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DAY 204 – THE AMBIVALENCE CONTINUES, WITH A UN GENERAL ASSEMBLY OPENING: TRUMP'S "ANNIHILATION" WEIGHING PERSISTS AND TWO MORE SHIPS ARE ATTACKED IN THE STRAIT (BLOCKADE NOW 105 VESSELS REDIRECTED, NEW US SANCTIONS) – BUT THE US HAS GRANTED VISAS FOR IRAN'S LEADERSHIP (PEZESHKIAN AND ARAGHCHI) TO ATTEND NEXT WEEK'S UNGA IN NEW YORK, A POTENTIAL DIPLOMATIC VENUE. THE STRAIT STAYS SHUT; THE YEMEN FIGHTING RAGES. THE IRAN-UAE THAW STANDS – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE AMBIVALENT, MIXED PICTURE OF RECENT DAYS HAS CONTINUED, WITH PRESIDENT TRUMP'S HARDER TONE PERSISTING EVEN AS A POTENTIAL DIPLOMATIC VENUE HAS OPENED; THE STRAIT REMAINS SHUT AND THE ALERT REMAINS AT MAXIMUM. President Trump has continued to say his next move could be to "annihilate" the Iranian regime, two more ships have been attacked in the Strait of Hormuz, the US blockade has now redirected 105 commercial vessels, and the US has imposed further sanctions. But, in a notable opening, the US has granted visas for Iran's leadership – President Pezeshkian and Foreign Minister Araghchi – to attend next week's UN General Assembly in New York, keeping a diplomatic channel open, and the easing threads of recent days – the fall in oil, the Saudi rerouting via Oman's Sohar port, the proposed Saudi-Houthi truce – continue. The Strait remains effectively shut, and the Yemen fighting rages, with heavy casualties. The Iran-UAE thaw stands. There is NO CONFIRMED STRIKE on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period. Westminster Security MAINTAINS MAXIMUM ALERT, keeps both phases suspended, holds readiness at a high level, and advises clients to complete departures, protect energy and water resilience, and suspend all Strait transits.

⚖ **MIXED SIGNALS:** THE SIGNALS REMAIN MIXED – A UNGA OPENING AGAINST A PERSISTENT HARDER TONE. The picture remains genuinely ambivalent. On the opening side: the US has granted visas for Iran's president and foreign minister to attend next week's UN General Assembly in New York – a notable step given the war, and a potential venue for informal contacts, as the UN has historically been for US-Iran diplomacy; and the easing threads of recent days – oil down to around $104, the Saudi rerouting via Sohar, the proposed Saudi-Houthi truce, the Houthi pledge, and the Iran-UAE thaw – continue. On the harder side: President Trump's weighing of whether to "annihilate" Iran persists; two more ships have been attacked in the Strait; the US blockade continues, with 105 vessels redirected, and further sanctions have been imposed; and the Yemen fighting rages, with dozens killed on both sides. The net picture is one of continued ambivalence, with the UN General Assembly next week a potential inflection point but no sign yet of an imminent settlement.

⚠ **ASSESSMENT:** THE UNGA IS A VENUE, NOT A BREAKTHROUGH – THE ALERT STAYS AT MAXIMUM. The granting of visas for Iran's leadership to attend the UN General Assembly is a genuine and notable development, and the UNGA next week may provide a venue for informal US-Iran contacts that could advance a de-escalation. But it should not be over-read: the US has stressed there is no sign that agreements to reopen the Strait or return to talks are close, the Iranian delegation is under travel restrictions, and the underlying reality is unchanged – the Strait remains shut, the blockade persists, Iran and the US remain apart on terms, and President Trump is simultaneously weighing whether to "annihilate" Iran. The UNGA is a venue, not a breakthrough. The easing threads and the Iran-UAE thaw remain favourable for the UAE, but the harder tone, the persistent blockade, and the rogue-hardliner risk keep the danger elevated. For UAE clients, the posture remains MAXIMUM with high readiness. There is NO CONFIRMED STRIKE on UAE territory.

