

DAILY BRIEFING

The Dispatch

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MAIN STORY: IRAN STAGES A SEVEN-DAY STATE FUNERAL FOR THE SLAIN KHAMENEI

- Iran opened seven days of state funeral rites for Ayatollah Ali Khamenei, killed at 86 on February 28 in the US-Israeli airstrike on his central Tehran compound that opened the war. His coffin arrived at Tehran's Grand Mosalla, with public ceremonies set to begin Saturday at 6am. The processions run July 3 to 9 across Tehran and the seminary city of Qom, then the Iraqi shrine cities of Najaf and Karbala (the Baghdad stop dropped for time), ending in burial July 9 at the Imam Reza shrine in Mashhad, Khamenei's birthplace. Authorities expect 15 to 20 million mourners in Tehran alone over three days, a scale meant to exceed the roughly 10 million who attended Khomeini's 1989 funeral.
- Chief negotiator and parliament speaker Mohammad Bagher Ghalibaf, who days earlier ruled out talks under current conditions, cast the turnout as vengeance, declaring that "the nation's call for vengeance must ring in the ears of the whole world." Clerics reframed the mass mourning as a legitimacy test, with Qom Friday prayer leader Mohammad Saidi calling the procession "another referendum for the Islamic Republic." The rites double as the first major state ceremony under Khamenei's son and designated successor Mojtaba, who has stayed out of public view since the war began four months ago.
- Tehran warned the United States and Israel against any strike during the funeral window. Ali Abdollahi, commander of the Khatam al-Anbiya Central Headquarters, told the two governments "to avoid any miscalculation" and threatened "harsh retaliation" for any aggression. The state imposed temporary airspace restrictions over Tehran, Mashhad, and other cities and raised security across the processions.
- The warnings answered Israeli Defense Minister Israel Katz, who declared Mojtaba Khamenei "marked for death." Foreign Minister Abbas Araghchi vowed that any threat to Iran's people or leadership would draw "an immediate powerful response," charging under the Islamabad memorandum that Trump "has committed the US to muzzling its pets in Tel Aviv" and that "if they ignore their master, Iran will school them." US officials had earlier warned Araghchi and Ghalibaf, through third countries, that Israel might try to assassinate them in the weeks after the April 8 ceasefire, fearing it would collapse the talks. Israel had already killed senior figures who could have negotiated, including national security chief Ali Larijani and former foreign minister Kamal Kharazi.
- Officials from more than 100 countries were expected. Pakistan, which brokered the US-Iran memorandum, sends Prime Minister Shehbaz Sharif, while China, Afghanistan, and Caucasus

states dispatch representatives. Iraq will host official ceremonies in Najaf, where the body arrives July 7, and in Karbala, with the Iran-backed Popular Mobilization Forces escorting a separate procession for the bodies of Khamenei's relatives killed alongside him.

- The rites proceed under the fragile ceasefire that halted the war, with Tehran and Washington set to resume negotiations after the burial. The regime wove the war's dead into the mourning: IRGC chief Ahmad Vahidi attended a pre-funeral farewell at the Imam Khomeini Hussainiya, the hall where authorities say Khamenei was killed, joined by thousands of families of service members lost in the fighting.

STRATEGIC ASSESSMENT

Iran is using the funeral as a mass legitimacy and mobilization instrument, converting Khamenei's killing into a controlled show of devotion and a vengeance narrative that binds the public to the wartime leadership while the ceasefire holds. The "referendum" framing signals the leadership's need to prove the strike broke neither the system nor the successor line under Mojtaba. Tehran's layered warnings, from Abdollahi's retaliation threat to Araghchi's answer to Katz, are calibrated to deter an Israeli decapitation attempt during the vulnerable seven-day window without themselves rupturing the truce. The clearest near-term signal is whether the processions close on July 9 without an Israeli strike and whether Tehran and Washington in fact reconvene once the burial ends, the test of whether the funeral is a closing rite or a prelude to renewed escalation. A visible move against Mojtaba or a senior negotiator during the mourning would convert the rhetoric into action and likely sink the resumption of talks.

