OVER THE HORIZON

Forecasting Temporal News Inflection Points

v0.98 CLEAN-ROOM RE-RUN

Pre-survey + full OTH synthesis | Friday, September 4, 2026

Data cutoff: 2026-09-04 15:54 CDT / 2026-09-04 20:54 UTC
Run ID: OTH-v0.98-2026-09-04-1554-CDT-CLEANROOM

RUN ISOLATION: PROCEDURAL CLEAN ROOM / STRICT BLINDNESS NOT CERTIFIED

Prior OTH numerical outputs were quarantined from the current scoring inputs until the fresh field was computed. However, this model had already been exposed to earlier OTH discussions in conversational context; therefore an experiment-grade claim of true blindness would be false. The safeguard is stronger than concealment: the human-predictor packet receives zero temporal mass and cannot promote a ridge. The conventional field is rebuilt from newly retrieved, date-stamped sources and frozen v0.98/v0.5 rules.

George A. Ure
Over-the-Horizon Software /

RESEARCH NOTICE: OTH is an experimental horizon-scanning and prospective scorekeeping instrument. Relative field intensity, coherence labels, predictor hardening states, and ridge classifications are not calibrated probabilities. Human predictive/remote-viewing/astrology material is retained as an experimental source lane, not presented as established scientific evidence.

Contents

1. Run Header, Isolation Record and Glossary

Field	Value
Run ID	OTH-v0.98-2026-09-04-1554-CDT-CLEANROOM
Tasker	Over_the_Horizon_Software_Tasker_v0.98.txt
Numerical core	v0.9-core inheritance; v0.5 multiplier table; area-normalized triangular kernels; 7-day centered smoothing; root/source dependence collapse
Data cutoff	2026-09-04 15:54 CDT / 2026-09-04 20:54 UTC
T+7 boundary	2026-09-11
Qualifying current atoms	24
Predictor independence credit	0
Predictor temporal mass	0
Predictor Major-ridge confirmation	PROHIBITED
Run isolation	PROCEDURAL CLEAN ROOM; STRICT MODEL-CONTEXT BLINDNESS NOT CERTIFIED
Prior processed ridge values in current scoring	EXCLUDED from computation; used only later for lineage comparison
Weight perturbation sensitivity	SPECIFICATION GAP - v0.98 requires it but does not freeze a numerical perturbation map

Isolation interpretation. The clean-room claim here is procedural, not metaphysical. The current atom register and field were rebuilt from fresh public/official sources under frozen rules. Earlier OTH numerical answers were not fed into the current computation. Because the language model had prior exposure to earlier conversations, strict experiment-grade blindness cannot be certified; consequently the predictor lane is hard-zeroed and can neither add field mass nor clear a Major-ridge gate.

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
DCA	Data Coherence Analysis

Abbrev.	Meaning
SCCL	Source-Channel Coherence Layer
SWFS	Space Weather Forward Sensor
N_eff	Effective independent root/source count

2. Executive Summary

The clean-room rerun does not produce one defensible “magic date.” It produces a stacked mid-to-late-September structure with two independent clocks running through it.

