

# OVER THE HORIZON

## Forecasting Temporal News Inflection Points

v0.98 Complete Diagnostic Prospective Report

Data cutoff: 26 August 2026, 06:46 CDT / 11:46 UTC

Run ID: OTH-v0.98-2026-08-26-0646-CDT

**RUN ISOLATION: COMPROMISED BY PRIOR CONVERSATIONAL EXPOSURE — USE AS DIAGNOSTIC / PROSPECTIVE UPDATE, NOT A CLEAN BLIND RUN**

**George A. Ure**

**Over-the-Horizon Software / Peoplenomics Research**

### RESEARCH NOTICE

OTH is an experimental horizon-scanning and prospective scorekeeping instrument. Relative field intensity, coherence, source hardening, and machine ridge labels are not calibrated event probabilities. Missing lanes are reported as missing rather than treated as zero.

## Run Header and Abbreviations

| Field                   | Value                                        |
|-------------------------|----------------------------------------------|
| Run ID                  | OTH-v0.98-2026-08-26-0646-CDT                |
| Tasker                  | v0.98                                        |
| Numerical core          | v0.9-core corrected bridge/kernel            |
| Pretasker run           | OTH-PT-v0.2-20260826-0646-CDT                |
| Data cutoff local       | 2026-08-26T06:46:00-05:00                    |
| Data cutoff UTC         | 2026-08-26T11:46:00Z                         |
| T+7 boundary            | 2026-09-02                                   |
| Active qualifying atoms | 21                                           |
| Bridge rejections       | 4                                            |
| Run isolation           | COMPROMISED BY CONVERSATIONAL PRIOR EXPOSURE |
| Predictor packet hash   | b484e6b24b71614dc75f93f6...                  |

## Working Glossary

| Abbrev.          | Meaning                                                     |
|------------------|-------------------------------------------------------------|
| OTH              | Over-the-Horizon Software                                   |
| H1-H5            | T+7-13, T+14-30, T+31-90, T+91-150, T+151+                  |
| WFA              | Word-Frequency Analysis / language-pressure lane            |
| NCD              | News Cycle Decrementer                                      |
| HQV              | Human Query Vector                                          |
| HBR              | Human-Buffered Restatement                                  |
| PMFS             | Prediction-Market Forward Sensor                            |
| SCCL             | Source-Channel Coherence Layer                              |
| DCA              | Data Coherence Analysis                                     |
| SWFS             | Space Weather Forward Sensor                                |
| P1/P2            | Registered scoring/watch tiers for human predictive sources |
| N <sub>eff</sub> | Effective independent root/source count                     |

## Executive Summary

The August 26 v0.98 run does not support treating September 26 as a newly discovered sharp event date. The machine ridge module returns a nominal September 26 centroid and a MAJOR label, but the actual 7-day-smoothed field is flat at its maximum from roughly September 12 through September 27. The operational interpretation is therefore a broad mid-to-late-September landing zone rather than a one-day target.

The underlying field is materially more diversified than on August 21. The current main cluster carries 16 effective roots across eight domains, while the largest single source falls to 39.2% from 56.0% in the prior run. This clears the numerical concentration veto that previously blocked Major status. However, the entire run is explicitly marked

COMPROMISED\_BY\_CONVERSATIONAL\_PRIOR\_EXPOSURE, so the machine MAJOR classification is carried in this report as a diagnostic result, not as clean prospective confirmation.

New conventional atoms are two-sided. Stress/hardening additions include a planned Russian diesel-export ban extension through September, severe Qatari LNG impairment with a winter-Europe tail, the October UK household-energy price-cap increase, and the already active Black Sea and Iranian supply constraints. Counter-signals and adaptation include Saudi Aramco shifting more September loading outside Hormuz and Iran-Oman navigation/mine-clearance talks, although the latter did not yield a bounded T+7 atom.

The human-predictor lane remains AMBER, but there is no new narrowing. Jackowski and Hamilton-Parker retain active overlap with the ordinary field; neither changes hardening state. Jessica Adams remains the explicit counter-signal to a simple broad world-war interpretation. Brandon Biggs remains P2 because the original oil-price artifact is still unavailable. Predictor temporal mass and independence credit remain zero.

Bottom line: the field has broadened from a September 15 point emphasis into a high plateau across much of mid-to-late September. Energy/transport remains the dominant causal chain, food/trade is the strongest secondary propagation channel, and finance contributes a scheduled liquidity-support operation rather than a panic signal. Late October remains a real consequence zone but is structurally weaker than the September plateau.

| Headline measure          | Current read                                                                                   |
|---------------------------|------------------------------------------------------------------------------------------------|
| Main machine ridge        | 2026-09-26 / relative 100.0 / 16 roots / 39.2% max source                                      |
| Analyst landing-zone read | Mid-to-late September; broad plateau, not a sharp Sep 26 call                                  |
| Machine ridge status      | MAJOR                                                                                          |
| Report disposition        | DIAGNOSTIC MAJOR / AUDIT HOLD due run isolation and plateau geometry                           |
| Predictor field           | AMBER / selective signal persists, no new narrowing                                            |
| Predictor mass            | 0                                                                                              |
| Key falsifier             | Broad Hormuz normalization + easing refined-fuel/logistics stress + Black Sea flow improvement |

# 1. Temporal Field and Ridge Decision

Figure 1. Current OTH Temporal Field — Relative 7-Day Smoothed Intensity

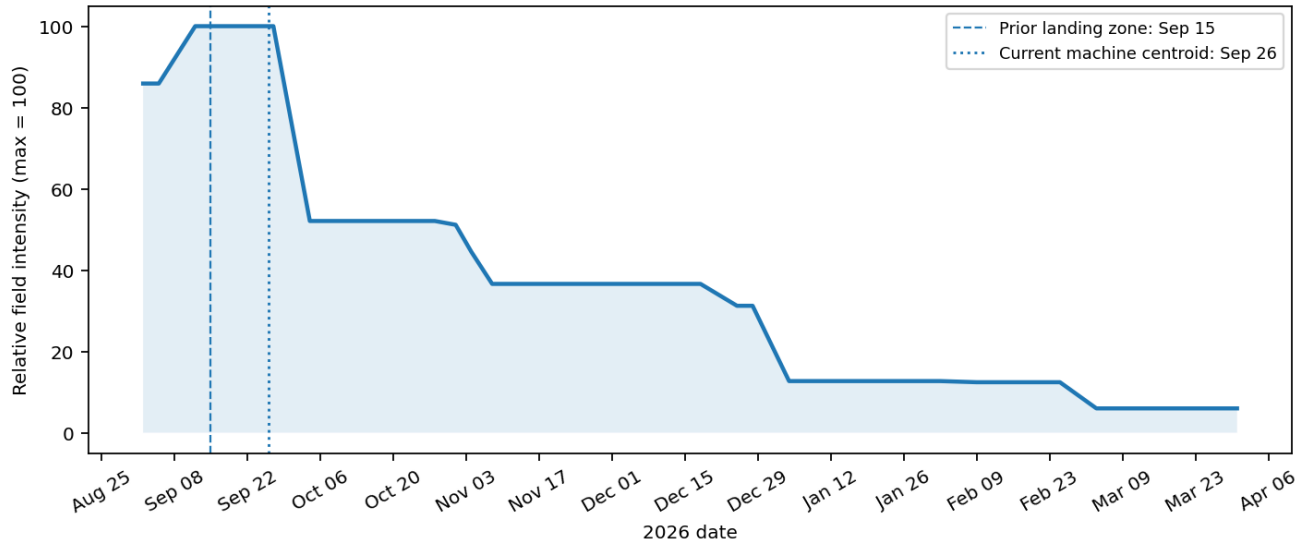


Figure 1. Current OTH Temporal Field — Relative 7-Day Smoothed Intensity

The field reaches its maximum across a long September plateau. The prior September 15 landing zone lies inside the plateau; the current machine centroid of September 26 is therefore a geometric summary of a broad high-field interval, not evidence for a one-day event.

