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DAY 207 – THE PIVOTAL UN GENERAL ASSEMBLY DAY ARRIVES: PEZESHKIAN ADDRESSES THE ASSEMBLY TODAY, WITH A POSSIBLE TRUMP-PEZESHKIAN MEETING AND TRUMP'S MEETING WITH THE GULF LEADERS (INCLUDING THE UAE) DUE TODAY – THE DIPLOMACY COMES TO A HEAD (EVENTS PENDING AT THIS CUTOFF). OIL FELL MORE THAN 3% AS STRAIT TRAFFIC PICKED UP, BUT THE STRAIT REMAINS LARGELY CLOSED, THE HOUTHIS DECLARED A BLOCKADE ON SAUDI SHIPPING, AND TRUMP'S "ANNIHILATION" THREAT STANDS. THE IRAN-UAE THAW STANDS – NO CONFIRMED STRIKE ON UAE TERRITORY – MAXIMUM HELD, HIGH READINESS

Prepared for the CEO

Westminster Security Group Ltd

22 September 2026 (0900 GMT)

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

Classification: STRICTLY CONFIDENTIAL

⚠ **MAXIMUM ALERT:** THE PIVOTAL DAY OF THE UN GENERAL ASSEMBLY HAS ARRIVED, WITH THE DIPLOMACY COMING TO A HEAD, THOUGH THE KEY EVENTS ARE STILL PENDING AT THIS CUTOFF; THE STRAIT REMAINS LARGELY CLOSED AND THE ALERT REMAINS AT MAXIMUM. Iran's President Pezeshkian is due to address the assembly today and hold talks; a possible Trump-Pezeshkian meeting – which would be the first leader-level US-Iran contact of the war – remains under discussion, though Iran says some of Pezeshkian's delegation have been refused visas; and President Trump is due to meet the Gulf leaders, including the UAE, today to discuss the war. In a positive sign, oil fell more than 3% on Monday as tanker traffic and energy flows through the Strait picked up, though the Strait has remained largely closed. But President Trump's threat to annihilate the Iranian regime or eliminate its leadership stands; the Houthis have declared a blockade on Saudi shipping in the Bab el-Mandeb and the Red Sea, and struck Riyadh at the weekend; and no meeting or agreement has been confirmed. 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 DIPLOMACY COMES TO A HEAD TODAY – WITH EASING SIGNS, BUT THE HARDER TONE AND COMPLICATIONS PERSIST. The pivotal day of the UN General Assembly brings the diplomacy to a head, with both encouraging signs and persistent frictions. On the encouraging side: President Pezeshkian addresses the assembly today, a possible Trump-Pezeshkian meeting remains under discussion, and President Trump is due to meet the Gulf leaders, including the UAE; oil fell more than 3% on Monday as tanker traffic and energy flows through the Strait picked up, a tangible easing; and the Iran-UAE thaw and the easing threads continue. On the harder side: President Trump's threat to annihilate Iran or eliminate its leadership stands; Iran says some of Pezeshkian's delegation have been refused visas, a friction point; the Houthis have declared a formal blockade on Saudi shipping and struck Riyadh; and the Strait, while seeing some traffic pick

up, remains largely closed. The day is a genuine potential inflection point, but the outcome is unresolved at this cutoff.

⚠ **ASSESSMENT:** TODAY IS THE INFLECTION POINT – BUT THE OUTCOME IS UNRESOLVED, AND THE ALERT STAYS AT MAXIMUM. Today is the most important day of the diplomacy so far: Pezeshkian's address, a possible Trump-Pezeshkian meeting, and President Trump's meeting with the Gulf leaders could, if they go well, open a path to a de-escalation; and the more-than-3% fall in oil as Strait traffic picked up is the most tangible easing sign yet. But the outcome is unresolved at this cutoff, and the alert stays at MAXIMUM. President Trump's threat to eliminate Iran's leadership underlines that he is maintaining maximum pressure; the visa refusal for part of Pezeshkian's delegation is a friction point; the Houthi blockade declaration shows the Yemen front escalating; and the Strait remains largely closed, with no meeting or agreement confirmed. For the UAE, the Gulf leaders' meeting is a significant opportunity, and the Iran-UAE thaw is favourable; but the harder tone and Iran's warning to the Gulf 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 207 – THE PIVOTAL UN GENERAL ASSEMBLY DAY ARRIVES

