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DAY 191 – THE PLATEAU BREAKS, THE EXCHANGE ESCALATES: IRAN FIRED BALLISTIC MISSILES AT TWO US NAVY WARSHIPS (SATURDAY, WHICH EVADED THEM), AND THE US RETALIATED BY STRIKING THREE IRANIAN OIL TANKERS – DISABLING TWO (OFF KHARG, NEAR JASK) AND SINKING A THIRD (THE M/T KYLO) IN THE GULF OF OMAN – UNDER A NEW POLICY OF DESTROYING IRAN'S "SHADOW OIL FLEET." IRAN'S RHETORIC HARDENS: GHALIBAF SAYS "THE ERA OF PROPORTIONATE RESPONSES IS OVER" – NO NEW DAMAGING STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

6 September 2026 (0900 GMT)

Subject: The Security Situation in Dubai, the UAE, and the Wider Middle East

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE TENTATIVE PLATEAU HAS BROKEN, AND THE STRIKE EXCHANGE HAS ESCALATED INTO A DIRECT NAVAL CONFRONTATION. On Saturday, Iran fired ballistic missiles at two US Navy warships – an aircraft carrier and a guided-missile destroyer – patrolling regional waters; both evaded the attacks, with no US personnel harmed. The US retaliated by striking three Iranian oil tankers, permanently disabling two – the M/T Downy off Kharg Island and the M/T Stark 1 near Jask – and destroying and sinking a third, the M/T Kylo, in the Gulf of Oman, under a new policy of imposing higher economic costs on Iran by destroying its "shadow oil fleet." Iran's rhetoric has hardened sharply: parliament speaker Ghalibaf has declared that "the era of 'proportionate responses' is over," and Iran has warned of a stronger response – an ominous signal that Iran may escalate beyond tit-for-tat. President Trump's threat to strike Kharg Island stands. There is NO CONFIRMED NEW DAMAGING STRIKE on UAE territory, ports or infrastructure, and no new attack on the UAE in the latest period – but the escalation and Iran's "beyond proportionate" threat raise the danger. Westminster Security MAINTAINS MAXIMUM ALERT, keeps both phases suspended, holds readiness at a high level, and advises clients to complete departures and suspend all Strait transits.

⚠ **ASSESSMENT:** THE PLATEAU WAS PREMATURE – THE DANGER IS RISING, NOT FALLING. The tentative plateau flagged yesterday has proved premature: the exchange has escalated into a direct naval confrontation, with Iran firing on US warships and the US sinking an Iranian tanker for the first time in this phase. Two developments make the picture more dangerous. First, the US "shadow fleet" policy – destroying Iran's oil tankers to impose economic costs – directly attacks Iran's oil-export lifeline, the very thing Iran has threatened to defend by blocking all Gulf exports; it escalates the economic-military confrontation and raises the risk of an Iranian response against Gulf oil infrastructure. Second, and more ominously, Iran's declaration that "the era of proportionate responses is over" signals that Tehran may abandon tit-for-tat and escalate disproportionately – a significant hardening that raises the risk of a larger Iranian strike, potentially against Gulf states including the UAE. The mediators' push for a cessation is now being overtaken by the escalation. For UAE clients, the danger is rising, and the posture must remain at its most cautious: MAXIMUM, high

readiness, complete departures, suspend all Strait transits, and heightened vigilance for a disproportionate Iranian response. There is NO NEW DAMAGING STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 191 – THE PLATEAU BREAKS, THE EXCHANGE ESCALATES