1. SITUATION SUMMARY: DAY 204 – THE AMBIVALENCE CONTINUES; A UNGA OPENING

The ambivalent, mixed picture of recent days has continued, with President Trump's harder tone persisting even as a potential diplomatic venue has opened at the UN General Assembly; the Strait remains effectively shut and the alert remains at MAXIMUM. On the harder side, President Trump has continued to say his next move could be to annihilate the Iranian regime; two more ships have been attacked in the Strait of Hormuz; the US naval blockade has now redirected 105 commercial vessels heading into or out of Iranian ports; the US has imposed further sanctions, on an Iranian cryptocurrency exchange accused of processing payments for safe passage through the Strait; and Russia and China have ended a UN Security Council mandate for the independent monitoring of sanctions on Iran. But in a notable opening, the US State Department has granted visas for Iran's leadership – President Pezeshkian and Foreign Minister Araghchi – to attend next week's UN General Assembly high-level meeting in New York, even as the two countries are at war, keeping a diplomatic channel open; and the easing threads of recent days – oil down to around $104, the Saudi rerouting of oil via Oman's Sohar port, the proposed two-week Saudi-Houthi truce, the Houthi pledge not to target non-Saudi commercial vessels, and the Iran-UAE thaw – continue. The Strait remains effectively shut, and the Yemen fighting rages, with dozens of government soldiers and Houthi fighters reported killed. There is no confirmed strike on UAE territory, ports or infrastructure, and no new attack near the UAE in the latest period. Westminster Security MAINTAINS MAXIMUM ALERT with readiness at a high level, keeps both phases suspended, and advises clients to complete departures, protect energy and water resilience, and suspend all Strait transits.

Where Things Stand

Element	Status (as of 0900 GMT Saturday 19 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The ambivalence continues; the Strait stays shut. Complete departures; high readiness; suspend all Strait transits.
UNGA opening	**IRAN'S LEADERSHIP TO ATTEND.** The US grants visas for Pezeshkian and Araghchi to attend next week's UN General Assembly in New York – a potential venue for informal contacts.
Trump tone	**STILL WEIGHS "ANNIHILATION."** Trump continues to say his next move could be to "annihilate" the regime. The harder tone persists.
Strait of Hormuz	**STILL SHUT.** Two more ships attacked; the blockade has redirected 105 vessels; new US sanctions. Iran asserts control.
Easing threads	Oil ~$104, the Saudi rerouting via Sohar, the proposed Saudi-Houthi truce, the Houthi pledge, and the Iran-UAE thaw all continue.
Yemen front	**FIGHTING RAGES.** Dozens of government soldiers and Houthi fighters reported killed; the Houthis hold/threaten Bab el-Mandeb; Saudi Red Sea exports suffer. A truce is proposed.
UAE territory	**NO CONFIRMED STRIKE.** No confirmed strike on UAE soil, ports or infrastructure; no new attack near the UAE. The Iran-UAE thaw stands. Airports open.

WS Assessment: The signals remain mixed – a UN General Assembly opening and the continuing easing threads against a persistent harder Trump tone, a shut Strait, and raging Yemen fighting. The UNGA next week is a potential venue for informal contacts, but a venue, not a breakthrough. The alert stays at MAXIMUM with high readiness; clients should watch the UNGA and the easing threads while holding posture, and guard against the harder tone and a rogue escalation.

2. A UN GENERAL ASSEMBLY OPENING – IRAN'S LEADERSHIP TO ATTEND IN NEW YORK

- **The visas granted:** The US State Department has approved visas for Iran's core delegation – President Pezeshkian and Foreign Minister Araghchi – to attend next week's UN General Assembly high-level meeting in New York, even as the two countries are at war; the decision keeps a diplomatic channel open and places Iran's leadership in the same city as the US administration and the world's leaders.
- **A potential venue for contacts:** The UN General Assembly has historically served as a venue for informal US-Iran contacts and back-channel diplomacy, and Iran's leadership being in New York next week, amid the warming and ambivalent diplomatic climate, offers a potential opportunity for contacts that could advance a de-escalation, whether through mediators or directly.
- **But under restrictions, and no breakthrough signalled:** The opening should not be over-read: the US has stressed there is no sign that agreements to reopen the Strait or return to talks on Iran's nuclear program are close; the Iranian delegation is smaller than last year and under travel restrictions in New York; and the visa approval is a routine, if notable, obligation rather than a signal of imminent settlement.
- **A channel kept open:** Nonetheless, the granting of visas, at a time when President Trump is simultaneously weighing whether to annihilate Iran, indicates that the US is keeping a diplomatic channel open alongside its military pressure; the UNGA is a potential inflection point, and clients should watch closely for any contacts or signals during the high-level week.
- **Iran's position:** Iran has continued to condition any reopening of the Strait and any return to talks on the lifting of the US blockade and the end of the war, and a senior Iranian official has rejected talks unless these conditions are met; the UNGA may provide a venue to explore these positions, but the gap between the parties remains real.

