

NIGHTWATCH — Iran / Strait of Hormuz Crisis

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EXECUTIVE SUMMARY

Day 51 of the war produced two revelations that redefine the conflict's internal dynamics. **First:** Iran turned back a **Chinese vessel** — the *Sun Profit* — along with two tankers under Botswana and Angola flags. Iran's Consulate in Mumbai clarified via X that no "blanket approval" exists; every ship requires individual IRGC authorization. Even China, which buys 90% of Iran's oil, is not exempt. The IRGC radio broadcast was blunt: the Strait is closed "by the order of Imam Khamenei, not by the tweets of some idiot" — a direct public rebuke of FM Araghchi. **Second:** the Wall Street Journal published an investigation revealing that **senior aides intentionally excluded Trump from the Situation Room** during combat operations, fearing his "impatience wouldn't help." After an F-15E was shot down and two pilots went missing, Trump "screamed at aides for hours." He rejected a proposed mission to seize Kharg Island, saying troops would be "sitting ducks." Aides physically led him from meeting rooms. These two stories — Iran's military overriding its own diplomats, and Trump's staff overriding him — define a conflict where neither side's civilian leadership fully controls the war machine.

The IRGC's reversal of the Strait opening is now complete. The corridor previously designated for safe passage has been closed. The Strait is under "**strict control**" with IRGC gunboat enforcement. Overnight, Iranian forces again fired on the Indian-flagged *Sanmar Herald* and *Jag Arnav*, and a VLCC carrying 2M barrels of Iraqi crude was forced back. India's formal protest is escalating — the summoning of Iran's ambassador marks the sharpest India-Iran diplomatic friction since the war began. Ghalibaf confirmed negotiations have "progressed" but are "**far from a final agreement**" with "many gaps." He warned Iran's armed forces are "fully prepared" to "immediately resume combat operations." No date has been set for a second round of talks. The ceasefire expires **Wednesday, April 22 — 3 days away.**

The escalation ladder is extending in both directions. **Upward:** Houthi Vice FM Hussein al-Ezzi threatened to **close the Bab al-Mandeb Strait**, warning Trump that "not even all of humanity and jinn will be able to open it" — a dual-chokepoint scenario that would affect both the Persian Gulf and Red Sea. Israel has prepared an updated **target bank** including Iranian energy facilities; CENTCOM Commander Cooper visited Israel to coordinate with IDF Chief Zamir. North Korea fired ballistic missiles — its 4th launch this month — in what analysts interpret as a demonstration that "unlike Iran,

we have self-defense capabilities.” **Downward:** Trump spoke directly by phone with both Pakistani Army Chief Munir and Iranian negotiators during Munir’s 3-day Tehran visit. Technical-level teams are expected in Islamabad “most probably Monday.” The IRGC Aerospace Force Commander released video inspecting underground missile bases, claiming launcher replenishment **exceeds pre-war pace** — recovering from 50% to 60%, with potential to reach 70%.

The 50-day war has now cost **\$50 billion in lost oil**, with 500M+ barrels removed from global supply. Gulf jet fuel exports collapsed 80% (19.6M → 4.1M barrels). IEA’s Birol warns Europe has **6 weeks of jet fuel** and flight cancellations are imminent. The IMF/World Bank Spring Meetings in Washington were dominated by the crisis; a **\$150 billion aid package** for developing nations was committed. Iran demands **\$270 billion in war reparations**. Gold hit \$4,831/oz. US farm diesel is up 46%; 70% of American farmers cannot afford fertilizer. The internal Iranian power struggle — IRGC vs civilian government — is now the most consequential variable in the war. Mojtaba Khamenei’s authority is contested, his Chief of Staff Mussawi is dead, and the IRGC operates with increasing autonomy. The question is no longer whether a deal can be reached between Washington and Tehran, but whether Tehran can negotiate with itself.

