



| Flash |

Military Strikes on Iran – SITREP

#33: April 9, 2026

F-2026-04-09a

Classification: TLP:CLEAR

Criticality: High

Intelligence Requirements: Geopolitics, Deep and Dark Web

April 9, 2026

Scope Note

*ZeroFox Intelligence is derived from a variety of sources, including—but not limited to—curated open-source accesses, vetted social media, proprietary data sources, and direct access to threat actors and groups through covert communication channels. Information relied upon to complete any report cannot always be independently verified. As such, ZeroFox applies rigorous analytic standards and tradecraft in accordance with best practices and includes caveat language and source citations to clearly identify the veracity of our Intelligence reporting and substantiate our assessments and recommendations. All sources used in this particular Intelligence product were **identified prior to 4:00 AM (EDT) on April 9, 2026**; per cyber hygiene best practices, caution is advised when clicking on any third-party links.*

| Flash | Military Strikes on Iran – SITREP #33: April 9, 2026

| Key Findings

- On April 7, 2026, the United States and Iran agreed to a two-week ceasefire. However, just hours later, Iran closed the Strait of Hormuz (SoH) over Israeli targeting of Hezbollah, creating confusion as to whether the ceasefire remains in place and if both sides are even negotiating from the same framework.
- Markets have almost certainly determined that the ceasefire marks the end of the conflict. However, such early setbacks have reduced the probability the truce will hold, and there is only a roughly even chance the agreed-upon ceasefire holds for the two-week duration and that a longer-term agreement can be reached in that time.
- Israel's willingness to abide by the terms agreed upon by the United States and Iran is one of several uncertainties regarding the ceasefire's success. Other uncertainties include the continued buildup of U.S. forces in the region, how willing the United States and its Gulf allies are to tolerate an Iranian-controlled SoH, assurances made to Iran against future aggression, and historical concerns over Iran's nuclear and missile programs and support for regional proxies. One

certainty is that the ceasefire's success very likely depends on the free flow of tanker traffic through the SoH.

| United States and Iran Agree to Two-Week Ceasefire

On April 7, 2026, the United States and Iran agreed to a two-week, conditional ceasefire, the terms of which included the reopening of the SoH. The agreement was reached two hours before U.S. President Donald Trump's latest deadline for Iran to open the SoH.¹

- One day before the agreement, President Trump posted on social media that “a whole civilization will die tonight...I don't want it to happen, but it probably will.”² This was a reference to threats to target Iranian dual-use infrastructure, such as bridges, power plants, and energy installations. Iran responded with similar threats against Gulf infrastructure, which almost certainly would have been a major escalation. Absent this escalation, Iran was likely open to maintaining the status quo, along with Israel.

Several hours after President Trump announced his agreement of the ceasefire terms, Iran's Foreign Affairs Minister Abbas Araghchi confirmed that Iran would allow shipping through the SoH, as long as ships coordinate with the Iranian military.³ In the long-term, Iran is reportedly seeking to charge fees for ships to transit the SoH—with fees determined by ship size, cargo type, and other unspecified factors. Iran has stated that any permanent treaty to end the current war must confirm its right to charge such fees.⁴ One proposal would reportedly allow both Iran and Oman to collect fees for SoH transit.⁵

- The United States and regional Gulf states are unlikely to accept a permanent deal that allows Iran to collect fees or taxes on commercial shipping through the SoH. An agreement that allows both Iran and Oman to share the revenue from such fees would likely make the deal more palatable; however, unilateral Iranian

¹ [hXXps://edition.cnn\[.\]com/2026/04/08/middleeast/us-iran-ceasefire-explainer-war-intl-hnk](https://edition.cnn.com/2026/04/08/middleeast/us-iran-ceasefire-explainer-war-intl-hnk)

² [hXXps://x\[.\]com/sentdefender/status/2041489437788356808](https://x.com/sentdefender/status/2041489437788356808)

³ [hXXps://understandingwar\[.\]org/research/middle-east/iran-update-special-report-april-7-2026/](https://understandingwar.org/research/middle-east/iran-update-special-report-april-7-2026/)

⁴ [hXXps://www.reuters\[.\]com/world/middle-east/can-iran-charge-fees-ships-transit-strait-hormuz-2026-04-07/](https://www.reuters.com/world/middle-east/can-iran-charge-fees-ships-transit-strait-hormuz-2026-04-07/)

⁵ [hXXps://dailytimes\[.\]com\[.\]pk/1474623/ceasefire-agreement-iran-oman-to-impose-tax-on-ships-passing-through-the-strait-of-hormuz-says-us-media/](https://dailytimes.com.pk/1474623/ceasefire-agreement-iran-oman-to-impose-tax-on-ships-passing-through-the-strait-of-hormuz-says-us-media/)

fees would almost certainly be a dealbreaker in negotiations for a permanent peace deal.