WS Assessment: The UN General Assembly next week, with Iran's leadership in New York, is a genuine and notable potential venue for informal US-Iran contacts, and a possible inflection point in the diplomacy; but it is a venue, not a breakthrough, and no settlement is signalled. Clients should watch the high-level week closely while holding posture.

3. BUT THE HARDER TONE PERSISTS – "ANNIHILATION" WEIGHED, SHIPS ATTACKED, THE STRAIT SHUT

- **"Annihilation" still weighed:** President Trump has continued to say his next move could be to annihilate the Iranian regime; the harder tone of recent days persists, alongside his claim to control the Strait and his assessment that the US will win, and stands in contrast to the diplomatic opening at the UN General Assembly – a continuation of his shifting signals.
- **Two more ships attacked:** Two more ships have been attacked in the Strait of Hormuz, following the IRGC's strike on a Togo-flagged tanker attempting passage; the waters of the Strait remain hostile, and Iran continues to assert that no vessel may pass without its permission, with a further security incident reported near Oman's Khasab.
- **The blockade continues; new sanctions:** The US naval blockade has now redirected 105 commercial vessels heading into or out of Iranian ports, and the US has imposed further sanctions, on an Iranian cryptocurrency exchange accused of processing payments for safe passage through the Strait; the economic-military pressure on Iran continues, alongside the diplomatic opening.
- **Russia and China act at the UN:** Russia and China have ended a UN Security Council mandate for the independent monitoring of sanctions on Iran, reviving their argument that UN measures on Tehran had been removed under the nuclear deal; the move, favouring Iran, underlines the great-power dimension of the confrontation and the diplomatic manoeuvring around it.
- **The underlying reality unchanged:** Beneath the mixed signals, the underlying reality is unchanged: the Strait remains effectively shut, the blockade persists, Iran and the US remain apart on terms, and no reopening or agreement has been reached; the UNGA opening and the harder tone alike are set against a static core picture.

WS Assessment: The harder tone – President Trump's weighing of annihilation, the ship attacks, the continuing blockade and sanctions – persists alongside the diplomatic opening, and the underlying reality of a shut Strait is unchanged. Clients should disregard the swings in President Trump's tone, watch the UNGA, and hold posture until the Strait reopens and a durable de-escalation is confirmed.

4. THE YEMEN FRONT; THE UAE; THE REGIONAL PICTURE

- **The Yemen fighting rages:** The Yemen fighting rages, with dozens of government soldiers and Houthi fighters reported killed in missile and drone attacks and Saudi airstrikes; the Houthis hold their gains on the Red Sea coast and threaten the Bab el-Mandeb, and Saudi Red Sea oil exports continue to suffer, though Saudi Arabia has proposed a two-week truce with the Houthis, to be followed by direct talks.
- **No confirmed strike on UAE territory:** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack in the waters near the UAE in the latest period; the ships attacked in the latest period were in the Strait and near Oman, not near the UAE, and the Gulf tanker war remains at a lower intensity.
- **The UAE's favourable threads hold:** The Iran-UAE thaw, the Houthi pledge not to target non-Saudi commercial vessels, and the UAE's Fujairah export route stand, and the UNGA opening and the easing threads further ease the regional picture; the UAE remains in a relatively favourable position, though the harder tone and the core blockade keep the danger elevated.
- **The risk of a US escalation:** President Trump's continued weighing of whether to annihilate Iran is a reminder that a US escalation remains possible, which would raise the risk to the Gulf states, including the UAE, that host US forces; the harder tone, while likely a negotiating posture alongside the UNGA opening, cannot be discounted, and readiness must be maintained.
- **US security posture:** US security alerts for the region remain in force, and the threat environment across the Gulf remains heightened; the UAE hosts US forces at Al Dhafra, and the Gulf states hosting US forces remain exposed to Iranian retaliation, including a rogue hardliner attack, should the diplomacy fail or the US escalate. Clients should hold high readiness and protect energy resilience.