10 MAJOR DEVELOPMENTS

1. Iran turns back Chinese vessel — even Beijing is not exempt from IRGC Strait control

The IRGC turned back the Chinese-flagged *Sun Profit* along with two tankers under Botswana and Angola flags. Iran’s Consulate General in Mumbai clarified via X that no “blanket approval” exists — each vessel requires individual IRGC authorization. The IRGC radio broadcast: the Strait is closed “by the order of Imam Khamenei, not by the tweets of some idiot.” China buys 90% of Iran’s oil; being turned back signals the IRGC will enforce control universally, even against its most important economic partner ([Hindi News18](#), [AAWSAT](#)).

2. WSJ: Aides kept Trump out of the war room; F-15 crash triggered hours-long rage

The Wall Street Journal reported senior officials intentionally excluded Trump from Situation Room updates during operations, fearing his “impatience wouldn’t help.” After an F-15 was shot down and two pilots went missing, Trump “screamed at aides for hours” and demanded immediate rescue. He rejected a Kharg Island seizure mission, saying troops would be “sitting ducks.” His Easter “Glory to Allah” Truth Social post was described as calculated unpredictability. Aides physically escorted him from meetings. Security at Mar-a-Lago was upgraded against drone surveillance ([Middle East Eye](#), [Paris Match](#), [Kikar](#)).

3. IRGC-Foreign Ministry split fully exposed — Tasnim publicly rebukes Araghchi

The internal Iranian power struggle is now public. IRGC-aligned Tasnim News openly criticized FM Araghchi for publishing his Strait-reopening tweet “without any necessary and complete information,” accusing him of a “lack of wisdom in communication.” Hardline deputy Mortaza Mahmoudi called for Araghchi’s dismissal, accusing him of “providing a gift to the United States” by lowering oil prices. Parliament Speaker Ghalibaf stated Strait decisions will

be made by Iran, “not on social media.” ISW interprets this as “widespread division within the Iranian regime” post-Khamenei ([Sky News Arabia](#), [Navbharat Times](#), [T-Online](#)).

4. Houthis threaten Bab al-Mandeb closure — dual-chokepoint scenario

Houthi Vice FM Hussein al-Ezzi warned Trump that if the US doesn't lift its blockade, Yemen will close Bab al-Mandeb: “Not even all of humanity and jinn will be able to open it.” This would create a dual-chokepoint crisis simultaneously closing both the Persian Gulf outlet and the Red Sea gateway — affecting 30%+ of global oil transit and the Suez Canal route. The threat is Iran's most expansive maritime leverage to date ([Middle East Eye](#), [Voz Populi](#)).

5. Trump spoke directly with Iranian negotiators via Munir's phone during Tehran visit

Axios reported Trump spoke by phone with both Pakistani Army Chief Munir and Iranian negotiators during Munir's 3-day Tehran visit — the most direct US-Iran communication channel since the war began. Technical-level teams expected in Islamabad “most probably Monday.” The ceasefire expires Wednesday. The phone call contrasts with Trump's public “dropping bombs again” rhetoric and suggests a backchannel is active even as public positions harden ([AA](#)).

6. IRGC Aerospace Commander releases video from underground missile bases — claims replenishment exceeds pre-war pace

Major General Majed Mousavi released footage inspecting fortified underground missile facilities, claiming launcher replenishment has exceeded pre-war production rates. US intelligence confirms Iran recovered ~100 launchers from caves since the ceasefire, restoring capacity from 50% to 60% of pre-war levels with potential to reach 70%. Iran retains ~700-800 missiles (from original ~3,000), ~40% of drones, and 60% of launchers. The ceasefire is functioning as a reconstitution window ([Asharq](#), [JDN](#), [i24 News](#)).

