

DAILY BRIEFING

The Dispatch

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MAIN STORY: US AND IRAN TRADE STRIKES OVER THE STRAIT OF HORMUZ

- US Central Command struck Iranian territory on three successive nights. The first wave late Friday hit missile and drone storage and coastal radar along Iran's southern coast, with a projectile landing near Taheroui pier in the port city of Sirik and a second strike on Qeshm island. A further wave followed Saturday, and a third at 04:30 Eastern on Sunday hit 10 military targets in and near the Strait of Hormuz, flown by navy and air force fighters. The cumulative target set spanned surveillance and communication systems, air defense sites, drone storage, and minelayer capabilities. CENTCOM cast each round as a response to "unwarranted aggression against commercial shipping by Iranian forces" that breached the ceasefire.
- Every US wave cited a drone strike on a tanker moving through Hormuz, the chokepoint Iran had largely closed during the war. The Singapore-flagged Ever Lovely was hit by a projectile off Oman's coast Thursday, triggering the first response. The Panama-flagged Kiku, carrying roughly two million barrels of crude, was struck by drone the next day, triggering the second. Iran acknowledged neither attack but did not deny them.
- Iran's IRGC Navy said it struck US military sites across the Gulf region in retaliation, hitting US forces stationed in Kuwait and Bahrain, and warned that "if the aggression is repeated, our response will be broader than this." Iran's Foreign Ministry condemned the US strikes as a "blatant violation" of the UN Charter and a "clear breach of Paragraph 1" of the memorandum, the clause under which Tehran asserts full control of navigation through Hormuz.
- Trump pushed his rhetoric to its sharpest level, posting that "there may come a point when we are no longer able to be reasonable, and will be forced to militarily complete the job that we very successfully started," and that if so "the Islamic Republic of Iran will no longer exist." He accused Tehran of violating the ceasefire "AGAIN" and branded its strike on the cargo ship "foolish." Vice President JD Vance reinforced the posture, warning that "violence will be met with violence."
- The exchange is the first armed confrontation since Trump and President Masoud Pezeshkian signed the 14-point memorandum in mid-June to end the four-month war, and it lands days before the two sides were due to convene the next round of talks. The IRGC threatened to suspend political negotiations entirely over the strikes on Qeshm. Each side now accuses the other of violating an interim deal less than two weeks old, leaving the broader final agreement, and the reopening of Hormuz, in doubt.

STRATEGIC ASSESSMENT

The ceasefire is functioning as a live exchange of fire rather than a settlement, and the cause is structural: neither side has resolved who controls Hormuz, so each tanker incident invites another strike cycle. Trump's "no longer exist" threat raises the rhetorical ceiling, but the US strikes stay calibrated to military, surveillance, and air-defense targets rather than regime or population centers, signaling managed escalation over a decision to resume the war. The IRGC's threat to suspend talks is the weightier signal, because the memorandum's survival rests on the next negotiating round actually happening. The clearest near-term indicator is whether that round convenes on schedule or Tehran walks: a cancellation would mark the MoU's collapse, while a held session amid continued low-level strikes would confirm both sides still prefer a standoff to a war. A second indicator is the tempo of tanker attacks in Hormuz, since a pause would let the cycle cool and another hit would likely draw a fourth US wave.

IRAN

- Iran escalated pressure on the Strait of Hormuz by floating tolls on the waterway. A joint Tehran-Oman statement said the two would study the route's administration and the service costs to be charged on it, asserting their sovereignty over the strait. Secretary of State Marco Rubio, opening a Gulf tour through the UAE and Bahrain (home to the Navy's 5th Fleet), rejected the move: "No country is allowed to charge tolls or fees on an international waterway." Lead negotiator Mohammad Bagher Ghalibaf insisted the strait would stay under Iranian control. Tankers nonetheless transited Thursday using a new corridor hugging Oman's shore promoted by the UN maritime agency, hours after Iran threatened any vessel using the route without Tehran's permission. Two vessels on that corridor were struck by projectiles off Oman the same day, one taking damage with no casualties. Rubio called the alternative passage a US commitment and warned Washington would have a problem if transit through it stopped. By Thursday morning at least six US Air Force refueling tankers were operating over the Persian Gulf, Gulf of Oman, and the strait in support of ISR and possible combat aircraft, raising the prospect of renewed US strikes on Iranian targets.
- Granting IAEA inspectors access to the nuclear sites the US bombed last year would open the path to lifting sanctions, and inspectors are expected back in Iran soon under the initial deal. IAEA director general Rafael Grossi called Iran's stated lack of intent to build a weapon "not enough," demanding a "very strong verification system in place as soon as is practicable." The agency has barely begun talks with Tehran on the fate of its uranium stockpile. Before the war the IAEA assessed Iran held 440kg of uranium enriched to 60%, near the 90% threshold for a weapon and far above the 3.67% cap of the defunct 2015 accord, with roughly half of that 60% stock believed still in tunnels.
- President Masoud Pezeshkian traveled to Islamabad to meet President Asif Ali Zardari and Prime Minister Shehbaz Sharif, his first foreign trip since the February 28 US-Israeli attack on Iran, as Pakistani mediators and technical teams worked through the ceasefire's details. The visit followed Monday's high-level round in Switzerland led by Vice President JD Vance and parliament speaker Mohammad Bagher Ghalibaf. Vance said those talks secured Iranian agreement to IAEA inspections, but Foreign Ministry spokesman Esmail Baghaei countered that no visits to the US-bombed

