

US-Iran Conflict Briefing

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Iran blacklists 77 vessels for Hormuz "protocol violations"

- Iran's Persian Gulf Strait Authority published an updated list Monday of 77 vessels it says are "violating Iranian protocols for the Strait of Hormuz." — [Reuters](#)
- Listed vessels face restrictions on future passage including fines, detention, or confiscation; vessels cooperating with the authority will be added to the list. — [Reuters](#)
- The authority warned insurers, P&I clubs, and classification societies to refrain from serving the listed vessels; the list was posted on X. — [Reuters](#)
- Commodity vessel transits through the strait fell to single-digit daily numbers at the weekend vs a 10-day average of 14; four vessels exited and ten entered, excluding ships with AIS transponders off. — [Reuters](#)
- In the Bab el-Mandeb strait, 24 and 27 commodity vessels transited Saturday and Sunday respectively, vs a 10-day average of about 27. — [Reuters](#)

Energy: Brent near \$108 Monday; UK gas at 2022 highs

- Brent crude rose 2.9% to \$107.68 a barrel in early European trading Monday; WTI gained 2.8% to \$102.88, after Brent gained 8.7% and WTI 9.4% last week. — [WSJ](#)
- Brent traded around \$107.44 overnight (+2.7%); UK natural gas rose 4.3% to 207p a therm, its highest since December 2022. — [The Times](#)
- Both Baghdad and Riyadh said Friday's drone attack that shut Saudi Arabia's East-West pipeline originated in Iraq, where Iranian-backed militias operate; the pipeline had been moving 4-5 million barrels per day. — [Reuters](#)
- Traders say Riyadh has 5-7 days of exportable oil stored at Yanbu if the pipeline stays shut; repair estimates range from days to weeks. — [Reuters](#)
- Markets now price an ~90% chance the Fed raises rates 25bp on Wednesday after hot August inflation; economists estimate each \$10 on crude adds 0.2pp to inflation and trims growth by 0.1pp. — [The Times](#)

Trump brushes aside report of Chinese help to Iran

- President Trump on Sunday dismissed a Wall Street Journal report that Iran acquired satellite imagery of a US base in Jordan from Chinese entities before a July attack that killed three US troops. — [Reuters](#)
- Trump, aboard Air Force One: "They basically do what we do... When they say China spies on us, I say you're right and we spy on them too"; he did not say whether he would raise it with Xi Jinping. — [Reuters](#)
- The Journal cited unnamed US officials who declined to identify the Chinese entities and did not allege direct Beijing involvement; Reuters could not independently verify the report. — [Reuters](#)

- Trump and Xi are expected to meet in the US on September 24, though China has not confirmed; Trump said Xi had "behaved reasonably well." — [Reuters](#)

Yemen: Saudi airstrike wave around Mokha; government regroup

- Saudi jets pounded Houthi positions around Mokha ahead of a planned counter-offensive by government loyalists; government forces have rallied south of the city, regaining some territory. — [The Times](#)
- The Houthis have dispersed fighters through Mokha and are fortifying coastal positions; they have also launched a new offensive east to cut off Taiz and besiege the government-held city. — [The Times](#)
- Presidential council head Rashad Alimi dismissed the setback as "incidental" and vowed the government would reclaim sovereignty over all national territories. — [The Times](#)
- The UN estimates more than 80,000 people have been displaced by the fighting since the start of September. — [AP](#)
- Saudi Civil Defense lifted danger alerts Monday for Najran, Khamis Mushait, Jazan, and Abha amid the recent Houthi attack uptick. — [Reuters](#)

Conflict map



Markers show reported strike sites, bases, and shipping areas. Purple polygons mark approximate or announced closure / exclusion zones.

Related media



U S naval forces operating in the Strait of Hormuz region (illustrative of the waterway where weekend transits fell to single digits per day and Iran blacklisted 77 vessels) — [view original](#)



The Bab el-Mandeb strait (illustrative of the second chokepoint where Houthi advances and the fighting around Mokha threaten Red Sea shipping) — [view original](#)

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