7. Israel-US preparing joint strikes on Iranian energy facilities if ceasefire collapses

A senior Israeli military official told Maariv that if negotiations fail, Iran faces “extremely harsh strikes” with “heavy losses.” CENTCOM Commander Brad Cooper visited Israel to coordinate with IDF Chief Zamir. Joint forces have dropped **37,000+ munitions** on Iran over 40 days. The IDF has prepared an updated “target bank” including Iranian energy infrastructure. Netanyahu stated Operations “Rising Lion” and “Lion's Roar” prevented Iran from obtaining nuclear weapons ([Sky News Arabia](#), [Mako](#)).

8. North Korea fires ballistic missiles — 4th launch this month, 7th of year

Missiles launched near Sinpo (SLBM test facility area) traveled ~140 km. Analysts frame the launches as demonstrating “unlike Iran, we have self-defense capabilities.” IAEA Director Grossi warned of “very serious” nuclear weapons production advances at Yongbyon, including a probable new enrichment facility. The launches signal that the Iran war's nuclear dimension is creating proliferation incentives beyond Iran itself ([CNBC](#), [Geo TV](#)).

9. Ghalibaf: “progress” but “far from final agreement” – ceasefire expires

Wednesday

Iranian Parliament Speaker and lead negotiator confirmed talks have “advanced” but “many gaps and fundamental points remain.” He called Iran victorious “on the battlefield” and warned armed forces are “fully prepared” to “immediately resume combat operations.” He stated: “We have absolutely no confidence in the United States.” Key sticking points unchanged: US demands 20-year enrichment suspension vs Iran’s 3-5 year offer; uranium disposition; \$20B frozen assets; Hormuz sovereignty. No date set for second round ([Le Monde](#), [TASS](#), [Al Jazeera](#)).

10. IMF/World Bank: \$150B aid committed; IEA says 6 weeks of EU jet fuel; 70% US farmers can’t afford fertilizer

The Spring Meetings in Washington were dominated by the war. IMF lowered 2026 growth to 3.1% best-case (2.5% adverse). A \$150B aid package for developing nations committed. Saudi FM stated improvement impossible until tankers can pass Hormuz with reasonable insurance. IEA’s Birol: flight cancellations between cities imminent. US farm diesel up 46%; urea doubled; 70% of American farmers reported they cannot afford fertilizer for the planting season. Global airline capacity contracting 3% vs projected 4-6% growth ([BBC Hindi](#), [Bloomberg HT](#), [USA Today](#)).

NUMBERS AT A GLANCE

METRIC	VALUE	SOURCE
War duration	Day 51	Multiple
Ceasefire expiry	Apr 22 (3 days)	Multiple
War Powers deadline	Apr 28 (9 days)	Multiple
Iran deaths (Martyrs Foundation)	3,468	Europapress
Iran deaths (HRANA)	3,636 (incl. 254 children)	DW
Iran injuries	26,500+	Europapress
Lebanon deaths (since Mar 2)	~2,300	France24
US KIA	13	DW
US/Israel munitions dropped on Iran	37,000+ (40 days)	Sky News Arabia
Iran missile launchers retained	~60% (up from 50% on Apr 8)	US intel/NYT
Iran drones retained	~40%	US intel/NYT
Iran missiles remaining	700-800 (from ~3,000)	Srugim/Rafael
Hidden launchers recovered	~100 during ceasefire	Multiple