The pivotal day of the UN General Assembly has arrived, with the diplomacy coming to a head, though the key events are still pending at this cutoff of 0900 GMT, early morning in New York; the Strait remains largely closed and the alert remains at MAXIMUM. Iran's President Pezeshkian is due to address the assembly today, present Iran's positions on the war, and hold talks with the leaders of several countries on the sidelines; a possible Trump-Pezeshkian meeting – which President Trump has said he would probably be willing to hold, and which would be the first leader-level US-Iran contact of the war – remains under discussion, though Iranian state media reports that some of President Pezeshkian's delegation, including his communications team, have been refused visas; and President Trump is due to meet the leaders of the six Gulf Cooperation Council states, including the UAE, today to discuss next steps for the war. In a positive sign, oil prices fell more than 3% on Monday as tanker traffic and energy flows through the Strait of Hormuz picked up, although the Strait has remained largely closed and uncertainty persists over the diplomacy. But President Trump's threat to annihilate the Iranian regime or eliminate its leadership if no deal is struck stands; the Iran-backed Houthis have declared a blockade on Saudi shipping in the Bab el-Mandeb and the Red Sea, and struck Riyadh at the weekend; and no meeting or agreement has been confirmed. The Iran-UAE thaw and the easing threads continue. 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 Tuesday 22 September)
Alert level	**MAXIMUM (held), high readiness.** Both phases suspended. The pivotal UNGA day; the Strait stays largely closed. Complete departures; high readiness; suspend all Strait transits.
UNGA today	**PEZESHKIAN ADDRESSES; TRUMP MEETS THE GCC.** Pezeshkian addresses the assembly today; a possible Trump-Pezeshkian meeting is under discussion; Trump meets the six Gulf leaders (incl. UAE) today. Events pending at this cutoff.
Oil	**FELL 3%+.** Oil fell more than 3% Monday as tanker traffic and energy flows through the Strait picked up – the most tangible easing yet. Strait still largely closed.
Visa friction	Iran says some of Pezeshkian's delegation (his communications team) were refused visas – a friction point, though the core delegation attends.

Trump tone	**"ANNIHILATION" THREAT STANDS.** Trump's threat to "annihilate" Iran or eliminate its leadership if no deal stands. Maximum pressure maintained.
Yemen front	**HOUTHI BLOCKADE DECLARED.** The Houthis have declared a blockade on Saudi shipping in Bab el-Mandeb and the Red Sea, and struck Riyadh (intercepted). The front escalates.
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: Today is the inflection point – Pezeshkian's address, a possible Trump-Pezeshkian meeting, and President Trump's meeting with the Gulf leaders – and the more-than-3% fall in oil as Strait traffic picked up is the most tangible easing sign yet; but the key events are pending at this cutoff, and the harder tone, the visa friction, and the Houthi blockade persist. The alert stays at MAXIMUM with high readiness; clients should watch today's events closely, with tomorrow's edition to capture the outcomes.

2. THE PIVOTAL UNGA DAY – PEZESHKIAN ADDRESSES, A POSSIBLE TRUMP MEETING, THE GULF LEADERS TO COORDINATE

- **Pezeshkian addresses today:** Iran's President Pezeshkian is due to address the UN General Assembly today, present Iran's positions on the war with the US and Israel, and hold talks with the leaders of several countries on the sidelines; his address, at the high-level week that runs to the end of the month, is the centrepiece of the diplomatic moment, and will be closely watched for Iran's stance.
- **A possible Trump-Pezeshkian meeting:** A possible meeting between President Trump and President Pezeshkian remains under discussion, President Trump having said he would probably be willing to hold one; such a meeting, if it occurs, would be the first leader-level US-Iran contact of the war and a potential breakthrough, though neither side has confirmed it and Iran has presented conditions for negotiations.
- **A visa friction:** Iranian state media reports that some of President Pezeshkian's delegation, including his communications team, have been refused visas by the United States; while the core delegation – President Pezeshkian and Foreign Minister Araghchi – is attending, the partial visa refusal is a friction point that underlines the difficulty of the diplomacy even as the leaders gather.
- **Trump to meet the Gulf leaders:** President Trump is due to meet the leaders of the six Gulf Cooperation Council states – Saudi Arabia, the UAE, Qatar, Bahrain, Kuwait and Oman – today on the sidelines of the assembly to discuss next steps for the war; the meeting is a significant US-Gulf coordination moment, directly relevant to the UAE, and an opportunity for the Gulf states to shape the US approach.
- **The events pending at this cutoff:** The key events – President Pezeshkian's address, a possible Trump-Pezeshkian meeting, and President Trump's meeting with the Gulf leaders – are scheduled for later today, after this cutoff of 0900 GMT, and their outcomes are therefore not yet known; the coming edition will capture them, and clients should watch today's developments closely as a potential inflection point.

