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COLLECTION OPERATIONS REQUIREMENTS GROUP FOR INTELLIGENCE

MORNING UPDATE BRIEF

Tuesday, 20 October 2026 - Prepared 0600 CT

Global Situational Awareness

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BOTTOM LINE UP FRONT

Day 235, and today's focus is a single chain running from the Gulf to the streets of Europe: the CENTCOM-region fuel squeeze is now the detonator of the worst European unrest in years, and it is reshaping both domestic politics and energy diplomacy. France is the epicentre — nationwide rioting and looting on 17–18 October drew a televised address from President Macron ('anger and shame'; rioters who 'sought to bring down the Republic' would 'pay'), roughly 2,300–2,400 arrests over the weekend and about 1,000 police injured, with PM Lecornu ordering partial curfews. The *gilets jaunes* have revived, calling an 'Act II' for Saturday 24 October; unions have called cross-sector strikes for 5 November. The spark was student and school-funding anger, but the accelerant is the pump: French energy prices ran +21% year-on-year and petrol +26% into the autumn.

The unrest is not France alone, but it is not a single movement either. Genuine cost-of-living protests sharing the fuel-and-austerity thread hit Belgium (Brussels and Liège), Italy (Milan looting, ~50 detained) and Portugal (Lisbon) the same weekend; analysts call it 'several protests with shared grievances, not one movement.' Spain (housing), Greece (a refinery-safety dispute) and Albania (anti-corruption) saw simultaneous but distinct-cause protests, and — correcting a common framing — Germany is a political and polling story (AfD gains on energy anger), not part of the street wave. The connective tissue is the energy shock, which the European Commission has estimated at roughly €100bn.

That shock originates in the CENTCOM theatre, where the fuel picture is contested and severe at once. The IRGC claims two tankers struck mines on a southern Hormuz route on 19–20 October and asserts 'full dominance' of the strait; US CENTCOM counters that Hormuz 'remains open,' that primary routes are clear of mines and that about 97% of vessels transit safely — a contradiction leadership should hold open, as neither the mine strikes nor a full closure is independently confirmed. What is not disputed is the economics: Saudi Arabia is pumping ~5.8m bpd through its Red Sea bypass pipeline, Brent sits near $110, European diesel benchmarks are near records, and the IEA says the distillate squeeze will run into 2027. US on-highway diesel is at a record near $6.18 a gallon.

Into that squeeze, President Macron ran a three-day Gulf tour (Kuwait, UAE, Bahrain, Qatar, 19–21 October), accompanied by the TotalEnergies chief, securing bilateral diesel commitments equal to roughly 10% of French consumption. The popular framing — that France is chasing Gulf oil *outside* US coordination, unlike the Baltics — is **not** borne out by open sources: the record shows active, contentious France–US coordination (a US diesel-export-ban threat, a French G7 counter-offer, a 100m-barrel G7 reserve release President Macron himself chaired on 2 October). The real signal is fragmentation — national bilateral energy deals layered on, and in tension with, the collective mechanism — not a clean transatlantic rupture. Belligerent battle-damage and 'dominance' claims are graded claimed pending open-source confirmation.

BRENT CRUDE	WTI CRUDE	US GASOLINE	US DIESEL	S&P 500 (MON)	DAY OF WAR	HORMUZ
$110.48	$103.66	$4.36	$6.18	7,690.73	235	CONTESTED

CHOKEPOINT STATUS — HORMUZ: SEVERE · BAB EL-MANDEB: SEVERE · SUEZ / RED SEA: ELEVATED · BOSPORUS: WATCH · MALACCA: CLEAR · PANAMA: CLEAR · GIBRALTAR: CLEAR

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KEY ITEMS - GLOBAL SITUATIONAL AWARENESS

01 UNREST / FRANCE — Worst Rioting in Years; *Gilets Jaunes* Call 'Act II'

Nationwide looting and clashes on 17–18 October drew a televised address from President Macron, who said rioters sought 'to bring down the Republic' and would 'pay for their crimes'; the Interior Ministry put arrests at more than 2,300 (nearly 2,400) with ~1,000 police injured. PM Lecornu ordered partial curfews, not a state of emergency. The *gilets jaunes* revived and called an 'Act II' for 24 October; unions set strikes for 5 November. Spark: school/student funding; accelerant: fuel and cost of living.

02 UNREST / EUROPE — Fuel-and-Cost Protests Echo in Belgium, Italy and Portugal

The same weekend brought cost-of-living unrest beyond France: Milan saw looting in the Piazza del Duomo (~50 detained, many minors); Brussels and Liège had anti-austerity clashes and a public-sector strike; Lisbon marched on wages, pensions and housing. Analysts call it 'several protests with shared grievances, not a single movement.' Spain (housing), Greece (refinery safety) and Albania (anti-corruption) are distinct-cause; Germany is an AfD polling story, not street unrest — a common mis-framing corrected here.

03 ENERGY / FRANCE-GULF — President Macron Secures Gulf Diesel Deals Worth ~10% of French Use

On a three-day tour of Kuwait, UAE, Bahrain and Qatar (19–21 October) with the TotalEnergies chief, President Macron secured bilateral diesel commitments totalling roughly 295,000 tonnes a month — about 10% of French consumption (Saudi 190,000t over two months; UAE/Bahrain ~100,000t/month; Kuwaiti supply routed via Oman to bypass Hormuz). The framing that France is bypassing US coordination is not supported by sourcing (see Detailed); the real signal is national-vs-collective energy fragmentation.

04 ENERGY / CENTCOM — Hormuz Contested: IRGC Mine Claims vs CENTCOM 'Open, 97% Transit'

The IRGC claims two tankers struck mines on a southern Hormuz route (19–20 October) and asserts 'full dominance'; CENTCOM (Capt. Tim Hawkins) counters that the strait 'remains open,' routes are clear of mines and ~97% of vessels transit safely. The Singapore-flagged *GFS Pride* sank on 13 October after an 'unidentified projectile.' Saudi Arabia is pumping ~5.8m bpd through its Red Sea bypass pipeline. Mine strikes and 'dominance' are graded claimed; neither closure nor the strikes are independently confirmed.

