

DAILY BRIEFING

The Dispatch

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MAIN STORY: US AND IRAN TRADE A FOURTH ROUND OF STRIKES OVER HORMUZ

- CENTCOM launched a fourth wave of strikes on Iran overnight, opening at 5pm US Eastern on Trump's order to "further degrade" Iran's ability to threaten Hormuz shipping. Explosions hit Bandar Abbas, Qeshm Island, Sirik, Jask and Bushehr, plus at least eight Khuzestan districts including Ahvaz, Omidiyeh, Mahshahr, Behbahan and Dezful, with a direct hit on the Aghajari airport hangar at Omidiyeh. Targets included IRGC coastal radars, anti-ship missile positions, air defense systems and fast boats around the strait. CENTCOM put the three-night total this week above 300 targets, roughly 310 over the week. No US personnel were hurt. Iran's atomic agency denied a strike on the Bushehr nuclear plant and called all units operational.
- The IRGC triggered the exchange by firing on the Cyprus-flagged M/V GFS Galaxy, whose crew abandoned it in flames with one member missing. It then declared Hormuz "closed until further notice and until the end of American interventions" after hitting a second vessel for "violating regulations." US strikes killed a navy lieutenant, Hamidreza Dehghani, at Jask and a telecoms official, Nooh Mahdavi, in Bandar Lengeh, with one dead and four wounded in Khuzestan. Qeshm's governor reported 10 to 11 projectiles on military sites, with no casualties there.
- Iran retaliated with missiles and drones against US-linked targets across the Gulf, striking Qatar for the first time since April along with Kuwait, Bahrain, Jordan and Oman. The IRGC said it hit Al Udeid air base in Qatar, HIMARS launchers in Kuwait, and command and radar sites in Bahrain, Jordan and Oman, claiming three US officers killed in Kuwait, a figure Washington did not confirm. Tehran had avoided Qatar since early April and the UAE since early May, making the strike on the lead mediator a marked widening. Its foreign ministry warned Arab states that any base used against Iran would become a "legitimate target" for defensive strikes.
- Trump declared Hormuz open even as strikes continued. "Yeah, it's open. We bombed the hell out of them last night." CENTCOM said Iran does not control the strait and that traffic was flowing. It had helped move more than 800 commercial ships and 400 million barrels of crude through since early May, roughly 20 crossing in the prior 24 hours. Iran's IRGC navy commander countered that all "foreign and extraregional" vessels stayed under watch and none had entered Iranian waters. The clash centers on the memorandum's ambiguous Hormuz terms, which Iran reads as granting it authority over the strait and Washington rejects.
- Trump insisted the ceasefire was "OVER" while agreeing to further talks. He said Iran had accepted a "perfect deal" barring its nuclear program on Saturday, then launched a drone and struck a ship within an hour of leaving the room. Iran's foreign ministry said the strikes "rendered futile"

months of de-escalation efforts and accused Washington of war crimes, 25 days after signing the war-ending understanding. A Qatari delegation was in Tehran, and Iran, the US, Qatar and Pakistan agreed to hold negotiations by phone. The mediation runs in parallel with Trump's standing threat to "completely decimate" Iran should it move against him.

STRATEGIC ASSESSMENT

The exchange has settled into parallel tracks of deterrence and diplomacy rather than a slide to all-out war, and that pattern most likely holds while Iran keeps its retaliation to US bases and shipping and off Israeli targets. The earlier read held: the memorandum bought a pause, and 25 days on both sides interpret its Hormuz clause incompatibly, with neither conceding control of the strait. Tehran calculates it can raise the cost of transit without the regime-threatening war it most fears, while Washington treats any attack on commercial shipping as a fixed red line, so the cycle persists unless the phone-format Qatar and Pakistan talks produce a written corridor agreement. The sharpest escalation risk runs through Iran's threat against Trump and its first strike on Qatar, either of which could pull the mediators out and widen the war if Iran hits Israeli soil. Watch whether the Muscat "median lane" proposal is signed before the IRGC fires on another vessel.