- Clock 1 - **institutional / policy compression:** the full dependence-collapsed field peaks on September 14, with the high zone continuing through September 19 and a weighted centroid on September 16. The main drivers are the September 11 CPI handoff, the September 15-16 FOMC decision, August retail/import-price releases on September 16, housing starts on September 17, and the expected September 17 UN Iran sanctions-panel vote. The September 4 payroll surprise made the Fed outcome genuinely live rather than merely calendar noise. [S10][S16][S17][S18][S21]
- Clock 2 - **unscheduled physical consequences**: when all known-date calendar events are stripped out, the physical/logistics field peaks around September 21, with a broad high band from roughly September 18 through September 25. This is built from persistent Hormuz impairment, Black Sea wheat substitution/delay, record diesel-cost pressure, food-price stress, rare-earth supply friction and the strengthening El Niño background. [S11][S12][S13][S14][S15][S22]
- The overlap of those clocks - not a single date - is the important forecast. The practical landing zone is September 14-25, with September 16-21 the highest-convergence sub-zone.
- A second September cluster appears around September 22-30, peaking near September 27 in the full field. It is more diversified by source and is driven by UN General Assembly/high-level meetings, new-home sales, international-transactions data, durable goods, JOLTS, GDP/PCE, and continuing physical supply effects. [S18][S19][S20]
- The next lower-amplitude institutional cluster appears October 26-November 3: October FOMC, Q3 GDP/PCE, and the November 3 federal election. The broad El Niño/energy/food arcs remain underneath, but the September field is materially stronger. [S16][S19][S28]
- The predictor pre-survey is AMBER / selectively hardening, led by two late-August FFG September debriefs. Jackowski has two September windows but one is heavily contaminated by the already-public Iran war and the later Sep-20 framing has a documented 2022 near-repeat that failed as specified. Predictor information therefore remains shadow-only and contributes zero numerical mass. [S01][S02][S03][S04]
- No Major ridge is claimed. The main machine peak fails the <=50% single-source concentration rule (Reuters-grouped share about 59.9%), and the v0.98 low/central/high atom-weight perturbation map remains unfrozen. The correct status is CANDIDATE / WATCH, not calibrated event probability.

Headline measure	Current read
Main machine peak	Sep 14, 2026; relative 100; centroid ~Sep 16
Main high zone	Sep 13-20; strongest operational overlap Sep 16-21
Physical-only peak	~Sep 21; broad Sep 18-25 band
Late-September secondary	Sep 22-30; local peak ~Sep 27; relative ~74
Late-Oct / election cluster	Oct 26-Nov 3; local peak ~Oct 31; relative ~38
Main ridge status	CANDIDATE - Major vetoed by source concentration + unfrozen weight perturbation test
Predictor field	AMBER / selectively hardening; shadow only; zero mass
Key bullish/normalizing counter-signal	Substitution/adaptation in wheat supply plus any durable Hormuz normalization
Key hardening trigger	CPI/inflation surprise + Fed repricing + continued chokepoint/logistics impairment