Figure 2. September–October Field Geometry: Plateau, Not a Sharp Spike

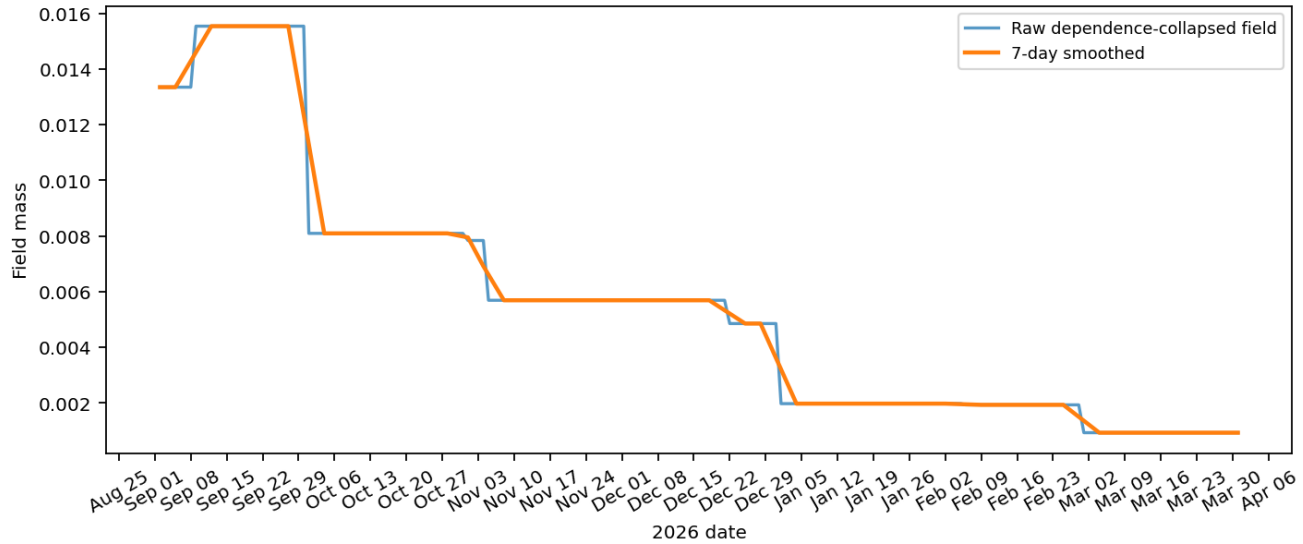


Figure 2. September–October Field Geometry: Plateau, Not a Sharp Spike

The raw field changes in steps as bounded windows enter and leave the overlap. Seven-day smoothing produces an extended flat maximum. This is the central audit finding of the current run.

## Machine Ridge Board

| Peak       | Centroid   | Rel.  | Machine status | Roots | Domains | Max source | Share | Cluster                  |
|------------|------------|-------|----------------|-------|---------|------------|-------|--------------------------|
| 2026-09-26 | 2026-09-26 | 100.0 | MAJOR          | 16    | 8       | Reuters    | 39.2% | 2026-09-02 to 2026-10-28 |

Audit disposition: the numerical test for Major is satisfied by root count, domain breadth, percentile, and source concentration. The report nevertheless prevents the single printed centroid from being interpreted as a precise forecast because the maximum is a plateau. The machine label is preserved; the analytical interpretation is narrowed only to what the field geometry actually supports.

## Half-Life Sensitivity

Figure 8. News-Memory Half-Life Sensitivity

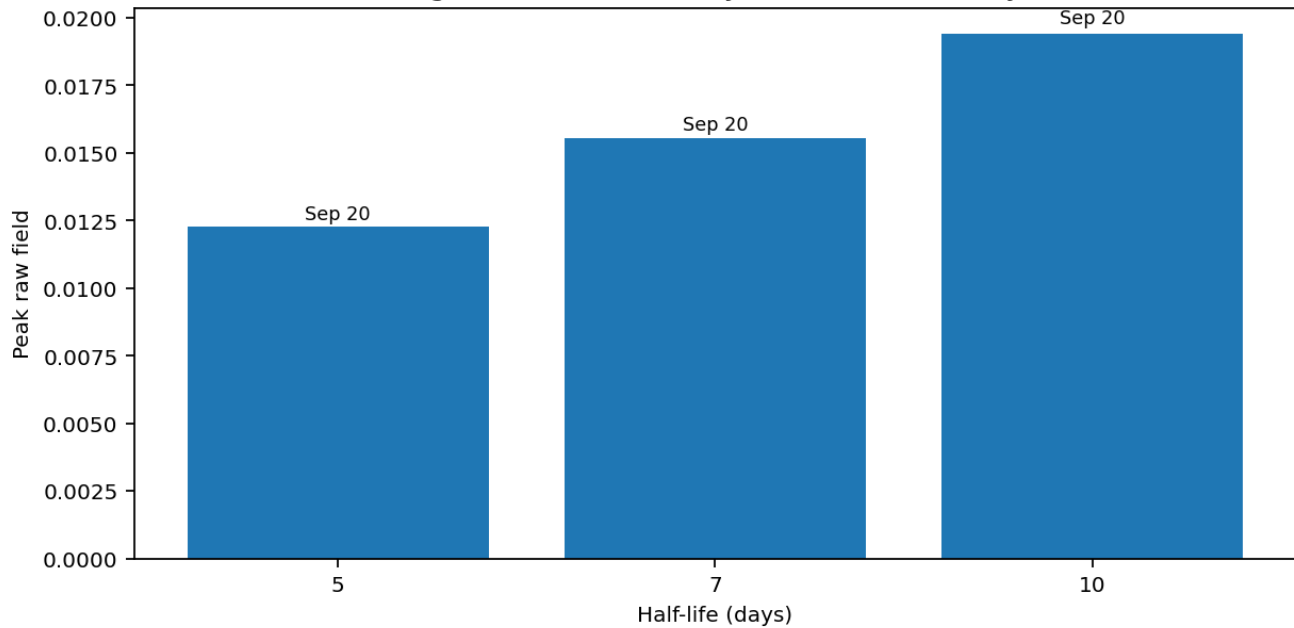


Figure 8. News-Memory Half-Life Sensitivity

The 5-, 7-, and 10-day NCD sensitivity passes all retain the same top-date neighborhood around September 20. The absolute field mass changes, but the broad September landing zone survives.

## 2. What Moved Since August 21?

| Metric          | Aug 21 baseline                              | Aug 26 current                                   | Motion                                                           |
|-----------------|----------------------------------------------|--------------------------------------------------|------------------------------------------------------------------|
| main_ridge      | Sep 15 / 100.0 / 12 roots / 56.0% max source | 2026-09-26 / 100.0 / 16 roots / 39.2% max source | PERSISTED / concentration test changed                           |
| secondary_ridge | Oct 25 / 28.2                                | See current ridge board; late-Oct is broad/weak  | WEAKENED/WIDENED unless current board shows a stronger secondary |
| active_atoms    | 18                                           | 21                                               | +3 net active (2 near-field atoms expired; 5 new bounded atoms)  |
| predictor_field | AMBER / selectively hardening                | AMBER / no new narrowing                         | PERSISTED BUT NO NEW HARDENING                                   |

Figure 7. Main Ridge Diversification Since August 21

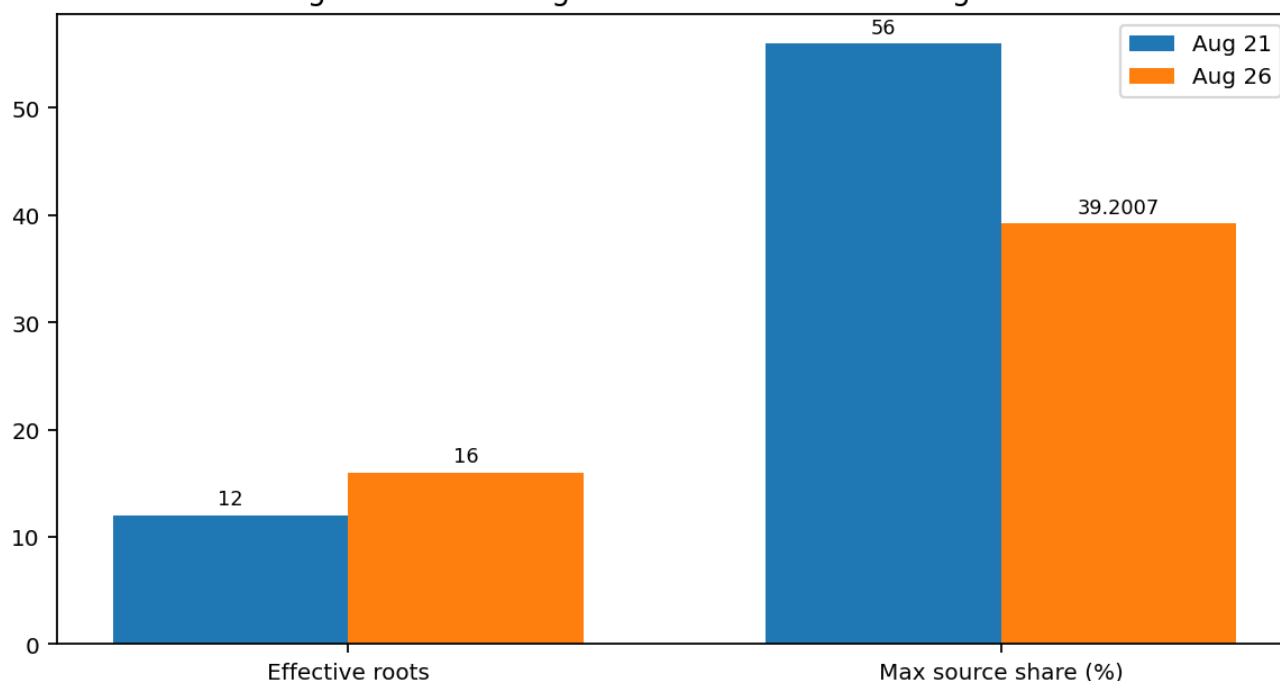


Figure 7. Main Ridge Diversification Since August 21

Effective roots rise from 12 to 16 while the largest-source share falls from 56.0% to 39.2%. This is the most important structural change in the run: the September field is less dependent on one source even though its date geometry is broader.

