US–Iran Conflict Briefing

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Iran Claims Three Tankers Hit Mines in Hormuz — Unconfirmed

- Iran's Revolutionary Guards navy said three "violating" oil tankers caught fire after hitting naval mines in the Strait of Hormuz on Monday, November 23, 2026, Iran's Press TV reported via Reuters; the claim gave no ship names and had no confirmation from the U.S. military or any shipping authority. — Reuters
- The mine claim is disputed by the official shipping record: UKMTO has attributed the Hormuz incidents it logged in recent days — including a tanker struck by an unidentified projectile on November 21 — to projectiles, not mines, and no vessel has been named in connection with the mine claim. — Reuters
- Context from Monday: the United States is investigating Iran's potential involvement in dozens of cyberattacks against energy tankers, with as many as 50 ships carrying oil, liquefied petroleum gas and chemicals believed to have been attacked, some receiving warnings or bomb threats; U.S. officials see Iran as a primary suspect and Russia as also a possible culprit. — Reuters

Middle East Crude Exports Trend Lower as Hormuz Attacks Rise

- Middle East crude exports have trended lower since mid-October: Kpler tracked 13.96 million barrels per day in the week beginning November 16, down from 15.77 million barrels per day the prior week and 16.03 million barrels per day the week before, as vessel attacks in Hormuz rose. — Reuters
- At least 12 vessels have been struck in and around the Strait of Hormuz so far in November, after 17 in October, according to the Joint Maritime Information Center. — Reuters

Markets

- Brent crude futures fell 0.45% to $88.97/bbl in early Tuesday trading (0147 GMT on November 24), holding near a three-month low as rising supply outweighed the Hormuz threat. — Reuters
- WTI crude futures fell 0.29% to $79.94/bbl in early Tuesday trading (0147 GMT on November 24). — Reuters
- The fall came despite the Hormuz claim: rising supply outweighed shipping risk, with global observed liquids inventories up about 52 million barrels in October (roughly 1.7 million barrels per day of oversupply, per Deutsche Bank) and Libya's Sharara pipeline reopened. — Reuters

Shipping

- Middle East crude exports fell to 13.96 million barrels per day in the week beginning November 16 (Kpler), down from 15.77 million barrels per day the prior week, as vessel attacks in and around the Strait of Hormuz rose; no fresh Hormuz-only transit or flow count was reported by a vetted outlet this cycle. — Reuters

Conflict map



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

Sources: Reuters · Reuters · Reuters

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