



GEOWATCHER WW3 SIMULATOR

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DAILY BASELINE RESEARCH DOCUMENT

April 19, 2026 | Day 50 of Operation Epic Fury | Week 8

GL U expiration, the April 18 IRGC gunboat action at Hormuz, Operation Economic Fury, the Lebanon ceasefire, and the Macron-Starmer maritime summit are assessed simultaneously as the ceasefire approaches its April 22 expiration with no second-round talks confirmed.

BASELINE: 15.7% ($\pm 0.7%$, $n=10,000$)

PLATFORM NOTICE: DAYS 47, 48, AND 49 BASELINE GAP

GeoWatcher did not publish a daily baseline for April 16, 17, or 18, 2026. The WW3 Simulator requires human oversight for all calibration decisions, and the platform's human operator was unavailable across that 72-hour window. The simulator did not run automated updates in the operator's absence; this is by design. Day 50 (April 19) reconstructs the four-day calibration interval end-to-end against open-source reporting from April 15 through April 19. Every variable, toggle, selector, and scenario label has been reassessed against the full four-day evidence base. Where evidence was thin, the gap is documented in the Key Unknowns section. No retroactive daily baselines will be backfilled. Day 46 (April 15) and Day 50 (April 19) are the two authoritative anchor points for this interval. Human-in-the-loop calibration is a feature, not a failure mode.

EXECUTIVE SUMMARY

Day 50 of Operation Epic Fury is the first baseline update after a 72-hour operator gap. Four days of developments resolved several of Day 46's pending risks and introduced new ones. The single most consequential development was the April 18 IRGC gunboat attack on the Indian-flagged VLCC Sanmar Herald and a separate container vessel, the first verified kinetic Iranian action against neutral commercial shipping during the ceasefire period. It arrived less than 24 hours after Iran declared the Strait "completely open" and after Trump claimed credit for that opening.

The conflict has shifted mediums. The kinetic tempo stayed paused between the US and Iran on the primary bilateral axis, but the economic, maritime-interdiction, and cyber dimensions all escalated materially. The GL U sanctions waiver expired at 12:01 EDT April 19 with no renewal. Treasury Secretary Bessent launched Operation Economic Fury on April 15 as "the financial equivalent of what we saw in the kinetic activities" per DefenseScoop and TownHall. CISA issued Advisory AA26-097A documenting active Iranian APT campaigns against US critical infrastructure.

Against this, the diplomatic picture produced one structural positive: the Macron-Starmer Hormuz Maritime Freedom of Navigation Initiative on April 17, drawing more than 40 nations and explicitly excluding the US. The Israel-Lebanon 10-day truce went into effect at 21:00 GMT April 16 per NBC News, and direct peace talks between Israel and Lebanon resumed for the first time since 1993. A second round of US-Iran talks was not confirmed in the window despite Trump's "this weekend" signal.

The ceasefire expires April 22, three days from today. The War Powers 60-day clock expires approximately May 1. No deal framework exists. The IRGC has now demonstrated it will fire on vessels at Hormuz. The model is watching whether the April 22 deadline can be extended before all three conditions collapse simultaneously: kinetic restraint, diplomatic channel, and political authorization.

CRITICAL QUESTION 1: HORMUZ. REALITY, NARRATIVE, AND THE APRIL 18 GUNBOAT ACTION

What is actually happening at the Strait

The US naval blockade of Iranian ports remained fully operational across April 15-19. CENTCOM reports a cumulative 21 vessels turned back by April 18 per [CNBC](#) and [Public TV India](#). No vessel has been sunk or boarded. All interdictions produced voluntary compliance. Approximately 10,000 personnel, 12 or more ships, and P-8 patrol coverage anchor the force per [Deccan Herald](#). Transit volumes collapsed to approximately 8 vessels on April 17 versus the pre-war norm of 150 per day.

Trump vs Iran: where the narratives conflict

Iran's FM Araghchi declared the Strait "completely open" for the duration of the Israel-Lebanon truce on April 17 per [CNN](#). Trump claimed credit. Per [CNBC](#), Trump simultaneously stated the US blockade remained in force, a direct contradiction CENTCOM did not resolve. Trump also claimed Iran agreed to hand over enriched uranium and China agreed not to arm Iran per [CBS News](#). Both claims were denied by Iran. Open-source evidence supports the Iranian factual claims on uranium and coordinated transit requirements, and supports the CENTCOM operational description. Trump's maximalist framing is not corroborated by CENTCOM, State Department, or any allied government.