05 ENERGY / DIESEL — Record Diesel and $110 Brent as the Distillate Squeeze Runs to 2027

US on-highway diesel sits at a record near $6.18/gal (EIA; West Coast $7.24, California $8.09); European ICE low-sulphur gasoil is near $1,500/tonne after a mid-September record, and the IEA says the squeeze will last into 2027. Brent reached about $110.48 on 20 October. Washington told France and Germany to release diesel stocks or face a US export ban; the G7 agreed a 100m-barrel release on 2 October — a call President Macron chaired. The shock is two-source: Russian refinery losses plus Gulf/Hormuz disruption.

06 MILITARY / IRAN — US and Israel Weigh Resuming Operations; Gulf Force Build-Up

Per Axios, Defense Secretary Hegseth met Prime Minister Netanyahu on an unannounced Israel visit as the two governments discussed *potentially resuming* major operations against Iran; the Pentagon added ~10,000 personnel, is restoring a three-carrier presence and sent missile-defense batteries to Qatar and Saudi Arabia. President Trump said strikes are 'possible' after the 3 November midterms. No confirmed new strike in the window; analysts judge escalation likelier after the vote.

07 MILITARY / UKRAINE — Russia Blacks Out Ukraine Grid; Kyiv Torches St Petersburg Terminal

Overnight into 19 October Russia struck energy sites in eleven regions; President Zelensky reported 10-plus facilities hit, at least 550,000 households dark, 16 ballistic missiles on Kyiv and a destroyed data centre, and said Russia had hit the energy sector 76 times since an 11 October 'energy ceasefire.' Ukraine answered with a 1,000-plus-drone raid that set the Petersburg Oil Terminal ablaze. Drone and intercept counts are belligerent claims.

08 MILITARY / YEMEN — Houthi Missile Kills ≥53 at Shabwa Camp; Bab el-Mandeb Contested

A Houthi ballistic missile struck a Yemeni-government camp in Shabwa (at least 53 killed, ~200 injured) and the group barraged Saudi cities, with Riyadh alerts and a reported coalition intercept. After the Houthis' September seizures around Bab el-Mandeb (Mocha, Perim/Mayyun), the approaches are contested and partly reversed; transit sits near a third of pre-2023 levels. A WSJ IRGC-aid report is denied by Tehran and the Houthis and graded claimed.

09 CYBER / GLOBAL — Nikkei Breach Hits 1.83M; Record 1,413-CVE Patch Tuesday

Nikkei disclosed (20 October) a breach exposing 1.83 million records, about 150,000 with personal detail, via compromised cloud credentials; it says no card data was taken. CISA added nine actively-exploited CVEs on 13–16 October — including a Windows shell zero-day, CVE-2026-96951 — and Microsoft's 14 October Patch Tuesday fixed a record ~1,413 vulnerabilities. CVSS detail pending per-CVE NVD confirmation.

10 TECHNOLOGY / AI — OpenAI Races ~$30bn Raise at >$1.4tn Before Anthropic IPO

Reuters reports OpenAI is accelerating a roughly $30bn raise at a valuation above $1.4tn — up from $852bn in March — to get ahead of Anthropic's planned mid-November listing; one lawyer called it 'a two-horse race.' Revenue figures are company-provided. DeepSeek shipped an updated V4.1-Flash model on 17 October, a sign Chinese labs keep pace at lower cost; China's Q3 GDP (+4.5%) beat forecasts the same week.

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DETAILED ITEMS

UNREST / FRANCE — THE STREETS AND THE PUMP

The worst French rioting in years forces a presidential address, curfews and a *gilets jaunes* revival

France absorbed its most serious domestic unrest in years on the weekend of 17–18 October, as a student and school-funding movement broadened into nationwide looting and clashes. Crowd figures ran from 550,000 (Interior Ministry) to 800,000 (CGT union); Limoges' 1883 town hall was destroyed by fire and roughly 1,500 businesses were damaged, with losses the Retail and Trade Federation put in the hundreds of millions of euros. President Macron addressed the nation on 18 October, speaking of 'anger and shame,' distinguishing 'legitimate demands' from looters who 'sought to bring down the Republic' and would 'pay for their crimes.' A single death during the Paris march was described by officials as health-related, not linked to the violence.

The arrest count that circulated as '1,800' and '2,400' is one weekend tally at different hours: the consolidated Interior-Ministry figure is more than 2,300 (nearly 2,400) arrested with almost 1,000 police and gendarmes injured. PM Lecornu ordered 'localised and partial' curfews (8pm–6am in four northern cities including Lille; targeted measures in Paris, Nice and Lyon) rather than a state of emergency, and President Macron declined the interior minister's resignation. The *gilets jaunes* joined the marches and a yellow-vest site has called an 'Act II' for 24 October; unions have called cross-sector strikes for 5 November. The economic backdrop is a fuel shock — French energy prices +21% year-on-year and petrol +26% into September.

> ***So what*** *— For leadership the exposure is operational and political: disrupted logistics and retail, a renewed risk premium on French sovereign debt, and a far-right that is gaining from fuel anger ahead of the 2027 election. Watch whether the curfews hold or the 24 October 'Act II' and 5 November strikes re-escalate, whether the budget crisis forces another government change, and the read-across to French OAT spreads.*

UNREST / EUROPE — SHARED GRIEVANCES, NOT ONE MOVEMENT

Cost-of-living protests echo in Belgium, Italy and Portugal as the energy shock spreads the anger

The French unrest did not stay French, but it is not a coordinated movement. The clearest genuine echoes on the cost-of-living axis came the same weekend: in Milan, a march against 'wars and rising living costs' turned violent, with looting around the Piazza del Duomo and roughly 50 detained, many of them minors; Prime Minister Meloni said 'demonstrating is a right — setting our cities ablaze is not.' In Belgium, Brussels and Liège saw anti-austerity clashes and a partial public-sector strike over a delayed budget; in Portugal, Lisbon marched over wages, pensions, fuel and housing (prices up sharply since 2017).

Other protests swept into the same 'Europe map' coverage are distinct in cause: Spain's are about housing, Greece's a refinery-safety dispute after two workers were killed, and Albania's an anti-corruption revolt against the government. Analysts (HEC Paris's Alemanno) frame the whole as 'several protests with some shared grievances, not a single movement.' Correcting a common assumption: Germany is *not* part of the street wave in this window — it appears as a political and polling story, with the AfD leading national polls on energy inflation near 15%. No EU-level political response to the unrest was verified.