METRIC	VALUE	SOURCE
Potential recovery target	70% of pre-war	AA
Iran reparations demand	\$270 billion	Ensonhaber
Oil lost (50 days)	500M+ barrels / \$50B	Reuters/Kpler
Gulf production drop (March)	-8M bpd	Multiple
Jet fuel exports (Feb vs Mar-Apr)	19.6M → 4.1M barrels	Multiple
Brent crude	~\$89-90/bbl	Multiple
WTI crude	~\$83-84/bbl	Multiple
Gold	\$4,831/oz	Vietnam.vn
Jet fuel price	\$99 → \$209/bbl	Multiple
EU jet fuel remaining	~6 weeks	IEA/Birol
US farm diesel	+46% since Feb	USA Today
US farmers unable to afford fertilizer	70%	USA Today
Urea prices	Doubled	ParaAnaliz
US warships enforcing blockade	12+ with 10,000+ personnel	MEE
Ships turned back by US	23	MEE
Strait traffic (pre-war vs current)	~135/day → <10/day	La Vanguardia
Sailors trapped in Gulf	~20,000	El Pais
Vessels trapped	823 (Vortexa)	El Pais
IMO attacks on commercial vessels	21 attacks, 10 deaths	El Pais
World Bank/IMF aid committed	\$150 billion	Bloomberg HT
IMF 2026 growth	3.1% best / 2.5% adverse	Bloomberg HT
49-nation Hormuz coalition	UK/France-led; US excluded	Hani
Iran internet blackout	50 days / 1,176 hours	Fontanka
Iran hospitals damaged	51	Sabah
Korean won	1,455-1,490/USD (war low)	Bloomingbit
Korea March import prices	+16.1% MoM (highest since 1998)	Bloomingbit
UK insolvencies (March)	2,022 (+82% YoY)	Oxford Mail

METRIC	VALUE	SOURCE
Bangladesh fuel price hike	10-15%	Al-Ain
EU inflation (March)	2.8% (from 2.1% Feb)	ICIS

PIVOT EVENT TRACKER

Pivot 1 – Does China cut a passage deal? (Timeline: Apr 2026)

Current assessment: UNCLEAR – probability DOWN

The IRGC turned back a Chinese vessel. Even China is not exempt. This undermines the theory that Beijing has a special arrangement. The IRGC radio message – “not by the tweets of some idiot” – signals the military will not honor diplomatic commitments to any party. May 14-15 Trump-Xi summit remains on but the IRGC’s universal enforcement changes the calculus.

Pivot 2A – Saudi back-channel to Iran? (Timeline: Jun 2026)

Current assessment: YES – probability STABLE

Saudi FM stated at IMF/WB meetings that improvement is impossible until Hormuz reopens with reasonable insurance. Quadrilateral coordination continues. Saudi Arabia’s structural alignment with the diplomatic track persists but the timeline is compressed by the Wednesday expiry.

Pivot 2B – Nuclear sprint to 90%? (Timeline: May 2026)

Current assessment: UNCLEAR – probability UP

IRGC Aerospace Commander’s underground missile base video. Launcher replenishment “exceeds pre-war pace.” IAEA blocked. North Korea demonstrating that nuclear capability provides immunity from US attack. The proliferation incentive is now explicit.

Pivot 3A – Ceasefire deal? (Timeline: Sep–Oct 2026)

Current assessment: UNCLEAR – probability DOWN further

Ghalibaf: “far from final agreement.” No date for second round. IRGC publicly overriding FM. Khatibzadeh demands “framework” before talks. Trump’s phone call with Iranian negotiators via Munir is the only positive signal. Wednesday expiry with no confirmed talks is the most dangerous configuration since February 28.

Pivot 3B – US recommit militarily? (Timeline: Aug 2026)

Current assessment: UNCLEAR – probability UP

WSJ reveals Trump was excluded from operational decisions by his own staff. But he convened the Situation Room meeting, threatened bombing, and is coordinating with Israel on energy infrastructure targets. Three carriers converging. Diego Garcia buildup. The operational posture is escalation even as the Commander-in-Chief’s control is questioned.

Pivot 3C – US strike nuclear sites? (Timeline: Jul 2026)

Current assessment: UNCLEAR – probability UP

IRGC demonstrating underground reconstitution. IAEA blocked. North Korea accelerating. The nuclear clock is ticking faster than the diplomatic one.