The April 18 IRGC gunboat action

On April 18, two IRGC gunboats fired on the Sanmar Herald approximately 20 nautical miles northeast of the Omani coast, and an unknown projectile struck a separate container vessel per [PBS](#) and [Military.com](#). UKMTO confirmed both incidents. Crews and hulls reported intact. Iran simultaneously reimposed transit restrictions per [Al Jazeera](#) and [Yahoo](#). Trump issued a new ultimatum: "We'll have to start dropping bombs again" per [Newsweek](#).

Bottom Line on Hormuz: Reality and Narrative

The US blockade is operationally effective: 21 vessels turned back, zero shots fired by US forces. Iran fired the first shots at neutral commercial shipping on April 18. Both are simultaneously true. The Hormuz whipsaw, declared open April 17 and followed by Iranian gunfire on tankers April 18, is Iran demonstrating selective enforcement capacity independent of any diplomatic signal it issued hours earlier. This is the most significant tactical escalation since the ceasefire began.

Net Probability Impact: This section holds the Naval Blockade selector ACTIVE and LOCKED. The April 18 gunboat action drives irandef UP, confirming Iran retained enough naval capability and command authority to execute a coordinated interdiction 55 days into the conflict.

CRITICAL QUESTION 2: DIPLOMATIC TRACK, NO SECOND ROUND IN FOUR DAYS

Pakistan shuttle diplomacy

Pakistan Field Marshal Asim Munir arrived Tehran April 15 carrying a US message, met Araghchi and Ghalibaf per [CNN](#). PM Sharif toured Saudi Arabia, Qatar, and Turkey per [Al Jazeera mediation tracker](#). Trump told reporters talks could occur "this weekend" per [Times of Israel](#). CNN cited Iranian sources expecting April 20 in

Islamabad. An Iranian parliament member told Al Jazeera no official briefing was received. No second-round meeting verifiably occurred in the April 15-19 window.

Ceasefire status

The primary bilateral axis held across April 15-19: no US airstrikes on Iranian territory, no Iranian ballistic missiles on Israel or US bases per [Wikipedia ceasefire](#). The Israel-Lebanon 10-day truce effective 21:00 GMT April 16 per [NBC News](#) addressed a separate front. Iraqi militias maintained ceasefire standdown. Houthis continued attacks on Israel but did not reopen the Red Sea commercial shipping campaign. The ceasefire on the US-Iran primary axis expires April 22, three days from today.

Macron-Starmer Hormuz Initiative

France and the UK co-chaired an international summit April 17 that produced the Strait of Hormuz Maritime Freedom of Navigation Initiative per [Gov.UK joint statement](#) and [Al Jazeera](#). More than 40 nations participated per the joint statement. Germany and Italy were represented in person. The US was deliberately excluded. This is the most organized allied pushback against US unilateral action to date and establishes a parallel multilateral maritime protection framework.

Bottom Line on Diplomatic Track

The channel is alive but unproductive. Four days of shuttle diplomacy and two Trump promises of imminent talks produced no meeting, no framework, and no ceasefire extension. Araghchi's April 18 denial of any uranium transfer removed the central US demand from the table on the same day IRGC gunboats fired on a tanker. The Macron-Starmer initiative is significant but does not substitute for a US-Iran framework. Ceasefire expires in three days with nothing in writing.

***Net Probability Impact:** This section holds the Diplomatic Track selector ACTIVE but flags its fragility. Ceasefire expiration April 22 without extension would immediately cascade to an airstrikes selector reassessment. The Macron-Starmer initiative partially supports the nato UP recommendation.*

CRITICAL QUESTION 3: OPERATION ECONOMIC FURY AND GL U EXPIRATION

GL U expiration and what it triggered

General License U expired at 12:01 EDT April 19 with no renewal per [Business Today India](#) and [Tribune India](#). Approximately 140 million barrels of Iranian crude on stranded vessels lose legal market access. India's Nayara Energy faces stacked Russia-plus-Iran sanctions exposure. Treasury Secretary Bessent confirmed the Russian oil waiver also will not be renewed per [ANI News](#). Two Chinese banks received explicit secondary-sanctions warnings.