IRAN

- Iran completed Ayatollah Ali Khamenei's burial and opened the shrine to pilgrims, days after mass processions and Tehran's decision to grant hundreds of foreign reporters rare access to calibrate its messaging. Beneath the show of strength runs deep division: a senior aide to reformist President Masoud Pezeshkian called Iran "severely polarized" between the Islamic Republic's hard core and those seeking its downfall. Successor Mojtaba Khamenei, still in hiding, has lent tentative backing to talks. The IRGC's wartime ascendancy sharpened the question of who commands Iran. Foreign Minister Abbas Araghchi spent the day with Omani and Qatari officials, only for Iranian missiles to strike both hours later, overshadowing his diplomacy.
- Iran's parliamentary national security commission declared the country had taken control of the Strait of Hormuz and would hold it "with strength." The Persian Gulf Strait Authority said transit was "currently not possible," blaming illegal US military activity. Mohsen Rezaee, adviser to the supreme leader, called the strait "more important than dozens of atomic bombs." UN ambassador Amir Saeid Iravani warned Iran would no longer consider itself bound by the Islamabad Understanding if US violations continued, and chief negotiator Mohammad Bagher Ghalibaf declared "the era of one-sided deals is over." Foreign Ministry spokesman Esmail Baqaei defended Iran's strikes as legitimate self-defense.
- The IRGC released video of ballistic missiles its naval forces launched in retaliation for US strikes and vowed a "crushing response" to any further American attack on Iranian territory.
- Iran's supreme national security council chief Mohammad Bagher Zolghadr warned that any attack on the country's infrastructure would draw retaliation and that Israel would not be spared, citing recent exchanges of fire with the United States.
- The Iranian government approved a support package for economic enterprises damaged in US-Israeli attacks, aimed at protecting business owners and employment.

- Foreign Minister Abbas Araghchi met UN Special Coordinator for Lebanon Jean Arnault in Tehran on Sunday for talks on political developments.

ISRAEL

- Ambassador to the United States Yechiel Leiter conditioned any IDF pullout from south Lebanon on Hezbollah's removal from the pilot zones, saying that if Hezbollah stays there Israel has accomplished nothing. If the zones work, withdrawal continues. If they do not, forces stay in place. Leiter, who casts himself as leading the negotiations, insisted the plan is not delayed and hinges on the Lebanese army proving receptive to the two zones. He framed the memorandum as the mechanism that removes Iran from Lebanon entirely, and said Israel would rejoin kinetic action against Iran if Washington asks.
- The IDF has coordinated with US Central Command on scenarios for joining American strikes on Iran should the exchange intensify. Israeli officials assess Tehran does not currently intend to hit Israel because that would pull the escalation cycle out of control.
- The Knesset set Israel's national election for October 27, the date already fixed by law, with coalition whip Ofir Katz confirming Netanyahu's government will become the first in over 40 years to serve a full four-year term.
- Israeli defense officials assess that Turkey could engineer workarounds to the US-imposed limits on any F-35s it acquires, deepening the alarm behind Netanyahu's push against the sale after Trump signaled at the NATO summit he may approve it.
- Newly published excerpts from Yahya Sinwar's August 2022 memo show he expected Israel might "use an atomic bomb, no less" in response to the October 7 assault yet ordered it anyway, framing the attack as "a campaign of life or death."

LEBANON

- Israeli forces struck a pickup near Kounine and a car in Kfar Rumman, wounding at least three, and shelled Deir Seryan, Kfar Tebnit, and the Houjeir valley. Drones dropped incendiary bombs on Jdeideh Marjeyoun, burning over 100 dunums of wheat and olive groves. Israel released video of large detonations flattening border villages it says sit atop Hezbollah tunnels, and entrenched at Beaufort Castle overlooking Nabatieh, signaling a long stay. Reserve Brigade 551 ended two months of operations claiming more than 80 Hezbollah fighters killed and 200 sites destroyed. The toll since March 2 reached 4,322 dead, extending truce-period strikes that killed a Nabatieh motorcyclist Friday.
- Lebanon confirmed a sixth round of talks with Israel in Rome on July 14 and 15, shifting from Washington to technical discussion of Israeli demands to form joint political, security, and "good neighborly relations" committees. Ambassador Simon Karam leads an expanded delegation carrying Lebanon's responses. Israel accepted Rome to ease the US pressure it faced in Washington, and Ambassador Michel Issa framed the move as a technical continuation. President Aoun heads to the White House on July 21, counting on Trump to keep Lebanon on the American agenda and press Israel to withdraw. His file includes reconstruction funding under sole state control and

more support for the army.

- Samir Geagea met the president in Baabda after pressing Aoun for days to see the framework through. The state alone decides, not Hezbollah, he insisted, arguing Lebanon needs a single army and one armed force. Aoun assured the Lebanese Forces delegation he will not back down from the decision to negotiate, calling it a difficult but sovereign choice. The push to disarm Hezbollah is deepening old divisions, with the group's supporters blocking major roads and one lawmaker warning of civil war if disarmament is forced. Speaker Berry cast internal stability as his priority, while Patriarch Rai urged the state over "mini-states" and dialogue over arms.
- UN monitoring counted roughly 127,000 people still in shelters across the south, where artillery shelling, expanded displacement warnings, and destruction near the yellow line kept returns uncertain through mid-June.