> ***So what*** *— For leadership the read is a continent-wide cost-of-living fault line, lit by the same energy shock, that benefits the populist right across several 2026–27 elections rather than a single insurrectionary movement. Watch whether the Belgian, Italian and Portuguese strands sustain or fade, whether any cross-border coordination emerges around the 24 October and 5 November dates, and the electoral read-through.*

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ENERGY / CENTCOM — THE CONTESTED STRAIT

Iran claims mines and ‘dominance’; CENTCOM says Hormuz is open — the economics are severe either way

The fuel shock driving Europe’s streets originates in the CENTCOM theatre, where the Hormuz picture is contradictory and consequential. The IRGC claimed via Sepah News that naval mines ‘set ablaze and halted’ two oil tankers on a southern route Tehran deems illegal on 19–20 October, and adviser Mohammad Reza Naqdi asserts the strait is under Iran’s ‘full dominance’ until its conditions are met. US CENTCOM directly disputes this: Capt. Tim Hawkins said about 97% of vessels have transited without being hit, primary routes ‘remain clear of mines,’ and the US and partners ‘maintain control.’ The Singapore-flagged *GFS Pride* sank on 13 October after an unidentified projectile; its 21 crew were evacuated. C.O.R.G.I. grades the mine strikes and ‘dominance’ as belligerent claims — neither a full closure nor the specific strikes is independently confirmed.

The undisputed signals point to severe disruption regardless of whose transit narrative holds. Saudi Arabia is running its East–West (Petroline) pipeline at ~5.8m bpd of a 7m capacity to reroute crude to the Red Sea around Hormuz, with talk of expanding to 10m; OPEC+ held November quotas unchanged on 4 October with output ‘significantly below’ pre-conflict levels; and the US has added roughly 10,000 personnel, moved toward a three-carrier posture and sent missile-defense batteries to Qatar and Saudi Arabia. FM Araqchi has floated reopening the strait within seven days under conditions — an offer, not an agreement.

> ***So what*** *— For leadership the decision-relevant fact is the unresolved closed-versus-open contradiction, which should be carried as such; the economic read — ~5.8m bpd on the bypass, Brent near $110, record European diesel, an IEA squeeze into 2027 — is severe either way. Watch for any independent confirmation of a mine strike, a Hormuz transit test, and whether the Araqchi reopening offer gains a venue.*

ENERGY / DIPLOMACY — THE GULF SCRAMBLE AND THE COORDINATION QUESTION

President Macron’s Gulf diesel deals are real; the ‘snubbing Washington’ framing is not

With France’s streets burning over fuel, President Macron ran a three-day Gulf tour — Kuwait, UAE, Bahrain and Qatar, 19–21 October — accompanied by TotalEnergies chief Patrick Pouyanné, and secured bilateral diesel commitments of roughly 295,000 tonnes a month, about 10% of French consumption: Saudi Arabia 190,000 tonnes over October and November (arranged earlier), the UAE and Bahrain around 100,000 tonnes a month, and Kuwaiti diesel and kerosene for French overseas territories routed via Oman to bypass Hormuz. The Élysée framed it as ‘securing and diversifying our energy supplies’; an adviser put it plainly: ‘the greater the quantity, the lower the price.’

The widely-circulating framing — that France is chasing Gulf oil *outside* US coordination, unlike the Baltics and other states that worked through Washington — is **not supported by open sources, and parts of it are contradicted.** In the fortnight before the tour, Washington told France and Germany to release diesel stocks or face a US export ban (1 October); France, holding the G7 presidency, counter-offered a ‘50-plus-50’ release, President Macron spoke with President Trump directly, and the G7 agreed to release up to 100m barrels on 2 October — a call President Macron chaired. A real France–US split does exist, but it is over *military* strategy on Hormuz (March 2026), not these energy deals. The ‘unlike the Baltics’ contrast could not be sourced and is carried as an analytic construct, not a reported fact.

> ***So what*** *— For leadership the accurate read is the more useful one: the Gulf bilateral deals are national supply-security moves layered on top of — and in tension with — the collective G7/IEA mechanism, so the genuine risk is energy-policy fragmentation and competition for scarce distillate, not a clean transatlantic rupture. Watch whether other EU states cut their own Gulf deals, whether the G7 release is fully drawn, and whether the national-vs-collective tension hardens.*

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ENERGY / MARKETS — THE DISTILLATE SHOCK

Record pump diesel and $110 Brent as a two-source supply shock runs into 2027

The number most material to freight, agriculture and defense logistics is at a record: US on-highway diesel averaged about $6.18 a gallon nationally (EIA, week of 12 October), with West Coast diesel at $7.24 and California at $8.09; 2026 is on pace to be the costliest diesel year on record. In Europe the ICE low-sulphur gasoil benchmark sits near $1,500 a tonne after a mid-September record above $1,560, and Platts put North-West Europe physical diesel at a record near $1,642 a tonne. The IEA says the squeeze will last into 2027. Crude firmed in parallel: Brent reached about $110.48 on 20 October.

The IEA frames the shock as two-source and roughly balanced: unplanned outages at some seventeen Russian refineries (~3.8m bpd in August, seaborne product exports down about half year-on-year) alongside Gulf disruption that cut Mideast-to-Europe diesel flows to a fraction of pre-war levels — together about 1.6m bpd below February, from suppliers that had provided roughly 45% of seaborne diesel trade. The policy response is contested: the US diesel-stock-release demand, the G7's 100m-barrel agreement, and national bilateral buys such as France's all compete for the same scarce barrels. US equities, for their part, rebounded — the S&P 500 closed Monday 19 October at 7,690.73 — with the ten-year near 5.15% after the Fed's 16 September hike to 3.75–4.00%.