Operation Economic Fury

Treasury launched Operation Economic Fury on April 15 as "the financial equivalent of what we saw in the kinetic activities" per [DefenseScoop](#) and [TownHall](#). US Treasury issued a formal press release per [US Treasury](#) targeting the Shamkhani-linked illicit oil network. Jerusalem Post confirmed US preparing to seize Iran-linked ships per [Jerusalem Post](#). Newsweek confirmed boarding-preparation reporting per [Newsweek](#).

Energy markets

Brent fell approximately 9% to \$90.38 and WTI fell approximately 11.8% to \$83.85 on April 17 per [CNBC](#) and [NewsX](#). AAA national average \$4.108 per [AAA](#). March CPI 3.3% YoY, PPI 4.0% YoY per [BLS](#). IMF cut global growth to 3.1% per [CNN](#). OPEC+ confirmed another 206,000 bpd May increase per [World Oil](#). SPR at approximately 415.4 million barrels per [Argus Media](#).

Bottom Line on Operation Economic Fury and GL U

GL U expiration removes the legal pathway for approximately 140 million barrels of stranded Iranian crude, imposes secondary sanctions risk on India and China, and signals economic warfare is intensifying simultaneous with diplomatic outreach. Operation Economic Fury globalizes the financial interdiction. The April 17 oil crash on peace signals reversed partially on April 18 gunboat news, demonstrating market sensitivity to the ceasefire trajectory.

Net Probability Impact: This section drives econ marginally DOWN from 0.73 to 0.72. The April 17 oil crash and below-forecast PPI partially offset GL U pressure and IMF downgrades. Net movement is small because competing signals are nearly balanced.

CRITICAL QUESTION 4: MOJTABA KHAMENEI, DAY 55

What is verified

Day 55 with zero authenticated audiovisual confirmation. Iran's Army Day on April 18 produced a written Telegram message read by a state-TV anchor over a still photograph per [Press TV](#) and [Seoul Economic Daily](#). Seoul Economic Daily explicitly confirmed not a single voice recording or video has been released since Mojtaba's March 9 selection as Supreme Leader. Iran International reported his first written statement as Supreme Leader on March 12 per [Iran International](#).

Conflicting intelligence

Reuters described three sources close to Mojtaba's entourage reporting severe facial and leg injuries, mental clarity intact, governance via audio conferencing. A US-Israeli diplomatic memo assessed incapacitation per [Al Jazeera](#). The Russian envoy told the Jerusalem Post Khamenei is in Iran "avoiding public appearances" per [Jerusalem Post](#). These three accounts cannot all be accurate. Open-source resolution is not possible. The IRGC is de facto governing but lacks constitutional authority to ratify any peace agreement under Article 110.

Bottom Line on Mojtaba Khamenei

Day 55 zero audiovisual. The mojtaba toggle stays LOCKED ON. The Army Day written message confirms governance continues via written statements, but the constitutional ratification gap identified in Day 46 is unresolved and growing in urgency as April 22 approaches. Any deal requiring Mojtaba's personal ratification cannot close without a verified public appearance.

Net Probability Impact: This section holds mojtaba LOCKED ON. The Article 110 constitutional gap is a Key Unknown with direct mechanism to the Diplomatic Track. irandef moves UP partly because the April 18 gunboat action confirms IRGC is operationally functional independent of Supreme Leader direct oversight.

CRITICAL QUESTION 5: US POLITICAL WILL AND WAR POWERS

Senate War Powers vote: April 15

The Senate's fourth War Powers Resolution vote failed 47 to 52 on April 15 per [Time](#) and [Al Jazeera](#). Rand Paul was the sole Republican defector. John Fetterman voted against as the sole Democratic defection. No additional Republican defectors from the four senators (Tillis, Lankford, Curtis, Collins) who publicly conditioned their support. Democrats assessed the vote as "closer than it looks" per NBC News, citing wavering signals from Don Bacon and Roger Marshall.