enrichment sites have been scheduled. Ghalibaf, addressing a conference in Baku, cast the Islamabad memorandum as "America's declaration of defeat" and the fruit of Iranian resistance rather than coercion, set the withdrawal of foreign military forces from the region as a strategic goal, and held the end of the Lebanon war to be as important as the end of Iran's own. An American assessment circulating in the region read the outcome inversely, judging Iran at its weakest in years after the collapse of its proxy network, Assad's fall, and the destruction of its nuclear infrastructure, with the brief Hormuz closure its lone and depreciating card.

- Iran's annual inflation hit a record 88.6% in June, driven by sharp rises in food and basic-commodity prices that deepened the squeeze on low-income households.

ISRAEL

- Netanyahu enters an October general election as the gravest threat yet to his nearly four-decade career, weighed down by corruption charges and his conduct of the wars with Iran and Hezbollah. At a Saturday press conference on the new trilateral agreement, he announced he intends to form a "broad national government," warning that enemies abroad are "waiting for us to start a civil war" and invoking Begin's "no more civil war." The opposition rejected the overture flatly. Democrats chairman Yair Golan called him the man "responsible for the greatest disaster in Israel's history" and urged the liberal and democratic bloc to refuse any government with him, telling Netanyahu to unite instead with Ben-Gvir, Smotrich and the haredi parties in opposition. Blue and White's Benny Gantz said he did not believe him, even as Gantz himself drew accusations that he would smooth Netanyahu's path back to power.
- Netanyahu vowed Israel will hold the "security zone" in south Lebanon "as long as Hezbollah has not disarmed," calling the hold a major achievement and confirming the military will keep up operations. Defense Minister Israel Katz ordered the army to prepare for a "prolonged stay" in Lebanon and threatened force against Iran if Tehran blocks the framework. Katz also stated flatly there is "no American demand" for an Israeli withdrawal, the condition Tehran had sought in its Washington talks, saying he told Pete Hegseth, and Netanyahu told Trump, that the troops remain to protect northern residents. The IDF keeps key positions including the Beaufort Fortress, with two pilot areas, south and north of the Litani, set for handover to the Lebanese Army on the military's recommendation.
- Netanyahu renewed his call for Israel to "break free from dependency" on the United States and build "our own independent armaments network," speaking June 18 to reserve officers at a West Bank training course, a day after the initial US-Iran deal that Israel had fiercely opposed. Israel has drawn more than \$300 billion in US economic and military aid since 1948, and under the 2016 memorandum running through 2028 it receives roughly \$3.8 billion a year for weapons, about 15 percent of its defense budget.
- The Binyamin Brigade searched Beit Aryeh in the West Bank after two suspicious figures were spotted at 4:29 am Saturday and infiltration sirens sounded. The all-clear came around 11:00 am with no suspects found.

