

DAILY BRIEFING

The Dispatch

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MAIN STORY: US DRIVES ITS IRAN CAMPAIGN INTO A SEVENTH NIGHT OF STRIKES AND BLOCKADE

- US Central Command ran a seventh consecutive night of strikes on Iran, opening a fresh round Friday at 3 p.m. Eastern and ending at 9:30 p.m., hitting surveillance sites, military logistics infrastructure, underground weapons storage, and maritime capabilities. The campaign widened past military targets to an Iranian port and energy facilities, following through on Trump's threat to strike infrastructure unless Tehran eases its chokehold on the Strait of Hormuz. At least 12 airstrikes hit a missile site at Lar, with further strikes at Ahvaz, Qeshm, Yazd, Darab, and Sanandaj on the Kurdish side. Three people were killed and eight injured in Hormozgan. CENTCOM said more than 50,000 US personnel remain across the Middle East, "vigilant, lethal, and ready."
- US Marines from the 11th Marine Expeditionary Unit released video of their boarding of the tanker M/T Wen Yao in the Gulf of Oman, enforcing the reimposed naval blockade of Iran's ports. Traffic through the Strait of Hormuz, which normally carries a fifth of the world's oil and LNG, has largely halted. Tehran holds the strait closed to all shipping except corridors it designates and supervises, insisting no oil or gas passes until US strikes end. Oman has offered to open a maritime corridor through its territorial waters, while CENTCOM says the comprehensive blockade will remain in force.
- Mohsen Rezaei, a senior military adviser to Iran's supreme leader, warned that two or three more days of US strikes will push Iranian forces past deterrence and reciprocal retaliation into a phase of "attack and total destruction." Iran would then treat US bases and troops across the region as direct targets. He declared the policy of fighting and negotiating at once finished, with Iran now on an "eye for an eye" footing. IRGC aerospace commander Majid Mousavi vowed the strikes from across Iranian territory would continue until calm returns to the southern coast and the strait. Military spokesman Abolfazl Shekarchi said Iran insists on a US withdrawal from the region and will never give up Hormuz.
- Iran fired a regionwide barrage of missiles and drones at US bases and their host states in retaliation for the overnight strikes. The IRGC claimed hits on US refueling aircraft and fighter jets stationed in Jordan, a US drone-boat depot and an AI targeting center in Bahrain, and radar sites in Oman. Air defenses engaged across Kuwait, Qatar, Bahrain, Jordan, and Iraq, with explosions heard over Doha and Jordan reporting 10 missiles downed. Tehran justifies the barrage as targeting the bases it says Washington uses as launchpads against it.
- Mediators kept the diplomatic track alive even as the fighting widened. Pakistan's foreign ministry rejected suggestions it had abandoned brokering, saying the parties "will have to come to

the negotiating table," while conceding the mediation had grown harder. China's Wang Yi and Pakistan's Ishaq Dar, meeting in Shanghai, urged an immediate ceasefire and called phase one of the Islamabad memorandum "hard-won," warning peace could still "slip away." US Vice President Vance said the administration is "not going to bomb and bomb and bomb" and cast diplomacy as one tool alongside force. Trump, who has notified Congress that hostilities resumed, insisted the war is going well and that only strength moves Tehran.

STRATEGIC ASSESSMENT

The war has settled into a punishing tit-for-tat over Hormuz that neither side yet treats as total, but Rezaei's two-to-three-day ultimatum sets a near-term tripwire that would break that restraint. Iran most likely keeps its retaliation calibrated to US bases and their host states so long as strikes stay below the threshold of hitting Tehran or the regime's core. A sustained US shift onto energy and civilian infrastructure could trigger the "total destruction" phase Rezaei named, meaning direct fire on US troops, not proxy signaling. The diplomatic track survives on mediator insistence more than on either principal's concession, and Vance's "not going to bomb" hedge suggests Washington still wants an exit it can brand a win. The next observable is whether US strikes pause past Rezaei's window: a lull would signal back-channel movement, while a hit on an Iranian power plant or a direct strike on a US base would mark the escalation both sides have so far avoided.