IRAN

- Iran and the United States concluded a two-day round of indirect talks in Doha on Wednesday with no breakthrough, working through the two pillars both sides had largely settled in June: maritime arrangements in the Strait of Hormuz and the financial incentives owed to Tehran. Jared Kushner and envoy Steve Witkoff handled the American side, and Deputy Foreign Minister Kazem Gharibabadi led Tehran's delegation, which he said held no direct contact with the Americans and dealt with the Qatari and Pakistani mediators only on Lebanon and the return of frozen Iranian assets. The parties agreed to open a channel to log alleged violations of the memorandum and to reconvene after Khamenei's funeral, with the next round, possibly a direct one, expected in Doha in the third week of July. Trump called the meetings "very good" and said Iran's denuclearization was "moving along well," while Vice President JD Vance signaled Washington will push the nuclear file, so far kept off the table, onto the agenda. Trump is promoting the roughly \$12 billion in frozen Iranian assets the deal commits Washington to release (some sitting in US accounts, the rest held by third countries such as Qatar) as a windfall for American farmers, pressing Tehran to spend it on US corn, wheat and soybeans. After Ghalibaf dismissed the farm-goods idea outright, Agriculture Minister Gholamreza Ghezeljeh cracked the door open, saying Iran could buy essential goods from multinational companies with American shareholders, but only if its terms on price, quality and health standards are met.
- Iran's joint military command, Khatam al-Anbiya, warned that every oil tanker crossing the Strait of Hormuz must follow its designated routes or meet an "immediate and forceful response," and

branded the continued presence of US manned and unmanned aircraft over the strait a threat to regional security that would draw a "swift and decisive" reaction. The command called the waterway "the sovereign territory of the Islamic Republic" and a "red line," hardening Tehran's claim to control transit and eventually charge passage fees, a reversal of decades of free navigation. The threat followed a US Central Command meeting in Bahrain where regional officials "underscored their shared commitment to the free flow of commerce through the Strait of Hormuz." On the water, the standoff holds: two container ships the IRGC seized in April remain held, dozens of cargo vessels sit offshore Bandar Abbas awaiting Iranian permission to pass, and a tanker Iranian outlets said had run aground after taking a "US-suggested route," the Comoros-flagged Arista, has been stuck in the same spot since March as part of an operation run by sanctioned oil magnate Mohammad Hossein Shamkhani, a central figure in the Iranian and Russian shadow fleet.

- More than 120 days after the deadliest strike of the US-Israeli war against Iran, a reconstruction of the February 28 bombing of a primary school in Minab established that at least one US missile hit the schoolyard and killed more than 100 children, yet the Trump administration has neither accepted blame nor released the findings of a Pentagon investigation, though the military had evidence almost immediately that the school site had been struck. Trump, asked last week, said he had not read the Pentagon report and doubted US responsibility, offering that "there were missiles flying all over the place" and "I don't think it was us." Iran's theocracy has meanwhile cast the dead children as martyrs, complicating independent efforts to establish the record.
- Ghalibaf, the parliament speaker leading Tehran's negotiating team, reaffirmed that IAEA inspectors "will not be granted any access" to the nuclear sites bombed in the war, citing a parliamentary law and a Supreme National Security Council resolution and confining the agency to the Bushehr power plant and the Tehran Research Reactor. The stance keeps the nuclear file, which Washington now wants on the negotiating table, walled off from international monitoring even as the memorandum takes effect.
- The Revolutionary Guards said they killed five members of the banned Democratic Party of Iranian Kurdistan (PDKI) in an ambush near Piranshahr in West Azerbaijan province, the second operation they have claimed near the town this week after reporting six alleged separatists killed days earlier. A newly formed Kurdish faction in turn killed two Guards in a shooting in Kermanshah province, claiming retaliation for the Guards' suppression of the 2022-2023 protests. The exchange underscores that Kurdish armed groups, which US and Israeli planners had hoped would open a ground front against Tehran during the war, stayed out under Iranian threats and now trade blows with the regime along the northwest border.
- The regime and the IRGC moved to seize St. Peter Evangelical Church, Tehran's oldest Protestant church, ordering the 20 low-income Christian families on its downtown compound to leave and confiscating the property through EIKO (the Execution of Imam Khomeini's Order), with re-registration through the Islamic Revolutionary Court to strip its legal status. Church leaders, threatened with imprisonment, cast the move as part of a widening campaign against Iran's evangelical community that already destroyed the Evangelical Church of Mashhad on June 4.