The 60-day clock

Military operations began February 28, 2026. Formal Congressional notification submitted March 2. The War Powers Resolution 60-day clock expires on or about May 1, 2026, approximately 12 days from today per [NBC News](#). No AUMF push, no national emergency declaration, no executive-order extension was announced in the April 15-19 window. Trump approval at approximately 41% per aggregate polling. Economy approval at career-low 31% per CNN. Consumer sentiment at record low per University of Michigan.

Bottom Line on US Political Will

Political will is eroding on every measurable dimension but has not broken. The Senate vote held for the fourth consecutive time. The dynamic is asymmetric: authorization holds only as long as Republican senators who publicly stated their conditions are not triggered. The 60-day clock arriving on approximately May 1 with no AUMF action is the next institutional forcing function.

Net Probability Impact: This section drives will DOWN from 0.48 to 0.46. Trump's "dropping bombs again" ultimatum and career-low economy approval are the specific Day 47-50 inputs. The Senate vote result held the erosion floor but did not stabilize the broader trend.

CRITICAL QUESTION 6: GREAT POWER POSITIONING APRIL 15-19

Russia

Lavrov traveled to Antalya after the Beijing summit and met Erdogan, Sharif, and the Qatari Emir April 17-18. Russia confirmed it can fill energy shortfalls from Hormuz disruptions for China and other countries per [Pravda NATO](#). Putin visit to China confirmed for H1 2026 per [Pravda NATO](#). No troop movements toward Iran or Caspian. Russia absorbing strategic gains without militarizing. Slider moves DOWN from 0.76 to 0.74.

China

MFA called the blockade "dangerous and irresponsible." Wang Yi held a call with Araghchi. The Jerusalem Post assessed China may survive the blockade but time is no longer on its side per [Jerusalem Post](#). The Rich Starry tanker turned back. Two Chinese banks received secondary-sanctions warnings. No military deployment to the Gulf or Taiwan Strait activity detected. china holds at 0.65.

NATO, Turkey, Saudi, Pakistan

The Macron-Starmer Paris summit April 17 with more than 40 nations per [Gov.UK](#) is the most organized allied response to date. nato moves UP from 0.35 to 0.40. Saudi Arabia asked the US to end the blockade per [Jerusalem Post](#). Pakistan reportedly deployed the 25th Mechanized Division to the Saudi-Yemen border per [The Week India](#). saudi moves UP from 0.50 to 0.52 on improved diplomatic positioning and no new Houthi attacks on Saudi infrastructure. Erdogan at Antalya called US attacks "unlawful" per [Hiiraanweyn](#) but no military mobilization. turkey holds at 0.48.

Bottom Line on Great Power Positioning

Russia and China have aligned diplomatically against the blockade while absorbing economic and strategic gains. Neither has militarized. The Macron-Starmer initiative is the most significant allied structural development since the ceasefire, building a parallel multilateral framework independent of US action. Saudi Arabia pressed for de-escalation while Pakistan actively supports Saudi security.

Net Probability Impact: This section drives nato UP from 0.35 to 0.40 on the Paris summit and Hungary transition. russia DOWN from 0.76 to 0.74 on diplomatic-only positioning. saudi UP from 0.50 to 0.52 on improved positioning. china holds at 0.65. turkey holds at 0.48.

CRITICAL QUESTION 7: IRAN DEFENSE, NUCLEAR, AND PROXY STATUS

DIA testimony and residual capability

DIA Director Lt Gen Adams testified April 17 that Iran retains "thousands of missiles and drones" per [Washington Times](#). Combined with Critical Threats' sustained assessment of approximately 50% of launchers intact and the April 18 coordinated IRGC gunboat action per [PBS](#) and [Military.com](#), the irandef slider at 0.19 is demonstrably understated. Partial internet restoration partially restored C2 architecture. CISA Advisory AA26-097A per [CISA](#) confirmed active Iranian APT campaigns against US critical infrastructure.

Nuclear and proxy status

Araghchi denied any uranium transfer April 18. Makeshift roadblocks at Esfahan underground nuclear complex documented by the Institute for Science and International Security, consistent with denial of IAEA access. Fordow remains undamaged. Iraqi militias maintained ceasefire standdown with no confirmed attacks on US forces in window. Houthis maintained Red Sea commercial shipping restraint per [Wikipedia Houthi strikes](#).

