US–Iran Conflict Briefing

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IRGC says two tankers and a tug caught fire in Hormuz — still unconfirmed

- Iran's Islamic Revolutionary Guard Corps said on Thursday, November 5 that two oil tankers and a tugboat had caught fire in separate incidents after attempting to use unauthorised routes through the Strait of Hormuz — one tanker striking a mine while crossing a passage south of the strait, a supertanker catching fire while exiting the route in the eastern waterway, and a tugboat that approached to help also catching fire, Reuters reported. — Reuters
- No vessel has been named and no shipping authority has confirmed any fire: the claim rests on the IRGC's own statement, carried by Reuters, with no matching UKMTO advisory for a mine strike or fire in or around Hormuz on November 5. — Reuters
- The new statement is separate from the IRGC's November 4 claim that four tankers were destroyed by mines and two vessels seized south of the strait — that claim also remains unconfirmed, with no vessel names, flags, or an authority's confirmation. — Reuters
- In a distinct incident inside the Gulf, a tanker was struck by two unidentified projectiles about 50 nautical miles north of Qatar's Madinat ash Shamal on November 4 at 2320 GMT, the UK Maritime Trade Operations centre said on Thursday; the crew's status and any damage remain unconfirmed and no one has claimed responsibility, Reuters reported. — Reuters

Houthis keep up attacks on Saudi Arabia as Yanbu is put on alert

- Saudi authorities issued alerts on Thursday warning of potential danger in Yanbu, the kingdom's Red Sea oil export hub, as Houthi attacks on Saudi Arabia continue, Reuters reported. — Reuters
- The Saudi-led coalition destroyed a missile launched toward Medina, and civil defence alerts were also issued for Sharurah, Reuters reported. — Reuters
- The Houthis said on Wednesday they had attacked Riyadh's international airport during Syrian President Ahmed al-Sharaa's visit to the kingdom; Saudi authorities have not confirmed that claim, and the Houthis made no claim over Thursday's attacks, Reuters reported. — Reuters

Turkey set to ratify the Mecca defence pact as Saudi Arabia signs a defence deal with Syria

- Turkey's parliament was set on Wednesday to ratify the Mecca Joint Defence Agreement with Saudi Arabia and Pakistan, which carries an Article 5-style collective defence clause and would give Ankara a formal mutual-defence obligation, though deploying Turkish troops would require a separate mandate, Reuters reported. — Reuters
- Turkish Defence Minister Yasar Guler said Turkey's expected contribution is equipment, intelligence and weapons, and that Turkish troops are not seen in combat or offensive operations against the Houthis, Reuters reported. — Reuters

- Saudi Arabia and Syria's defence ministries signed a cooperation agreement on Wednesday during President al-Sharaa's visit to Riyadh — his second meeting with Crown Prince Mohammed bin Salman in under a month — though no details of the agreement were given, Reuters reported, citing Saudi state media. — Reuters

Qatar says both sides are reviewing mediators' proposals to end the war

- Qatar stepped up its mediation to end the war, and Qatar's foreign ministry spokesperson said on Tuesday that both sides were reviewing proposals put forward by mediators, with talks continuing, Reuters reported. — Reuters
- Crude shipments through the Strait of Hormuz have recovered to close to pre-war levels, according to analysts, though at a higher cost, Reuters reported. — Reuters

Hegseth faces a reckoning in Washington as Netanyahu weakens in Jerusalem

- The Pentagon said Defense Secretary Pete Hegseth is '100 percent committed' to leading the Pentagon until January 20, 2029, while Senator Thom Tillis said Hegseth has 'a reckoning' coming and incoming House Armed Services chair Adam Smith promised vigorous oversight of the Iran war, Reuters reported. — Reuters
- From January, Democrats in Congress could cut defence spending or hold up nominations to pressure President Trump to seek congressional authorisation to continue the Iran war, and require public hearings and official reporting on war plans, Reuters reported. — Reuters
- Prime Minister Benjamin Netanyahu's position weakened further on Thursday as the ultra-Orthodox United Torah Judaism party declined to recommend any candidate to form a government; President Isaac Herzog was to meet Netanyahu and Gadi Eisenkot on Thursday night, with a decision deadline of November 11, and Netanyahu remains caretaker prime minister, Reuters reported. — Reuters
- A Democratic Congress could trigger the biggest reassessment of U.S. support for Israel in decades, with scrutiny of military aid, hearings and challenges to nominees, Reuters reported. — Reuters

Markets

- Brent crude was trading at $96.36 a barrel on November 5, recovering from Wednesday's plunge of more than 8% as markets weighed a lower risk of renewed Iran war escalation, Reuters reported. — Reuters
- U.S. West Texas Intermediate crude was trading at $89.05 a barrel on November 5, Reuters reported. — Reuters
- The 10-year U.S. Treasury yield fell to 4.888% on November 4, from 4.951%, the Wall Street Journal reported. — Wall Street Journal

Shipping

- Crude shipments through the Strait of Hormuz have recovered to close to pre-war levels, according to analysts, though at a higher cost, Reuters reported on November 5. — Reuters

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