ISRAEL

- IDF Chief of Staff Eyal Zamir named Iran the primary focus of Israeli preparedness at the General Staff situational assessment marking 1,000 days since October 7, describing an interim period

across all theaters with each arena undergoing defining developments. Katz declared that the IDF must be prepared to carry out an independent Israeli strike on Iran whenever necessary to remove any threat, and asserted Israel had eliminated Khamenei and most of the Iranian leadership and severely damaged Tehran's strategic capabilities.

- Brig.-Gen. Shai Taib, head of the IDF Planning and Personnel Administration Division, warned the Knesset Foreign Affairs and Defense Committee that the regular combat force faces severe strain without urgent manpower legislation, calling for an effective draft law, an extension of mandatory service, and a reserve service law as the combat gap intensifies. The warning followed the Knesset's passage of the Basic Law: Torah Study bill, which critics say lets yeshiva students avoid service while keeping state benefits, even as the IDF has stood up dozens of reserve battalions, planned two more infantry battalions, and recalled tens of thousands of former service members. The strain also surfaced in the 2026 defense budget settled Thursday between the Defense Ministry, which sought NIS 183-188 billion citing the Iranian threat, and the Finance Ministry under Bezalel Smotrich, which cited fiscal credibility and deficit concerns, with the IDF Disabled Veterans Organization warning of a national disaster after the agreement excluded increased funding for treating wounded veterans.
- Prosecutors refused to withdraw the bribery charge against Prime Minister Benjamin Netanyahu in Case 4000, holding to the count despite the three-judge Jerusalem District Court panel signaling that its June 2023 doubts about establishing the bribery offense remained unchanged after Netanyahu's testimony and cross-examination, a rare judicial indication that the most serious charge faces significant obstacles. The legal pressure compounds the electoral challenge from former army chief Gadi Eisenkot, whose new Yashar party polls at 22 seats against Likud's 24, four months before the planned vote.
- The Knesset passed the so-called muezzin bill in a 50-36 preliminary vote, advancing legislation from Otzma Yehudit MK Zvika Fogel that would restrict the volume and use of mosque loudspeakers broadcasting the Muslim call to prayer, backed by Yisrael Beiteinu and the coalition's Shas party while United Torah Judaism abstained. The Organization of Islamic Cooperation condemned the measure as a discriminatory and racist violation of freedom of worship and an attack on Islamic holy sites. The bill requires three further readings to become law.
- The United States signed the agreement to build its permanent embassy compound at the Allenby site in southern Jerusalem, with Ambassador Mike Huckabee and Foreign Minister Gideon Sa'ar formalizing the land allocation that advances Washington's 2017 recognition of Jerusalem as Israel's capital.

LEBANON

- Israeli forces killed a Hezbollah operative who emerged from an underground opening in the Ali al-Taher heights of Nabatieh district, the air force striking him on ground-forces instructions, and vowed to keep operating there to stop fighters surfacing from tunnel infrastructure. Overnight, troops detonated houses in Beit Yahoun, Hadatha, and al-Tiri, bulldozed roads and uprooted trees along a stretch from Naqoura to Aita al-Shaab, fired on a civilian vehicle in Ibl al-Saqi, and machine-gunned the Kounine-Bint Jbeil road. A drone strike on a vehicle in Sadiqin, in Tyre district, wounded two. Fresh checkpoints went up along the border zone, the Israeli-declared Yellow Line, and the Litani River. The health ministry put the cumulative toll from the offensive since its

March 2 expansion through July 2 at 4,298 killed and 12,196 wounded, a count still rising as bodies are recovered from areas Israeli forces had sealed.