OUTCOME PROBABILITY ASSESSMENT

RANK	OUTCOME	TREND	RATIONALE
1	E: Full regional war	↑ ↑	Moves to #1. Houthi Bab al-Mandeb threat = dual chokepoint. IRGC firing on ships including Chinese. Israel preparing energy strikes. 37,000 munitions already dropped. Wednesday deadline with no talks scheduled. North Korea demonstrating proliferation incentive.
2	B: Frozen conflict	↓	Drops from #1. The frozen state requires a ceasefire extension; Iran hasn't committed to talks. IRGC overriding diplomats. Ghalibaf "far from agreement." The ice is cracking.
3	C: Pyrrhic US war	→	\$50B/500M barrels. 70% farmers can't afford fertilizer. WSJ reveals dysfunctional command. Consumer sentiment record low. Cost documentation comprehensive regardless of outcome.
4	G: China wins the peace	↓	Chinese vessel turned back. Even Beijing's ships aren't exempt. CIPS yuan settlements continue but the physical passage is blocked.
5	F: Nuclear Iran fait accompli	↑	IRGC underground reconstitution. IAEA blocked. North Korea demonstrating that nuclear weapons = immunity. The lesson is being transmitted in real time.
6	H: Uneasy US restoration	↓	49-nation coalition excluding US. WSJ: staff excluding Trump from his own war room. Alliance erosion + internal dysfunction = structural inability to restore.
7	D: Gulf collapse	→	\$150B IMF/WB aid committed. Saudi bank deposits hit record 3T riyals. Adaptation continues even as damage deepens.

RANK	OUTCOME	TREND	RATIONALE
8	A: Early capitulation	↓	IRGC reconstituting. Ghalibaf: “victorious on the battlefield.” Turned back Chinese ship. The opposite of capitulation.

BIAS & NARRATIVE ANALYSIS

LOCALE	DOMINANT NARRATIVE	KEY FRAMING
US (English)	WSJ war room expose + Wednesday deadline	Trump excluded by own staff; F-15 rage; dual “close”/“bombs” messaging
India (Hindi/English)	IRGC attacks on Indian ships + ambassador summoned	\$1.4B insurance fund; LPG down 75%; formal diplomatic escalation
Israel (Hebrew)	Target bank + energy facility preparation	Cooper-Zamir coordination; 37,000 munitions; “harsh strikes” if talks fail
Iran (fractured)	IRGC vs FM now public; Tasnim rebukes Araghchi	“Not by tweets of some idiot”; Ghalibaf dominates; Mahmoudi calls for dismissal
Germany (DE)	Power struggle analysis + kerosene crisis	T-Online long-form on IRGC-FM split; BDL kerosene demand
Russia (TASS)	Iran “strategic victory” + US dysfunction	WSJ expose amplified; Ghalibaf “victorious”; Medvedev nuclear test claim
Gulf (Arabic)	\$270B reparations demand + Hormuz toll regime	Saudi FM at IMF; IRGC turned back even Chinese ship
Korea/Japan	North Korea missiles + import price shock	March imports +16.1% MoM (1998 record); DPRK demonstrating immunity

CONTRADICTIONARY CLAIMS

1. Strait status: “open” → “closed” → IRGC: “by order of Imam Khamenei, not by tweets of some idiot”

- **Araghchi (Friday):** “Completely open” ([Multiple])
- **IRGC (Saturday):** “Strict control,” any approaching vessel = “cooperating with the enemy” ([CGTN](#))

- **IRGC radio:** “By the order of Imam Khamenei, not by the tweets of some idiot” ([Hindustan Times](#))

2. Trump’s role: “in command” vs excluded by own staff

- **Trump:** Convened Situation Room; threatened bombing; spoke with negotiators ([Multiple])
- **WSJ:** Aides kept him out of war room; feared his “impatience”; physically escorted him from rooms ([MEE](#))

3. Iran military: “destroyed” vs recovering to 70%

- **Trump/Hegseth:** Iran has “no navy, air force, or leaders” ([Prior SITREP])
- **US intelligence:** 60% launchers, 40% drones, recovering 100 systems, potential 70% ([AA](#))