> ***So what*** *— For leadership the split is the story: softer-sounding crude headlines mask a record diesel crack that passes straight into freight, food and defense-logistics costs and into the politics of the European street. Watch whether the Russia diesel deal and the G7 release actually loosen distillate, whether the crack persists, and the pass-through into inflation.*

MILITARY / IRAN — THE RESUMPTION WINDOW

An armed pause holds as Washington and Jerusalem stage for a possible second round after the midterms

The headline war is quiet in the sense that matters least: there was no independently confirmed US–Iran kinetic strike in the window, but the posture is tilting toward resumption. Axios, citing two sources, reported that Defense Secretary Hegseth made an unannounced Israel visit and met Prime Minister Netanyahu as the two governments discussed *potentially resuming* major operations against Iran; the Pentagon has added roughly 10,000 personnel, moved toward a three-carrier presence and sent missile-defense batteries to Gulf partners. President Trump said strikes are 'possible' after the 3 November midterms.

Iran is answering on two registers: Qatar says US–Iran talks remain 'ongoing' while the IRGC runs its Hormuz 'dominance' and tanker-mine information operations. Israel, for its part, unveiled a new national-security doctrine asserting the right to strike first without American approval, ahead of its 27 October election — campaign-charged framing that nonetheless raises the ambient risk. Independent analysts judge a genuine re-escalation likelier after the US midterms than before them.

> ***So what*** *— For leadership the read is a widening resumption window gated by two elections rather than a settlement. Gulf force-protection, energy-tail and war-powers exposures stay live, and a strike would reprice the Hormuz premium and the diesel crack instantly. Watch the carrier build-up, any Hormuz transit test, and whether rhetoric converts to strikes once the electoral calendar clears.*

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MILITARY / UKRAINE-RUSSIA — THE TWO-WAY ENERGY WAR

Russia blacks out Ukraine's grid as Kyiv torches a St Petersburg oil terminal

The war's sharpest 24-hour exchange was fought over energy infrastructure in both directions. Overnight into 19 October, Russia struck Ukrainian energy sites across eleven regions; President Zelensky reported more than ten facilities damaged, at least 550,000 households without power, sixteen ballistic missiles fired at the Kyiv area and a destroyed Datagroup data centre, and said Russia had hit the energy and oil-and-gas sector 76 times since an 11 October 'energy ceasefire.' Ukraine's air force said it downed 243 of 269 drones and four Iskander-K missiles.

Kyiv answered in kind, launching what Russian officials said were more than 1,000 drones overnight into 18 October in one of its largest long-range raids, with confirmed fires at the Petersburg Oil Terminal and the Ruchi depot and tens of thousands left without power in the Leningrad region. The drone and intercept counts on both sides are belligerent claims; the terminal and grid damage are corroborated across independent outlets. The campaign collides with diplomacy, as President Trump presses Kyiv to stop refinery strikes even as they are its most effective pressure — and feeds the same global distillate shock behind Europe's pump prices.

> ***So what*** *— For leadership the point is that a second front on global energy now runs through refineries and terminals, directly linked to the diesel crack and the European street. Watch Ukrainian heating-season resilience, any sustained drop in Russian product exports, and whether the 'energy ceasefire' is more than a label.*

MILITARY / YEMEN — THE SECOND WATERWAY

A Houthi missile kills dozens in Shabwa as the Bab el-Mandeb approaches stay contested

The Yemen war was the region's most lethal front in the window. Houthi ballistic missiles struck a Yemeni-government military camp in Shabwa province, with at least 53 soldiers reported killed and around 200 wounded — a toll that rose over the day and is corroborated across Al Jazeera, Reuters-sourced copy and CBS. The group said it ran six operations against Saudi targets in 48 hours; Riyadh issued hostile-aerial-threat alerts and the coalition reported an intercept on 20 October.

The maritime backdrop is a contested Bab el-Mandeb. After the Houthis' September seizures of Mocha and the Perim and Hanish islands gave them physical control of the strait's approaches, government forces have reportedly retaken parts (Dhubab, Perim) in a fluid fight; IMF PortWatch puts transit near a third of pre-October-2023 levels. A Wall Street Journal report alleging IRGC training, targeting and resupply to the Houthis via Mahan Air is denied by Tehran and the Houthis and is carried as claimed.

> ***So what*** *— For leadership the live kinetic risk and a second chokepoint exposure sit in Yemen, compounding the Hormuz picture for Gulf-to-Europe product flows. Watch whether the Houthis sustain strikes on Saudi cities or Aramco sites, the fate of the Bab el-Mandeb islands, and any outside-navy escort role.*

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TECHNOLOGY / AI — THE TWO-HORSE RACE AND THE CHINA PACE

OpenAI races a mega-raise ahead of Anthropic's IPO as Chinese labs keep shipping

Away from the energy story, the commercial AI race sharpened. Reuters reported that OpenAI is accelerating a raise of roughly $30 billion at a valuation above $1.4 trillion — up some 64% from $852 billion in March — explicitly to get ahead of Anthropic's planned mid-November public listing; one securities lawyer called it 'really a two-horse race in terms of being public.' The revenue figures circulating for both firms are company-provided and accounted differently, and are carried as unaudited.

The cost and capability pressure keeps coming from China, which shipped an updated DeepSeek V4.1-Flash model on 17 October and reported Q3 GDP up 4.5% year-on-year, beating forecasts. TSMC posted record Q3 revenue of $46.7bn (+41%) on AI demand, while the IMF's October stability report warned markets are 'increasingly exposed to an AI-driven correction.' The 20th Central Committee's Fifth Plenum (26–29 October) and the 10 November expiry of China's rare-earth export-control suspension bracket the month.

> ***So what*** *— For leadership the theme is concentration risk cutting two ways — a US frontier duopoly raising at trillion-dollar marks while Chinese open models compress price, in a market the IMF itself flags as over-exposed. Watch the OpenAI round's close, Anthropic's IPO terms, and the plenum and rare-earth signals on the hardware base beneath it.*

CYBER / GLOBAL — A BREACH, A KEV SURGE AND A RECORD PATCH

Nikkei loses 1.83m records as exploited zero-days drive a heavy patch cycle

The cyber window was led by disclosure and exploitation. Japanese media group Nikkei said on 20 October that an intrusion via previously compromised cloud credentials exposed about 1.83 million records — roughly 150,000 with names, addresses and contact detail and 120,000 with email addresses — while stating no card data was taken and no misuse had yet been found. The actor is unattributed and the figures rest on the company's own statement, warranting a second source.