- The prospects of an Iranian SoH toll over the long term are unclear. Iran has extensively targeted its neighbors throughout the war, who are unlikely to support Iran's ability to restrict their energy exports. Investments in pipelines that avoid the SoH are almost certain if Iran maintains long-term control of the SoH.
- If Iran is allowed to charge fees, it would have the dual benefit of financing its reconstruction while simultaneously giving the country greater control over SoH traffic, which it would almost certainly leverage to deter future hostilities from the United States and regional neighbors.

Israel-Hezbollah

The Israeli military continued to conduct attacks against Hezbollah ground positions across Lebanon, including Beirut, after the announcement of the ceasefire.⁶ Later on April 8, 2026, Iran officially re-closed the SoH, blaming Israeli attacks on Hezbollah in Lebanon.⁷

- Despite initial reports that Israel agreed to cease military operations—including against Hezbollah in Lebanon—as long as Iran allows traffic to flow through the SoH, Israeli Prime Minister Benjamin Netanyahu subsequently stated that Lebanon is not included in the agreement amid large-scale Israeli airstrikes across the country on April 8, 2026.⁸ President Trump also stated that the Lebanon theater is not part of the truce.⁹ For its part, Hezbollah has reportedly ceased attacks against Israel, and Iranian military officials claim that Israel's continued strikes on Hezbollah represent a major violation of the truce.¹⁰

⁶

[hXXps://www.nbcnews.com/world/iran/live-blog/live-updates-iran-war-ceasefire-trump-hormuz-israel-lebanon-rcna267205](https://www.nbcnews.com/world/iran/live-blog/live-updates-iran-war-ceasefire-trump-hormuz-israel-lebanon-rcna267205)

⁷ [hXXps://apnews.com/live/iran-war-israel-trump-04-08-2026](https://apnews.com/live/iran-war-israel-trump-04-08-2026)

⁸

[hXXps://www.reuters.com/world/middle-east/hezbollah-pauses-attacks-under-us-iran-ceasefire-sources-close-group-say-2026-04-08/](https://www.reuters.com/world/middle-east/hezbollah-pauses-attacks-under-us-iran-ceasefire-sources-close-group-say-2026-04-08/)

⁹ [hXXps://x.com/elizlanders/status/2041878299454955640?](https://x.com/elizlanders/status/2041878299454955640?)

¹⁰

[hXXps://www.timesofisrael.com/liveblog_entry/irgc-warns-it-will-deliver-a-response-if-israel-continues-strikes-on-lebanon/](https://www.timesofisrael.com/liveblog_entry/irgc-warns-it-will-deliver-a-response-if-israel-continues-strikes-on-lebanon/)

While there is a roughly even chance that Israel will agree to the ceasefire and make public statements and overtures of support for an end to hostilities, it will almost certainly continue to conduct strikes against Hezbollah—including likely claiming the strikes are within the ceasefire framework—in an effort to obtain maximum strategic advantage in the post-war environment.

Ceasefire Strength

There is a roughly even chance the agreed-upon ceasefire will hold for the two-week duration and that a longer-term agreement can be reached in that time.

- Saudi Arabia, the United Arab Emirates (UAE), Kuwait, Qatar, and Bahrain all reported Iranian attacks after the ceasefire went into effect,^{11,12} highlighting the risks of the ceasefire not holding. Meanwhile, Israel has also targeted Hezbollah beyond the ceasefire deadline. Nevertheless, the ceasefire remains intact and will likely continue to do so despite occasional violations.

The United States is very likely willing to cease hostilities in the long term, and the current ceasefire gives President Trump the opportunity to claim victory, seize upon any Iranian concessions, and bring Operation Epic Fury to a permanent end. Key Operation Epic Fury gains include assassinating dozens of political and military leaders in Iran and severely degrading its military and offensive weapons.