4. Negotiations: “very close” vs “far from agreement”

- **Trump:** Deal could come “within a day or two” ([Prior])
- **Ghalibaf:** “Far from a final agreement”; “many gaps”; “no confidence in the United States” ([Le Monde](#))

UNCONFIRMED RUMORS & FORWARD SIGNALS

1. Trump spoke directly with Iranian negotiators via Munir’s phone – HIGH

- Axios sourced. Most direct US-Iran communication since the war began. Suggests backchannel active despite public hardening.

2. Houthi Bab al-Mandeb closure threat – HIGH

- Al-Ezzi on record. Would create dual-chokepoint crisis. Execution capability demonstrated in 2024 Red Sea campaign.

3. WSJ: Trump excluded from own war room – HIGH

- Published investigation with multiple named scenarios. Redefines command-and-control assumptions.

4. Mojtaba Khamenei severely injured; authority contested – MODERATE

- Multiple sources report he hasn’t appeared publicly since March 8. Death of Chief of Staff Mussawi removed IRGC-Artesh link. Reports of ammunition shortages and desertions.

5. Iran’s “Mosquito Fleet” of 2,000-3,000 fast boats – MODERATE

- Arabic Euronews cites ~50,000 IRGC maritime personnel across 10 fortified coastal bases. The asymmetric threat persists regardless of conventional naval destruction.

6. North Korea accelerating nuclear production – HIGH

- IAEA's Grossi: “very serious” advances at Yongbyon. The Iran war is creating a global proliferation incentive.

INFORMATION GAPS

What did Trump say to Iranian negotiators?

The Axios-reported phone call via Munir is the most significant backchannel signal. Content is unknown.

Why was a Chinese vessel turned back?

IRGC enforcement appears universal, but China's reaction is unreported. Beijing's response will determine whether the yuan-oil relationship survives.

What is Mojtaba Khamenei's actual condition?

42+ days without public appearance. If incapacitated, the IRGC's operational autonomy is explained by a power vacuum, not a policy choice.

Can Houthis actually close Bab al-Mandeb?

Their 2024 campaign disrupted but didn't fully close the strait. A simultaneous Hormuz + Bab al-Mandeb closure would be unprecedented.

Who controls Iran's war decisions?

Araghchi opened the Strait; the IRGC closed it and called him “some idiot.” Ghalibaf issues definitive statements. The SNSC reviews proposals. Mojtaba Khamenei is invisible. There may be no single decision-maker.

APPENDIX: SOURCE STATISTICS

Coverage window: 2026-04-19 01:00 UTC → 2026-04-19 12:00 UTC (Apr 18 9:00 PM EDT → Apr 19 8:00 AM EDT, 11 hours) **Articles analyzed:** 490 **Unique source domains:** 233 **Country-language locales:** 21

Articles by locale

LOCALE	ARTICLES	LOCALE	ARTICLES
DE-de	62	IN-en	12
CA-en	55	KR-ko	10
ES-es	42	IL-he	8
AR-sa	36	TR-en	5
FR-fr	34	IL-en	4

LOCALE	ARTICLES	LOCALE	ARTICLES
HI-in	30	KR-en	3
RU-ru	28	IR-en	2
EN-us	22		
EN-gb	20		
EN-pk	18		
TR-tr	16		
EN-uk	15		
ZH-cn	14		
AR-eg	13		
JA-jp	12		
RU-en	10		

Top source domains

DOMAIN	ARTICLES
middleeasteye.net	16
tass.com	14
hindustantimes.com	12
asharq.com	11
aa.com.tr	10
dawn.com	10
n-tv.de	9
skynewsarabia.com	8
aljazeera.com	8
dw.com	7
bbc.com	6
fr.de	6
independent.co.uk	5
ndtv.com	5

lemonde.fr

5

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