- President Joseph Aoun defended the framework agreement with Israel, calling negotiations “not treason but a diplomatic war without unnecessary bloodshed,” vowing not to yield “a single inch” of territory, and urging critics to await the talks’ outcome before passing judgment. Speaker Nabih Berri, who had agreed with Aoun to demand any Israeli withdrawal proceed by administrative district, said he was surprised the final text adopted the “pilot zones” mechanism instead, branded the accord an “agreement of sedition” and not implementable, yet signaled he would pursue a settlement rather than a front to topple it, arguing Lebanon needs an international umbrella spanning the United States, Saudi Arabia, and Iran. Berri said Hezbollah is ready to withdraw south of the Litani concurrent with a complete Israeli pullout and to place its arms under the Lebanese state. Lebanese Forces leader Samir Geagea countered that the agreement has shattered Hezbollah’s narrative and opens a credible path to dismantling its weapons, pinning Israel’s presence on the war Hezbollah started. Druze leader Walid Jumblatt said he will not join a coalition to bring the accord down but will not support it either, warning that Article 13 bars prosecuting war crimes during talks and that the word “withdrawal” never appears in the text. Hezbollah MP Ibrahim Moussawi called it an “agreement of humiliation,” null and void. Prime Minister Nawaf Salam, a former International Court of Justice president, said Clause 13 only suspends legal action against Israel while good-faith negotiations proceed and surrenders no right, insisting implementation should produce an Israeli withdrawal and the return of the displaced. Israel’s ambassador to Washington, Yechiel Leiter, claimed the Lebanese Army is sidelining Shiite officers unwilling to confront Hezbollah and described a “shelf agreement” kept ready for full peace once the group is dismantled.
- Syrian Foreign Minister Asaad al-Shaibani visited Beirut carrying an initiative handwritten by President Ahmad al-Sharaa to back extending Lebanese state authority, meeting Aoun, Salam, and, for the first time, Berri. He reassured leaders that Damascus has no intention of intervening militarily in Lebanon, countering Washington’s suggestion that Syria could move against Hezbollah, and said Syria is open to meeting the group “if interests require it.” With Salam he signed an agreement forming a joint Syrian-Lebanese Higher Committee of ministers from both countries, meeting regularly on security coordination, economic cooperation, electricity interconnection, and the movement of goods and people, a 13-article body replacing the 1991 Brotherhood, Cooperation and Coordination Treaty of the Assad-era tutelage. The cabinet ratified the committee, and Shaibani conveyed Sharaa’s invitation for Aoun to make a first visit to Damascus.
- France, working with Italy, is preparing to deploy an international coalition force in south Lebanon once UNIFIL’s mission ends, with American backing and at Beirut’s request in support of the Lebanese Army.
- Crisis-level food insecurity (IPC Phase 3) is set to persist through January across the South, El-Nabatieh, Beirut, Baalbek-El Hermel, Bekaa, Akkar, and parts of the north, as sustained hostilities, displacement, lost income, and high prices erode purchasing power amid declining food aid and a collapsed summer tourism season. A displacement snapshot dated July 1 recorded 499,784 people still internally displaced, down 29 percent from June 24, while 646,107 have begun returning home, up 23 percent.

SYRIA

- The death toll from a bomb blast at a crowded cafe in central Damascus on Thursday rose to nine, with more than 20 wounded, the deadliest attack in the capital since a June 2025 church suicide bombing killed 25. The Interior Ministry said a crudely made improvised device weighing about one kilogram and packed with metal shrapnel had been planted inside the cafe in the Al Hijaz district, roughly 100 meters from the Palace of Justice. No group claimed responsibility. Damascus Governor Maher Marwan Idlibi said the bombing was meant to create chaos as Syria pursues its recovery. The attack is a fresh security challenge to President Ahmed al-Sharaa's government, which took power after Bashar al-Assad's ouster in late 2024, and follows a May 19 car bombing outside the Defense Ministry that killed a soldier and wounded at least 18, with ISIS working to exploit the security vacuum.
- A bipartisan group of US lawmakers wrote to Secretary of State Marco Rubio urging Syria's removal from the state-sponsors-of-terrorism list, arguing the legal grounds for the designation no longer apply and that it remains a significant barrier to the economic recovery of al-Sharaa's government. Republican Representative Joe Wilson joined Democratic Senators Jeanne Shaheen, ranking member of the Senate Armed Services Committee, and Elizabeth Warren, crediting Damascus with serious steps against ISIS and against Hezbollah's transnational weapons and financial networks inside Syria. The appeal tracks a wider reintegration bet on foreign energy investment to rebuild a power sector crippled by nearly 14 years of war, anchored by a June 16 gas-development deal between US major ConocoPhillips, Novaterra Energy, and the state Syrian Petroleum Co. that energy minister Mohammed al-Bashir says is meant to stabilize the electricity network and support broader recovery.
- A reported Trump administration plan to task Syria's new government with confronting Hezbollah drew a sharp rebuff from a former US envoy to Lebanon, who called the proposal "preposterous."