On the vulnerability side, CISA added nine actively-exploited CVEs to its Known Exploited Vulnerabilities catalog on 13–16 October — spanning BeyondTrust, Fortinet, Atlassian, Cisco, Palo Alto PAN-OS, Ivanti Connect Secure and a Windows shell zero-day, CVE-2026-96951, that evades Mark-of-the-Web defenses — and Microsoft's 14 October Patch Tuesday fixed a record of roughly 1,413 vulnerabilities, including that exploited zero-day. Per-CVE CVSS detail is pending NVD confirmation and carried cautiously.

> ***So what*** *— For technologists and critical-infrastructure operators the theme is identity and edge appliances as the entry point, with exploitation coinciding with disclosure. The exposure is any organisation running the named products or embedding compromised cloud credentials. Watch CISA remediation deadlines, patch-and-hunt telemetry on CVE-2026-96951, and any revision to the Nikkei blast radius.*

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SPOTLIGHT - STRATEGIC ANALYSIS

The European Energy Revolt: Fuel, the Street, and the Gulf Scramble

> ***So what*** *— A single chain now runs from the Strait of Hormuz to the streets of Paris: a CENTCOM-region fuel squeeze has pushed European diesel and petrol to records, and the cost-of-living anger has become the worst unrest in years — France at the epicentre, with real echoes in Belgium, Italy and Portugal. Governments are responding nationally: President Macron ran a Gulf tour for bilateral diesel even as the G7 argued over a collective release. This assessment traces the chain, weighs the brakes and branches, maps who is exposed, and corrects the framing that France is freelancing away from Washington. The unrest, the Gulf deals and the G7 coordination are verified; IRGC 'dominance' and mine claims are graded information operation; the 'unlike the Baltics' contrast is unsourced.*

1. WHAT CHANGED

The energy shock crossed from the balance sheet to the barricade. For months the Iran war and the Russia–Ukraine refinery campaign drove diesel higher; in the last week that cost became a political event, as France saw its worst rioting in years, the *gilets jaunes* revived with an 'Act II' for 24 October, and genuine cost-of-living unrest hit Belgium, Italy and Portugal. The novelty is not a new war but the transmission of an old one into European domestic stability.

2. THE TRANSMISSION MECHANISM

The chain is legible link by link. Gulf and Hormuz disruption plus Russian-refinery losses cut roughly 1.6m bpd of diesel from suppliers that provided ~45% of seaborne trade; European gasoil hit records near $1,500–1,640 a tonne; French pump prices ran +21% year-on-year; and a student-funding protest became a nationwide riot. Brent near $110 and a record US diesel of ~$6.18 are the same signal one step upstream. Energy is the fastest conductor between a Gulf chokepoint and a European street.

3. THE BRAKES

Several forces cap the spiral. The G7 agreed a 100m-barrel reserve release on 2 October and the IEA mechanism can draw more; Saudi Arabia is rerouting ~5.8m bpd around Hormuz; President Macron's Gulf deals add ~10% of French diesel; and governments from Paris to Rome have chosen curfews and firm messaging over concession. The protests, though large, remain several national movements rather than one coordinated front, which limits their political velocity.

4. THE OPEN QUESTION

The unknown is whether Europe manages the shock collectively or fragments into national energy mercantilism. The popular framing — France snubbing Washington for Gulf oil while the Baltics play ball — misreads it: the record shows contentious but active France–US coordination inside the G7, with bilateral Gulf deals layered on top. The real question is whether those national deals complement the collective mechanism or cannibalise it, competing for the same scarce barrels.

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SPOTLIGHT - STRATEGIC ANALYSIS (CONTINUED)

5. THE BRANCHES

Three branches fan out. In the first, the shock eases: the G7 release, Gulf bilateral deals and any Hormuz de-escalation loosen distillate, pump prices drift down, and the unrest loses its fuel by winter. In the second, the squeeze persists into 2027 as the IEA warns, curfews contain but do not resolve the anger, and the populist right compounds its gains across the 2026–27 European elections. In the third, a Hormuz escalation or a hard winter spikes diesel again, the 24 October and 5 November mobilisations catch, and the fragmentation hardens into open national energy competition. C.O.R.G.I. weighs the second as most likely, the first as achievable, and the third as the tail that dominates planning.

6. WHO IS EXPOSED

The exposure runs through logistics, retail and politics. Freight, agriculture, aviation and chemicals take the record diesel crack directly; French and southern-European retailers and insurers take riot and looting losses already in the hundreds of millions of euros; French sovereign debt takes a renewed risk premium; and any firm with Gulf-to-Europe product exposure sits under the Hormuz and Bab el-Mandeb contest. For corporate leadership the near-term pressure points are fuel surcharges, European operational continuity and political-risk cover.

7. MISCALCULATION RISKS

The fastest escalations are accidents of narrative and timing. A confirmed Hormuz mine strike, a hard crackdown that produces a protest death, a failed G7 draw that strands diesel, or a cold snap arriving with the 24 October ‘Act II’ could each convert a manageable squeeze into a crisis. The IRGC’s ‘dominance’ information operation raises the ambient risk that a shipping incident is misread as closure and repriced accordingly.

8. INDICATORS TO WATCH

The tells are concrete. Energy: whether ICE gasoil and US diesel ease on the G7 draw or hold at records, and any Hormuz transit test. Street: turnout on 24 October (*gilets jaunes* ‘Act II’) and the 5 November strikes, and whether Belgium, Italy and Portugal sustain. Policy: whether more EU states cut bilateral Gulf deals or the G7 release is fully drawn. Political: far-right polling into the French, Spanish and Italian electoral calendars.

9. THE READ — BOTTOM LINE

Europe is living the domestic-stability bill for a Middle East and Ukraine energy war, and the bill is being paid at the pump and on the street. The accurate frame is not a transatlantic rupture but a fragmentation risk: national energy mercantilism — France’s Gulf diesel, others likely to follow — layering on a strained collective mechanism. Plan for a squeeze that persists into 2027, watch the 24 October and 5 November dates and the Hormuz tape as the fastest gauges, and treat the ‘snubbing Washington’ narrative as unverified — the real story is whether Europe holds together on energy.

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STANDING WATCH - CARRIED THREADS

Threads tracked and digested to a line; each breaks out to a full item on movement. Today's European energy-and-unrest focus led the sections above; the following are held, unchanged, or carried at low confidence.