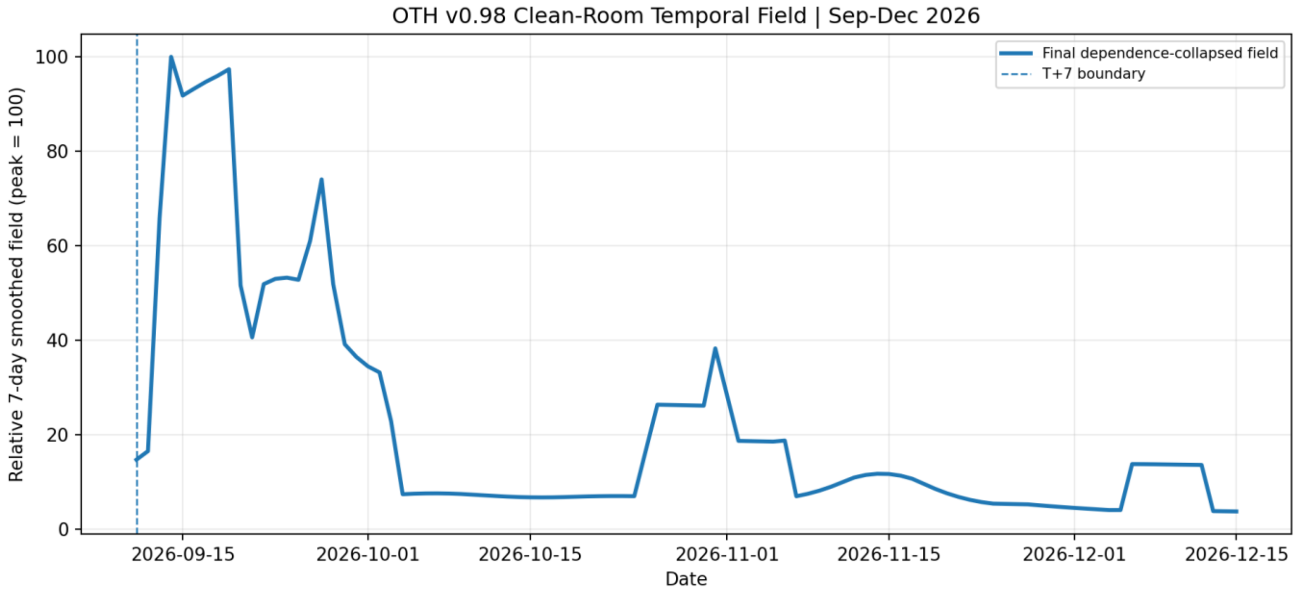

Figure 1. Final v0.98 clean-room temporal field. Relative intensity is normalized to the current run peak, not to event probability.

WHAT THIS CHART IS BELIEVED TO SHOW: the rebuilt field is no longer best described as one flat September mesa. It resolves into a strong mid-September institutional/policy ridge, a still-material late-September cluster, and a much smaller late-October/early-November structure. The chart is a density-of-forward-consequence instrument, not a forecast of catastrophe.

3. Pre-Survey / Pretasker v0.2 - Frozen Predictor Packet

Frozen packet SHA-256: 4bf2f5864649f1ebbde51b99069be02d782a3b6d7f5640b1f9abb7a49f1ce6c3. Aggregate predictor state: AMBER / SELECTIVELY HARDENING. Under the current isolation rule, PREDICTOR_TEMPORAL_MASS = 0 and PREDICTOR_MAJOR_RIDGE_CONFIRMATION = PROHIBITED.

Source	State	Fresh artifact	Current read	Disposition	Ref
P1-FFG-A	HARDENING	Aug 28 public debrief; sessions recorded Aug 26	September: multi-viewer seismic convergence; Iran unrest/diversion; hazmat; transport anomalies. Public summary is date-stamped; full notes gated.	P1 / shadow only	S01
P1-FFG-BLUESKY	HARDENING	Aug 26 public debrief; three independent sessions	September: disaster/weather load, consumer strain, housing velocity, Hormuz, airport drones, battlefield robotics.	P1 / shadow only	S02
P1-JACKOWSKI-SEP9-17	UNCHANGED / REPEAT	July creator-content transcript archive	A serious/violent Iran event was placed in Sep 9-17; current war state creates high contamination and makes incremental specificity modest.	P1 / shadow only	S04
P1-JACKOWSKI-SEP20	SOFTENING	Aug 31 recording reported Sep 2	After Sep 20: worsening around Poland/Russia; critique documents near-identical Sep 20 language from 2022 that did not resolve as specified.	P1 / heavy repeat penalty	S03
P1-HAMILTON	UNCHANGED	Jun 25 creator video	Broad next-six-month geopolitical escalation including Iran; useful as long-window register, weak timing specificity.	P1 / shadow only	S05
P1-ADAMS	UNCHANGED	Sep 4 creator-original post	October-November reversals/delays, Wall Street and Midterm complications; explicitly calendar-generated astrology.	P1 / symbolic-calendar	S06
P1-ASTROLOGYKING	UNCHANGED	Sep 1 creator-original post	Aug 28-Sep 6 conflict window from Mars/Sirius/Saturn; mostly BlinkLab range at cutoff and calendar-generated.	P1 / symbolic-calendar	S07
P1-FARSIGHT	MISSING	No fresh suitable public predictive-news artifact recovered	No current bounded public atom available for clean scoring.	P1 / missing	
P2-BIGGS	INSUFFICIENT_BASELINE	Prior discovery only	Original prospective artifact for widely retold oil-price claim remains insufficiently established for skill credit.	P2 / no scoring	

The strongest fresh predictor-side information is not one celebrity “hit”; it is within-organization breadth. FFG published two separate late-August September debriefs. One describes four blind viewers converging on a major seismic signature and multiple Iran/transport/hazmat motifs; the other describes three independent sessions clustering around natural disasters, U.S. consumer strain, housing velocity, Hormuz, airport drones and battlefield robotics. Both are prospective with respect to September, but public summaries are much less detailed than the subscriber session material, so specificity and full provenance are access-limited. [S01][S02]