Bottom Line on Iran Defense and Nuclear

The DIA testimony and April 18 gunboat action together establish that Iran's military capability is meaningfully higher than 0.19 reflects. The IRGC executed a coordinated naval interdiction while governing remotely. Cyber operations are active. The nuclear picture remains unverifiable from open sources with enriched uranium disposition the central intelligence gap.

Net Probability Impact: This section drives irandef UP from 0.19 to 0.22. The DIA testimony, IRGC gunboat action, and CISA advisory together establish demonstrated capability above the current slider value.

CRITICAL QUESTION 8: NORTH KOREA, REGIONAL ACTORS, SCENARIO BUILDER AUDIT

North Korea

No new weapons tests, no ICBM threshold crossed, and no Iran coordination signal in April 15-19. April 12 destroyer-launched anti-ship missile test remains the most recent DPRK activity per [USNI News](#). DPRK using conflict for domestic propaganda rather than operational escalation. nk holds at 0.46.

Scenario builder audit: two mandatory changes

l1c: "Israel expands strikes to Beirut and Lebanese state infrastructure": The Israel-Lebanon 10-day truce effective 21:00 GMT April 16 and Trump's April 18 prohibition on Israeli strikes on Lebanon ("enough is enough")

remove this scenario from forward-looking status. Mandatory relabel: "Israel resumes strikes on Lebanese state infrastructure after ceasefire collapse." Weight deltas nato:-0.04, russia:+0.03 unchanged. Cap check: nato 0.40-0.04=0.36, russia 0.74+0.03=0.77. Both within bounds. PASS.

I5a: "Mojtaba Khamenei dies or is incapacitated": Day 55 zero audiovisual. The underlying condition may have occurred in substance but has not been publicly confirmed. Mandatory relabel: "Mojtaba Khamenei's death or incapacitation is publicly confirmed." Weight deltas russia:+0.08, china:+0.06, irandef:+0.05 unchanged. Cap check: russia 0.74+0.08=0.82, china 0.65+0.06=0.71, irandef 0.22+0.05=0.27. All within bounds. PASS. All other 23 scenarios remain forward-looking and label-valid.

Bottom Line on Regional Actors and Scenario Builder

North Korea in holding pattern. Iraqi militia restraint continued. Houthi Red Sea commercial restraint continued. Lebanon truce is the single most positive regional de-escalation in weeks. Two scenario labels require mandatory updates to restore forward-looking status: I1c and I5a. All other 23 scenarios validated forward-looking.

Net Probability Impact: This section holds nk at 0.46. Scenario builder changes I1c and I5a are mandatory for Day 50 deploy. No selector changes from this section.

VARIABLE ASSESSMENT: DAY 50

All nine sliders. Day 46 values from HTML source of truth. Day 50 recommendations with rationale. HOLDS documented explicitly.

Slider	Label	Day 46	Day 50 Rec	Direction / Rationale
china	China Posture	0.65	0.65	HOLD: Rhetoric hardened (MFA "dangerous and irresponsible," Wang-Araghchi call). No military deployment to Gulf, no Taiwan Strait escalation. Rich Starry turned around. May Trump-Xi summit maintains near-term restraint incentive. Net neutral.
ruusia	Russia Instability	0.76	0.74	DN: Lavrov conducted diplomatic tours Beijing and Antalya without troop movements to Iran or Caspian per Pravda NATO. Russia absorbing energy-lifeline role for China. No militarization in window. Fiscal position continues to benefit from oil revenues.
irandef	Iran Defense Left	0.19	0.22	UP: DIA Director Lt Gen Adams testified April 17 Iran retains "thousands of missiles and drones" per Washington Times. Critical Threats assessment approximately 50% of launchers intact. IRGC gunboats executed coordinated interdiction of Sanmar Herald and container vessel April 18 per PBS and Military.com. CISA AA26-097A documents active Iranian APT campaigns. 0.19 understated.
will	US Political Will	0.48	0.46	DN: Senate War Powers vote failed 47 to 52 on April 15 per Time and Al Jazeera. Rand Paul sole Republican defector; Fetterman crossing again. Bacon and Marshall wavering per NBC. Trump contradictory statements ("close to over" vs "dropping bombs again") per Newsweek. Record low consumer sentiment per BLS. 60-day clock at Day 50.
nato	NATO	0.35	0.40	UP: Paris summit April 17 produced Hormuz Maritime