- Iran can claim several successes. Its military and political establishment remains intact, it retains control of its enriched uranium, and it has established control over the SoH. Moreover, some statements from President Trump suggest that he is willing to end the conflict without addressing these issues.¹³ The current ceasefire is reportedly based on some of Iran's 10 demands from April 6, which include several items that had previously been considered unfeasible by the United States.
 - While Iran publicly released what it said were these 10 demands on April 8, U.S. officials claimed the released points were not the same as those

¹¹ <https://x.com/FT/status/2041868940540805151/photo/1>

¹²

https://www.timesofisrael.com/liveblog_entry/kuwait-uae-say-they-are-under-attack-by-iranian-drones-missiles-despite-ceasefire/

¹³ ZeroFox Intelligence – Military Strikes on Iran – SITREP #31: April 2, 2026

currently under discussion.¹⁴ This makes it unclear if both sides are operating from the same framework. Therefore, there is further confusion over what will be covered in upcoming negotiations—or what has been agreed upon so far—though major topics such as Iran’s nuclear program, its control of the SoH, and U.S. sanctions will almost certainly be featured.

However, key U.S. strategic goals—including an end to Iran’s regional proxies, and limits on Iranian uranium enrichment—are unlikely to be resolved, and there is a roughly even chance these issues will lead to a resumption of hostilities in the future.

- Unless progress or formal concessions are made on Iran’s nuclear program, proxies such as Hezbollah, and Iran’s military threats to the region, there is a roughly even chance that hostilities will resume in the near- to medium-term.

| Oil Markets React Positively to Ceasefire

Global oil markets declined following the announcement of a U.S.–Iran ceasefire. Brent crude, the industry standard for crude oil, dropped by more than 13 percent to settle at USD 94 per barrel. Prior to the post-ceasefire drop, the price of oil had not been below USD 100 per barrel since March 25, 2026.¹⁵

- The likely key component for energy investors was Iran's commitment to the ceasefire. ZeroFox had forecast that Iran was unlikely to agree to a ceasefire whose terms included the reopening of the SoH because it would mean surrendering the leverage over energy prices it had been using to pressure the United States to end the war. Furthermore, the United States would almost certainly benefit more than Iran from the market stabilization a ceasefire would bring. A ceasefire would also enable energy importers to stockpile and permit the United States and Israel to re-arm without guaranteeing an end to the fighting, while Iran is unlikely to be able to rebuild its military within that same timeframe.¹⁶

¹⁴ <https://www.nytimes.com/2026/04/08/world/middleeast/iran-10-point-proposal-trump-us-ceasefire.html>

¹⁵ <https://oilprice.com/oil-price-charts/#Brent-Crude>

¹⁶ ZeroFox Intelligence – Military Strikes on Iran – SITREP #32: April 7, 2026

- The United States reportedly abiding by much of Iran’s 10-point plan—including its ability to control SoH passage—and suggestions that the United States is abandoning other war aims likely contributed to Iran’s ceasefire acceptance.

For now, investors are assuming a full reopening of the SoH, along with the likely resumption of oil production in Gulf states, leading to a more stabilized oil market that will very likely allow prices to continue going down. If a permanent peace deal can be agreed upon in the next two weeks, oil prices will likely return to pre-war levels—which were around USD 80 per barrel. However, news reports indicating the ceasefire is not going according to plan will very likely reverse energy prices.

- Energy markets are reacting as if the ceasefire means a long-term end to the war, but so far, there has been little change in traffic around the SoH, despite an 800 ship backlog.¹⁷ The probability of the ceasefire holding very likely depends on how freely tanker traffic flows through the SoH.¹⁸ However, unless details on how the agreement will be enforced—including its quick extension beyond two weeks—are revealed, shippers are unlikely to feel secure returning. President Trump said the United States will help with the traffic buildup in the SoH, likely with naval escorts, and is also reportedly considering lifting sanctions on Iran to ensure its participation.¹⁹
- Even when the SoH reopens, supply chains in the region will not immediately return to normal operating procedures. Output has been reduced at oil and gas fields, while refineries have curtailed production or shut down.²⁰ These will take weeks and, in some cases, years to rebuild.

¹⁷

[hXXps://www.wired\[.\]com/story/the-strait-of-hormuz-reopens-but-global-shipping-will-take-months-to-recover/](https://www.wired.com/story/the-strait-of-hormuz-reopens-but-global-shipping-will-take-months-to-recover/)

¹⁸

[hXXps://www.cnn\[.\]com/2026/04/08/world/live-news/iran-war-trump-us-ceasefire?post-id=cmnqlbwne000c3b60ifjtc1k8](https://www.cnn.com/2026/04/08/world/live-news/iran-war-trump-us-ceasefire?post-id=cmnqlbwne000c3b60ifjtc1k8)

¹⁹ [hXXps://www.reuters\[.\]com/world/trump-says-us-will-help-with-traffic-buildup-strait-hormuz-2026-04-08/](https://www.reuters.com/world/trump-says-us-will-help-with-traffic-buildup-strait-hormuz-2026-04-08/)

