global refining capacity, not a crude shortage.
- **NEW** — Farm/Freight Impact: SD combine operators reporting up to \$1,500/day fuel costs (2x YoY); farm fuel expenses up ~\$11/acre (corn) and ~\$7/acre (soybeans); CA vegetable producers reporting ~40% fuel-cost increases and diesel above \$8/gal in some CA markets; refrigerated freight rates from WA's Yakima Valley at a 4-year high; produce transport costs from CA up 40–120% YoY.
- **NEW** — Federal Response: DOT granted drivers hauling gasoline +2 hours daily driving time; USDA stated it is examining possible assistance measures; a temporary U.S. diesel-export restriction was reportedly under discussion but not implemented during the reporting period.
- **IMPROVING** — CISA KEV Volume: Only 3 new KEV entries this cycle (Cisco ISE 16 Sep, Acronis Backup 16 Sep, Linux Kernel 18 Sep) versus 11 last cycle. Last cycle's Cisco FMC (CVSS 10.0) and Citrix NetScaler entries remain unresolved active-exploitation items — no follow-on impact reporting identified.

- **IMPROVED** — Transportation/Mass Gatherings: The September 11 25th-anniversary security posture in Lower Manhattan and GSX 2026 (Atlanta, 14–16 Sep) both concluded within this window with no incidents identified.
- **NO CHANGE** — Charlie Kirk Assassination / Tyler Robinson Trial: No new court filings or scheduling changes identified; next court date remains 23 Oct.
- **NO CHANGE** — Delaney Hall: No new incidents identified since the 3 Sep vehicle-into-crowd incident reported last cycle.
- **NO CHANGE** — PJM Grid Reliability, Section 702/FISA, Government Funding/Continuity, America 250: No material developments this window.
- **BRIEF MENTION** — Strait of Hormuz (international, US fuel-price relevance only): The Iran-Oman safe-corridor deal remains unsigned as of this DTG; most recent Iranian MFA statement (7 Sep) described talks as in their “final stage.” Hormuz transit stays suppressed at an estimated ~7M bpd versus ~20M pre-war.

DELTA SUMMARY – CHANGES FROM LAST REPORT (260913-1800Z)

TOPIC	DELTA FROM 260913-1800Z / STATUS
Diesel / Fuel Prices	NEW / WORSENING. Record nominal U.S. diesel prices (\$6.29–\$6.39/gal, +68% YoY) driven by constrained global refining capacity and lowest-since-1982 U.S. distillate inventories; significant farm, trucking and refrigerated-freight cost impact; food-price effects assessed as likely but delayed.
CISA KEV Catalog	LIGHTER VOLUME. 3 new CVEs this cycle (Cisco ISE, Acronis Backup, Linux Kernel) vs. 11 last cycle. Last cycle's Cisco FMC (CVSS 10.0) and Citrix NetScaler entries remain unresolved active-exploitation watch items.
September 11 25th Anniversary	CONCLUDED. Commemorations held 11 Sep with no incidents identified; item drops from active watch.
Charlie Kirk Assassination / Tyler Robinson Trial	NO CHANGE. Next court date remains 23 Oct; no new filings identified.
GSX 2026 (Atlanta)	CONCLUDED. Event held 14–16 Sep with no incidents identified; item drops from active watch.
Delaney Hall	NO CHANGE. No new incidents since the 3 Sep vehicle-into-crowd incident.
PJM Grid Reliability	NO CHANGE. Remains ROUTINE; no new grid stress identified.
Government Funding / Continuity	NO CHANGE. CR holds through 11 Dec; no new developments.
Section 702 / FISA	NO CHANGE. No new legislative action this window.
America 250	NO CHANGE. No reinstatement trigger identified.
Strait of Hormuz (brief mention)	NO CHANGE. Iran-Oman safe-corridor deal remains unsigned as of this DTG; tracked for US fuel-price relevance only.

NO CHANGE

- **NO CHANGE** — Section 702 / FISA: No new legislative action this window.
- **NO CHANGE** — Government Funding / Continuity: CR holds through 11 Dec; no new developments.