Instrument change versus world change: the numerical core remains v0.9-core corrected bridge/kernel. The field change is driven by newly admitted bounded conventional atoms. Predictor mass remains zero and therefore cannot manufacture the ridge.

### 3. Data Coherence Analysis and Source-Channel Architecture

| Lane                  | State                                  | Independent credit | Interpretation                                                                                                                       |
|-----------------------|----------------------------------------|--------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| CONVENTIONAL_OFFICIAL | HARDENING / TWO-SIDED                  | HIGH               | Russia diesel, Qatar LNG, Ofgem pass-through harden stress; Aramco bypass and Iran-Oman talks are easing/adaptation counter-signals. |
| GENERAL_NEWS          | MIXED / ACTIVE                         | MEDIUM             | Physical state confirms persistence but much coverage descends from visible war/shipping drivers.                                    |
| WFA                   | PARTIAL: REFINED-FUEL UP; HORMUZ MIXED | LOW-MEDIUM         | Current mini-corpus only; no frozen comparable 1/7/30-day production corpus in this run.                                             |
| PMFS                  | DELAYED-NORMALIZATION SHADOW           | SHADOW             | Market pricing still favors a long normalization tail; formula remains unfrozen so temporal mass = 0.                                |
| HUMAN_PREDICTORS      | AMBER / NO NEW NARROWING               | ZERO THIS RUN      | Active overlap persists; no new hardening transition; non-blind packet.                                                              |
| HQV                   | MISSING                                | NONE               | No fixed-basket query time series; missing is not zero signal.                                                                       |
| HBR                   | UNAVAILABLE                            | NONE               | No defensible current sample.                                                                                                        |
| SWFS                  | PARTIAL / BLINK-ONLY                   | NONE OTH           | Near-field coronal-hole timing does not cross T+7 with a terrestrial consequence.                                                    |

The dominant causal architecture is still ENERGY -> TRANSPORTATION -> FOOD/TRADE, with FINANCE contributing a scheduled liquidity-management operation and ENVIRONMENT carrying the longer El Niño arc. Raw agreement is higher than true independence because several news and WFA observations descend from the same visible war, refinery, shipping, and chokepoint mechanisms.

#### Cross-Channel Read

- Conventional/official: hardening but two-sided. Refined-fuel, LNG and household-energy pass-through stress are offset by bypass/adaptation evidence.
- General news: active confirmation, but much of it is causal descendant material rather than independent precursor evidence.
- WFA: partial. Current mini-corpus shows refined-fuel pressure but lacks a frozen comparable 1/7/30-day corpus.
- PMFS: delayed-normalization shadow. Market captures still lean toward a long Hormuz normalization tail, but the formula remains unfrozen, so temporal mass is zero.
- HQV/HBR: missing or unavailable. They are not treated as zero signal.

## 4. Predictor Field State — Pretasker v0.2 Handoff

Pretasker field: AMBER / SELECTIVE SIGNAL PERSISTS, NO NEW NARROWING. The packet was frozen before main synthesis, but its blindness is compromised. Predictor independence credit = 0; predictor temporal mass = 0; predictor Major-ridge confirmation is prohibited.

Figure 10. Predictor Source State — Qualitative Diagnostic Only

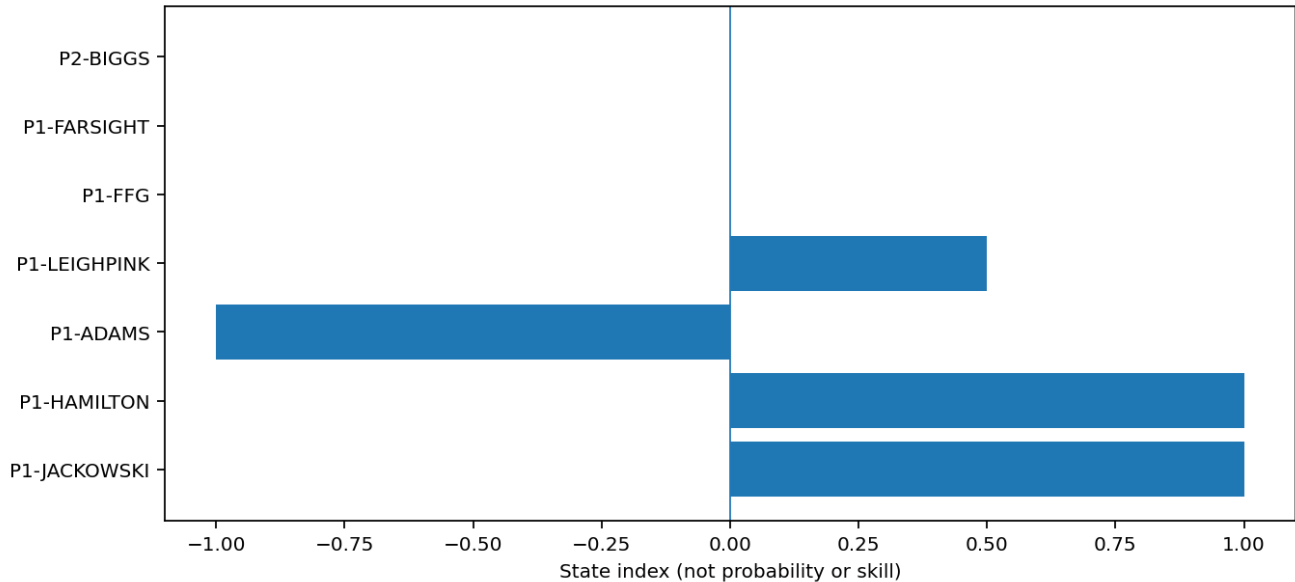


Figure 10. Predictor Source State — Qualitative Diagnostic Only

The index is only a display mapping of categorical states. It is not a probability, skill score, or Source Hardening Index.

| Source       | Prior              | Current                    | Transition       | Reason                                                                                                 |
|--------------|--------------------|----------------------------|------------------|--------------------------------------------------------------------------------------------------------|
| P1-JACKOWSKI | HARDENING_FAST     | UNCHANGED / REPEAT         | NO_NEW_NARROWING | Aug17-23 archive reinforces same autumn/Iran/Hormuz themes but does not narrow beyond frozen baseline. |
| P1-HAMILTON  | HARDENING          | UNCHANGED / REPEAT         | NO_NEW_NARROWING | No fresh creator-original narrowing after prior Aug16 secondary report.                                |
| P1-ADAMS     | COUNTER_SIGNAL     | COUNTER_SIGNAL             | UNCHANGED        | No fresh bounded reversal recovered.                                                                   |
| P1-LEIGHPINK | UNCHANGED / REPEAT | UNCHANGED / ACCESS-LIMITED | NONE             | No new clean bounded creator artifact.                                                                 |
| P1-FFG       | GATED              | GATED                      | NONE             | Content unavailable.                                                                                   |
| P1-FARSIGHT  | MISSING            | MISSING                    | NONE             | No fresh accessible artifact.                                                                          |
| P2-BIGGS     | P2                 | P2 / KEEP                  | NONE             | Original oil-price artifact still missing; baseline insufficient.                                      |

### Predictor Gaps

| Gap                                    | Status                     |
|----------------------------------------|----------------------------|
| FFG current content                    | ACCESS_GAP                 |
| Farsight current predictive artifact   | DATA_ACCESS_GAP            |
| Biggs original oil claim               | PROVENANCE_GAP             |
| Jackowski creator-original exact spans | PROVENANCE_TRANSLATION_GAP |
| HBR                                    | UNAVAILABLE                |

Interpretation: the unconventional lane is doing what v0.98 was designed to make possible—preserving timestamped source states and misses without allowing familiar retrospective stories to become numeric confirmation. There is overlap, but no lead claim is made.