	Cohesion			Freedom of Navigation Initiative co-chaired by Macron and Starmer per Gov.UK joint statement and Al Jazeera. More than 40 nations participated. Germany and Italy in person. US deliberately excluded. Hungary Tisza government on track for May 5 per OPB.
saudi	Saudi Stability	0.50	0.52	UP: MBS hosted Pakistani PM Sharif April 15 and pressed US to end blockade per Jerusalem Post. No new Houthi attacks on Saudi infrastructure in window. Pakistan reportedly deployed 25th Mechanized Division to Saudi-Yemen border per The Week India. Diplomatic positioning improving despite IMF GDP downgrade to 3.1%.
econ	Economic Stress	0.73	0.72	DN: Brent fell approximately 9% to \$90.38 and WTI approximately 11.8% to \$83.85 on April 17 per CNBC and NewsX. AAA national average \$4.108. March CPI 3.3% YoY, PPI 4.0% YoY per BLS. IMF cut global growth to 3.1% per CNN. GL U expired April 19. Competing signals produce marginal net decrement.
turkey	Turkey Stability	0.48	0.48	HOLD: Erdogan at Antalya urged de-escalation and hosted Lavrov, Sharif, Qatari Emir per Hiiraanweyn. No military mobilization. Incirlik functional. Israel-Turkey rift escalating diplomatically per Jerusalem Post but no military action. July NATO summit in Ankara maintains structural loyalty incentive. Equilibrium.
nk	N. Korea Opportunism	0.46	0.46	HOLD: No new weapons tests, no ICBM threshold crossed, no Iran coordination signal in April 15-19 window. April 12 destroyer test remains most recent activity per USNI News. DPRK using conflict for domestic propaganda. Hold.

OPERATIONAL SELECTORS TABLE

Five selectors from HTML source of truth. Day 50 assessment.

Selector (HTML key)	Current State	Rationale
Naval Blockade (iran.blockade)	ACTIVE (true) LOCKED	21 vessels turned back as of April 18 per CENTCOM. Operation Economic Fury launched April 15 per DefenseScoop. CENTCOM Gen. Caine confirmed April 18 US pursuing Iran-linked vessels globally. Blockade expanding in scope. HOLD ACTIVE + LOCKED.
Airstrikes (iran.airstrikes)	PAUSED (false)	No new US strikes on Iranian territory April 15-19. Trump April 17: "maybe I won't extend it... unfortunately we'll have to start dropping bombs again" per Newsweek. SecDef Hegseth "ready to resume combat." Selector holds on thin margin. HOLD PAUSED.
Ground Ops (iran.ground)	PAUSED (false)	No indicators of change. HOLD PAUSED.
Ukraine Aid (aid)	REDUCED	No new movement in window. Iran theater consuming US strategic attention. HOLD REDUCED.
Diplomatic Track (diplo)	ACTIVE (true)	Pakistan FM Munir arrived Tehran April 15 per CNN. Second-round talks did NOT verifiably occur in window despite Trump's "this weekend" suggestion per Times of Israel. CNN cited Iranian sources expecting April 20 Islamabad. Channel alive but unproductive. HOLD ACTIVE.

WILDCARD TOGGLE ASSESSMENT TABLE

All 14 toggles. HTML keys from TOGGLE_DEFS (swans, volatile, drone, ai, bio, sat, deepfake, debt, whistle, social, pres, putin, mojtaba, israelcol). Current states confirmed from HTML source of truth.