- NO CHANGE — America 250: No reinstatement trigger identified; still pending operator direction.
- NO CHANGE — PJM Grid Reliability: Remains ROUTINE; no new grid stress identified this window.
- NO CHANGE — Delaney Hall: No new incidents since the 3 Sep vehicle-into-crowd incident.
- NO CHANGE — Charlie Kirk Assassination / Tyler Robinson Trial: Next court date remains 23 Oct; no new filings identified.

SECTOR THREAT LEVELS

SECTOR	LEVEL	NOTES
Terrorism / Extremism	ELEVATED	September 11 25th-anniversary commemorations and the Charlie Kirk assassination one-year anniversary both concluded this window without a new documented-violence incident meeting current reporting criteria. Carried forward at prior assessment.
Cyber / Infrastructure	ELEVATED	3 new CISA KEV entries this cycle (Cisco ISE, Acronis Backup, Linux Kernel) — lighter volume than last cycle's 11. Last cycle's Cisco FMC (CVSS 10.0, actively exploited) and Citrix NetScaler authentication-bypass entries remain unresolved.
Energy / Economic	ELEVATED	Record U.S. diesel prices (\$6.29–\$6.39/gal, +68% YoY) driven by constrained global refining capacity and lowest-since-1982 U.S. distillate inventories. Source reporting assesses this as economic disruption, not physical shortage; does not independently justify a level change. Hormuz corridor deal remains unsigned (brief mention).
Civil Unrest	ROUTINE	No new documented instance of actual violence, specific threat, or unlawful paramilitary activity meeting current reporting standard identified this cycle.
Transportation / Mass Gatherings	ROUTINE	September 11 anniversary security posture and GSX 2026 (Atlanta, 14–16 Sep) both concluded this window without incident; steps down from ELEVATED.
Public Health / Environmental	ELEVATED	Carried forward at prior assessment; no fresh reporting collected this cycle pending next OSINT sweep.
Border / Immigration	HEIGHTENED	No new incident identified this cycle; the 3 Sep Delaney Hall vehicle-into-crowd incident remains the standing driver pending litigation/oversight developments.
Domestic Political / Continuity	HEIGHTENED	No change; government funding remains secure through 11 Dec, a stabilizing factor.
Grid / Utilities	ROUTINE	No new grid stress identified this cycle; PJM remains in normal operations.

KEY INCIDENTS

RECORD DIESEL PRICES — AGRICULTURE, FREIGHT AND FOOD-COST PRESSURE

U.S. retail diesel prices reached record nominal levels during the fall harvest, per the S2 flash report published this cycle (260919-0501Z). Reuters reported a national average of \$6.29/gal on 18 Sep, up 68% from \$3.74 one year earlier; Barron's separately reported \$6.31/gal on 16 Sep; AAA data cited by KCRG-TV placed the average at \$6.39/gal on 17 Sep. The underlying driver is constrained global refining capacity — combined

Russian and Gulf diesel exports down roughly two-thirds from 2025 levels, and Russia's own export ban imposed in July — layered on U.S. distillate inventories at their lowest seasonal level since at least 1982. U.S. refiners have increased seasonal diesel output to its highest level since 2018, but limited spare capacity constrains how quickly lost international supply can be replaced.

Farmers reported sharply higher operating costs during the corn, soybean, wheat and vegetable harvests: a South Dakota producer estimated up to \$1,500/day in fuel expenses for one combine, roughly double the prior year; farm fuel expenses rose an estimated \$11/acre for corn and \$7/acre for soybeans; a California vegetable producer reported a roughly 40% increase in fuel costs, with diesel exceeding \$8/gal in some California markets. Refrigerated freight rates from Washington's Yakima Valley reached a four-year high, and produce transportation costs from California rose 40–120% year over year. Independent truckers — who generally purchase fuel before receiving payment — reported increased cash-flow exposure; an Iowa driver reported a single semi-truck fill-up costing roughly \$1,000.

DOT is allowing drivers transporting gasoline to operate two additional hours daily; USDA stated it is examining possible assistance measures. The source report's assessment: the principal near-term threat is economic disruption rather than physical unavailability, and perishable goods (produce, dairy, meat) are more exposed than shelf-stable goods given their dependence on refrigerated, time-sensitive transport. The underlying constraint is refining capacity rather than an absolute crude shortage, meaning increased crude production or emergency crude releases may offer less relief than in a conventional supply disruption.