## 5. Seven-System Vector Board

Figure 6. Seven-System Direction Board

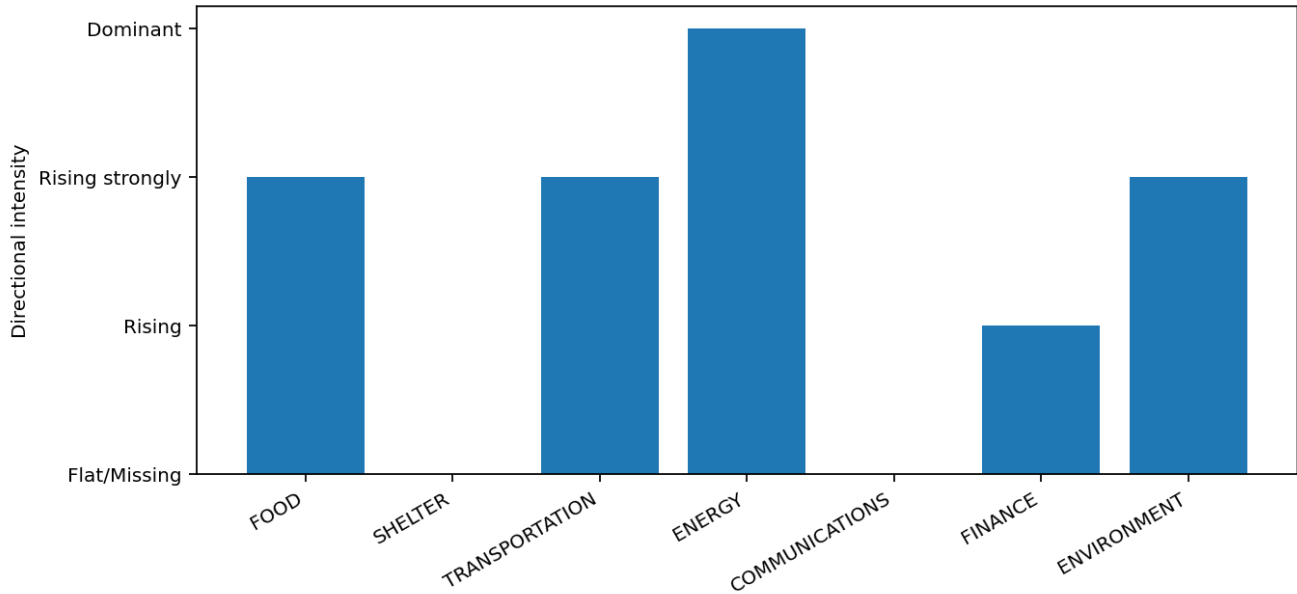


Figure 6. Seven-System Direction Board

ENERGY is the dominant system; TRANSPORTATION, FOOD and ENVIRONMENT are strong secondary channels. FINANCE is rising through a scheduled Treasury operation. SHELTER and COMMUNICATIONS lack strong direct bounded atoms in the current run.

| System         | Vector      | Read                                                                                                            |
|----------------|-------------|-----------------------------------------------------------------------------------------------------------------|
| FOOD           | ↑↑          | Black Sea cargo stress and U.S. wheat tightness; global buffer and oilseed substitution temper the read.        |
| SHELTER        | →           | No strong new direct shelter atom; household energy burden is indirect.                                         |
| TRANSPORTATION | ↑↑          | Hormuz constraints, rerouting, vessel risk and Russian refined-fuel logistics remain active.                    |
| ENERGY         | ↑↑↑         | Qatar LNG, Russia diesel/refinery stress and Hormuz remain the dominant system; Aramco bypass is adaptation.    |
| COMMUNICATIONS | → / MISSING | No qualifying independent bounded communications atom; HQV unavailable.                                         |
| FINANCE        | ↑           | Treasury liquidity-support buybacks begin Sep 9; this is a scheduled stabilizing operation, not a panic signal. |
| ENVIRONMENT    | ↑↑          | Very strong El Niño remains the major long-horizon environmental state; SWFS current timing is near-field only. |

## 6. New Conventional State Changes and Forward Atoms

### V098-REUTERS-RUSSIA-DIESEL-SEP: Reuters

Window: 2026-09-01 to 2026-09-30. Domain: ENERGY\_TRANSPORT. Direction: DIESEL\_EXPORT\_BAN\_EXTENDED. Effective weight: 0.110368.

Claim: Russia plans to extend its diesel export ban through September because of domestic fuel shortages and idle refinery capacity.

Source: <https://www.reuters.com/business/energy/russia-extend-diesel-export-ban-through-september-sources-say-2026-08-25/>

### V098-REUTERS-SA-OUTSIDE-HORMUZ-SEP: Reuters

Window: 2026-09-01 to 2026-09-30. Domain: ENERGY\_TRANSPORT. Direction: OUTSIDE\_HORMUZ\_LOADING\_UP. Effective weight: 0.121856.

Claim: Saudi Aramco increased oil shipments outside Hormuz for September loading, using transfers and alternative handling outside the chokepoint.

Source: <https://www.reuters.com/business/energy/aramco-offers-more-oil-outside-hormuz-with-some-cargoes-heading-china-2026-08-26/>



## V098-TREASURY-LONGEND-BUYBACK: U.S. Treasury

Window: 2026-09-09 to 2026-11-04. Domain: FINANCE. Direction: LONG\_END\_LIQUIDITY\_SUPPORT\_UP. Effective weight: 0.125000.

Claim: Treasury will at least double long-end liquidity-support buyback operations to at least \$4 billion per operation from September 9 through November 4.

Source: <https://home.treasury.gov/news/press-releases/sb0607>

## V098-OFGEM-OCT-CAP: Ofgem

Window: 2026-10-01 to 2026-12-31. Domain: ENERGY\_HOUSEHOLD. Direction: HOUSEHOLD\_ENERGY\_PRICE\_UP. Effective weight: 0.200000.

Claim: The UK household energy price cap rises 4% for October 1 through December 31, to £1,723 annualized for a typical direct-debit household.

Source: <https://www.ofgem.gov.uk/press-release/energy-price-cap-will-rise-4-october-2026>

## V098-REUTERS-QATAR-LNG-WINTER: Reuters

Window: 2026-09-22 to 2026-12-21. Domain: ENERGY\_TRADE. Direction: EUROPE\_WINTER\_GAS\_STRESS. Effective weight: 0.076160.

Claim: With Qatari LNG exports down sharply and European storage historically low, the winter 2026-27 gas balance carries elevated price-spike risk.

Source: <https://www.reuters.com/business/energy/war-strands-qatari-gas-6-months-us-sales-rise-european-stocks-plummet-2026-08-26/>

## Counter-Signal Without a New Atom

Reuters Iran-Oman talks remain an easing/adaptation signal involving temporary navigation-corridor and mine-clearance discussions, but the current package does not assign it a bounded T+7 atom. It therefore affects interpretation but not temporal mass.

## 7. Ridge Composition and Concentration

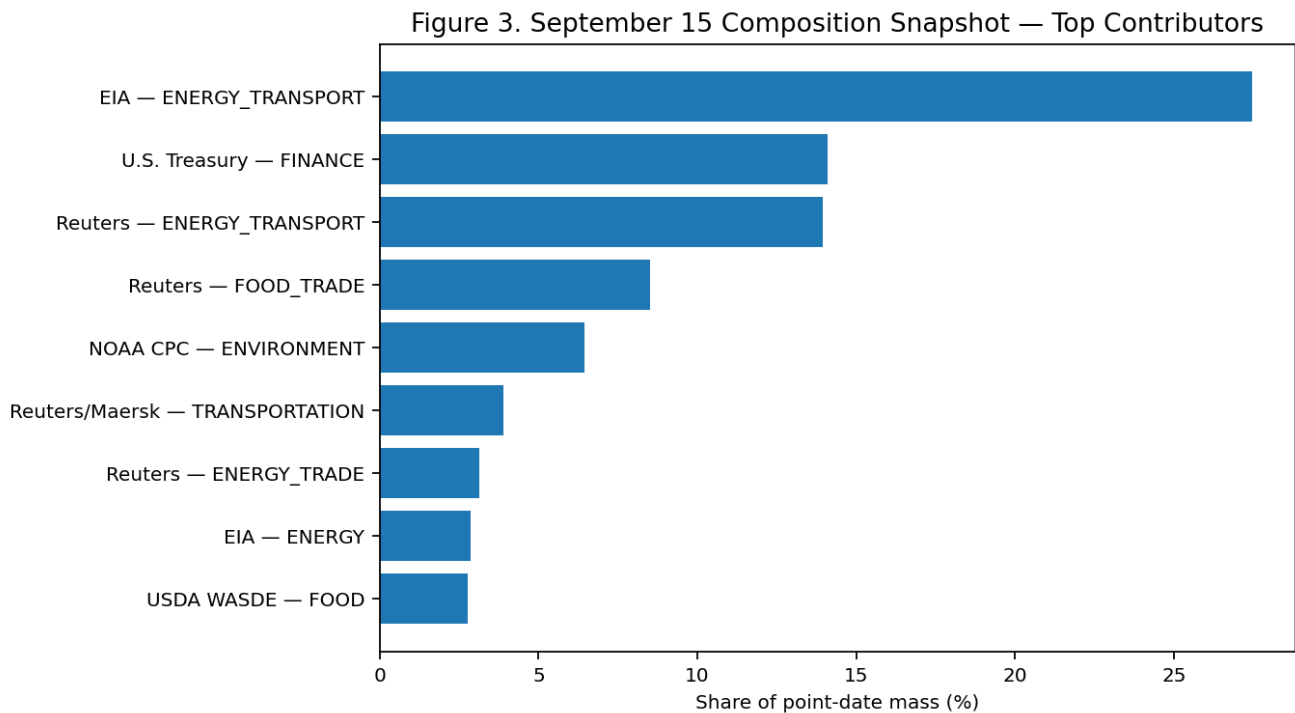


Figure 3. September 15 Composition Snapshot — Top Contributors

At the prior September 15 point, EIA Hormuz flow is now only 27.5% of mass. Treasury, Saudi bypass/adaptation, Russia diesel and Black Sea cargo stress materially diversify the point-date structure.