Spain / Greece / Albania: Distinct-cause protests swept into the 'Europe unrest' map: Madrid's is housing (Puerta del Sol occupied), Greece's a refinery-safety dispute after two deaths, Albania's an anti-corruption revolt (167 arrested). Not part of the cost-of-living thread; carried separately.

Israel / election: Israel votes 27 October with Prime Minister Netanyahu's new pre-emptive-strike doctrine as a campaign theme and President Trump's endorsement in play; i24NEWS polling shows Likud slipping and Otzma Yehudit rising. Covered in the Iran item and the Israeli channel.

Economy / China: China's Q3 GDP rose 4.5% (released 19 October), beating forecasts; the Fifth Plenum meets 26–29 October and the rare-earth export-control suspension lapses 10 November absent renewal. Covered in the AI item.

Markets / rebound: The S&P 500 closed Monday 19 October at 7,690.73 (+0.4%) on an AI-led bounce; the ten-year sat near 5.15% and gold near $4,164, off recent peaks. Macro backdrop to the energy item.

Diplomacy / summit: President Trump said he is 'willing' to meet Presidents Xi and Putin in China — a three-way summit Moscow is reported (WSJ) to have floated for November's APEC — while Secretary Rubio pressed Kyiv to 'focus' on ending the war. Carried, not agreed.

Energy / sanctions: The US Treasury extended Lukoil's license to 24 April 2027 and President Trump waived parts of the Graham Russia-Iran sanctions act (16 October), tied to a Trump–Putin diesel deal; tonnage figures are President Trump's claims. Structural driver behind the diesel item.

Korea / DPRK: North Korea tested its first submarine-launched cruise missile in roughly three years (14 October, announced 15 October); an 'AI'/evasive-flight claim is Pyongyang's, unverified by Seoul or Tokyo.

Asia-Pacific / Taiwan: Taiwan's MND reported elevated PLA activity in the week to 18 October — 44 aircraft entering the ADIZ, all crossing the median line, and a fourth joint-readiness patrol in 15 days. One government's tally, graded official.

Americas / SOUTHCOM: The US Caribbean boat-strike campaign stands at ~71 strikes and ~238 killed (claimed) as of the 4 October strike, with no confirmed strike in this window; a USS Gerald R. Ford movement is reported inconsistently and flagged.

Israel / Gaza & Lebanon: The year-old Gaza ceasefire holds but is strained (IDF weekend strikes; WFP to cut aid to 500,000); the IDF reports dismantling 540-plus southern-Lebanon sites (20 October, IDF-sourced, uncorroborated). Held pending movement.

Europe / hybrid war & Canada: A Leipzig/Halle airport fence breach (17 October) found no drone and is not asserted as a Russian incursion; separately, Alberta voted to remain in Canada. Carried low-priority.

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ASSESSMENT - NEXT 24 TO 72 HOURS

Europe / the street: France's curfews meet the *gilets jaunes* 'Act II' on 24 October and union strikes on 5 November. Watch whether Belgium, Italy and Portugal sustain, whether any cross-border coordination forms, and the far-right electoral read-through.

France / politics: After the worst rioting in years, watch whether PM Lecornu's partial curfews hold or a state of emergency follows, whether the budget crisis forces another government change, and French OAT spreads.

Energy / diplomacy: President Macron's Gulf diesel deals test whether Europe coordinates or fragments. Watch whether other EU states cut bilateral Gulf deals, whether the G7 100m-barrel release is fully drawn, and any US friction over national buys.

CENTCOM / Hormuz: The closed-versus-open contradiction is unresolved. Watch for independent confirmation of any mine strike, a Hormuz transit test, the Araqchi reopening offer, and the Petroline bypass throughput.

Diesel / distillate: US diesel is at a record ~$6.18/gal and European gasoil near records, with an IEA squeeze into 2027. Watch whether the G7 draw and the Russia diesel deal loosen distillate, whether the crack persists, and the inflation pass-through.

Iran / resumption: The armed pause coexists with a Gulf force build-up and President Trump's 'possible after midterms' line. Watch the three-carrier posture, any Hormuz incident, and whether the Qatar channel produces a venue before 3 November.

Ukraine / energy war: Russia and Ukraine are trading grid and refinery strikes into the heating season, feeding the same distillate shock. Watch Ukrainian power resilience and whether President Trump's pressure trims Kyiv's refinery campaign.

Yemen / Red Sea: The Saudi–Houthi war is the region's live kinetic front after the Shabwa strike. Watch further strikes on Saudi cities or Aramco sites and the fate of the contested Bab el-Mandeb islands.

Markets / rates: Equities rebounded while yields held near 5.15% and Brent firmed to ~$110. Watch whether the S&P holds its bounce, the ten-year's war-inflation pricing, and the IMF AI-correction warning on concentrated tech names.

Cyber: Actively-exploited CVEs (incl. CVE-2026-96951) and a record Patch Tuesday lead, alongside the Nikkei breach. Watch CISA deadlines, patch-and-hunt telemetry, and any revision to the Nikkei blast radius.

China / calendar: The Fifth Plenum (26–29 October) and the 10 November rare-earth deadline bracket the month. Watch the communiqué and any MOFCOM signal on renewal.

Carried: The DPRK missile track, Taiwan gray-zone pressure, SOUTHCOM, the Gaza and Lebanon ceasefires and the Spain/Greece/Albania protests show movement short of a decisive break and are held to Standing Watch.

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SOURCING & CAVEATS

Edition note: this is a revised edition of CMB-26-293-AM, re-anchored at leadership request on the European energy-and-unrest theme and the CENTCOM fuel picture; the global board is retained in compressed form. The serial and Day of War are unchanged.