²⁰

[hXXps://gulfnnews\[.\]com/business/energy/why-middle-east-oil-and-gas-recovery-could-take-months-despite-ceasefire-1.500500789](https://gulfnnews.com/business/energy/why-middle-east-oil-and-gas-recovery-could-take-months-despite-ceasefire-1.500500789)

| Conclusion

Significant differences remain between the demands of the United States and Iran to bring the war to a complete end. Primarily, there are concerns over whether Iran will genuinely allow a safe passage for ships through the SoH and how the proposed toll system will operate. Iran is almost certainly eager for the war to end and not resume in the near future. Utilizing, or signaling, Iran's ability to impact shipping through the SoH is key to deterring future aggression. Establishing guarantees against future aggression will likely be difficult.

- Financing is another major issue. Upon the war's conclusion, Iran's economy will very likely be in shambles, making it eager to secure additional financing to prevent domestic unrest. While the toll system will likely help, Iran will likely also demand sanction relief and call for direct payments. The latter is very unlikely but highlights Iran's severe economic problems it will almost certainly be seeking to address. Iran will almost certainly see a resumption of protests—similar to those in late 2025 and early 2026—if its economy stagnates or declines further.
- The future of Iran's nuclear program remains unclear, with all sides far apart on the issue. A similarly large gap exists regarding its offensive weapons program, including its drones and missiles. Both programs have very likely been degraded but likely form a key part of Iran's deterrence strategy in the coming years.

The latest ceasefire demonstrates—to investors, at least—that the United States and Iran are likely more willing to concede on their demands than previously thought. However, it is less likely that Israel will abide by the terms, particularly concerning the ceasefire against Hezbollah. Israel will very likely continue to view proxies like Hezbollah and the Houthis in Yemen as a threat.

With both sides so far apart, Iran will very likely be concerned over continued military deployments to the region. A third U.S. aircraft carrier, the *USS George H.W. Bush*,²¹ deployed in early April is due to arrive after the two-week ceasefire ends. The *USS Boxer*,

²¹

<https://www.wsj.com/politics/national-security/what-an-influx-of-17-000-u-s-troops-could-mean-for-the-iran-war-7569afea>

carrying 2,500 Marines, is en route, while the *USS Tripoli* recently arrived.²² A signal from the Trump administration that these assets will not be used will likely serve as a stronger indicator that a return to fighting is unlikely.²³

²² [hXXps://www.stripes\[.\]com/branches/navy/2026-03-31/uss-boxer-11th-meu-hawaii-21240757.html](https://www.stripes.com/branches/navy/2026-03-31/uss-boxer-11th-meu-hawaii-21240757.html)

²³

[hXXps://www.cnn\[.\]com/2026/04/08/world/live-news/iran-war-trump-us-ceasefire?post-id=cmnqlbwne000c3b60ifjtc1k8](https://www.cnn.com/2026/04/08/world/live-news/iran-war-trump-us-ceasefire?post-id=cmnqlbwne000c3b60ifjtc1k8)

Appendix A: Traffic Light Protocol for Information Dissemination

	Red	Amber
WHEN SHOULD IT BE USED?	Sources may use TLP:RED when information cannot be effectively acted upon by additional parties and could lead to impacts on a party's privacy, reputation, or operations if misused.	Sources may use TLP:AMBER when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.
HOW MAY IT BE SHARED?	Recipients may NOT share TLP:RED with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.	Recipients may ONLY share TLP:AMBER information with members of their own organization and its clients, but only on a need-to-know basis to protect their organization and its clients and prevent further harm. Note that TLP:AMBER+STRICT restricts sharing to the organization only.
	Green	Clear
WHEN SHOULD IT BE USED?	Sources may use TLP:GREEN when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.	Sources may use TLP:CLEAR when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.
HOW MAY IT BE SHARED?	Recipients may share TLP:GREEN information with peers and partner organizations within their sector or community but not via publicly accessible channels.	Recipients may share TLP:CLEAR information without restriction, subject to copyright controls.

Appendix B: ZeroFox Intelligence Probability Scale

All ZeroFox intelligence products leverage probabilistic assessment language in analytic judgments. Qualitative statements used in these judgments refer to associated probability ranges, which state the likelihood of occurrence of an event or development. Ranges are used to avoid a false impression of accuracy. This scale is a standard that aligns with how readers should interpret such terms.

Almost No Chance	Very Unlikely	Unlikely	Roughly Even Chance	Likely	Very Likely	Almost Certain
1-5%	5-20%	20-45%	45-55%	55-80%	80-95%	95-99%