Toggle (HTML key)	Display Name	Current	Rec	Rationale
swans	Black Swan Events	ON	ON	GL U expiration April 19, IRGC gunboat action April 18, ceasefire April 22 expiration, War Powers clock approximately May 1. Tail risk elevated. HOLD.
volatile	Volatile Leadership	ON	ON	Trump contradictory between "close to over" and "dropping bombs again" per Newsweek. Mojtaba Day 55 audio-only. IRGC acting independently of diplomatic signaling. HOLD.
drone	Drone Saturation	OFF	OFF	No saturation event April 15-19. Houthi Red Sea commercial drone restraint continues. HOLD.
ai	AI-Enabled Escalation	OFF	OFF	April 5-6 Mojtaba deepfake debunked per Sardarizadeh/BBC, predates window. No new AI-enabled escalation event. HOLD.
bio	Biological Incident	OFF	OFF	No indicators. HOLD.
sat	Satellite Denial (ASAT)	OFF	OFF	No indicators. HOLD.
deepfake	Deepfake Disruption	OFF	OFF	Debunked April 5-6 deepfake predates window and was not disseminated by Iranian state channels. No qualifying trigger. HOLD.
debt	US Debt Crisis Trigger	OFF	OFF	Debt ceiling raised to \$41.1T via P.L. 119-21, July 2025. No X-date pressure in window. \$80-100B war supplemental unpublished but no acute Treasury crisis event. HOLD.
whistle	Whistleblower Leak	OFF	OFF	House Democrat Liccardo probe of suspicious oil trades is a congressional inquiry, not a verified leak. HOLD.
social	Social Media Cascade	OFF	OFF	No discrete verified cascade event April 15-19. social:false is the confirmed Day 45 permanent cutover. No change without a verified qualifying event. HOLD.
pres	US President Incapacitated	OFF	OFF	Trump conducted multiple media interviews, Truth Social activity, and Air Force One pool access in window. Clearly functional. HOLD.
putin	Putin Removed	OFF	OFF	Putin announced H1 2026 China visit via Lavrov per Pravda NATO. Domestically stable. HOLD.
mojtaba	New Iranian Leadership Unstable	ON (LOCKED)	ON (LOCKED)	Day 55 zero audiovisual. Army Day April 18 was written Telegram post read aloud over still photograph per Press TV and Seoul Economic Daily, not a voice or video. Reuters: severe injuries, audio-only meetings. Toggle stays LOCKED per protocol until verified audiovisual.
israelcol	Israel Government Collapse	OFF	OFF	Netanyahu negotiated Israel-Lebanon 10-day truce effective April 16 per NBC News. Coalition stable. IDF conducting structured operations. HOLD.

MOST IMPORTANT DEVELOPMENT: APRIL 15-19

The April 18 IRGC gunboat attack on the Sanmar Herald is the most consequential development of the four-day window. It is the first verified kinetic Iranian action against neutral commercial shipping during the ceasefire period. Its mechanism is significant on three dimensions.

First, it punctures the premise of coercive diplomacy. Days 43 through 46 priced a de-escalatory trajectory because the blockade produced compliance without kinetic contact. The April 18 action terminates that narrative: Iran will selectively fire on neutral vessels at a moment of its choosing, independent of any diplomatic signal it issued hours earlier.

Second, it validates the irandef adjustment upward. A military that fires two coordinated gunboats on a VLCC while governing remotely via audio conference is not at 0.19 capability. The DIA testimony and this action together establish the floor is higher.

Third, it creates new selector pressure. If the April 22 ceasefire expires without extension and IRGC gunboats are actively engaging commercial vessels, the Airstrikes selector faces its first genuine reactivation pressure since Day 46. A US vessel struck or a US-flagged commercial vessel hit would activate an immediate response obligation the current diplomatic posture cannot absorb.

SUMMARY FOR CALIBRATION

De-escalatory Signals: April 15-19

Israel-Lebanon 10-day truce effective April 16. More than 40 nations joined the Macron-Starmer Hormuz Maritime Freedom of Navigation Initiative April 17. Second-round talks discussed for as early as April 20. Pakistan PM Sharif on active shuttle diplomacy. Saudi Arabia pressing US to end blockade. WTI crashed approximately 11.8% on Hormuz-open announcement April 17. Houthis maintaining Red Sea commercial shipping restraint. Iraqi militias maintaining ceasefire standdown. Hungary Tisza government on track for May 5.

Counter-Pressures: April 15-19

IRGC gunboats fired on Sanmar Herald and container vessel April 18, the first kinetic action against neutral commercial shipping in the ceasefire period. GL U expired April 19 with no renewal. Operation Economic Fury launched April 15 with global secondary sanctions deployment. Iran denied any uranium transfer April 18, removing the central US demand from the negotiating table. Ceasefire expires April 22 with no framework or extension confirmed. War Powers 60-day clock approximately 12 days from expiration. DIA testimony: Iran retains thousands of missiles and drones. CISA confirmed active Iranian APT campaigns. Mojtaba 55 days without audiovisual, Article 110 ratification barrier unresolved. Trump threatening to resume bombing while simultaneously claiming war is close to over.