LEBANON

- Lebanon, Israel, and the United States signed a trilateral 14-point framework agreement in Washington on Friday, the product of five rounds of US-mediated talks, the last extended an extra day after the two delegations broke off a 10-hour session without agreement. The text provides for a phased Israeli withdrawal from two pilot zones, where the Lebanese Armed Forces would gradually take control once Hezbollah's disarmament is confirmed, while Israeli forces remain in an expanded security zone pending implementation. It affirms each state's right to exist in peace and, in Article 13, commits both to cease hostile actions in international political and legal forums. President Joseph Aoun welcomed it as a first step toward restoring full sovereignty, pledging an end to occupation, captives, and tutelage, and Prime Minister Nawaf Salam said it aims at Israeli withdrawal from all Lebanese territory and the return of the displaced. Lebanese officials framed it as a non-aggression process to end hostilities rather than a peace treaty, leaving the rejection of normalization and the Arab Peace Initiative commitment intact, and the foreign minister called it a victory for diplomacy. FPM leader Gebran Bassil judged the deal useful if Lebanon recovers its full rights and dangerous if it becomes a recipe for sedition. Hezbollah Secretary-General Naim Qassem rejected it as null and void and a humiliating surrender of sovereignty, refused the linkage of Israel's withdrawal to disarmament, and vowed continued armed resistance. Lawmaker Hassan Fadlallah warned the authorities could not enforce the deal without American-backed civil war. Supporters rode motorbikes through Beirut's southern suburbs, the airport road, and central districts in protest, drawing army checkpoints. Speaker Nabih Berri, who was not consulted on the text, said he read it and saw sedition in it. Article 13's pledge to halt actions in international legal forums could bar victims of alleged Israeli war crimes since October 2023 from seeking justice and foreclose any grant of ICC jurisdiction in Lebanon.
- Israeli strikes in south Lebanon continued through the week despite the Washington talks, breaking a lull that had held since Sunday. A drone strike on the road between Zawtar and Mayfadoun killed three people, which Hezbollah condemned as a flagrant ceasefire violation against civilians and the Israeli military said had eliminated five armed fighters threatening its troops. The Israeli army separately claimed it killed seven Hezbollah operatives moving weapons near its security zone, and killed a militant near Beit Yahoun after he wounded three Israeli soldiers with a grenade. Warplanes also hit the outskirts of Nabatieh al-Fawqa. The health ministry counted at least seven people killed in the strikes this week, the deadliest stretch since the lull began.
- Aoun welcomed French and Italian efforts to assemble a multinational coalition to succeed UNIFIL, whose mandate the UN Security Council voted under US pressure to end on December 31, 2026. After meeting Italian Prime Minister Giorgia Meloni, French President Emmanuel Macron said the two states would launch the post-UNIFIL arrangement in coordination with the EU and UN to reinforce Lebanese sovereignty and keep the south from becoming a foothold for regional escalation. Aoun called the initiative a sincere expression of international commitment and pressed for any formula that strengthens the Lebanese army.
- Qassem signaled Hezbollah could move against the government if state institutions act decisively to disarm it, warning that the authorities cannot oppose more than half of the Lebanese people and expect the country to function normally, and casting the resistance as the foundation of Lebanon's independence. With his supporters' nighttime protests reaching the approaches to the Grand Serail in central Beirut, the Gathering of Arab Tribes warned that any assault on the seat of government or on Prime Minister Salam's office would strike at state institutions and open

the way to chaos and division.

- UAE President Sheikh Mohamed bin Zayed and Aoun discussed steps to bolster Lebanon's security and stability in a phone call a day after the framework signing, with Aoun voicing appreciation for Emirati support. Deputy Prime Minister and Foreign Minister Sheikh Abdullah bin Zayed separately welcomed the road map to peace in a call with Salam.

SYRIA

- Syria's permanent mission to the UN, jointly with the UN counterterrorism office and the EU, presented the new government's counterterrorism doctrine at an event titled "From an inherited threat to national leadership: Syria's new approach to combating Daesh." The doctrine recasts the campaign against the Islamic State from a discrete security mission into a component of state reconstruction, tying durable security to rebuilding state institutions, the rule of law, and professional security services, and positioning Damascus as the lead national authority on counterterrorism within its territory rather than a managed threat.
- The Syrian Network for Human Rights, marking the International Day in Support of Victims of Torture, classified torture under the deposed regime as institutional rather than isolated abuse, drawing on documentation compiled since March 2011. Its database records torture, enforced disappearance, and death in custody as a systematic, large-scale pattern built into the detention apparatus, spanning security-branch facilities and both official and unofficial sites, with methods running from severe beatings and electric shocks to sexual violence. The network called for a comprehensive transitional-justice response, including accountability, reparations, institutional reform, and guarantees of non-recurrence, to end the impunity that accompanied the regime's rule.