Jackowski requires much harsher treatment. A July transcript archive contains a Sep 9-17 Iran/Hormuz window, but the underlying Iran conflict was already highly public and therefore contamination is high. A newer Aug 31 “after September 20” framing is more current, but a September 2 critical review documents strikingly similar Sep-20 language from 2022 and records that the concrete Polish elements did not occur. This is exactly the sort of repeat/retrospective problem the pretasker is designed to penalize. [S03][S04]

Jessica Adams and Astrology King are retained as date-stamped source-family records, but their timing is explicitly generated from known astronomical calendars. Their role is prospective scorekeeping of a symbolic lane, not independent unknown-event timing. [S06][S07]

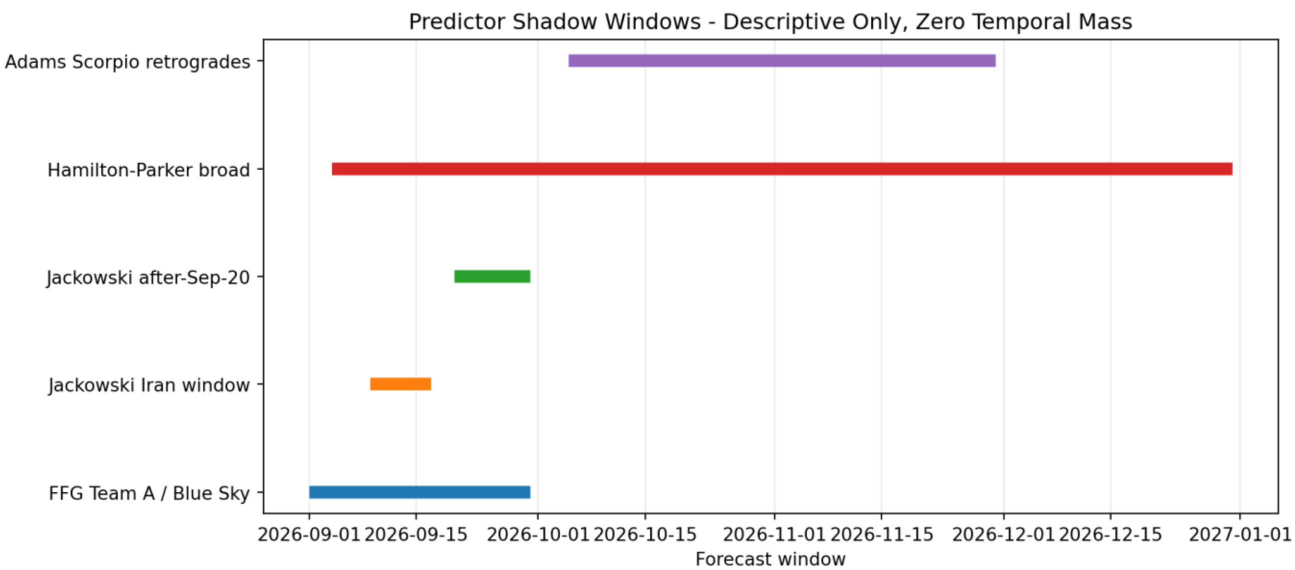

Figure 2. Predictor windows preserved for prospective scorekeeping. All are shadow-only in this run.

4. Temporal Field and Ridge Board

The current field was computed from 25 re-sourced future atoms. Every atom carries fixed total mass across its admissible window; broad forecasts therefore spread thinly, exact scheduled events remain narrow, and same-source/day contributions are capped at 1.5 times the strongest surviving same-source atom. Generic known-date calendar events are downweighted by the frozen 0.25 calendar multiplier.