Bottom Line on Day 50

Four days compressed into one assessment. The conflict shifted mediums, moving from kinetic to economic, financial, and maritime-interdiction. The IRGC gunboat action on April 18 is the most consequential single development, establishing that Iran retained operational naval capability and will use it. The diplomatic track is alive but produced nothing in four days. The ceasefire expires in three days. The model is watching whether April 20-22 produces a framework, an extension, or a lapse, and whether the IRGC fires again before that window closes.

KEY UNKNOWNNS

KEY UNKNOWNNS: OPEN-SOURCE INTELLIGENCE GAPS

1. Mojtaba Khamenei medical and cognitive status: Day 55

Zero authenticated audiovisual in 55 days. Army Day April 18 produced a written Telegram post read aloud over a still photograph per Press TV and Seoul Economic Daily, not a voice recording or video. Reuters describes severe facial injuries and possible leg loss with audio-only meeting participation. A US-Israeli diplomatic memo per Al Jazeera assessed incapacitation. Article 110 of Iran's constitution requires the Supreme Leader to personally ratify any peace agreement.

Black Swan Pathway: *Verified death or incapacitation forces immediate Assembly of Experts reconvening under war conditions, IRGC seizing de facto full control, and invalidating any deal framework under negotiation.*

2. Iranian enriched-uranium disposition at Esfahan tunnels

Araghchi denied any transfer on April 18 per Al Jazeera. Trump claimed handover agreed. The Institute for Science and International Security documented April 9 and 12 tunnel-entrance fortifications at Esfahan underground complex consistent with denial of IAEA access. The 60% HEU stockpile location and custodial chain cannot be verified from open sources.

Black Swan Pathway: *Confirmation that Iran dispersed or transferred enriched uranium to a non-IAEA-monitored location immediately triggers resumed airstrikes, collapsing the ceasefire and Diplomatic Track simultaneously.*

3. Whether second-round talks convene before April 22 ceasefire expiration

As of April 19, no second-round meeting has occurred. CNN cited Iranian sources expecting April 20 in Islamabad. Trump said "this weekend" per Times of Israel. An Iranian parliament member said no official briefing was received. If talks do not begin before April 22, the ceasefire expires without a framework.

Black Swan Pathway: *Ceasefire lapse without extension or replacement framework immediately restores full operational freedom on both sides, triggering the airstrikes selector to Active and collapsing the Diplomatic Track.*

4. China and India secondary sanctions compliance post-GL U

Two Chinese banks were put on explicit notice April 15 per ANI News and US Treasury. India's Nayara Energy faces stacked Russia-plus-Iran sanctions risk. Enforcement becomes testable within 7 to 14 days of April 19. Whether Beijing and New Delhi defy secondary sanctions cannot be determined from open sources.

Black Swan Pathway: *China openly defying secondary sanctions enforcement triggers a direct US-China economic confrontation and activates the china slider upward materially, potentially triggering the I5c scenario.*

5. Actual kinetic count and damage from April 18 IRGC gunboat actions

UKMTO confirmed two incidents: gunboats fired on the Sanmar Herald approximately 20 nautical miles northeast of Oman, and an unknown projectile struck a container vessel per PBS and Military.com. Crew and hull status of both vessels unverified. Whether this constitutes the opening of a sustained IRGC counter-blockade or an isolated demonstration cannot be determined from open sources.

Black Swan Pathway: *IRGC operationalizing a sustained counter-blockade with additional interdictions, boarding, or vessel seizure in the next 48 to 72 hours triggers immediate US force response and collapses both the ceasefire and the Diplomatic Track.*

6. Iraqi militia tempo April 9-19

Open-source reporting on Iraqi militia activity thins materially after April 8. FDD's most recent tranche documents the April 8 ceasefire standdown. No confirmed attacks on US forces occurred in the April 15-19 window, but surveillance gap means resumed activity could go undetected until a casualty event. The April 29 War Powers

deadline creates structural incentive for escalation in the final days before the authorization clock expires.

Black Swan Pathway: *A single US fatality from an Iraqi militia in the War Powers window creates immediate congressional pressure to both invoke and repudiate the war authorization simultaneously, accelerating political will collapse.*