The tentative plateau flagged yesterday has proved premature, and the strike exchange has escalated into a direct naval confrontation, with Iran's rhetoric hardening sharply. On Saturday, Iran's Islamic Revolutionary Guard Corps fired ballistic missiles at two US Navy warships – an aircraft carrier and a guided-missile destroyer – patrolling regional waters; both evaded the attacks, and no US personnel were harmed. The United States retaliated by striking three Iranian crude oil tankers, permanently disabling two of them – the M/T Downy off the coast of Kharg Island and the M/T Stark 1 near Jask – and destroying a third, the M/T Kylo, which was struck repeatedly in the Gulf of Oman and sank, in one of the most significant kinetic actions against Iran's petroleum infrastructure in decades. The strikes are part of a new US policy of imposing higher economic costs on Iran by destroying its so-called shadow oil fleet, which the US says funds the Revolutionary Guards and their regional proxies. In an ominous hardening, Iran's parliament speaker and chief negotiator, Ghalibaf, declared that the era of proportionate responses is over, and Iran warned of a stronger response and condemned the strikes as illegal; President Trump's threat to strike Kharg Island stands. There is no confirmed new damaging strike on UAE territory, and no new attack on the UAE in the latest period, but the escalation and Iran's beyond-proportionate threat raise the danger. Westminster Security MAINTAINS MAXIMUM ALERT with readiness at a high level, keeps both phases suspended, and advises clients to complete departures, hold high readiness, and suspend all Strait transits.

Where Things Stand

Element	Status (as of 0900 GMT Sunday 6 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The plateau has broken; the exchange escalates. Complete departures; high readiness; suspend all Strait transits.
Naval confrontation	**IRAN FIRES ON US WARSHIPS.** Iran fired ballistic missiles at a US carrier and destroyer (Saturday); both evaded, no US personnel harmed.
US retaliation	**THREE IRANIAN TANKERS STRUCK.** US disabled the M/T Downy (off Kharg) and M/T Stark 1 (near Jask) and sank the M/T Kylo (Gulf of Oman) – the "shadow fleet" policy.
Iran rhetoric	**"PROPORTIONATE RESPONSES" OVER.** Ghalibaf: "the era of 'proportionate responses' is over." Iran warns of a stronger response – a beyond-tit-for-tat signal.
Kharg	Trump's threat stands (an AI video); Kharg not struck, operations continue. US struck a tanker off Kharg.
Mediation	**OVERTAKEN.** The mediators' push for a cessation is being overtaken by the escalation; Iran's conditional off-ramp nominally stands.
UAE	**NO NEW STRIKE; DANGER RISING.** No new damaging strike on UAE territory; no new attack in the latest period. Iran's beyond-proportionate threat raises the risk. Airports open.

WS Assessment: The plateau has broken into a direct naval confrontation, the US is now sinking Iran's oil tankers, and Iran has signalled it may escalate beyond proportionate responses – the danger is rising, not falling. The alert stays at MAXIMUM with high readiness, and clients should be at their most cautious and vigilant for a disproportionate Iranian response, potentially against Gulf states including the UAE.

2. THE US SINKS IRANIAN OIL TANKERS – THE "SHADOW FLEET" POLICY

- **Iran fires on US warships:** On Saturday, Iran's Revolutionary Guard fired ballistic missiles at two US Navy warships – an aircraft carrier and a guided-missile destroyer – patrolling regional waters; US Central Command said both vessels evaded the multiple attacks and that no US personnel were harmed.
- **The US strikes three tankers:** In retaliation, the US struck three Iranian crude oil tankers: the M/T Downy, permanently disabled off the coast of Kharg Island; the M/T Stark 1, permanently disabled near Jask; and the M/T Kylo, an unladen, Comoros-flagged carrier struck repeatedly in the Gulf of Oman and completely destroyed, which subsequently sank.
- **The "shadow fleet" policy:** The strikes are part of a new US policy of imposing higher economic costs on Iran by destroying its shadow oil fleet, which US Central Command says is part of a multibillion-dollar network funding the Revolutionary Guards and their regional proxies; the US said Iran has no means to defend the tankers.
- **CENTCOM's warning:** The CENTCOM commander framed the strikes as retaliation, warning that if Iran shoots at two US ships, the US will impose an even higher economic cost by taking out three of Iran's, and that the US would not hesitate to destroy Iran's limited and exposed oil fleet – a clear escalation of the economic-military pressure.
- **A significant escalation:** The sinking of the M/T Kylo is one of the most significant kinetic actions against Iran's petroleum infrastructure in decades, and the direct targeting of Iran's oil-export fleet – rather than only military or mining targets – marks a widening of the US campaign into Iran's economic lifeline.