Figure 4. October 25 Composition Snapshot — Top Contributors

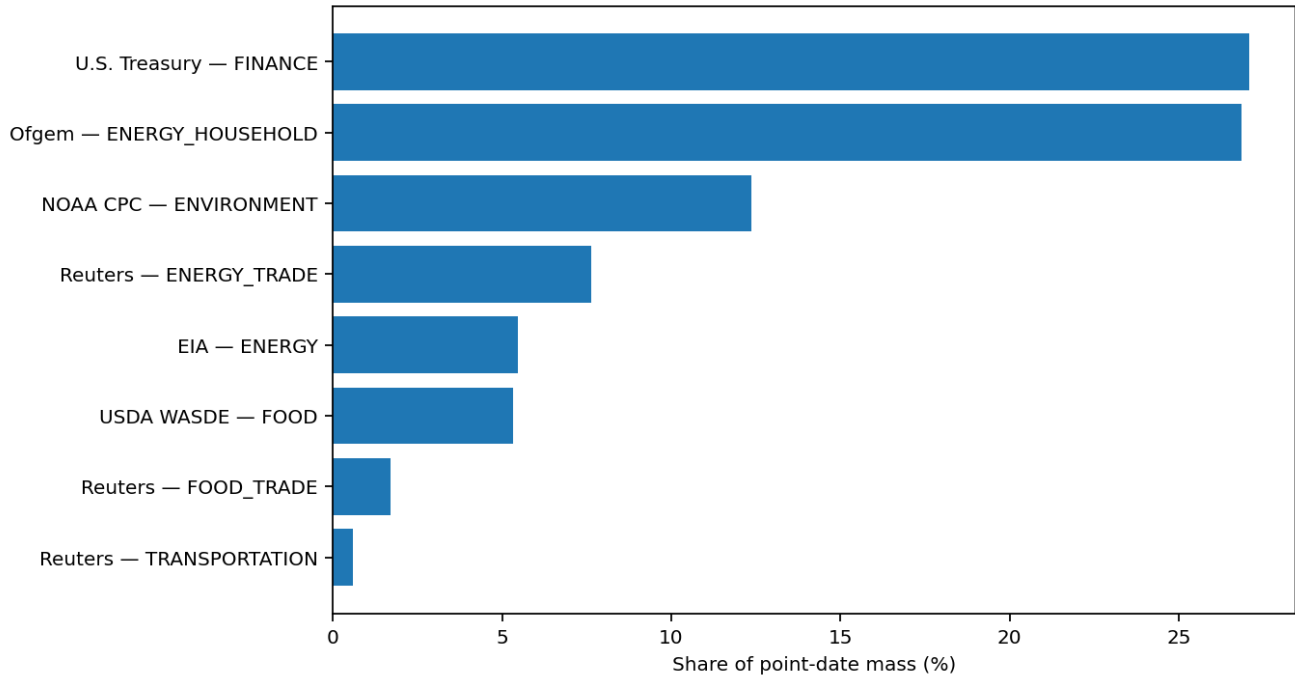


Figure 4. October 25 Composition Snapshot — Top Contributors

The October consequence zone is led by Treasury liquidity-support timing and the Ofgem Q4 household-energy cap, with El Niño and energy-trade tails behind them. It is more balanced than the old September structure but less intense.

### September 15 Composition Table

| Source         | Root                           | Domain           | Share |
|----------------|--------------------------------|------------------|-------|
| EIA            | EIA_HORMUZ_FLOW                | ENERGY_TRANSPORT | 27.5% |
| U.S. Treasury  | TREASURY_BUYBACK_Q3            | FINANCE          | 14.1% |
| Reuters        | SAUDI_REDSEA_BYPASS            | ENERGY_TRANSPORT | 14.0% |
| Reuters        | RUSSIA_FUEL_CHAIN              | ENERGY_TRANSPORT | 12.6% |
| Reuters        | BLACKSEA_GRAIN_EXPORT_CAPACITY | FOOD_TRADE       | 8.5%  |
| NOAA CPC       | NOAA_ENSO                      | ENVIRONMENT      | 6.4%  |
| Reuters/Maersk | MAERSK_Q3_DEMAND               | TRANSPORTATION   | 3.9%  |
| Reuters        | IRAN_OIL_CHINA_SEPOCT          | ENERGY_TRADE     | 3.1%  |
| EIA            | EIA_AI_POWER_DEMAND            | ENERGY           | 2.8%  |
| USDA WASDE     | USDA_GLOBAL_WHEAT              | FOOD             | 2.8%  |
| USDA WASDE     | USDA_US_WHEAT                  | FOOD             | 2.6%  |
| Reuters        | INDIA_SOYOIL_SUBSTITUTION      | FOOD_TRADE       | 0.7%  |

### October 25 Composition Table

| Source                               | Root                           | Domain           | Share |
|--------------------------------------|--------------------------------|------------------|-------|
| U.S. Treasury                        | TREASURY_BUYBACK_Q3            | FINANCE          | 27.1% |
| Ofgem                                | UK_ENERGY_PRICE_CAP_Q4         | ENERGY_HOUSEHOLD | 26.9% |
| NOAA CPC                             | NOAA_ENSO                      | ENVIRONMENT      | 12.4% |
| Reuters                              | IRAN_OIL_CHINA_SEPOCT          | ENERGY_TRADE     | 7.6%  |
| Reuters                              | QATAR_LNG_EU_WINTER            | ENERGY_TRADE     | 7.0%  |
| EIA                                  | EIA_AI_POWER_DEMAND            | ENERGY           | 5.5%  |
| USDA WASDE                           | USDA_GLOBAL_WHEAT              | FOOD             | 5.3%  |
| USDA WASDE                           | USDA_US_WHEAT                  | FOOD             | 5.0%  |
| Reuters                              | INDIA_SOYOIL_SUBSTITUTION      | FOOD_TRADE       | 1.7%  |
| Reuters                              | RUSSIA_FREIGHT_FUEL            | TRANSPORTATION   | 0.6%  |
| Reuters/Ukraine Agriculture Ministry | BLACKSEA_GRAIN_EXPORT_CAPACITY | FOOD_TRADE       | 0.5%  |
| Reuters/NRF                          | US_CONTAINER_IMPORTS           | TRANSPORTATION   | 0.5%  |