PALESTINE

- Gaza passed the 1,000th day of war since the October 7, 2023 attack, with the enclave's authorities putting the toll at 73,066 killed, including more than 21,500 children (1,022 of them under a year old), 9,500 missing under the rubble, and 173,514 wounded, and estimating Israel has dropped some 223,000 tonnes of explosives on the strip, roughly 16 times the Hiroshima bomb. At least 21,000 children have been confirmed killed and about 800,000, some 80 percent of Gaza's child population, displaced, with 625,000 school-age children now three years without formal schooling and around 245,000 at risk of malnutrition. Strikes continue near-daily despite the October ceasefire, with 1,053 killed since the truce took effect, over 350 of them women and children, and a drone strike on Nuseirat camp in central Gaza wounding several as troops shot a man riding a motorcycle. Civil defense has lost 145 of its members and recovered roughly 1,500 bodies since the ceasefire, 38 hospitals sit out of service, and Israeli forces hold the majority of the territory while moving to expand their share toward 70 percent. The Committee to Protect Journalists voted to affirm its existing definition of who counts as a journalist after a backlash over fears that Palestinian and Lebanese reporters killed by Israel, the deadliest conflict on record for the press, could be dropped from its casualty database.

- Hamas, the Palestinian Foreign Ministry, and the Arab League rejected the US-backed Board of Peace's declaration that UNRWA "has no place in the new Gaza," with Hamas casting the drive to defund or replace the agency as an effort to erase the refugee issue and the right of return, and the Arab League calling it legally baseless given UNRWA's UN General Assembly mandate. US Ambassador Jeff Bartos, addressing a UN session, framed the donor choice as one between "funding incitement, terrorism and stagnation, or funding the Peace Council," and said the Security Council had approved the Peace Council and a National Committee for the Administration of Gaza by an overwhelming majority.
- Hamas spokesman Hazem Qassem called on the Arab League to convene an emergency summit against what he described as Israeli plans to displace Gaza's population, warning that any forced displacement would directly threaten neighboring states, particularly Egypt, and pressing Arab governments to move beyond condemnation to concrete political and diplomatic measures.
- Israeli forces raided Qalqilya in the northern West Bank, closing the city's main roads, storming a home, and firing stun grenades around Al-Ghubari Hall amid a wide deployment, with no arrests reported. Separately, troops opened a pursuit of suspects in a West Bank car-ramming attack that caused no injuries.
- Gaza's Resistance Security executed a man identified as M.M. after what it called the completion of "all revolutionary procedures," accusing him of working with Israeli intelligence to enable several wartime massacres and the killings of resistance leaders, most recently Al-Qassam Brigades chief of staff Izz al-Din al-Haddad (Abu Suhaib), killed in a May 15 Israeli strike in Gaza City. The same day it announced the execution of three other alleged collaborators and urged others to surrender, part of a widening campaign against collaborator networks.

KEY REGIONAL EVENTS

Iraq

- The United States resumed air shipments of dollars to Iraq this month after freezing them since April, when it halted roughly \$500 million in cash deliveries and suspended parts of security co-operation with Baghdad, tying the freeze to repeated Iran-backed militia attacks on American infrastructure and to pressure on the new government to rein in those groups. The cash, drawn from Iraqi oil revenues held at the Federal Reserve Bank of New York, funds mainly retail and foreign-exchange demand, while electronic transfers for trade continued through the halt. The resumption tracks Prime Minister Ali Al Zaidi's first month in office, built around three priorities in his dealings with Washington: disarming Iran-aligned militias, fighting corruption, and reforming financial oversight. His anti-corruption drive has arrested dozens of officials and lawmakers and seized tens of millions in assets, including oil-ministry undersecretary Adnan al-Jumaili, whose expected testimony points toward larger figures inside parliament. The security and financial-cooperation suspensions remain in place, and Al Zaidi plans a mid-month Washington visit to anchor a strategic partnership.