WS Assessment: The US "shadow fleet" policy is a significant escalation: by sinking Iran's oil tankers, the US is directly attacking Iran's oil-export lifeline, the very thing Iran has threatened to defend by blocking all Gulf exports. This raises the risk of an Iranian response against Gulf oil infrastructure, and escalates the confrontation into a direct economic-military exchange.

3. IRAN'S RHETORIC HARDENS – "THE ERA OF PROPORTIONATE RESPONSES IS OVER"

- **The declaration:** Iran's parliament speaker and chief negotiator, Ghalibaf, declared in a statement on Sunday that "the era of 'proportionate responses' is over" – an ominous hardening signalling that Iran may abandon the tit-for-tat approach it has followed and escalate disproportionately in response to the US strikes.
- **A warning of a stronger response:** Iran's Foreign Ministry condemned the tanker strikes as illegal and aggressive, and Iranian military officials warned of a stronger response if US attacks continued; the combination of Ghalibaf's declaration and the warnings points to the risk of a larger Iranian strike.
- **The risk of disproportionate escalation:** The abandonment of proportionality is significant: it raises the risk that Iran, having so far calibrated its retaliation, may now strike disproportionately – potentially against Gulf oil infrastructure, US bases, or Gulf states including the UAE – in response to the sinking of its tankers and the sustained US pressure.
- **Iran's options:** Iran retains a range of escalatory options it has threatened – blocking all Gulf oil exports, striking Gulf energy infrastructure, targeting the interests of Gulf states aligning with the US, and attacking US bases or Israel; Ghalibaf's declaration raises the risk that Iran may now act on one or more of these.
- **The mediation overtaken:** The mediators' push for a cessation – Qatar, Pakistan and Oman – is now being overtaken by the escalation; while Iran's conditional offer to reciprocate if Washington honours its June commitments nominally stands, the hardening rhetoric and the escalating exchange leave little immediate space for the diplomacy.

WS Assessment: Iran's declaration that the era of proportionate responses is over is the most ominous signal of this phase: it raises the risk of a disproportionate Iranian escalation, potentially against Gulf states including the UAE. Clients should treat the threat of a larger Iranian strike as elevated, hold high readiness, and watch closely for any Iranian escalation.

4. THE UAE; THE REGIONAL PICTURE

- **No new attack on the UAE:** There has been no new attack on the UAE in the latest period, beyond the intercepted drone of a week ago; there is no confirmed new damaging strike on UAE territory, ports or infrastructure, and no casualties in the UAE – the UAE has not been struck again as the exchange has escalated at sea.
- **But the danger is rising:** The danger to the UAE is rising: Iran's declaration that proportionate responses are over raises the risk of a disproportionate Iranian strike, potentially against Gulf states; the US "shadow fleet" policy could prompt an Iranian response against Gulf oil infrastructure; and the UAE remains exposed as a host of US forces.
- **The oil-infrastructure risk:** The direct US targeting of Iran's oil-export fleet raises the risk that Iran retaliates against Gulf oil infrastructure – a risk of direct concern to the UAE, a major oil exporter; Iran's standing threat to block all Gulf oil exports and to strike Gulf energy infrastructure is given added weight by the escalation.
- **US security posture:** US security alerts for the region, warning of the potential for unforeseen escalation and urging heightened vigilance amid possible flight cancellations and airspace closures, remain in force; the threat environment across the Gulf is heightened, and clients should hold high readiness.
- **The regional fronts:** Israel is bracing for a possible Iranian attack during the Jewish holidays, the Houthi campaign against Saudi shipping continues, and the US blockade remains in force; the regional fronts remain active, and a disproportionate Iranian escalation could widen the arena sharply.