France & European unrest sourcing: Al Jazeera, ABC (AU), Newsweek, euronews, PBS NewsHour, NBC and Washington Times (17–19 October) on the French riots, President Macron's 'anger and shame' address, the consolidated Interior-Ministry arrest figure (>2,300 / ~2,400, ~1,000 police injured; the '1,800' was a mid-weekend running total), PM Lecornu's partial curfews and the declined ministerial resignation; The Local (FR) on the *gilets jaunes* 'Act II' (24 October) and the 5 November strikes. Al Jazeera (17 October) and AP/ABC on cost-of-living protests in Belgium, Italy (Milan looting, ~50 detained) and Portugal; HEC Paris's Alemanno for the 'shared grievances, not one movement' framing. Spain (housing), Greece (refinery safety) and Albania (anti-corruption) are distinct-cause and carried separately; Germany is a polling story, not street unrest. A France24 headline attributing an immigration framing to VP Vance, and a Times of Israel detail on Milan, are single-sourced and flagged.

Macron Gulf tour & the coordination question (corrected framing): The National, France 24/AFP, Al-Monitor and euronews (19–20 October) corroborate the 19–21 October Kuwait/UAE/Bahrain/Qatar tour with TotalEnergies' Pouyanné, the ~295,000t/month (~10% of French consumption) diesel commitments, and the Oman bypass for Kuwaiti supply. The assertion that France acted **without US coordination** is not supported and is partly contradicted: Reuters/US News (1 October) on the US diesel-export-ban threat to France and Germany; euronews and Al Jazeera (2 October) on France's G7 presidency, the '50-plus-50' counter-offer, the Macron–Trump call and the G7's agreed 100m-barrel release chaired by President Macron. A real France–US split exists over *military* Hormuz strategy (Fox, 19 March 2026), not these energy deals. The 'unlike the Baltics' contrast is not traceable to reporting and is carried as an analytic construct, graded unverified.

CENTCOM fuel & Hormuz sourcing: Al Arabiya/AFP (20 October) on the IRGC two-tanker mine claim and 'full dominance' posture (graded claimed/IO); CENTCOM (Capt. Tim Hawkins, 16–18 October, via multiple outlets) on the strait 'open,' routes 'clear of mines' and ~97% safe transit (no denominator given); Singapore authorities on the *GFS Pride* sinking (13 October); Al Jazeera (6 October) on the Saudi East–West pipeline at 5.8m bpd of 7m capacity; World Oil/Bloomberg (4 October) on OPEC+ holding November quotas; gCaptain/Bloomberg (3 October) and Axios on the ~10,000-personnel surge, three-carrier posture and Gulf missile-defense batteries; Reuters (~19 October) on FM Araqchi's conditional reopening offer. The closed-versus-open contradiction is carried unresolved; neither the mine strikes nor a full closure is independently confirmed.

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SOURCING & CAVEATS (CONTINUED)

Energy & markets sourcing (verified on the day): Brent ~$110.48 for 20 October (convextrade, Fortune price page); front-month WTI ~$103.66 for 19 October (CappNotes; the Brent–WTI spread is unusually wide and the contract month is noted); AAA daily national gasoline ~$4.36 (gasprices.aaa.com); EIA on-highway diesel national ~$6.18 for the week of 12 October (West Coast $7.24, California $8.09) — a record, with 2026 the costliest diesel year on record; ICE low-sulphur gasoil near $1,500/t after a ~$1,568 mid-September record, Platts NWE physical diesel near a $1,642 record; IEA (via CNBC, 14 October) on the squeeze lasting into 2027 and the ~1.6m bpd / ~45%-of-trade two-source attribution. S&P 500 close 7,690.73 for Monday 19 October (BBN Times, Yahoo Finance, CappNotes); ten-year ~5.15% and the 16 September Fed hike to 3.75–4.00% (CNBC, Federal Reserve). **Metric-strip discipline:** all figures are real, verified spot/close values re-checked on the day; the retired scenario-oil series is not carried; the HORMUZ cell reads CONTESTED to reflect the unresolved Iran/CENTCOM narratives, a C.O.R.G.I. threat read, not a market quotation.

Iran / Ukraine / Yemen sourcing: Axios (two sources, via CBS and Iran International) on the Hegseth–Netanyahu visit and resumption discussion (graded reported/single-origin); Forbes/AP, PBS and bne IntelliNews on the Russia–Ukraine energy exchange (President Zelensky's grid figures and the Petersburg terminal fire; drone and intercept counts graded belligerent claims); Al Jazeera, Review Journal (Reuters-sourced) and CBS on the Shabwa camp strike (≥53 killed); ISW and Sana'a Center on the contested Bab el-Mandeb seizures; IMF PortWatch on transit volumes. The WSJ IRGC-to-Houthi aid report is denied by Tehran and the Houthis and graded claimed.

Technology / cyber sourcing: Reuters (via Investing.com/TechStartups) on OpenAI's reported ~$30bn raise at >$1.4tn and Anthropic's mid-November IPO (figures company-provided, unaudited); Bloomberg (via Yahoo) on DeepSeek's 17 October update; Xinhua/NBS and Reuters on Q3 GDP +4.5%; QZ/Benzinga on TSMC's record Q3; The Register on the IMF AI-correction warning; SecurityWeek on the Nikkei breach (single outlet, second source recommended); CISA and corroborating roundups on the nine 13–16 October KEV additions incl. CVE-2026-96951; SecurityWeek/TechRepublic on the record ~1,413-CVE Patch Tuesday. 2025-dated cyber items were identified and excluded.

Media & Israel sourcing: Fox News and Al Jazeera front pages were pulled live (19–20 October); CNN, France 24, Newsmax and i24NEWS headlines are verbatim article titles via same-day domain search; Ground News's bias split was taken at the article level. Reuters, BBC, NHK World and the Drudge Report could not be retrieved directly and are reconstructed from same-day coverage and labeled approximate — no verbatim Drudge banner was captured. The Israeli channel quotes verified PMO doctrine material, an IDF southern-Lebanon statement, a Defense-Minister posture line and a Police-Commissioner line; the TA-125 level is the 16 October close.

Sponsorship disclosure: This edition is supported by ObscureIQ (obscureiq.com), a threat-intelligence and digital executive-protection house and the first named sponsor of the C.O.R.G.I. Morning Update Brief. Sponsorship does not direct item selection, assessment or confidence grading, which remain the independent judgment of C.O.R.G.I.; no ObscureIQ-sourced assessment appears in this edition.