WS Assessment: Today is the most important day of the diplomacy so far, and a genuine potential inflection point; but the key events are pending at this cutoff, and the outcome is unresolved. For the UAE, the Gulf leaders' meeting is a significant opportunity; clients should watch today's events closely, with the coming edition to capture the outcomes.

3. EASING SIGNS AND PERSISTENT FRICTIONS – OIL FALLS, BUT THE HARDER TONE, THE VISA REFUSAL, AND THE HOUTHI BLOCKADE

- **Oil falls more than 3%:** In the most tangible easing sign yet, oil prices fell more than 3% on Monday as tanker traffic and energy flows through the Strait of Hormuz picked up; the pick-up in traffic, if sustained, would mark a partial easing of the closure, though the Strait has remained largely closed and the pick-up is modest against the pre-war norm.
- **But the Strait remains largely closed:** Despite the pick-up in traffic and the fall in oil, the Strait remains largely closed, with Iran continuing to operate its toll system and to require permission for passage, and the core US blockade persisting; the easing is real but partial, and the Strait has not reopened.
- **The harder tone stands:** President Trump's threat to annihilate the Iranian regime or eliminate its leadership if Tehran does not strike a deal stands, and he continues to maintain maximum pressure ahead of the assembly; the harder tone persists alongside the diplomatic moment, and President Trump's dual-track approach continues.
- **The Houthi blockade declaration:** The Houthis have declared a blockade on Saudi shipping in the Bab el-Mandeb and the Red Sea, attacking Saudi-linked vessels and oil facilities inside the kingdom, and struck Riyadh at the weekend; the Yemen front is escalating, with the Houthi campaign against Saudi Arabia intensifying despite the proposed two-week truce.
- **The Saudi pipeline a factor:** Saudi Arabia's closure of the East-West oil pipeline, hit by drones more than a week ago, continues to add pressure to global oil supplies, with the kingdom working to restore it; the pipeline's status, alongside the Strait's partial easing, remains a key factor in the oil picture.

WS Assessment: The more-than-3% fall in oil as Strait traffic picked up is the most tangible easing sign yet, and encouraging; but it is set against a Strait that remains largely closed, President Trump's standing threat to eliminate Iran's leadership, the visa friction, and the Houthi blockade declaration. Clients should welcome the easing while holding posture until the Strait genuinely reopens.

4. THE UAE; THE GULF LEADERS' MEETING; THE REGIONAL PICTURE

- **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 Houthi attacks in the latest period were on Saudi Arabia, on Riyadh, not near the UAE, and the Gulf tanker war remains at a lower intensity.
- **The Gulf leaders' meeting an opportunity for the UAE:** President Trump's meeting with the Gulf leaders, including the UAE, at the UNGA today is a significant opportunity for the UAE to help shape the US approach to the war, to press for a de-escalation and a reopening of the Strait, and to coordinate the Gulf position; the UAE's pragmatic posture and its thaw with Iran place it well to influence the outcome.
- **Iran's warning a standing caution:** Iran's warning that regional countries supporting renewed US strikes could face retaliation remains a standing caution for the UAE, which hosts US forces; President Trump's threat to eliminate Iran's leadership, if acted upon, could place the UAE at risk of Iranian retaliation, and readiness must be maintained against that contingency, notwithstanding the Iran-UAE thaw.
- **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 diplomacy, the oil easing, and the easing threads further ease the regional picture; the UAE remains in a relatively favourable position, though the harder tone and the Houthi escalation keep the danger elevated.
- **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, and the Gulf leaders' meeting with President Trump today is a significant opportunity to shape the US approach; but Iran's warning to the Gulf, the harder tone, and the Houthi escalation keep the danger elevated, and a US escalation could draw the UAE in. Clients should hold high readiness and watch today's UNGA events.