WS Assessment: The absence of a new attack on the UAE is a modest relief, but the danger to the UAE is rising given Iran's beyond-proportionate threat, the US attacks on Iran's oil fleet, and the risk of an Iranian strike on Gulf oil infrastructure. Clients should hold high readiness and watch closely for any Iranian escalation, particularly against Gulf energy targets.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait and Gulf of Oman a strike zone:** The Strait and the Gulf of Oman are now an active strike zone: Iran has fired on US warships, the US has struck and sunk Iranian tankers, and the waterway is mined and blockaded; transit is acutely dangerous, and the direct US targeting of Iran's oil fleet adds a new dimension of risk.
- **Oil elevated:** Oil prices, which surged to near $97 last week, remain elevated on the escalation; the sinking of Iranian tankers and the risk of an Iranian response against Gulf oil infrastructure keep the risk premium high, and a disproportionate Iranian escalation would drive prices higher still.
- **Iran's oil fleet targeted:** The US targeting of Iran's shadow oil fleet – the tankers that carry Iranian crude, mainly to Asia, in defiance of the blockade – directly attacks Iran's remaining oil-export capacity, and raises the stakes of the confrontation for global oil supply and for Iran's economy.
- **The blockade and regional fronts:** The US naval blockade remains in force, now reinforced by the direct strikes on Iran's tankers; the Houthi campaign against Saudi shipping continues, and Israel is bracing for an Iranian attack – the regional fronts remain active as the exchange escalates.
- **UAE approaches:** There is no damage to UAE territory or to shipping in UAE waters; vessels remain anchored off the UAE's east coast at Khor Fakkan. UAE-linked operators should treat the Strait and the Gulf of Oman as an active strike zone and suspend all transits.

WS Assessment: The Strait and Gulf of Oman are an active strike zone, with the US now sinking Iranian tankers and oil elevated; the danger to shipping is acute, and the risk to Gulf oil infrastructure is rising. For UAE-linked operators, all Strait transits should remain suspended pending a durable de-escalation.

6. DUBAI AND THE UAE

Operational Picture

- **The exchange escalates at sea – the danger rising, but no new damaging strike on UAE territory.** The plateau has broken into a direct naval confrontation, the US is sinking Iran's oil tankers, and Iran has signalled it may escalate beyond proportionate responses. There has been no new attack on the UAE in the latest period, and no new damaging strike on UAE territory, ports or infrastructure. But the danger to the UAE is rising, and Iran's threat to Gulf oil infrastructure is given added weight.
- **COMPLETE DEPARTURES NOW – THE DANGER IS RISING.** With airports operating, complete any deferred non-essential departure on scheduled commercial flights without delay. The exchange is escalating and Iran has threatened to abandon proportionality; completing departures now is a priority, and the window should not be assumed to remain open.
- **HOLD READINESS AT A HIGH LEVEL – WATCH FOR A DISPROPORTIONATE IRANIAN RESPONSE.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; Iran has signalled it may escalate disproportionately, potentially against Gulf states. Review shelter locations and NCEMA guidance, keep go-bags current, and be prepared to shelter promptly on any alert. The UAE hosts US forces at Al Dhafra.
- **Protect energy and water resilience.** The US attacks on Iran's oil fleet raise the risk of an Iranian response against Gulf oil and energy infrastructure. Keep water, fuel and generator contingencies ready; UAE strategic water reserves are reported at roughly two days at current consumption, and Iran's threats to Gulf energy make resilience a priority.
- **Shipping: SUSPEND ALL STRAIT TRANSITS – THE STRAIT AND GULF OF OMAN ARE AN ACTIVE STRIKE ZONE.** Iran has fired on US warships, the US has struck and sunk Iranian tankers, and the Strait is mined and blockaded. Suspend all transits, hold vessels clear of the Strait, the Gulf of Oman and the Bab al-Mandeb, and treat the area as an active strike zone until a durable de-escalation is confirmed.
- **Review Iran-related sanctions exposure.** Review exposure to Iran-related sanctions risk through exchange houses, trade finance, shipping and re-export, and watch for new designations given the escalation; consult qualified counsel. This is not legal advice.