IRAN

- Iran's health ministry counted at least 38 killed and more than 400 wounded across the country since fighting with the United States resumed on June 22. Spokesman Hossein Kermanpour listed 22 injured women, three women killed, nine wounded under age 18 and one dead minor. A seventh straight night of US strikes on bridges and energy infrastructure in the south deepened the home-front strain. One strike cut water to several towns in Hormuzgan. The energy ministry urged citizens to switch off air conditioners at peak hours, to hold electricity supply steady in southern provinces facing extreme heat and repeated hits on power facilities. A cancer hospital in the southwest evacuated 211 chemotherapy patients after a nearby strike, which Tehran branded a "barbaric attack." Grocery prices have nearly doubled from pre-war levels.
- Satellite imagery captured between July 7 and July 12 shows fresh impact scars inside the Bushehr nuclear power plant complex, Iran's largest, along with an apparent strike on adjacent support facilities. Bushehr deputy governor Ehsan Jahanian confirmed on July 9 that several sites across the province were struck, including areas around the plant, a military site in Choghadak and a southern fishing port. He denied the reactor itself was hit, saying it continued operating normally.
- Iran's IRGC said it downed a US-made RQ-11 Raven reconnaissance drone, a lightweight AeroVironment surveillance aircraft, over Ramshir in Khuzestan province using an air defence system in its integrated network.
- The IRGC Navy released two videos with escalating anti-US messaging, one purporting to show the amphibious assault ship USS Iwo Jima (LHD-7) filmed near the US Gulf Coast, signaling either a claimed reach beyond the Persian Gulf or a broader information campaign.
- Iran's Revolutionary Guards claimed a strike on a US special operations command centre at al-

Tanf in eastern Syria, its first such attack on Syrian soil in the current war. The Guards said they destroyed helicopters and a radar system in retaliation for Iranian soldiers killed in a US strike on Iranshahr. The US called the claims "all false" and said no troops were killed or captured, noting it withdrew from al-Tanf in February. Syria's military confirmed an attack near the base but said it did not hit the site and caused no casualties or damage.

- An Iranian missile-and-drone bombardment at 4:30 a.m. Friday killed nine members of the exiled Komala party of Iranian Kurdistan at their camp near Sulaymaniyah in Iraq's Kurdistan region, the largest such escalation against Iranian Kurdish opposition groups since the April ceasefire.
- The US Treasury expanded sanctions on Iran's oil and cryptocurrency sectors after Iran, having blocked the Strait of Hormuz since February, struck ships transiting the waterway.

ISRAEL

- The Trump administration notified Israel it is sending several dozen more aerial refueling planes in the coming days ahead of a potential expansion of operations against Iran, restoring the fleet to its war-start level. About 30 US tankers now sit at Ben Gurion Airport near Tel Aviv and about 30 more at Ramon Airport in the south. Washington asked the Israeli government to accommodate the additional aircraft, deepening a crowding problem the tanker presence has already made a domestic political issue.
- Israel's Knesset dissolved early Friday, setting national elections for October 27 and closing out the first coalition to serve a full term since 1988. In a final marathon session Netanyahu's bloc rammed through contested bills halting the enlistment of ultra-Orthodox men, expanding government control over broadcast media, and weakening the attorney general. A poll put the opposition bloc at 62 seats against 48 for the coalition, with Likud dropping to 22 and tied with Gadi Eisenkot's Yashar. It found 83% of voters opposing any Haredi party in the next government.
- The IDF detained several Israeli civilians who crossed from Majdal Shams into Syria and stopped others attempting to breach the Golan border, condemning a recent rise in illegal crossings.
- Israeli Foreign Minister Gideon Saar and EU foreign-affairs chief Kaja Kallas have frozen contact after a push to restrict trade with Israeli settlements. Little chance of repair exists before the October elections.
- Netanyahu's public criticism of a proposed US sale of F-35 jets to Turkey angered Trump, and no Netanyahu meeting has been scheduled despite the premier's weeks-long push for one.
- Israel reclassified crocodiles as managed wild animals, clearing the main legal obstacle to National Security Minister Itamar Ben-Gvir's proposal to ring prisons holding Palestinian detainees with crocodile-filled moats.
- Israeli President Isaac Herzog voiced hope for normalization with Saudi Arabia and respect for Crown Prince Mohammed bin Salman in a Jerusalem interview, and called diplomacy the best path to end the war with Iran.