PALESTINE

- Israeli strikes hit displacement tents across Gaza through the weekend despite the ceasefire, killing at least four Palestinians, two of them children, and wounding more than 25 across several areas, including a bombing of displaced people west of Gaza City. A drone struck two makeshift tents in al-Mawasi, west of Khan Younis, killing two people including a young girl and wounding several others in a zone the truce had designated a safe area for the displaced. Walid Youssef Abu Jazar, aged 10, died of wounds from an earlier strike on al-Mawasi. Israeli forces killed Walid Haniyeh, a nephew of slain former Hamas political chief Ismail Haniyeh, in a Thursday operation, the army identifying him as a deputy Nukhba company commander who led a cell during the October 7 assault and directed it as it took Israeli hostages into Gaza. Israeli forces also pushed the Yellow Line withdrawal marker forward east of Deir al-Balah.
- The IDF arrested more than 100 people across the West Bank over the past week, accusing them of Hamas ties, weapons offenses, or attacking soldiers, and seized at least ten firearms including M-16 rifles and handguns along with seven drones and combat equipment. The army's wider weekly tally claimed 17 fighters killed across fronts. Settlers escalated in parallel, setting fires around homes in Khalayel al-Louz southeast of Bethlehem while firing live rounds, with Israeli troops moving in to secure the attackers afterward, and footage elsewhere showed settlers attempting

to seize a Palestinian house. Israeli forces and settlers carried out 1,659 documented attacks across the West Bank and occupied Jerusalem in May, 1,108 by the army and 551 by settlers.

- A leaked draft resolution shows the Board of Peace, the UN-authorized body Trump is to chair to govern post-war Gaza, planning to grant itself sweeping legal immunity and the right to take Gaza public property “free of charge.” The four-page text, labeled “sensitive but unclassified” and dated June 2026, shields every member of the board and its administrative arm, the office of the high representative, along with Palestinian technocrats, international military forces, and outside contractors, from “any arrest, detention or legal proceedings in the courts or other entities in Gaza,” with no clear accountability mechanism for property loss, injury, or death caused by its work. Trump as chair could waive an individual’s immunity with majority board backing. The seven-member executive board includes Jared Kushner, Steve Witkoff, Susie Wiles, and Marco Rubio. Legal scholars warned the body would create a self-contained legal order insulated from outside oversight, including international law on occupation.
- The Hind Rajab Foundation, a Belgian advocacy group, filed a complaint with the US Justice Department seeking the prosecution of Israeli National Security Minister Itamar Ben-Gvir for war crimes, a systematic prison-torture policy, murder, rape, and incitement to genocide. It timed the filing to Ben-Gvir’s planned July 7-8 visit to New York to lead a National Security Ministry delegation to a UN security conference, arguing that because some alleged victims of the detention abuses he oversees, as the minister responsible for the Prison Service and Border Police, are US citizens, the Justice Department holds jurisdiction. The group demands a criminal investigation, an arrest warrant, and a bar on his leaving the United States.

KEY REGIONAL EVENTS

Bahrain

- Several Iranian drones struck Bahrain, home to the US Navy’s Fifth Fleet, early Saturday, the first Gulf-state target of Tehran’s retaliation for the latest American strikes. The foreign ministry condemned the attack as a “flagrant violation” of sovereignty and a direct threat to civilians, and reserved “the full right to defend its sovereignty and security.” A day later, after Washington announced fresh strikes on Iran, the Interior Ministry sounded air-raid sirens across the kingdom early Sunday and urged residents to seek the nearest safe place and follow official channels. Manama did not specify the locations hit or any damage.

Kuwait

- Kuwaiti air defenses engaged “hostile” missile and drone attacks early Sunday, with the army’s general staff confirming that explosions heard over the country were its interceptors and urging residents to follow safety instructions. The IRGC said its naval and air forces had carried out joint missile and drone operations against Kuwait and Bahrain in response to the latest US strikes. No casualties or major damage to American facilities in the region were reported.

Jordan

- Jordan condemned the Iranian drone attacks on Bahrain as a blatant violation and reaffirmed full support for Manama. Saudi Arabia, Egypt, the UAE, and the Gulf Cooperation Council issued parallel condemnations, with GCC secretary-general Jasem Al-Budaiwi holding Tehran solely responsible for undermining regional peace efforts by striking civilian sites amid active de-escalation diplomacy.