WS Assessment: The UAE remains in a relatively favourable position – not struck, its shipping spared by the Houthi pledge, its thaw with Iran a positive, its Fujairah exports insulating it, and the UNGA opening and the easing threads easing the regional picture. But the raging Yemen fighting, the harder Trump tone, the core blockade, and the rogue-hardliner risk keep the danger elevated. Clients should hold high readiness and watch both the UNGA and the risk of a US escalation.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait still shut, easing elsewhere:** The Strait of Hormuz remains effectively shut, with two more ships attacked and the blockade redirecting 105 vessels; but easing continues elsewhere – oil around $104, the Saudi rerouting via Oman's Sohar port, the Houthi pledge narrowing the Red Sea threat, and the proposed Saudi-Houthi truce – so the maritime picture is easing at the margins while the core route remains closed.
- **Oil around $104:** Oil remains around $104 a barrel, eased from recent highs above $107 on the Saudi rerouting and the easing of supply-gap fears; a reopening of the Strait, or progress at the UNGA, would ease prices further, while a US escalation or a reversal would drive them higher.
- **Gulf producers bypassing the Strait:** Gulf producers continue to bypass the blockaded Strait – the UAE through Fujairah, Saudi Arabia through Oman's Sohar port and the resuming East-West pipeline – easing the impact of the closure on the region's oil exports, though the Strait remains the primary route and its closure keeps prices elevated.
- **The Yemen front and the Red Sea:** The Yemen fighting rages and the Houthis threaten the Bab el-Mandeb, with Saudi Red Sea exports suffering; the proposed Saudi-Houthi truce, if agreed, would ease the Red Sea route, but for now the second maritime front remains disrupted.
- **UAE approaches:** There is no confirmed damaging strike on UAE territory or ports, and no new attack near the UAE; vessels remain anchored off the UAE's east coast at Khor Fakkan, and the UAE's Fujairah ports continue to export oil bypassing the Strait. UAE-linked operators should continue to suspend all Strait transits pending a confirmed reopening.

WS Assessment: The maritime and energy picture is easing at the margins – oil around $104, Gulf producers bypassing the Strait, the Red Sea threat possibly easing with the proposed truce – but the Strait itself remains shut and hostile. For UAE-linked operators, all Strait transits should remain suspended pending a confirmed reopening with verified safe passage.

6. DUBAI AND THE UAE

Operational Picture

- **The ambivalence continues – but the UAE's threads hold, and no confirmed strike on UAE territory.** President Trump continues to weigh whether to annihilate Iran even as the US grants visas for Iran's leadership to attend the UNGA; the Strait remains shut. There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE. The Iran-UAE thaw, the Houthi pledge, and the Fujairah route keep the UAE in a relatively favourable position, but the harder tone keeps the danger elevated.
- **COMPLETE DEPARTURES NOW – THE PICTURE IS AMBIVALENT AND A US ESCALATION IS POSSIBLE.** With airports operating and the Gulf tanker war quieter, complete any deferred non-essential departure on scheduled commercial flights without delay. The picture is ambivalent, the Strait remains shut, and President Trump's weighing of a major escalation cannot be discounted; completing departures now, while the window is open, remains prudent.
- **HOLD READINESS AT A HIGH LEVEL – A US ESCALATION OR A ROGUE ATTACK REMAINS POSSIBLE.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; President Trump's harder tone and the rogue-hardliner risk mean a US escalation or a rogue attack cannot be discounted. 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 Strait remains shut, though oil has eased and Gulf producers are bypassing the Strait. Protect energy resilience; keep water, fuel and generator contingencies ready; the UAE's Fujairah exports provide a degree of insulation.
- **Shipping: SUSPEND ALL STRAIT TRANSITS – THE STRAIT REMAINS SHUT AND HOSTILE.** Despite the easing elsewhere, the Strait of Hormuz remains effectively shut, with two more ships attacked. Suspend all transits through the Strait, hold vessels clear of the Strait and the waters near the UAE, and treat the Strait as shut until a confirmed reopening with verified safe passage is in place.
- **Watch the UNGA; build on the UAE's favourable threads.** The UN General Assembly next week is a potential venue for US-Iran contacts and a possible inflection point; watch it closely. The Iran-UAE thaw, the Houthi pledge, and the Fujairah route keep the UAE favourably placed; build on them while holding posture until the Strait reopens and a durable de-escalation is confirmed.