5. SHIPPING, OIL AND THE REGIONAL PICTURE

- **The Strait largely closed, but traffic picking up:** The Strait of Hormuz remains largely closed, with Iran operating its toll system; but tanker traffic and energy flows through the Strait picked up on Monday, a partial easing, and oil fell more than 3% as a result – the most tangible sign yet that the closure may be easing, though the Strait has not reopened.
- **Oil falls more than 3%:** Oil fell more than 3% on Monday on the pick-up in Strait traffic and energy flows, and the hope for a recovery in Saudi supplies; but prices remain historically elevated, and analysts expect them to stay high while Iran keeps its chokehold on the Strait, with a full reopening or a UNGA breakthrough needed to ease them materially.
- **Gulf producers bypassing the Strait:** Gulf producers continue to bypass the blockaded Strait – the UAE through Fujairah, Saudi Arabia through Oman's Sohar port – while the East-West pipeline, hit by drones, is being restored; the routing of oil around the Strait has helped keep prices from spiking, though the Strait remains the primary route.
- **The Yemen front escalates:** The Houthis have declared a blockade on Saudi shipping in the Bab el-Mandeb and the Red Sea, and continue their campaign against Saudi Arabia; the proposed Saudi-Houthi truce, if agreed, would ease the Red Sea route, but for now the second maritime front is escalating and 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 – oil down more than 3%, Strait traffic picking up, Gulf producers bypassing the Strait – but the Strait itself remains largely closed, and the Yemen front is escalating. For UAE-linked operators, all Strait transits should remain suspended pending a confirmed, full reopening with verified safe passage.

6. DUBAI AND THE UAE

Operational Picture

- **The pivotal UNGA day – a UAE opportunity – but the harder tone persists, and no confirmed strike on UAE territory.** Today's UNGA events include the UAE's leadership meeting President Trump and the Gulf leaders – a significant opportunity – and oil has eased, but President Trump threatens Iran's leadership and the Houthis have declared a Saudi blockade; the Strait remains largely closed. There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE. The Iran-UAE thaw and the Fujairah route keep the UAE favourably placed, but Iran's warning keeps the danger elevated.
- **COMPLETE DEPARTURES NOW – THE OUTCOME IS UNRESOLVED 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 pivotal UNGA outcome is unresolved, the Strait remains largely closed, and President Trump's threat of a major escalation – which Iran warns could bring retaliation against the Gulf – cannot be discounted; completing departures now, while the window is open, remains prudent.
- **HOLD READINESS AT A HIGH LEVEL – A US ESCALATION COULD DRAW THE UAE IN.** Essential personnel should maintain shelter-in-place and evacuation readiness at a high level; President Trump's threat to eliminate Iran's leadership, Iran's warning of retaliation against the Gulf, and the rogue-hardliner risk mean a US escalation and a strike on the Gulf 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 largely closed, though oil has eased and traffic is picking up. 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 LARGELY CLOSED.** Despite the pick-up in traffic and the UNGA diplomacy, the Strait of Hormuz remains largely closed. Suspend all transits through the Strait, hold vessels clear of the Strait and the waters near the UAE, and treat the Strait as closed until a confirmed, full reopening with verified safe passage is in place.
- **Watch today's UNGA events closely; build on the UAE's opportunity.** Today's UNGA events – Pezeshkian's address, a possible Trump-Pezeshkian meeting, and President Trump's meeting with the Gulf leaders, including the UAE – are the key events and a possible inflection point; watch them closely. The Gulf leaders' meeting is a significant opportunity for the UAE to shape the US approach; build on it while holding posture until the Strait reopens and a durable de-escalation is confirmed.

Return Guidance: MAXIMUM Held, High Readiness – the Pivotal UNGA Day, the Outcome Unresolved

Westminster Security maintains MAXIMUM alert, with both Phase 1 (essential) and Phase 2 (non-essential) returns suspended and readiness at a high level. The pivotal UNGA day has arrived, with the diplomacy coming to a head – Pezeshkian's address, a possible Trump-Pezeshkian meeting, President Trump's meeting with the Gulf leaders – and oil has eased more than 3%; but the key events are pending, President Trump threatens Iran's leadership, the Houthis have declared a Saudi blockade, and the Strait remains largely closed. Clients should complete departures now, hold high readiness, suspend all Strait transits, protect energy and water resilience, and watch today's events.