Confidence: High on the verified record — the French and allied-European unrest and President Macron's address and curfews; the Gulf tour and its diesel commitments; the France–US G7 coordination record; the Saudi pipeline throughput, OPEC+ hold and US Gulf build-up; the record US/EU diesel and gasoil benchmarks and the IEA squeeze; Brent and the S&P close; the Russia–Ukraine energy exchange; the Shabwa strike; China's Q3 GDP; and the Nikkei/CISA/Patch-Tuesday cyber record. **Moderate** on the Hegseth visit (Axios, single-origin), the UAE/Bahrain diesel split and exact tonnages, live intraday crude and the wide Brent–WTI basis, the OpenAI/Anthropic figures, and the Bab el-Mandeb control picture. **Low** — explicitly — on the IRGC tanker-mine and 'dominance' claims, the WSJ IRGC-to-Houthi allegation, the 'France snubbing Washington / unlike the Baltics' framing (not sourced), the USS Gerald R. Ford disposition, and all belligerent battle-damage claims. Prepared for the situational awareness of corporate and defense leadership and not for further dissemination without consultation with C.O.R.G.I. leadership.

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MEDIA HEADLINES - 11 OUTLETS, TOP 4 EACH

REUTERS

— Macron secures Gulf diesel deals as fuel prices stoke unrest in France *(approx.)*
— French cities calm after curfews imposed to quell violence, PM says *(approx.)*
— IRGC says mines halted two tankers in Strait of Hormuz; CENTCOM says strait open *(approx.)*
— Russia strikes Kyiv's grid; Rubio presses Zelensky to focus on ending war *(approx.)*

BBC

— France imposes curfews after weekend of riots and looting *(approx.)*
— Cost-of-living protests spread across Europe *(approx.)*
— Diesel hits record as Iran war chokes global fuel *(approx.)*
— Macron in the Gulf seeking fuel for France *(approx.)*

CNN

— Several French cities impose curfews after weekend of chaos and protests
— The rioting across France is a symptom of a much larger political crisis
— 'The world will be amazed:' Iran's commanders prepare for further war
— Midterm election live updates: Trump ratchets up alarm about Democrats

FOX NEWS

— French Jews warned to hide signs of their faith as violent unrest grips country
— Trump shares Iran's latest demand as Soleimani's killing looms large
— Omar's sister quietly spoke with fed investigators after rep's home raided
— Trump ally warns Republican Party 'dead' if it loses key voting bloc

AL JAZEERA

— Cost-of-living protests hit Belgium, Italy, Portugal and France
— Macron opens Gulf tour after violent protests in France
— Qatar says Iran-US talks ongoing, warns of wider regional conflict
— Saudi Arabia says East-West pipeline pumping 5.8 million bpd

FRANCE24

— Macron secures diesel deals on Gulf visit as fuel prices stoke unrest
— France issues curfew for major cities including Paris, Bordeaux and Nice
— Macron says 'nothing justifies' violence in address to the nation
— Russia pounds Kyiv as Rubio urges Zelensky to 'focus' on ending war

NHK

— PM Takaichi's government confronts scandal as support slips *(approx.)*
— North Korea tests submarine-launched cruise missile *(approx.)*
— Europe unrest spreads over cost of living and fuel *(approx.)*
— Asian markets track Wall Street rebound *(approx.)*

NEWSMAX

— Rubio: Ukraine, Russia Should Be Focused on Ending War
— Trump, Vance Blame France's Unrest on Migrants, Not Economy
— Vance Declines Netanyahu Endorsement as Trump Backs Bibi
— DOJ Charges 28 Noncitizens in Calif. Voting Cases

DRUDGE

— PARIS BURNS: MACRON VOWS RIOTERS WILL 'PAY'... *(approx.)*
— DIESEL $6 RECORD AS WARS DRAIN GLOBAL FUEL... EUROPE REVOLTS *(approx.)*
— MACRON GOES HAT-IN-HAND TO GULF FOR OIL... *(approx.)*
— IRAN: WE OWN HORMUZ. CENTCOM: STRAIT OPEN. *(approx.)*

i24NEWS

— i24NEWS poll: Likud slips to 25 seats as Ben-Gvir's party reaches double digits
— Trump's Netanyahu endorsement 'unique and helpful' ahead of vote
— Israel preparing for 'massive' aliyah from France as riots rock country
— Likud backs Ben-Gvir for coalition, calls Otzma Yehudit a 'core partner'

GROUNDNEWS

— Top story: 'Mass protests in France spiral into worst riots in years'
— France-riot coverage: Left 38% · Center 38% · Right 24% (no blindspot flag)
— 'France's riots highlight a growing risk for its battered bond market'
— Bias-split framing applied across 17–19 October Europe-unrest reporting

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ISRAELI CHANNEL - ARUTZ SHEVA // ISRAEL NATIONAL NEWS

Prime Minister's Office (18–19 October, verbatim): Unveiling Israel's first new national-security doctrine in a decade, Prime Minister Netanyahu said: 'We are prepared to take the initiative… We must prevent the enemy from delivering the first blow. The objectives I set do not depend on American approval… To the extent necessary, we will also act independently.' At an airbase he warned Israel's enemies: 'Do not test us.' — PM Benjamin Netanyahu. (Campaign-charged framing ahead of the 27 October vote.)

IDF / southern Lebanon (20 October): The IDF said it has dismantled more than 540 sites and located over 150 weapons caches in southern Lebanon over recent weeks and remains 'committed to the ceasefire agreement.' The figures are IDF-sourced and were not independently corroborated by Lebanese or third-party reporting in the window; no distinct IDF Spokesperson verbatim on a single incident was independently verified.

Ministry of Defense (recent, near-verbatim): Defense Minister Israel Katz has said the IDF and security forces are prepared to 'defend Israel's borders and citizens everywhere,' and warned that Israel would capture more of southern Lebanon if Hezbollah 'joins Iran in an attack on Israel.' Wording is carried as near-verbatim pending a direct check against the original statement.

Knesset / markets: After settler attacks on diplomats and a photojournalist in the South Hebron Hills, police made multiple arrests; Police Commissioner Danny Levy said 'the law in Judea and Samaria applies to everyone.' Benny Gantz withdrew from the 27 October race. On markets, the TA-125 index last closed at 4,090.62 (+1.7%) on 16 October, after a strong 2026 run; the Tel Aviv Stock Exchange has repeatedly set records during the war.