CISA KEV — LIGHTER VOLUME THIS WINDOW

CISA added 3 vulnerabilities to its Known Exploited Vulnerabilities catalog this window, a marked drop from last cycle's 11. On 16 Sep: a Cisco Identity Services Engine flaw (incorrect use of privileged APIs) and an Acronis Backup flaw (incorrect default permissions). On 18 Sep: a Linux Kernel flaw (improper check for unusual or exceptional conditions). No follow-on impact reporting was identified this sweep for last cycle's Cisco Firewall Management Center (CVSS 10.0) or Citrix NetScaler authentication-bypass entries; both remain unresolved active-exploitation watch items and are carried forward in the bulletin below.

SEPTEMBER 11 ANNIVERSARY AND GSX 2026 — BOTH CONCLUDED WITHOUT INCIDENT

Both watch items carried from last cycle concluded within this reporting window: the September 11 25th-anniversary commemorations (11 Sep) and GSX 2026, the major U.S. physical-security industry gathering in Atlanta (14–16 Sep). No incidents were identified in connection with either in this sweep; both step down from active watch status accordingly.

CYBER / INFRASTRUCTURE KEV BULLETIN – PATCH IMMEDIATELY

VULNERABILITY	NOTES
CVE-2026-76460 — Cisco Identity Services Engine	NEW — Added to KEV 16 Sep. Incorrect use of privileged APIs. Apply vendor patch immediately.
CVE-2026-87886 — Acronis Backup	NEW — Added to KEV 16 Sep. Incorrect default permissions. Apply vendor patch immediately.
CVE-2025-39682 — Linux Kernel	NEW — Added to KEV 18 Sep. Improper check for unusual or exceptional conditions. Apply vendor/distro patch immediately.
CVE-2026-20079 — Cisco Firewall Management Center (carried forward)	CVSS 10.0, actively exploited authentication bypass — added last cycle (9 Sep). No follow-on impact reporting identified this sweep. Patch immediately if not already done.
CVE-2026-19490 — Citrix NetScaler (carried forward)	Actively exploited authentication bypass on an edge device — added last cycle (9 Sep). No follow-on impact reporting identified this sweep. Patch immediately if not already done.

EMERGING INDICATORS

- **WATCH** — Diesel / Fuel Prices: National and regional diesel prices continuing upward for two consecutive weeks; retail stations imposing purchase limits or reporting repeated delivery failures; declining U.S. distillate inventory reports; small trucking-firm route reductions or shutdowns.
- **WATCH** — Federal Fuel Relief: Whether USDA or DOT announce additional assistance measures, or whether a temporary U.S. diesel-export restriction is implemented.
- **WATCH** — Cisco FMC / Citrix NetScaler Exploitation: Continue monitoring for follow-on reporting on scope/impact of active exploitation of both edge-device authentication bypasses added last cycle.
- **WATCH** — Tyler Robinson Trial: Next court date 23 Oct in the Charlie Kirk assassination prosecution; monitor for scheduling changes or pretrial developments.
- **WATCH** — Hormuz Corridor Signature (brief mention): Whether the Iran-Oman safe-corridor deal is formally signed; tracked for US fuel-price relevance only.
- **WATCH** — America 250 Reinstatement: Operator direction still pending; no new triggering activity identified this cycle.
- **WATCH** — wp2shell Re-Verification: Continue periodic confirmation that magnethf.com's WordPress Core patch status postdates fixed releases 6.9.5/7.0.2.

VERIFIED STATUS

- ✓ **CONFIRMED** U.S. retail diesel prices reached record nominal levels this week: \$6.29/gal national average (Reuters, 18 Sep, +68% YoY); AAA data placed the average at \$6.39/gal (KCRG-TV, 17 Sep). (Reuters, AAA, KCRG-TV — 16–18 Sep 2026)
- ✓ **CONFIRMED** CISA KEV additions this cycle: Cisco ISE and Acronis Backup (16 Sep), Linux Kernel (18 Sep). (CISA.gov official KEV catalog alerts)
- ✓ **CONFIRMED** GSX 2026 (Atlanta, 14–16 Sep) concluded within this window; no incident reports identified in this sweep. (ASIS International / GSX.org event listing; cross-checked against news search)
- ✗ **NOT CONFIRMED** Whether the Iran-Oman Hormuz safe-corridor deal has been formally signed as of this DTG. Most recent (7 Sep) reporting described talks as in their “final stage”; no signature confirmed in this cycle's sweep.
- ✗ **NOT CONFIRMED** Whether a temporary U.S. diesel-export restriction, reportedly under discussion, has been implemented as of this DTG.