- **All returns – SUSPENDED:** Halt all inbound travel to the UAE until a durable, verified de-escalation and a confirmed reopening are in place; a pivotal diplomatic day with the outcome unresolved and the Strait still largely closed 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 outcome 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 today's UNGA events – Pezeshkian's address, a possible Trump-Pezeshkian meeting, President Trump's meeting with the Gulf leaders – whether the Strait reopens, a US escalation and Iran's warned retaliation against the Gulf, the Houthi campaign, the Iran-UAE thaw, a rogue hardliner attack, and any strike toward UAE territory.
- **Business/compliance clients:** Review exposure given the US sanctions campaign, the standing threat, and the escalation; consult qualified counsel. This is not legal advice.
- **De-escalation path (MAXIMUM → HIGH):** A successful Trump-Pezeshkian meeting and progress at the UN General Assembly, a full 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. Today is the most promising moment yet, but the outcome is unresolved and the harder tone and the largely closed 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, which Iran warns could bring retaliation against the Gulf, a rogue hardliner attack, a collapse of the diplomacy, a further Houthi escalation, 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 pivotal UNGA day, the outcome unresolved at this cutoff, the Strait still largely closed, a US escalation threatened and warned to bring Gulf retaliation, but oil easing 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 today's events.

7. WESTMINSTER SECURITY'S RECOMMENDATIONS

- **MAXIMUM ALERT HELD, HIGH READINESS – the pivotal UN General Assembly day arrives.** Pezeshkian addresses the assembly today, a possible Trump-Pezeshkian meeting is under discussion, and President Trump meets the Gulf leaders, including the UAE, today – the diplomacy comes to a head, with the events pending at this cutoff. Oil fell more than 3% as Strait traffic picked up. But President Trump's threat to "annihilate" Iran stands, the Houthis have declared a Saudi blockade, and the Strait remains largely closed. There is no confirmed strike on UAE territory.
- **WATCH TODAY'S UNGA EVENTS – THE INFLECTION POINT, OUTCOME UNRESOLVED.** Pezeshkian's address, a possible Trump-Pezeshkian meeting, and President Trump's meeting with the Gulf leaders are today and could open a path to a de-escalation; but the outcome is unresolved at this cutoff. Watch today's events closely; the coming edition will capture them.
- **WELCOME THE OIL EASING – BUT THE STRAIT REMAINS LARGELY CLOSED.** Oil fell more than 3% as Strait traffic picked up – the most tangible easing yet; but the Strait remains largely closed and has not reopened. Welcome the easing while holding posture until a full reopening.
- **THE GULF LEADERS' MEETING IS A UAE OPPORTUNITY; NOTE IRAN'S WARNING.** President Trump's meeting with the Gulf leaders, including the UAE, is a significant opportunity for the UAE to shape the US approach; but Iran's warning that a US escalation could bring retaliation against the Gulf is a caution. Build on the opportunity while holding high readiness.
- **BUILD ON THE UAE'S FAVOURABLE THREADS; SUSPEND ALL STRAIT TRANSITS.** The Iran-UAE thaw, the Houthi pledge, and the Fujairah route keep the UAE favourably placed; build on them. Suspend all transits through the Strait pending a confirmed reopening. Consult qualified counsel on sanctions exposure; this is not legal advice.
- **Monitor for:** (1) today's UNGA events – Pezeshkian's address, a possible Trump-Pezeshkian meeting, President Trump's meeting with the Gulf leaders; (2) whether the Strait fully reopens or a US escalation occurs; (3) Iran's warned retaliation against the Gulf; (4) the Houthi campaign and the proposed Saudi-Houthi truce; (5) a rogue hardliner attack; (6) any strike on UAE territory.
- **The pivotal UN General Assembly day – emergency updates to follow.** Westminster Security will issue immediate updates on any Trump-Pezeshkian meeting or UNGA outcome, 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-fourth edition.** Day 207 of the war.