Return Guidance: MAXIMUM Held, High Readiness – the Plateau Broken, the Danger Rising

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The plateau has broken into a direct naval confrontation, the US is sinking Iran's oil tankers, and Iran has signalled it may escalate beyond proportionate responses; the danger is rising. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch for a disproportionate Iranian response.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE; the exchange is escalating and Iran has threatened to abandon proportionality – this is not a setting for returns.
- **Non-essential personnel – COMPLETE DEPARTURES NOW:** Use the open airports to finish any deferred departures without delay, on scheduled commercial flights; do not assume the window remains open as the exchange escalates.
- **Essential personnel – high readiness:** Maintain shelter-in-place and evacuation readiness at a high level, review shelter locations, keep documentation and go-bags current, and monitor for a disproportionate Iranian response, any attack on the UAE or Gulf oil infrastructure, a US strike on Kharg, and any further widening of the exchange.
- **Business/compliance clients:** Review exposure given the direct sanctions, the standing threat, and the escalation; consult qualified counsel. This is not legal advice.
- **De-escalation path (MAXIMUM → HIGH):** A confirmed cessation of the strikes, the lifting of the US blockade, a confirmed de-escalation or ceasefire, and a genuine reopening of the Strait with verified safe passage would allow the alert to come down. The escalation and

Iran's hardening rhetoric have set this back sharply; Westminster Security is ready to lower the alert to HIGH promptly once a durable de-escalation is confirmed, but the immediate trajectory is toward wider conflict.

- **Further escalation – the central risk:** A disproportionate Iranian strike, an Iranian move against Gulf oil infrastructure or exports, a damaging strike on UAE territory, a US strike on Kharg, or an Iranian attack on Israel would deepen the emergency; Westminster Security will issue immediate updates.
- **Standing posture:** MAXIMUM, high readiness – the plateau broken, the exchange escalating at sea, Iran threatening to abandon proportionality; protect people first, complete departures now, hold high readiness, suspend all Strait transits, and protect energy and water resilience.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – the plateau breaks, the exchange escalates.** Iran fired ballistic missiles at two US Navy warships (Saturday, which evaded them), and the US retaliated by striking three Iranian oil tankers – disabling two (off Kharg, near Jask) and sinking a third (the M/T Kylo) – under a new "shadow fleet" policy. Iran's rhetoric hardens: Ghalibaf says "the era of 'proportionate responses' is over." There is no new damaging strike on UAE territory, but the danger is rising.
- **WATCH FOR A DISPROPORTIONATE IRANIAN RESPONSE.** Iran has signalled it may abandon proportionality and escalate disproportionately, potentially against Gulf states or Gulf oil infrastructure. Treat the threat of a larger Iranian strike as elevated, hold high readiness, and watch closely.
- **PROTECT ENERGY AND WATER RESILIENCE.** The US attacks on Iran's oil fleet raise the risk of an Iranian response against Gulf oil and energy infrastructure. Keep water, fuel and generator contingencies ready and protect energy resilience.
- **COMPLETE DEPARTURES NOW; SUSPEND ALL STRAIT TRANSITS.** Complete deferred non-essential departures on scheduled flights without delay, and do not assume the window remains open. The Strait and Gulf of Oman are an active strike zone; suspend all transits until a durable de-escalation is confirmed.
- **THE MEDIATION IS BEING OVERTAKEN – BUT REMAINS THE PATH OUT.** The mediators' push for a cessation is being overtaken by the escalation, though Iran's conditional offer nominally stands. Watch whether the mediation can regain traction before the cycle escalates further.
- **Monitor for:** (1) a disproportionate Iranian strike; (2) any attack on the UAE or Gulf oil infrastructure; (3) a US strike on Kharg; (4) an Iranian attack on Israel; (5) any confirmed cessation.
- **The plateau has broken – emergency updates to follow.** Westminster Security will issue immediate updates on any disproportionate Iranian strike, any attack on the UAE or Gulf oil infrastructure, any strike on Kharg, or any major development, and will lower the alert to HIGH only once a durable de-escalation is confirmed and safe passage verified.
- **This is the one hundred and seventy-eighth edition.** Day 191 of the war.