SYRIA

- Syria's new People's Assembly convened for its first session in Damascus, 19 months after Ahmed al-Sharaa's forces toppled Bashar al-Assad. It elected constitutional lawyer Abdul Hamid Aqeel al-Awak speaker with 99 votes against Muayyad al-Qiblawi's 75 and Mohammad Ramez Kurj's 31. Al-Awak chaired the committee that drafted the interim constitutional declaration. He takes over a 210-seat chamber whose two-thirds were picked by regional electoral colleges and remaining third named by al-Sharaa on July 1, with four seats vacant and three reserved for Druze-majority Sweida. Al-Sharaa urged lawmakers toward "responsibility and competence" and pledged general elections once documentation and infrastructure allow. The chamber's first task is drafting a permanent constitution.
- Macron's Damascus visit met its goals, France said, pledging continued support for reconstruction, security cooperation and investment, alongside the return of 23 antiquities including Roman bronze, Byzantine and Islamic-era pieces to the National Museum.
- The Organization for the Prohibition of Chemical Weapons reinstated Syria's voting rights, five years after suspending them over Assad-era gas attacks, rewarding Damascus for opening previously undeclared sites where dozens of chemical munitions have been found.

PALESTINE

- Israeli forces killed five Palestinians across Gaza on Sunday. They included nine-year-old Tala Abu Matar, killed by machinegun fire in the Al-Bureij refugee camp, and four killed when a drone fired three missiles into a blacksmith's workshop in the Sabra district of Gaza City. Two others died of earlier wounds, one near Al-Bureij and one east of Khan Younis. The military said the workshop strike hit "terrorist infrastructure," and separately claimed killing two Hamas members near the Yellow Line, Hassan al-Razina and Nukhba operative Mohammad Fayyumi, over the prior 48 hours. Demolitions and artillery continued in Khan Younis, Gaza City and Jabaliya. The toll since the October truce now exceeds 1,098 killed and 3,535 wounded.
- Netanyahu, pressed on Rep. Ro Khanna's account of being detained by M4-wielding settlers near Khirbet Zanuta, blamed "150 juvenile delinquents" outside the settler community. Khanna called

the IDF “lying” and demanded the arrest of four soldiers he said sided with the settlers. The military insisted its troops “quickly dispersed” the civilians.

- Israeli bulldozers razed olive groves in Zububa west of Jenin, having uprooted more than 1,500 trees this month, and leveled land toward the Nili settlement near Ramallah. An Israeli workers’ strike has shut the Allenby Bridge since Thursday, cutting the sole international gateway for 3 million West Bank Palestinians and halving bus traffic into Jordan.
- Five UAE convoys carrying 792 tonnes of aid in 59 lorries entered Gaza this week under Operation Gallant Knight 3, staged through the Emirati logistics center in Al Arish, Egypt.

KEY REGIONAL EVENTS

Iraq

- Iraqi FM Fuad Hussein pledged in Riyadh that Iraq will bar its territory from launching attacks on Saudi Arabia or the Gulf, as PM Ali al-Zaidi departs Monday to meet Trump and sign oil-and-gas deals.

Jordan

- Jordan’s armed forces intercepted and downed four missiles entering its airspace from Iran early Monday, after three Iranian missiles landed across several locations Sunday, causing minor property damage and no casualties. Royal Engineering Corps teams secured the impact sites and handled the debris. The IRGC said it struck missile depots and fuel stores at Prince Hassan Air Base with missiles and drones. Amman’s foreign ministry condemned the Iranian strikes on the UAE, Bahrain, Oman, Qatar and Kuwait as a blatant violation of their sovereignty and a dangerous escalation, warning Jordan will not allow its territory to become a theater of conflict.

Kuwait

- Kuwait’s defense ministry reported three northern land border posts struck and an offshore Kuwait Oil Company drilling platform hit by a hostile drone, damaging the rig and injuring one worker. Kuwaiti air defenses engaged hostile aerial targets inside national airspace Sunday and again Monday, attributing audible blasts to interceptions. The IRGC claimed destroying US HIMARS launchers and ammunition depots staged for strikes on Iran and, citing unofficial sources, the deaths of three US officers. CENTCOM called the claim false and said all personnel are accounted for. Survivors of the March 1 drone strike on Shuaiba port, which killed six US soldiers, accused commanders of ignoring intelligence warnings.

Bahrain

- Bahrain’s Defence Force said its air defenses intercepted and destroyed a fresh wave of Iranian missiles and drones on the morning of 12 July, accusing Tehran of systematic aggression targeting civilians. The interior ministry sounded sirens again early Monday, urging residents to move to the nearest safe place and follow official channels. The force kept units at highest readiness, urged the public to avoid debris from interceptions, and called the attacks a breach of international law

while asserting Bahrain's right to defend its territory.