Return Guidance: MAXIMUM Held, High Readiness – the Ambivalence Continuing, a UNGA Opening

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The ambivalence continues – President Trump weighing a major escalation even as the US grants visas for Iran's leadership to attend the UNGA – and the Strait remains shut. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch the UNGA and the risk of a US escalation.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed reopening are in place; an ambivalent picture with the Strait still shut is not a settlement.
- **Non-essential personnel – COMPLETE DEPARTURES NOW:** Use the open airports and the quieter period to finish any deferred departures without delay, on scheduled commercial flights; do not assume the picture will resolve favourably.
- **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 the UN General Assembly, whether the Strait reopens, the proposed Saudi-Houthi truce, the Iran-UAE thaw, a US escalation, a rogue hardliner attack, and any strike toward UAE territory.

- **Business/compliance clients:** Review exposure given the US sanctions campaign, including the new designations, the standing threat, and the escalation; consult qualified counsel. This is not legal advice.
- **De-escalation path (MAXIMUM → HIGH):** Progress at the UN General Assembly, a reopening of the Strait, the lifting of the US blockade, a confirmed ceasefire, an agreed Saudi-Houthi truce, and a durable de-escalation with verified safe passage would allow the alert to come down. The UNGA is a potential venue and the easing threads are encouraging, but the harder tone and the shut Strait keep this from being met; Westminster Security is ready to lower the alert to HIGH promptly once a durable de-escalation and a confirmed reopening are in place.
- **Further escalation – the central risk:** A US escalation, a rogue hardliner attack, a collapse of the diplomacy, a strike on UAE territory, or an Iranian attack on Israel would deepen the emergency; Westminster Security will issue immediate updates.
- **Standing posture:** MAXIMUM, high readiness – the ambivalence continuing, the Strait still shut, a US escalation possible, a UNGA opening next week, but the easing threads and the UAE's favourable position holding; protect people first, complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch the UNGA.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – the ambivalence continues, with a UNGA opening.** President Trump continues to weigh whether to "annihilate" Iran, two more ships are attacked in the Strait, and the blockade continues – but the US has granted visas for Iran's leadership (Pezeshkian and Araghchi) to attend next week's UN General Assembly in New York, a potential diplomatic venue, and the easing threads continue. The Strait stays shut; the Yemen fighting rages. The Iran-UAE thaw stands. There is no confirmed strike on UAE territory.
- **WATCH THE UN GENERAL ASSEMBLY – A POTENTIAL VENUE, NOT A BREAKTHROUGH.** Iran's leadership in New York next week is a potential venue for informal US-Iran contacts and a possible inflection point; but no settlement is signalled, and the delegation is under restrictions. Watch the high-level week closely while holding posture.
- **DISREGARD THE SWINGS IN TRUMP'S TONE – FOCUS ON THE UNDERLYING REALITY.** Trump's continued weighing of annihilation, alongside the UNGA opening, confirms his signals are mixed and unreliable. Disregard the swings and focus on the underlying reality – the shut Strait, the persistent blockade – which has not changed.
- **BUILD ON THE UAE'S FAVOURABLE THREADS.** The Iran-UAE thaw, the Houthi pledge sparing UAE shipping, the Fujairah route, and the easing threads keep the UAE in a relatively favourable position. Build on them.
- **GUARD AGAINST A US ESCALATION OR A ROGUE ATTACK.** Trump's weighing of annihilation and the rogue-hardliner risk mean a US escalation or a rogue attack cannot be discounted. Hold high readiness and guard against both.
- **Monitor for:** (1) the UN General Assembly and any US-Iran contacts; (2) whether the Strait reopens or a US escalation occurs; (3) the proposed Saudi-Houthi truce and the Iran-UAE thaw; (4) a rogue hardliner attack; (5) any strike on UAE territory; (6) an Iranian attack on Israel.
- **The ambivalence continues – emergency updates to follow.** Westminster Security will issue immediate updates on any development at the UNGA, any reopening of the Strait, any US escalation, any strike on UAE territory, or any major development, and will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.
- **This is the one hundred and ninety-first edition.** Day 204 of the war.