## 8. Future-Atom Windows and Horizon Structure

Figure 9. Active Future-Atom Windows Through March 2027

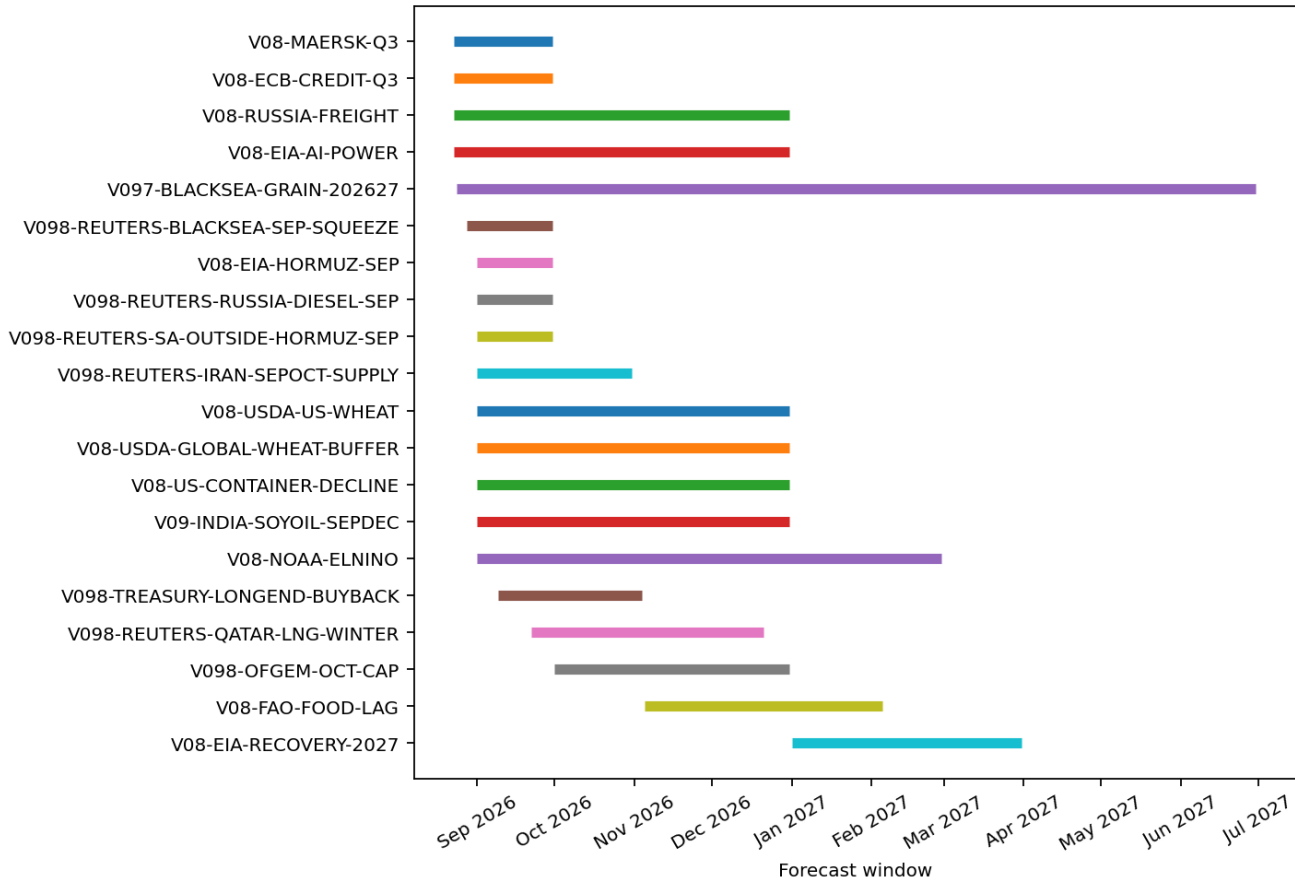


Figure 9. Active Future-Atom Windows Through March 2027

The chart shows why the September field can become a plateau: several strong monthly or multi-month windows overlap the same mid-September interval. Broad long-horizon atoms are spread thinly by the fixed-mass kernel and should not be read as exact dates.

The corrected bridge/kernel rule is preserved: atoms whose entire window ends before T+7 are rejected. A window crossing the boundary retains its original full kernel and only the T+7-and-later portion is sampled; it is not renormalized at the boundary.

## 9. Collector Completeness, PMFS, HQV, HBR and SWFS

Figure 5. Collector Completeness by Lane

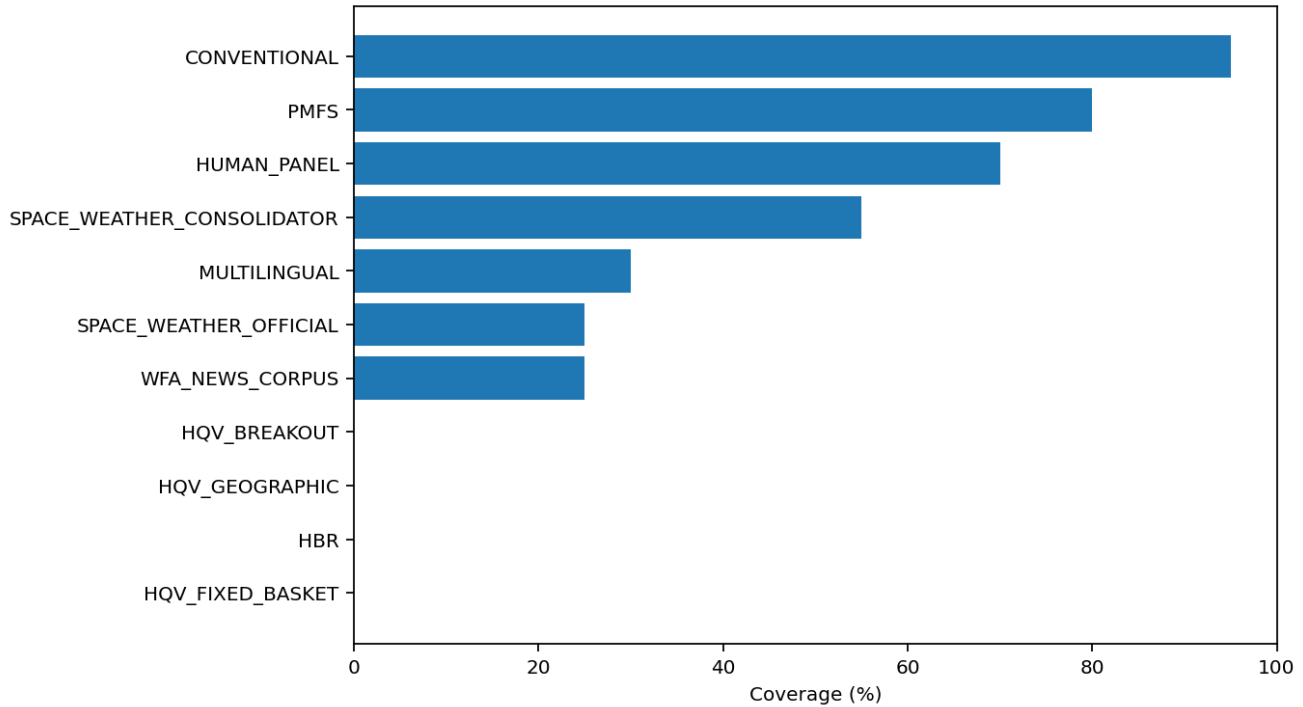


Figure 5. Collector Completeness by Lane

Completeness is an instrument-health measure, not a danger meter. Missing HQV and HBR are explicitly visible rather than silently converted to zero.

| Lane                       | Coverage | Note                                                                    |
|----------------------------|----------|-------------------------------------------------------------------------|
| CONVENTIONAL               | 95%      | Strong official/wire access.                                            |
| HUMAN_PANEL                | 70%      | Registry active; some creator originals/gated lanes missing.            |
| WFA_NEWS_CORPUS            | 25%      | Current mini-corpus only; no comparable frozen 1/7/30-day corpus.       |
| HQV_FIXED_BASKET           | 0%       | MISSING                                                                 |
| HQV_BREAKOUT               | 0%       | MISSING                                                                 |
| HQV_GEOGRAPHIC             | 0%       | MISSING                                                                 |
| HBR                        | 0%       | UNAVAILABLE                                                             |
| MULTILINGUAL               | 30%      | Polish predictor archive; broader multilingual coverage incomplete.     |
| PMFS                       | 80%      | Current crawl available, but numeric formula remains specification gap. |
| SPACE_WEATHER_OFFICIAL     | 25%      | Current exact official event capture partial.                           |
| SPACE_WEATHER_CONSOLIDATOR | 55%      | Secondary current discovery partial.                                    |

### PMFS Shadow Register

| Venue      | Contract                             | Current crawl read                                            | Disposition |
|------------|--------------------------------------|---------------------------------------------------------------|-------------|
| Polymarket | Hormuz traffic normal by Dec 31 2026 | current crawl around high-30s; exact snapshot varies by crawl | SHADOW_ONLY |
| Kalshi     | Hormuz normal before Apr 1 2027      | ~50%                                                          | SHADOW_ONLY |
| Kalshi     | Hormuz normal before Jul 1 2027      | ~55%                                                          | SHADOW_ONLY |
| Kalshi     | Hormuz normal before Jan 1 2028      | ~61-68% across current crawl surfaces                         | SHADOW_ONLY |

PMFS remains shadow-only because the tasker does not yet freeze a numerical equation combining motion, surprise, market quality and dependence into temporal mass. No after-the-fact formula was invented.

### Space Weather Forward Sensor

Current SWFS coverage is partial. Near-field coronal-hole timing is BlinkLab territory and no independent bounded T+7 terrestrial consequence was promoted into the OTH field. Space-weather absence from the OTH field therefore means no qualifying future atom was captured, not that solar activity is zero.