LEBANON

- Israeli forces shelled Wadi al-Saluqi with artillery and machine-gun fire on the morning of 18 July from positions in occupied al-Qantara. Overnight drone strikes on Mansouri killed several people whose bodies were recovered Friday. Troops opened fire that trapped residents in Harees, who appealed to the Lebanese Army for evacuation, while incendiary drones burned wheat fields outside Qlayaa. Education and Higher Education Minister Rima Karami said the army looted three southern schools before detonating them, raising the total fully destroyed to 20, with 100 more damaged. The fire extends near-daily strikes despite the ceasefire. Israel killed three Hezbollah members near Beit Yahoun days earlier.
- Lebanese army began intensive patrols in Froun, in the Bint Jbeil district, as the United States abruptly postponed Friday's virtual military meeting on the southern pilot zones, likely deferring it to CENTCOM commander Admiral Brad Cooper's 23 July Beirut visit. German Foreign Minister Johann Wadephul proposed deploying an EU-mandated force to replace UNIFIL when its mandate expires on 31 December, arguing it would prevent a security vacuum and enable an Israeli withdrawal without Hezbollah's return. The UN Security Council has held off substantive talks on a successor presence, awaiting the Israel-Lebanon track's own framework, with diplomats resigned to Washington's August 2025 decision to terminate the 48-year mission.
- Hezbollah MP Hassan Fadlallah accused President Aoun of partisan bias and broken disarmament promises, while Lebanese Forces leader Samir Geagea argued Hezbollah's failure to stop the Israel talks proves its declining capacity for armed conflict.
- Lebanon's displaced in collective shelters fell from about 131,200 to 59,700 by 25 June as over 523,000 began returning, and the first UAE aid batch of 29 trucks crossed at Masnaa.

SYRIA

- Syria's Interior Ministry said detained ISIS members confessed to the June 22 Mar Elias Church bombing in Damascus that killed 25. They also described a postponed plot against the Sayyida Zainab shrine to inflame sectarian tensions.

PALESTINE

- An Israeli airstrike killed at least eight Palestinians and wounded 20 attending a funeral in Nuseirat in central Gaza on Friday, striking mourners gathered outside the Ahmad Yassin Mosque for a man killed in an earlier Israeli strike on the same area. Hamas condemned the attack as a brutal massacre against mourners. The Israeli army said it had targeted an Islamic Jihad cell. At least three other Palestinians were killed in separate strikes across the enclave, raising Friday's toll to at least 12. More than 1,100 Palestinians have died since the October ceasefire, which halted major combat but not near-daily raids.
- More than 100 Israeli settlers attacked the outskirts of Sinjil, north of Ramallah, opening fire toward residents and burning agricultural crops, as residents and popular guard committees confronted

them and the army simultaneously tightened its siege and sealed the town's entrances. Settlers also destroyed a water network and two tanks in al-Minya, southeast of Bethlehem. The European Union urged Israel to halt settlement expansion, land appropriation, and the forced eviction of Palestinians, warning the measures undermine a future Palestinian state. The appeal came days after the security cabinet approved 1.3 billion shekels (\$427.8m) for 34 new settlements in the occupied West Bank.

- 274 Palestinian children have been killed since the October ceasefire, about one a day, with at least six more Palestinians killed across Gaza in the past 24 hours, including Al-Qassam Brigades media official Anas Hamdan.
- The UAE flew another 100 tonnes of relief (infant formula, medicines, and clothing) from Ras Al Khaimah to Gaza on Friday via the Emirates Red Crescent.

KEY REGIONAL EVENTS

Saudi Arabia

- The US State Department cast Saudi Arabia as a Major non-NATO Ally in clearing the nearly \$2 billion air-defense package, a sale sharpened by Houthi missiles striking Abha airport on Monday.

Kuwait

- An Iranian strike Friday damaged a Kuwaiti power and water desalination plant, sparking a fire and knocking out a large number of generation units in a nation that draws about 90% of its drinking water from desalination.