Bahrain

- Foreign Minister Abdullatif Al Zayani told the UN Security Council that Iran has carried out 808 attacks since February 28, comprising 203 ballistic missiles and 605 drones, continuing despite

the memorandum and striking a water desalination plant, residential neighborhoods, and other civilian sites rather than the military targets Tehran claims. He said the campaign also hit Kuwait International Airport, threatening civil aviation, and cited the drone strike on the Barakah Nuclear Power Plant in the UAE, and Bahrain has filed documentation of every attack with the Security Council and Secretary General Antonio Guterres. Separately, King Hamad bin Isa Al-Khalifa received CENTCOM commander Admiral Brad Cooper in Manama to review the Iranian attacks and deepen defense coordination, reaffirming the alliance with the United States, whose Fifth Fleet is based in the kingdom.

United Arab Emirates

- The United Arab Emirates again cleared its nationals to travel to Lebanon, effective Monday, requiring registration on a foreign-ministry emergency platform before departure and reversing the April 30 ban that had also covered Iran and Iraq. Prime Minister Nawaf Salam welcomed the move as renewed Emirati confidence in a state that has reasserted control over its political and security decisions, and Foreign Minister Youssef Raggi echoed the thanks. The parallel ban on travel to Iran stays in force, even as flights between Tehran and Dubai resumed for the first time since the war.

Oman

- Sultan Haitham bin Tarik met British Prime Minister Keir Starmer in London to press support for diplomacy securing safe navigation through the Gulf's strategic waterways and to weigh the Iranian nuclear file, agreeing that any lasting settlement should hold regional stability. Oman, one of ten regional states struck by Iran during the war, hosted Iran-US contacts in Muscat days before fighting broke out, and the meeting reinforces its standing as an intermediary channel.

Yemen

- Houthi-run areas sustained one of the group's largest mobilization pushes since the Gaza war began in October 2023, a week of armed tribal rallies, marches, and institutional events across multiple governorates drawing in tribes, local authorities, security officials, government employees, and religious figures, though the pace eased on the 82nd day of the conflict. The campaign is cast as a response to Abdulmalik al-Houthi's call for full readiness to end the war and lift the blockade, signaling preparation for possible escalation tied to Gaza, the Red Sea, or renewed confrontation with the United States and Israel. In parallel, anti-Houthi tribal mobilization around Matrah al-Karamah and Al Jawf grew to some 8,000 fighters setting up roadblocks, with a tribal leader warning of civil war.

KEY INTERNATIONAL EVENTS

- Russia's deadliest strike on Kyiv since its full-scale invasion killed at least 27 people overnight into Thursday, an 11-hour barrage of ballistic and cruise missiles and drones across the capital. President Volodymyr Zelensky vowed Ukraine would "definitely" retaliate and pressed Washington for licenses to build Patriot air-defense missiles, while EU foreign-policy chief Kaja Kallas moved to sanction more firms supplying Russia's military-industrial complex. Moscow framed the assault

as a reprisal for Ukrainian attacks on its energy complex, more than 50 on Russian oil refineries and energy sites since March, which have driven fuel shortages Putin dismissed as “not critical” as he ruled out any ceasefire until his war aims are met.

- Venezuela's death toll from the June 24 twin earthquakes (magnitudes 7.2 and 7.5) rose to 2,595, with more than 12,000 injured and 189 buildings fully collapsed, as rescue teams in the hardest-hit coastal state of La Guaira shifted from searching for survivors to recovering bodies with tens of thousands still unaccounted for. Interim President Delcy Rodriguez said a \$200 million IMF-backed reconstruction fund and oil revenue held under US Treasury control since Maduro's ouster would finance rebuilding, alongside more than \$300 million and roughly 900 military personnel committed by Washington.
- Public institutions across EU member states signed 194 contracts worth nearly 2.7 billion euros (\$3.1bn) with Israeli companies between January 2022 and July 2025, much of it for military gear and technology, even as several governments publicly condemned Israel's conduct in Gaza and the West Bank. Spain, among Europe's loudest critics, accounted for 14 contracts worth almost 227 million euros (\$257m), the bulk a 207-million-euro (\$235m) April 2024 deal between its Defence Ministry and Rafael for aerial combat systems. On the same accountability front, the European Commission refused to release 17 reports on EU-funded infrastructure in Gaza covering 2020 to 2023, a decision signed 23 June, arriving the same day a UN inquiry found Israel continues to commit genocide by deliberately targeting Palestinian children. The withheld files could document Israel's destruction of European-backed civilian projects and sharpen pressure on Brussels over whether its partnership with Israel breaches the human-rights terms of their agreements.
- Amnesty International accused Sudan's Rapid Support Forces of crimes against humanity and ethnic cleansing during their 2024-2025 campaign to seize El Fasher in North Darfur, drawing on 247 victim and witness interviews. The paramilitary systematically attacked settlements of the Zaghawa people and inflicted deliberate violence on children, including killings, abductions, forced recruitment, and rape. Amnesty chief Agnes Callamard said the RSF “exterminated” and “persecuted on the basis of ethnicity and gender,” a finding that follows a UN fact-finding mission's February conclusion that the assault bore “the hallmarks of genocide.”