## 10. Contradictions, Falsifiers and Watch Windows

| Window    | Drivers                                                                                         | Contradictions                                                | What weakens it                                                                               |
|-----------|-------------------------------------------------------------------------------------------------|---------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| Sep 2-9   | T+7 boundary; Russia diesel extension; Treasury operation approaches                            | Saudi bypass/loading adaptation; Iran-Oman navigation talks   | Broad fuel/logistics normalization before the Treasury start window                           |
| Sep 10-30 | Hormuz flow constraint; refined-fuel stress; Black Sea cargo timing; Treasury long-end buybacks | Saudi Red Sea/outside-Hormuz handling; global wheat buffer    | Broad Hormuz traffic normalization; refinery/freight stress fades; Black Sea delays clear     |
| Oct 1-31  | Ofgem Q4 cap; El Niño seasonal arc; Iran supply; Qatar LNG winter balance                       | Alternate crude/LNG origins; demand destruction; substitution | No fresh independent October atoms; substitution absorbs pass-through                         |
| Nov-Feb   | Very strong El Niño; LNG/storage stress; food-price lag; 2026/27 power demand                   | Global wheat stocks; adaptation; storage replenishment        | NOAA strength probabilities weaken; European gas/storage repairs; muted consumer pass-through |

### Strongest Boring Explanation

The September plateau does not require a mysterious single event. It can be generated by ordinary overlapping forward windows: continued Hormuz impairment, refined-fuel restrictions, Black Sea cargo delays, scheduled Treasury operations, and adaptation measures that all concentrate decisions and reporting into September. The instrument is measuring the timing density of consequences and news generation, not naming a catastrophe.

### Most Important Falsifiers

- Hormuz traffic and loadings normalize broadly rather than through limited bypass/adaptation channels.
- Russian refinery availability improves enough that the September diesel-export restriction is relaxed or becomes nonbinding.
- Black Sea cargo delays clear materially and alternate supply arrives without significant cost or timing stress.
- Qatari LNG output/flows recover quickly and European storage improves enough to neutralize the winter risk arc.
- No fresh independent atoms appear in October, allowing the current secondary field to decay under NCD and fixed-mass kernels.

## 11. Lay Reader Forward View

OTH is not saying that a catastrophe occurs on September 26. The current forward-information field says that many independent or partly independent systems deposit their strongest combined timing mass across a broad mid-to-late-September plateau. The machine centroid falls on September 26 because of the shape of that plateau; the field itself does not support one-day precision.

The most useful change since August 21 is diversification. The September structure is no longer primarily an EIA/Hormuz story. Russia refined-fuel restrictions, Saudi bypass adaptation, Treasury liquidity operations, Black Sea cargo stress and other conventional channels now share more of the mass. That makes the landing zone structurally more interesting even while making the exact date less precise.

The human-predictor experiment remains worth tracking, but this run gives it no numeric credit. The correct future test remains simple: freeze specific forecasts before ordinary information moves, preserve misses, and compare first-move timestamps. Anything else is retrospective pattern matching.

For operations, watch the first three weeks of September for whether adaptation beats disruption. If bypass capacity, navigation corridors and refinery recovery broaden, the ridge should soften. If those repairs remain partial while fuel, freight, grain and LNG constraints persist, the plateau is likely to retain or acquire fresh mass.

## Appendix A — Qualifying Future-Atom Register

| Atom                  | Source     | Domain           | Window                   | Ancestry         | Eff. wt. | Claim                                                                                          |
|-----------------------|------------|------------------|--------------------------|------------------|----------|------------------------------------------------------------------------------------------------|
| V08-EIA-HORMUZ-SEP    | EIA        | ENERGY_TRANSPORT | 2026-09-01 to 2026-09-30 | EIA_HORMUZ_FLOW  | 0.12800  | Hormuz flows remain severely constrained through August and slowly increase in September.      |
| V08-EIA-RECOVERY-2027 | EIA        | ENERGY           | 2027-01-01 to 2027-03-31 | EIA_OIL_RECOVERY | 0.08000  | Most disrupted production recovers by early 2027 and Brent prices ease as inventories rebuild. |
| V08-NOAA-ELNINO       | NOAA CPC   | ENVIRONMENT      | 2026-09-01 to 2027-02-28 | NOAA_ENSO        | 0.18114  | Greater than 90 percent chance of a very strong El Niño in fall and winter 2026-27.            |
| V08-USDA-US-WHEAT     | USDA WASDE | FOOD             | 2026-09-01 to 2026-12-31 | USDA_US_WHEAT    | 0.06400  | U.S. wheat ending stocks are lower and the farm price                                          |

|                                   |                                      |                       |                          |                                |         |                                                                                                                                    |
|-----------------------------------|--------------------------------------|-----------------------|--------------------------|--------------------------------|---------|------------------------------------------------------------------------------------------------------------------------------------|
|                                   |                                      |                       |                          |                                |         | forecast is higher in 2026/27.                                                                                                     |
| V08-USDA-GLOBAL-WHEAT-BUFFER      | USDA WASDE                           | FOOD                  | 2026-09-01 to 2026-12-31 | USDA_GLOBAL_WHEAT              | 0.06800 | Global wheat supplies and ending stocks are higher, countering a global physical-shortage narrative.                               |
| V08-FAO-FOOD-LAG                  | Reuters/FAO                          | FOOD                  | 2026-11-05 to 2027-02-05 | FAO_FOOD_PRICE_LAG             | 0.00405 | Energy, fertilizer and crop pressures feed consumer food prices with a three-to-six-month lag.                                     |
| V08-MAERSK-Q3                     | Reuters/Maersk                       | TRANSPORTATION        | 2026-08-23 to 2026-09-30 | MAERSK_Q3_DEMAND               | 0.02365 | Strong container demand and congestion-driven freight rates may extend through Q3.                                                 |
| V08-US-CONTAINER-DECLINE          | Reuters/NRF                          | TRANSPORTATION        | 2026-09-01 to 2026-12-31 | US_CONTAINER_IMPORTS           | 0.00464 | U.S. container import volume fades through the rest of 2026 while transport costs remain high.                                     |
| V08-RUSSIA-FREIGHT                | Reuters                              | TRANSPORTATION        | 2026-08-23 to 2026-12-31 | RUSSIA_FREIGHT_FUEL            | 0.00946 | Russian freight costs remain elevated even if fuel availability improves.                                                          |
| V08-EIA-AI-POWER                  | EIA                                  | ENERGY                | 2026-08-23 to 2026-12-31 | EIA_AI_POWER_DEMAND            | 0.05797 | U.S. electricity use reaches record highs in 2026 and 2027 as AI/data-center demand grows.                                         |
| V08-ECB-CREDIT-Q3                 | Reuters/ECB                          | FINANCE               | 2026-08-23 to 2026-09-30 | ECB_CREDIT_Q3                  | 0.00259 | Euro-area banks expect credit standards to tighten further in Q3.                                                                  |
| V09-INDIA-SOYIL-SEPDEC            | Reuters                              | FOOD_TRADE            | 2026-09-01 to 2026-12-31 | INDIA_SOYIL_SUBSTITUTION       | 0.02499 | India has secured about 1.4 million tons of soyoil for September-December delivery as Black Sea sunflower shipments are disrupted. |
| V09-IRAQ-SYRIA-PIPELINE-4Y        | Reuters                              | ENERGY_INFRASTRUCTURE | 2030-08-01 to 2030-12-31 | IRAQ_SYRIA_PIPELINE            | 0.02499 | A new Iraq-Syria crude pipeline intended to bypass Hormuz is estimated to take around four years to build.                         |
| V097-BLACKSEA-GRAIN-202627        | Reuters/Ukraine Agriculture Ministry | FOOD_TRADE            | 2026-08-24 to 2027-06-30 | BLACKSEA_GRAIN_EXPORT_CAPACITY | 0.01250 | Ukraine cut its 2026/27 grain export forecast by up to 12% because of attacks on Odesa ports; alternative routes were expected to  |
| V098-REUTERS-IRAN-SEPOCT-SUPPLY   | Reuters                              | ENERGY_TRADE          | 2026-09-01 to 2026-10-31 | IRAN_OIL_CHINA_SEPOCT          | 0.05570 | Trade sources reported fewer Iranian oil offers to Chinese buyers for September and October and limited available supply as the bl |
| V098-REUTERS-BLACKSEA-SEP-SQUEEZE | Reuters                              | FOOD_TRADE            | 2026-08-28 to 2026-09-30 | BLACKSEA_GRAIN_EXPORT_CAPACITY | 0.08409 | Black Sea attacks were delaying peak-season wheat cargoes;                                                                         |