OPERATOR GUIDANCE

CYBER

- **PATCH CISCO ISE** — CVE-2026-76460, added to KEV 16 Sep.
- **PATCH ACRONIS BACKUP** — CVE-2026-87886, added to KEV 16 Sep.
- **PATCH LINUX KERNEL** — CVE-2025-39682, added to KEV 18 Sep.
- **CONTINUE PATCHING CISCO FMC** (CVE-2026-20079, CVSS 10.0) **AND CITRIX NETSCALER** (CVE-2026-19490) if not already done — both remain actively exploited from last cycle.
- Report cyber incidents to cisa.gov or IC3.gov; CI Fortify guidance at cisa.gov.

FUEL / ECONOMIC

- Maintain routine monitoring; this development does not presently justify panic purchasing, public shortage claims, or a MAGCON change by itself.
- Avoid treating higher prices alone as proof of a shortage; confirm physical supply problems through multiple local reports.
- Report verified local disruptions — station outages, purchase limits, delayed commercial deliveries, or generator-fuel availability affecting essential services — through established MAGNET channels.

- Prepare for increased transportation surcharges in organizational budgets over the next 30–90 days.

DIPLOMATIC TRACKING

- Continue monitoring Iran-Oman Hormuz corridor signature status for US fuel-price relevance only; no change to reporting scope.

GENERAL

- Provide direction on America 250 watch-item reinstatement, still pending operator call.
- WP2SHELL re-verification of magnethf.com's WordPress Core version continues.
- No change to standing guidance for Section 702 or government-funding tracking at this time.

SOURCE LIST

[1] [A1] CISA.gov — Adds Two Known Exploited Vulnerabilities to Catalog (Cisco ISE, Acronis Backup), 16 Sep 2026 — <https://www.cisa.gov/news-events/alerts/2026/09/16/cisa-adds-two-known-exploited-vulnerabilities-catalog>

[2] [A1] CISA.gov — Adds One Known Exploited Vulnerability to Catalog (Linux Kernel), 18 Sep 2026 — <https://www.cisa.gov/news-events/alerts/2026/09/18/cisa-adds-one-known-exploited-vulnerability-catalog>

[3] [A2] Reuters — Record U.S. diesel prices squeeze farmers; food prices may rise, 18 Sep 2026 — <https://www.reuters.com/business/energy/record-us-diesel-prices-squeeze-farmers-food-prices-may-rise-2026-09-18/>

[4] [B2] Reuters Commentary — Record diesel prices could be Trump's Achilles' heel, 18 Sep 2026 — <https://www.reuters.com/commentary/reuters-open-interest/record-diesel-prices-could-be-trumps-achilles-heel-2026-09-18/>

[5] [B2] KCRG-TV — Diesel prices squeeze truck drivers; some Cedar Rapids pumps top national average, 17 Sep 2026 — <https://www.kcrg.com/2026/09/17/diesel-prices-squeeze-truck-drivers-some-cedar-rapids-pumps-top-national-average/>

[6] [A1] AAA — Fuel Prices — <https://gasprices.aaa.com/>

[7] [B2] Barron's price data (16 Sep, \$6.31/gal) referenced above is drawn from a paywalled article; no direct link included.

[8] [B2] Iranian Foreign Ministry (Esmaeil Baghaei), via Reuters/regional wire — Hormuz-Oman safe-corridor talks in “final stage,” 7 Sep 2026 — <https://morungexpress.com/iran-says-talks-with-oman-on-hormuz-strait-reach-final-stage>

[9] [MAGNET] S2 Report 260919-0501Z — Record Diesel Prices Threaten Agriculture, Freight and Food Costs (source flash report for this cycle's primary driver) — <https://magnethf.com/260919-0501z/>

[10] [MAGNET] S2 Report 260913-1800Z — prior cycle baseline — <https://magnethf.com/magnet-s2-snapshot-260913-1800z/>

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