MARKETS

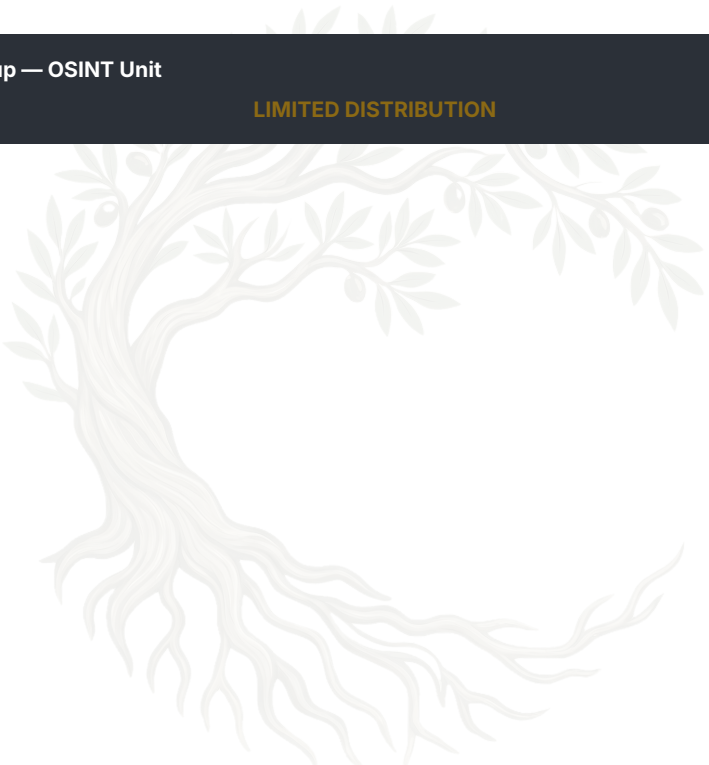
- Gulf crude flows through the Strait of Hormuz recovered sharply, with Trump claiming record numbers of ships now transiting the waterway. At least five supertankers carrying 10 million barrels of Saudi crude loaded at Ras Tanura, the world's largest oil port, cleared the strait, part of an Aramco ramp-up in loadings and Asia-bound shipments that follows the port's resumption last week after a near four-month halt. Aramco, among the last Gulf producers to restart exports from inside the Gulf, switched to spot pricing on its Bahri-fleet cargoes to speed Asian sales, offering 6 million barrels of July-loading crude to its usual Asian customers. The returning barrels added to a prompt glut that has pushed Brent to about \$70 a barrel, down from near \$120 in March. Aramco's July official selling prices to Asia, set in early June, still carry premiums of \$6 to \$10 a barrel, while other Middle Eastern grades for July and August have slipped to discounts.
- Most Gulf equity indices closed lower after the inconclusive Doha round. Saudi Arabia's benchmark TASI eased 0.3%, dragged by a 1.3% drop in miner Maaden, while Dubai's main index fell

0.3% on a 2.2% slide in toll operator Salik. Crude extended losses for a third straight session, Brent off 66 cents to \$70.91 and WTI down 59 cents to \$67.99, both the lowest since 27 February, as previously stranded tankers exiting the Gulf eased supply fears.

- US gasoline prices heading into the July 4 holiday reached their highest level since 2022.
- A Russian shadow-fleet tanker, one of the sanction-evading vessels Moscow uses to keep oil exports flowing, was documented for the first time mounting an automated machinegun, photographed this spring on the Baltic Sea in Estonian waters. The move follows five interceptions of such tankers by French marines since September and signals Moscow hardening the fleet's security as Western navies step up boardings.

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