8. KEY POINTS

- **THE PIVOTAL UN GENERAL ASSEMBLY DAY ARRIVES – THE DIPLOMACY COMES TO A HEAD.** Iran's President Pezeshkian addresses the assembly today and holds talks; a possible Trump-Pezeshkian meeting – potentially the first leader-level US-Iran contact of the war – is under discussion; and President Trump meets the six Gulf leaders, including the UAE, today to discuss the war. The key events are pending at this cutoff of 0900 GMT, early morning in New York; the coming edition will capture the outcomes.
- **A TANGIBLE EASING – OIL FELL MORE THAN 3% AS STRAIT TRAFFIC PICKED UP.** Oil prices fell more than 3% on Monday as tanker traffic and energy flows through the Strait of Hormuz picked up – the most tangible easing sign yet. But the Strait has remained largely closed and has not reopened, Iran continues to operate its toll system, and the core blockade persists; the easing is real but partial.
- **BUT THE HARDER TONE AND FRICTIONS PERSIST – TRUMP'S THREAT, A VISA REFUSAL, THE HOUTHI BLOCKADE.** President Trump's threat to "annihilate" Iran or eliminate its leadership if no deal is struck stands; Iran says some of Pezeshkian's delegation have been refused visas, a friction point; and the Houthis have declared a blockade on Saudi shipping in the Bab el-Mandeb and the Red Sea, and struck Riyadh. The Yemen front is escalating, and the harder tone persists alongside the diplomacy.
- **THE GULF LEADERS' MEETING IS A UAE OPPORTUNITY; IRAN'S WARNING A CAUTION.** President Trump's meeting with the Gulf leaders, including the UAE, is a significant opportunity for the UAE to help shape the US approach and coordinate the Gulf position. But Iran's warning that regional countries supporting renewed US strikes could face retaliation is a caution: a US escalation – which President Trump threatens – could place the UAE at risk. Readiness must be maintained.
- **NO CONFIRMED STRIKE ON UAE TERRITORY – THE UAE'S POSITION FAVOURABLE.** There is no confirmed damaging strike on UAE territory, ports or infrastructure, and no new attack near the UAE; the Houthi attacks were on Saudi Arabia, on Riyadh, not near the UAE. The Iran-UAE thaw, the Houthi pledge sparing UAE shipping, the Fujairah route, and the Gulf leaders' meeting keep the UAE in a relatively favourable position. But the harder tone and the Houthi escalation keep the danger elevated. Hold high readiness.
- **MAXIMUM HELD, HIGH READINESS – NO CONFIRMED STRIKE ON UAE TERRITORY. ONE HUNDRED AND NINETY-FOURTH EDITION. DAY 207.** The pivotal UNGA day has arrived – the diplomacy coming to a head, oil easing more than 3% – but the key events are pending at this cutoff, and the harder tone, the visa friction, the Houthi blockade, and the largely closed Strait persist; 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 today's UNGA events. Westminster Security will lower the alert to HIGH only once a durable de-escalation and a confirmed reopening are in place.

Prepared 22nd September 2026 – Information current as of 09:00 GMT

THE PIVOTAL DAY OF THE UN GENERAL ASSEMBLY HAS ARRIVED, WITH THE DIPLOMACY COMING TO A HEAD. IRAN'S PRESIDENT PEZESHKIAN ADDRESSES THE ASSEMBLY TODAY, A POSSIBLE TRUMP-PEZESHKIAN MEETING (THE FIRST LEADER-LEVEL US-IRAN CONTACT OF THE WAR) IS UNDER DISCUSSION, AND PRESIDENT TRUMP MEETS THE SIX GULF LEADERS, INCLUDING THE UAE, TODAY – A UAE OPPORTUNITY. THE KEY EVENTS ARE PENDING AT THIS CUTOFF (0900 GMT, EARLY MORNING IN NEW YORK); THE COMING EDITION WILL CAPTURE THE OUTCOMES.

IN A TANGIBLE EASING, OIL FELL MORE THAN 3% AS STRAIT TRAFFIC PICKED UP – BUT THE STRAIT REMAINS LARGELY CLOSED. THE HARDER TONE AND FRICTIONS PERSIST: PRESIDENT TRUMP'S THREAT TO "ANNIHILATE" IRAN STANDS, IRAN SAYS PART OF PEZESHKIAN'S DELEGATION WAS REFUSED VISAS, AND THE HOUTHIS HAVE DECLARED A BLOCKADE ON SAUDI SHIPPING AND STRUCK RIYADH. 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, THOUGH IRAN'S WARNING TO THE GULF IS A CAUTION. MAXIMUM ALERT HELD, HIGH READINESS – COMPLETE DEPARTURES NOW, HOLD HIGH READINESS, SUSPEND ALL STRAIT TRANSITS, PROTECT ENERGY AND WATER RESILIENCE.

WATCH TODAY'S UN GENERAL ASSEMBLY EVENTS CLOSELY AS THE INFLECTION POINT – THE OUTCOME UNRESOLVED AT THIS CUTOFF; WELCOME THE OIL EASING BUT NOTE THE STRAIT REMAINS LARGELY CLOSED; THE GULF LEADERS' MEETING IS A UAE OPPORTUNITY; AND NOTE THAT A US ESCALATION COULD DRAW THE UAE IN. PROTECT PEOPLE FIRST; EMERGENCY UPDATES TO FOLLOW. ONE HUNDRED AND NINETY-FOURTH EDITION. DAY 207.