Qatar

- Qatar's armed forces intercepted a ballistic missile attack on the country, with witnesses reporting explosions over Doha, and the defense ministry said forces continued intercepting several further barrages. The interior ministry recorded three injuries, including a child, from falling interceptor shrapnel. The transport ministry suspended all marine activity until further notice, exempting vessels operating under international maritime conventions.
- Former Qatari Emir Sheikh Hamad bin Khalifa Al Thani, who ruled from 1995 to 2013 and built Qatar into a soft-power and LNG powerhouse, died at 74 and was buried in Lusail.

United Arab Emirates

- The UAE defense ministry said the missile threats detected early Sunday were entirely outside the country's borders and posed no danger to its territory. The Supreme National Security Council told residents monitoring systems were operating around the clock and there was no cause for concern. Washington raised the UAE to the A:5 tier under its export administration regulations, the first Arab state to reach the classification, opening wider cooperation on AI and advanced computing, semiconductors, quantum technology, space and civilian nuclear power. President Sheikh Mohamed bin Zayed arrived in El Alamein for talks with Egypt's Sisi on regional developments and closer security cooperation.

Oman

- Oman's Maritime Security Center rescued 23 crew from the Cypriot-flagged GFS Galaxy and continued searching for one missing after the vessel was struck 4.4 nautical miles off Musandam. India, whose 11 nationals included the missing man, condemned the attack. Oman summoned the Iranian ambassador and handed him a rare formal protest over drone strikes on the Musandam and Al Wusta governorates. The latter drew attention to the deep-water port of Duqm, where the IRGC claimed hitting US carrier logistics and fueling platforms. Muscat and Tehran agreed to continue political and technical-legal talks on securing navigation through the Strait of Hormuz.

Yemen

- The Houthi delegation stranded in Tehran is refusing to return to Sanaa unless flown directly aboard an Iranian aircraft, rejecting mediated proposals for a third-country or Yemeni charter and challenging the Saudi-led coalition.
- Pro-Houthi mobilization continued across northern Yemen for a 73rd day, with tribes and government employees staging armed rallies in Sanaa, Amran, Hajjah, Taiz and Dhamar answering Abdulmalik al-Houthi's call to confront the Saudi-led coalition.
- Yemenis are turning to hazardous energy alternatives amid chronic power shortages. A lithium battery in a home solar system exploded in Taiz, killing a mother and two of her children.

KEY INTERNATIONAL EVENTS

- UN Secretary-General Antonio Guterres urged Washington and Tehran to halt fighting and resume negotiations, citing US strikes on Iran and Iran's attacks on Gulf shipping and states. Pope Leo XIV warned "winds of war" are again blowing across the Middle East and Ukraine, calling dialogue and diplomacy the only path to peace. Jordan's Ayman Safadi and Saudi Foreign Minister Faisal bin Farhan condemned Iran's repeated attacks on Arab states and pressed to restore security and freedom of navigation in Hormuz. Arab League chief Nabil Fahmy voiced full solidarity with Jordan. Pakistan's Shehbaz Sharif, who Saturday urged Pezeshkian to preserve the "hard-earned peace", reaffirmed its mediation offer.
- US Senator Lindsey Graham, 71, a leading Iran hawk and Israel ally, died of an aortic tear after a sudden illness, drawing tributes from Netanyahu and Trump while Iranian state TV celebrated his death.
- The European Union stalled on curbing trade with Israeli settlements as members split over whether a ban, tariffs or licensing counts as a sanction requiring unanimity, with Germany's framing effectively blocking action.
- Russia and Ukraine exchanged overnight drone and missile strikes that killed nine, four in Ukraine's Dnipropetrovsk and Kherson regions and five in Russian-held Zaporizhzhia and Russia's Samara, a day before Kyiv's allies met in Paris.
- A Sudanese court in Port Sudan sentenced RSF leader Mohamed Hamdan Dagalo and 15 others to death in absentia for genocide and war crimes in the 2023 El-Geneina killings, the first verdict against its leadership.

MARKETS

- Brent crude jumped 4.08% to \$79.11 and US West Texas Intermediate rose 4.11% to \$74.36 by 0325 GMT, extending the prior session's climb as renewed US-Iran strikes kept Hormuz shipments under threat. Six vessels transited the strait Sunday, the lowest in five weeks. The dollar firmed on revived inflation and rate-hike fears, up 0.1% to 161.92 yen, while the euro slipped to \$1.1403 and sterling to \$1.3383. Fed funds futures now price a 52.1% chance of two or more rate hikes by December, up from 47.6% Friday. Gold fell 1.2% to \$4,072.78 an ounce. Most Gulf bourses closed lower, though Saudi Arabia's index edged up 0.1% on a 0.2% Aramco gain. Iranian crude stuck at sea is swelling as Chinese teapots buy rival Iraqi, UAE and Qatari barrels instead.
- Ukrainian drones struck more Russian oil facilities and set two tankers ablaze in the Sea of Azov, deepening a fuel crisis that has forced gasoline rationing and hours-long queues across multiple Russian regions.