|                                    |               |                  |                          |                        |         |                                                                                                                                    |
|------------------------------------|---------------|------------------|--------------------------|------------------------|---------|------------------------------------------------------------------------------------------------------------------------------------|
|                                    |               |                  |                          |                        |         | importers feared delays in 2-2.5 million tons due through September and                                                            |
| V098-REUTERS-RUSSIA-DIESEL-SEP     | Reuters       | ENERGY_TRANSPORT | 2026-09-01 to 2026-09-30 | RUSSIA_FUEL_CHAIN      | 0.11037 | Russia plans to extend its diesel export ban through September because of domestic fuel shortages and idle refinery capacity.      |
| V098-REUTERS-SA-OUTSIDE-HORMUZ-SEP | Reuters       | ENERGY_TRANSPORT | 2026-09-01 to 2026-09-30 | SAUDI_REDSEA_BYPASS    | 0.12186 | Saudi Aramco increased oil shipments outside Hormuz for September loading, using transfers and alternative handling outside the ch |
| V098-TREASURY-LONGEND-BUYBACK      | U.S. Treasury | FINANCE          | 2026-09-09 to 2026-11-04 | TREASURY_BUYBACK_Q3    | 0.12500 | Treasury will at least double long-end liquidity-support buyback operations to at least \$4 billion per operation from September 9 |
| V098-OFGEM-OCT-CAP                 | Ofgem         | ENERGY_HOUSEHOLD | 2026-10-01 to 2026-12-31 | UK_ENERGY_PRICE_CAP_Q4 | 0.20000 | The UK household energy price cap rises 4% for October 1 through December 31, to £1,723 annualized for a typical direct-debit hous |
| V098-REUTERS-QATAR-LNG-WINTER      | Reuters       | ENERGY_TRADE     | 2026-09-22 to 2026-12-21 | QATAR_LNG_EU_WINTER    | 0.07616 | With Qatari LNG exports down sharply and European storage historically low, the winter 2026-27 gas balance carries elevated price- |

## Appendix B — Bridge-Gated / Rejected Material

| Atom                            | Source                       | Domain                    | Window                   | Disposition                  | Claim                                                                                                                                      |
|---------------------------------|------------------------------|---------------------------|--------------------------|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| V09-RUSSIA-GASOLINE-NEXT2W      | Reuters/LSEG                 | ENERGY_TRANSPORT          | 2026-08-24 to 2026-08-31 | REJECT_T0_T6_ONLY            | At least two more Indian gasoline cargoes are expected at Russian ports within the next two weeks as refinery disruption drives shortages. |
| V097-SA-ARAMCO-LATEAUG-LOADINGS | Reuters                      | ENERGY_TRANSPORT          | 2026-08-25 to 2026-08-31 | REJECT_T0_T6_ONLY            | Saudi Aramco had additional VLCCs waiting to load from inside Hormuz later in August after limited loadings resumed.                       |
| V098-SWFS-CORONALHOLE-AUG27-28  | SpaceWeather.com / NOAA SWPC | ENVIRONMENT_SPACE_WEATHER | 2026-08-27 to 2026-08-28 | T0_T6_ONLY_NO_T7_CONSEQUENCE | Current coronal-hole solar-wind timing is BlinkLab-range; no explicit T+7 terrestrial consequence recovered.                               |

|                                   |         |                  |            |                      |                                                                                                                                                        |
|-----------------------------------|---------|------------------|------------|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| V098-IRAN-OMAN-CORRIDOR-UNBOUNDED | Reuters | ENERGY_TRANSPORT | nan to nan | NO_BOUNDED_T7_WINDOW | Iran-Oman talks on a temporary navigation corridor and mine clearance are a real easing state update but do not supply a defensible bounded T+7 foreca |
|-----------------------------------|---------|------------------|------------|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|

## Appendix C — Predictor Source Fill / Tier State

| Source       | Current artifact | Bounded atom | Scorekeeping    |
|--------------|------------------|--------------|-----------------|
| P1-JACKOWSKI | YES              | YES          | DIAGNOSTIC_ONLY |
| P1-HAMILTON  | YES              | YES          | DIAGNOSTIC_ONLY |
| P1-ADAMS     | YES              | NO/COUNTER   | DIAGNOSTIC_ONLY |
| P1-LEIGHPINK | PARTIAL/NO       | NO/COUNTER   | DIAGNOSTIC_ONLY |
| P1-FFG       | PARTIAL/NO       | NO/COUNTER   | DIAGNOSTIC_ONLY |
| P1-FARSIGHT  | PARTIAL/NO       | NO/COUNTER   | DIAGNOSTIC_ONLY |
| P2-BIGGS     | PARTIAL/NO       | NO/COUNTER   | DIAGNOSTIC_ONLY |

## Appendix D — Reproducibility and Audit Record

| Control                                      | Status / value                                                                                                                  |
|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| Run isolation                                | COMPROMISED BY CONVERSATIONAL PRIOR EXPOSURE                                                                                    |
| Predictor independence credit                | 0                                                                                                                               |
| Predictor temporal mass                      | 0                                                                                                                               |
| Predictor Major confirmation                 | PROHIBITED                                                                                                                      |
| Numerical core                               | v0.9-core corrected bridge/kernel                                                                                               |
| Weight sensitivity                           | SPECIFICATION_GAP: tasker requires low/central/high but no numeric perturbation map is frozen; no after-the-fact rule invented. |
| Half-life sensitivity                        | 5/7/10-day passes preserve same September top-date neighborhood                                                                 |
| Current run freeze                           | TRUE                                                                                                                            |
| Prior processed output before current freeze | Exposure existed conversationally; run labeled compromised rather than hidden                                                   |

### Plateau Audit Note

The machine ridge module reports September 26 as both peak and centroid, yet the published temporal\_field\_daily ledger shows relative field intensity = 100.0 for a long run of dates from September 12 through September 27. The half-life sensitivity ledger reports September 20 as the top date at 5, 7 and 10 days. This report therefore preserves the machine ridge output while explicitly refusing false one-day precision. No weights or source windows were changed after seeing the result.

## Appendix E — Current Source Evidence Register

EIA STEO (2026-08-11): Hormuz severely constrained through Aug; flows slowly increase Sep; most production near pre-conflict early 2027.

Reuters Russia diesel (2026-08-25): Planned diesel export ban extension through Sep.

Reuters Aramco (2026-08-26): More Sep oil offered outside Hormuz; adaptation/easing counter-signal.

Reuters Qatar LNG (2026-08-26): Qatar LNG exports down 96%; Europe winter storage low; price risk.

U.S. Treasury (2026-08-19): Long-end buyback sizes at least doubled effective Sep9-Nov4.

Ofgem (2026-08-26): Price cap +4% Oct-Dec.

NOAA CPC (2026-08-13 / status Aug25): >90% chance very strong El Nino fall/winter 2026-27.

Reuters Iran-Oman talks (2026-08-25/26): Temporary navigation corridor/mine-clearance talks; no bounded T+7 atom.

### Source URLs in Newly Admitted Atoms

**V098-REUTERS-RUSSIA-DIESEL-SEP** — <https://www.reuters.com/business/energy/russia-extend-diesel-export-ban-through-september-sources-say-2026-08-25/>

**V098-REUTERS-SA-OUTSIDE-HORMUZ-SEP** — <https://www.reuters.com/business/energy/aramco-offers-more-oil-outside-hormuz-with-some-cargoes-heading-china-2026-08-26/>

**V098-TREASURY-LONGEND-BUYBACK** — <https://home.treasury.gov/news/press-releases/sb0607>

**V098-OFGEM-OCT-CAP** — <https://www.ofgem.gov.uk/press-release/energy-price-cap-will-rise-4-october-2026>



## Appendix F — Pretasker Frozen Handoff (Verbatim Operational Summary)

OTH PRETASKER v0.2 — FROZEN PREDICTOR PACKET

RUN\_ID: OTH-PT-v0.2-20260826-0646-CDT

DATA CUTOFF: 2026-08-26T06:46:00-05:00

BLINDNESS: COMPROMISED / NON-BLIND DIAGNOSTIC

FREEZE STATUS: FROZEN

PREDICTOR FIELD:

AMBER / SELECTIVE SIGNAL PERSISTS, NO NEW NARROWING

WHAT IS NEW?

- No clean P1 source supplied a new, creator-controlled, bounded world-event forecast that narrows the prior frozen timing.

WHAT HARDENED?

- No P1 source changes hardening state in this run. Jackowski and Hamilton-Parker remain active overlaps, but current material is repeat/reinforcement rather than a new state transition.

WHAT REVERSED / CONTRADICTS?

- Jessica Adams remains the explicit counter-signal to a simple broad world-war interpretation.

WHAT IS P2?

- Brandon Biggs remains P2 / DISCOVERY / INSUFFICIENT\_BASELINE. Recommendation: KEEP\_P2.

PREDICTOR\_INDEPENDENCE\_CREDIT: 0

PREDICTOR\_TEMPORAL\_MASS: 0

MAJOR\_RIDGE\_CONFIRMATION: PROHIBITED

PACKET\_HASH\_SHA256: b484e6b24b71614dc75f93f6c70aa28bb8c55e637e59a50330703d391ce6a5e0