Jordan

- Jordan condemned the Iranian strikes on Kuwait, Bahrain and Qatar as a violation of the three states' sovereignty, and its air defenses intercepted 10 Iranian missiles over the kingdom with no casualties or damage.

Qatar

- Qatar categorically rejected claims that it had agreed to join military action against Iran, affirming it has not and will not take part in any strike against a neighboring country.

UAE

- UAE President Sheikh Mohamed bin Zayed and Oman's Sultan Haitham reviewed the escalating Iran conflict by phone.

Iraq

- The Iraqi Islamic Resistance offered a \$10 million reward, funded by member donations, to anyone who kills US President Donald Trump.

Yemen

- Ansarallah leader Abdul-Malik al-Houthi warned Thursday that any Saudi escalation would be met “blockade for blockade,” accusing Riyadh of acting for the United States and Israel. His supporters filled Sanaa and other governorates Friday in a “Warning and Mobilization” rally endorsing further escalation. Senior figures in Yemen’s internationally recognized government, including Presidential Leadership Council deputy Othman Mujalli and Information Minister Muammar al-Eryani, rejected any negotiated settlement and pressed for a stronger military campaign. Saudi Arabia’s foreign ministry urged the Houthis to engage its initiative rather than repeat past decisions. The exchange followed the Saudi strike on Sanaa airport and the Houthi missile attack on Abha.

KEY INTERNATIONAL EVENTS

- House Democratic Leader Hakeem Jeffries opposed the amendment to zero out \$3.3 billion in US military aid to Israel, which more than half of House Democrats backed in a 104-314 vote, while urging that American Middle East policy must change.
- Pakistan and Kuwait are negotiating an expanded defense pact under which Kuwait would gain troops, jets, and drones in exchange for Pakistani energy cooperation and investment, talks still at an early stage amid US-Iran tensions.

MARKETS

- US energy firms signed roughly \$60 billion in agreements with Iraq at the US Chamber of Commerce, several aimed at building alternative crude-export routes that bypass the Strait of Hormuz. West Texas crude rose nearly 5% to \$88 a barrel, up from about \$67 before the war began and off an early-April peak above \$110. Deals span energy, healthcare, communications and infrastructure, with ExxonMobil, Chevron, Shell and Halliburton among the signatories. The pipelines are years from viability. A single-country line takes an estimated two and a half years to build, and these cross two or more nations.
- Iran’s Revolutionary Guards said two oil tankers hit mines and exploded south of the Strait of Hormuz on Saturday, blaming American intelligence for luring them into the minefield, a claim US Central Command flatly called false. Traffic through the strait has collapsed under the week-old US-Iran exchange and blockade: eight ships crossed Thursday, down from 15 the day before, 48 two weeks earlier, and a pre-war daily average above 100. The Guards said they stopped four more ships in a combined missile and drone operation, and the US military said it diverted four commercial vessels, disabled one, and boarded another to enforce the blockade.
- The dollar index steadied near 100.76, still down about 0.2% on the week, as safe-haven flows from a global equity selloff and Hormuz disruption offset softer US inflation data that had trimmed near-term Fed rate-hike bets.
- US diesel prices edged above \$5 a gallon Thursday after Russia banned fuel exports amid a Ukrainian drone campaign that has logged at least 100 strikes on Russian refineries since August 2025.

- Iraq and Syria signed a memorandum, executed by Chevron, to rehabilitate the decades-shut Kirkuk-Baniyas crude pipeline to the Mediterranean, a US-led coalition project with an initial capacity of two million barrels per day.
- Baghdad's federal oil ministry agreed to supply Kurdistan with LNG, an initial 140 tonnes flowing, after Dana Gas suspended output at the Kormor field over security threats, cutting 2,500 megawatts of power generation.
- Suspected Somali pirates seized the Tanzanian-flagged chemical tanker Asana 26 nautical miles off Yemen's Hadramawt on Friday, steering it toward Bosaso in the latest of 18 piracy incidents the French navy has logged in the region since April.
- A drone struck a ship carrying American-branded cars near an oil terminal off Basra, Iraq, after it arrived from the UAE. Baghdad's oil ministry verified that an object fell on the tanker.

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