8. KEY POINTS

- **A UN GENERAL ASSEMBLY OPENING – IRAN'S LEADERSHIP TO ATTEND IN NEW YORK.** The US has granted visas for Iran's president and foreign minister to attend next week's UN General Assembly in New York, even as the two are at war, keeping a diplomatic channel open and providing a potential venue for informal US-Iran contacts. But the US stresses no agreements to reopen the Strait or return to talks are close, and the delegation is under restrictions. The UNGA is a venue, not a breakthrough.
- **BUT THE HARDER TONE PERSISTS – "ANNIHILATION" WEIGHED, SHIPS ATTACKED.** President Trump continues to say his next move could be to "annihilate" the Iranian regime; two more ships have been attacked in the Strait; the blockade has redirected 105 vessels; the US has imposed further sanctions; and Russia and China have ended a UN sanctions-monitoring mandate. The picture remains genuinely ambivalent, with the harder tone set against the UNGA opening.
- **THE STRAIT STAYS SHUT; THE YEMEN FIGHTING RAGES.** The Strait of Hormuz remains effectively shut, and the underlying reality – the blockade, the parties apart on terms – is unchanged. The Yemen fighting rages, with dozens killed on both sides; the Houthis threaten the Bab el-Mandeb and Saudi Red Sea exports suffer, though Saudi Arabia has proposed a two-week truce. The easing threads – oil ~$104, the Sohar rerouting, the Houthi pledge – continue.
- **THE UAE'S POSITION REMAINS FAVOURABLE.** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE; the ships attacked were in the Strait and near Oman, not near the UAE. The Iran-UAE thaw, the Houthi pledge sparing UAE shipping, and the Fujairah route keep the UAE in a relatively favourable position. But the harder tone and the rogue-hardliner risk keep the danger elevated. Hold high readiness.
- **GUARD AGAINST A US ESCALATION OR A ROGUE ATTACK.** President Trump's continued weighing of whether to "annihilate" Iran, while likely a negotiating posture alongside the UNGA opening, cannot be discounted, and the rogue-hardliner risk persists; a US escalation or a rogue attack would raise the risk to the Gulf states, including the UAE. Guard against both, hold high readiness, and protect energy resilience.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND NINETY-FIRST EDITION. DAY 204.** The ambivalence continues – a UNGA opening and easing threads against a harder Trump tone and a shut Strait – but no UAE territory has been struck. Both phases remain suspended; complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch the UN General Assembly next week. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 19th September 2026 – Information current as of 09:00 GMT

THE AMBIVALENT PICTURE CONTINUES. PRESIDENT TRUMP'S HARDER TONE PERSISTS – HE CONTINUES TO SAY HIS NEXT MOVE COULD BE TO "ANNIHILATE" THE IRANIAN REGIME, TWO MORE SHIPS ARE ATTACKED IN THE STRAIT, THE BLOCKADE HAS REDIRECTED 105 VESSELS, AND NEW US SANCTIONS ARE IMPOSED. BUT THE US HAS GRANTED VISAS FOR IRAN'S LEADERSHIP (PEZESHKIAN AND ARAGHCHI) TO ATTEND NEXT WEEK'S UN GENERAL ASSEMBLY IN NEW YORK – A POTENTIAL VENUE FOR INFORMAL CONTACTS – AND THE EASING THREADS (OIL ~$104, THE SAUDI REROUTING VIA SOHAR, THE PROPOSED SAUDI-HOUTHI TRUCE) CONTINUE.

THE UNGA IS A VENUE, NOT A BREAKTHROUGH – NO SETTLEMENT IS SIGNALLED, THE DELEGATION IS UNDER RESTRICTIONS, AND THE UNDERLYING REALITY IS UNCHANGED: THE STRAIT REMAINS SHUT, THE BLOCKADE PERSISTS, AND THE YEMEN FIGHTING RAGES. THERE IS NO CONFIRMED STRIKE ON UAE TERRITORY, AND NO NEW ATTACK NEAR THE UAE; THE IRAN-UAE THAW STANDS AND THE UAE'S POSITION IS FAVOURABLE. MAXIMUM ALERT HELD, HIGH READINESS – COMPLETE DEPARTURES NOW, HOLD HIGH

READINESS, SUSPEND ALL STRAIT TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

WATCH THE UN GENERAL ASSEMBLY NEXT WEEK AS A POTENTIAL INFLECTION POINT; DISREGARD THE SWINGS IN TRUMP'S TONE AND FOCUS ON THE UNDERLYING REALITY – THE SHUT STRAIT; BUILD ON THE UAE'S FAVOURABLE POSITION; AND GUARD AGAINST A US ESCALATION OR A ROGUE ATTACK. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND NINETY-FIRST EDITION. DAY 204.