Saudi Arabia

- Foreign Minister Prince Faisal bin Farhan held separate calls with Egyptian counterpart Badr Abdelatty and Qatar's Sheikh Mohammed bin Abdulrahman Al-Thani, condemning the strikes on Bahrain and threats to maritime navigation and pressing for de-escalation, a return to negotiations, and adherence to the US-Iran agreement.
- The Gulf's foreign ministers, meeting under US Secretary of State Marco Rubio, set Iran's ballistic missiles, drones, and support for regional proxies as conditions for lasting peace, declaring any trade or investment with Tehran "conditional and reversible" and contingent on Iranian compliance with the memorandum and the final agreement. Gulf capitals are pressing the position concretely, with the UAE withholding roughly \$3 billion in frozen Iranian funds until Tehran answers for the war's damage to its neighbors.

Turkey

- Turkey detained 209 people in sweeping raids around Ankara ahead of the July 7-8 NATO summit, which Trump and 31 other alliance leaders will attend, with 178 formally jailed pending trial. Those held included 56 alleged Islamic State militants and 35 members of the far-left DHKP/C, and rights groups flagged journalists, academics, and lawyers among the detainees.

Yemen

- The anti-Houthi coalition sustained an elevated operational tempo across several fronts. On the west coast, National Resistance Forces (13th Infantry, the Al Zaranig Brigade) repelled a Houthi infiltration south of Hudaydah in a roughly 50-minute engagement and earlier downed a Houthi Rajoum attack drone carrying six mortar rounds. On the northern Al Jawf front, a Saudi-led Coalition Joint Forces Command delegation under Force 1501 commander Brigadier General Mubarak Al-Dosari inspected the 161st Mountain Infantry Brigade along the Qadhamil and Taybat Al Ism lines. In the south, Nation's Shield Forces under Brigadier General Ahmed al-Damani ("Abu Qusay") reinforced Abyan's Lawdar District bordering Houthi-held Al Bayda. In Aden and Ma'rib, Defense Minister Lieutenant General Taher Al Oqaili drove a command-reform and readiness campaign, including a leadership handover at the Military Intelligence and Reconnaissance Authority.

C O R E G R O U P

KEY INTERNATIONAL EVENTS

- The US Senate passed a symbolic concurrent resolution Tuesday, 50-48, directing Trump to remove US forces from hostilities with Iran unless Congress authorizes military action. As a concurrent resolution it never reaches Trump's desk and carries disputed legal force, but it put both

chambers on record against the war. Trump called the vote “poorly timed and meaningless” and lashed Republican lawmakers at a closed-door Capitol lunch the next day, after which the Senate reversed course, defeating a companion measure 50–47 as Rand Paul and Bill Cassidy switched to back him. Trump recast that outcome as putting “Iran on notice.” Vice President JD Vance framed the standoff as a win regardless of the deal’s fate, arguing that absent a final agreement Iran’s nuclear program is still destroyed and the country left weaker. The politics cut the other way at home, where most of a panel of 18 Trump 2024 voters criticized the interim agreement, his approval rating has slipped, only a quarter of Americans judge the war worth its costs, and some Republicans fear the deal’s shortfalls could cost them the midterms.

- The European Union disbursed the first 3 billion-euro (\$3.4 billion) tranche of a 90 billion-euro (\$101 billion) two-year loan to Ukraine, unveiled at a post-war recovery conference in Poland where von der Leyen reaffirmed the bloc’s backing days after Kyiv opened EU membership negotiations on June 15.
- Twin earthquakes of magnitude 7.2 and 7.5 struck northern Venezuela within a minute of each other on June 24, killing more than 900 people, leaving tens of thousands missing, and damaging the main international airport near Caracas, with the UN migration agency estimating 6.8 million people affected, including roughly two million in the capital. The UAE pledged \$10 million in relief, ordered by President Sheikh Mohamed and run through the UAE Aid Agency to deliver food and medical supplies.
- The UAE voiced concern over continued military escalation by both sides in Sudan, singling out the city of El Obeid.

MARKETS

- US gasoline and airfare prices remain above pre-war levels even as crude retreats from the spike that followed the brief closure of the Strait of Hormuz, and Trump ordered an investigation into major oil companies, accusing them of “gouging” customers by failing to cut pump prices in line with the “sharply lower” crude they now pay. Economists expect oil to take months to return to pre-war levels, citing the lag in restarting production and supply chains and the “rockets and feathers” pattern in which retail gasoline climbs fast but eases slowly while sellers capture wider margins. After Russia’s 2022 invasion of Ukraine, Brent took 171 days to recover to pre-invasion prices and gasoline a further 104 days beyond that, a benchmark for how slowly relief reaches consumers ahead of November’s congressional elections.