8. KEY POINTS

- **THE PLATEAU BREAKS – A DIRECT NAVAL CONFRONTATION.** The tentative plateau flagged yesterday has proved premature. On Saturday, Iran fired ballistic missiles at two US Navy warships (a carrier and a destroyer), which evaded the attacks; the US retaliated by striking three Iranian oil tankers, disabling two and sinking a third (the M/T Kylo) in the Gulf of Oman. The exchange has escalated into a direct naval confrontation.
- **THE US SINKS IRANIAN OIL TANKERS – THE "SHADOW FLEET" POLICY.** The US struck three Iranian crude oil tankers under a new policy of destroying Iran's "shadow oil fleet" to impose higher economic costs; CENTCOM warned that if Iran shoots at two US ships, it will take out three of Iran's. The sinking of the M/T Kylo is one of the most significant actions against Iran's oil infrastructure in decades, directly attacking Iran's oil-export lifeline.
- **IRAN'S RHETORIC HARDENS – "THE ERA OF PROPORTIONATE RESPONSES IS OVER."** Iran's parliament speaker Ghalibaf declared that "the era of 'proportionate responses' is over," and Iran warned of a stronger response – an ominous signal that Iran may abandon tit-for-tat and escalate disproportionately, potentially against Gulf states including the UAE. The mediators' push for a cessation is being overtaken by the escalation.
- **NO NEW DAMAGING STRIKE ON UAE TERRITORY – BUT THE DANGER RISES.** There has been no new attack on the UAE in the latest period, and no new damaging strike on UAE territory, ports or infrastructure. But Iran's beyond-proportionate threat raises the risk of a disproportionate strike, the US attacks on Iran's oil fleet raise the risk of an Iranian response against Gulf oil infrastructure, and the UAE remains exposed. The danger is rising; hold high readiness and protect energy resilience.
- **THE STRAIT AND GULF OF OMAN AN ACTIVE STRIKE ZONE; OIL ELEVATED.** Iran has fired on US warships, the US has struck and sunk Iranian tankers, and the waterway is mined and blockaded – the Strait and Gulf of Oman are an active strike zone. Oil remains elevated near recent highs, and a disproportionate Iranian escalation or a strike on Gulf oil infrastructure would drive prices higher. Suspend all Strait transits until a durable de-escalation is confirmed.
- **MAXIMUM HELD, HIGH READINESS – NO NEW DAMAGING STRIKE ON UAE TERRITORY. ONE HUNDRED AND SEVENTY-EIGHTH EDITION. DAY 191.** The plateau has broken, the exchange has escalated into a direct naval confrontation, and Iran has threatened to abandon proportionality – the danger is rising. Both phases remain suspended; complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, review sanctions exposure, and watch for a disproportionate Iranian response. Westminster Security will lower the alert to HIGH only once a durable de-escalation is confirmed.

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IRAN'S RHETORIC HAS HARDENED SHARPLY – PARLIAMENT SPEAKER GHALIBAF DECLARED "THE ERA OF 'PROPORTIONATE RESPONSES' IS OVER," AND IRAN WARNED OF A STRONGER RESPONSE – AN OMINOUS SIGNAL IT MAY ESCALATE DISPROPORTIONATELY, POTENTIALLY AGAINST GULF STATES INCLUDING THE UAE. THERE IS NO CONFIRMED NEW DAMAGING STRIKE ON UAE TERRITORY, AND NO NEW ATTACK IN THE LATEST PERIOD, BUT THE DANGER IS RISING. MAXIMUM ALERT HELD, HIGH READINESS – COMPLETE DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL STRAIT TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

WATCH FOR A DISPROPORTIONATE IRANIAN RESPONSE – PARTICULARLY AGAINST GULF OIL INFRASTRUCTURE OR GULF STATES; THE US "SHADOW FLEET" POLICY DIRECTLY ATTACKS IRAN'S OIL-EXPORT LIFELINE. THE MEDIATION IS BEING OVERTAKEN BY THE ESCALATION. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND SEVENTY-EIGHTH EDITION. DAY 191.