ID	Ridge	Window	Peak	Centroid	Rel.	Roots	Domains	Max source	Share	Status	Audit
R1	Mid-September institutional / policy stack	09-13 to 09-20	2026-09-14	Sep 16	100.0	12	8	Reuters	59.9%	CANDIDATE	Major veto: source >50%
R2	Late-September data + physical/logistics continuation	09-22 to 09-30	2026-09-27	Sep 25	74.0	12	9	BEA	34.2%	CANDIDATE	Major not claimed: weight-sensitivity spec unfrozen / relative prominence lower
R3	Late-October / election policy cluster	10-26 to 11-03	2026-10-31	Oct 29	38.3	8	7	FEC	31.8%	CANDIDATE	Major not claimed: weight-sensitivity spec unfrozen / relative prominence lower

R1 is a candidate, not Major, because the Reuters-grouped contribution at the smoothed peak is about 59.9%, above the v0.98 <=50% Major-ridge requirement. R2 and R3 are more source-diversified, but Major status is still withheld because v0.98 requires stability under a low/central/high atom-weight perturbation test and does not freeze the perturbation map. No after-the-fact sensitivity rule is invented here.

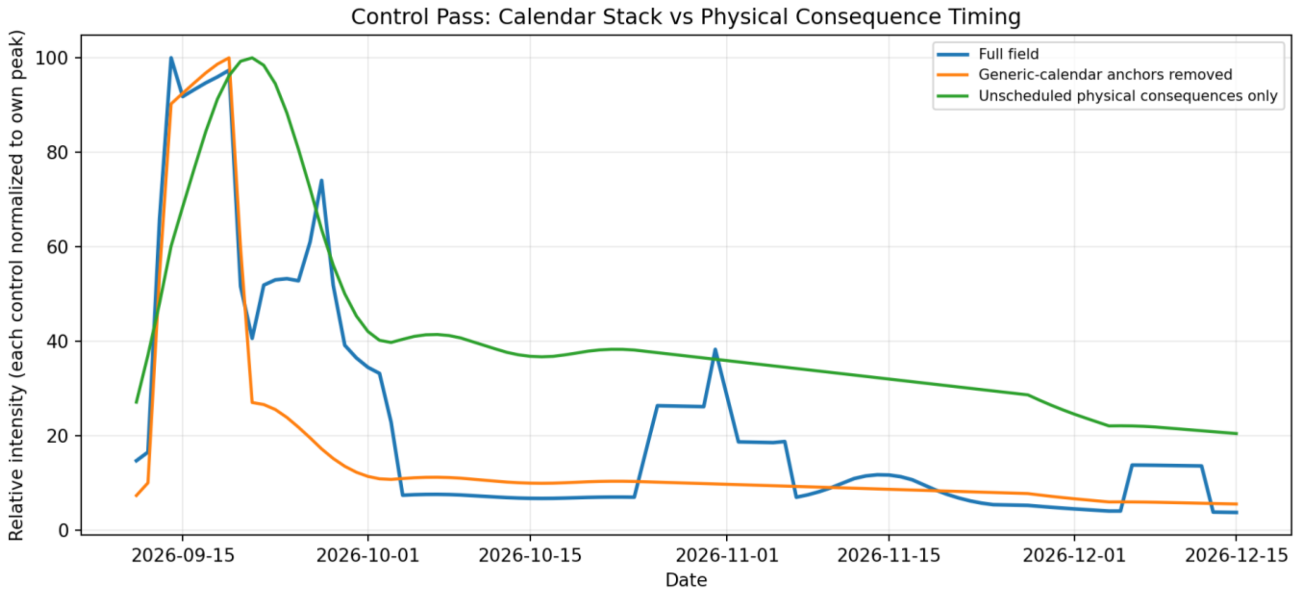

Figure 3. Control comparison. Each control is normalized to its own peak to compare timing geometry rather than absolute mass.

WHAT THIS CHART IS BELIEVED TO SHOW: removing generic calendar anchors does not erase the mid-September structure; it shifts the top later inside the same band. Removing all scheduled events leaves a broad physical-consequence crest centered near September 21. That means the September stack is not merely the economic-release calendar repainting itself into a forecast.

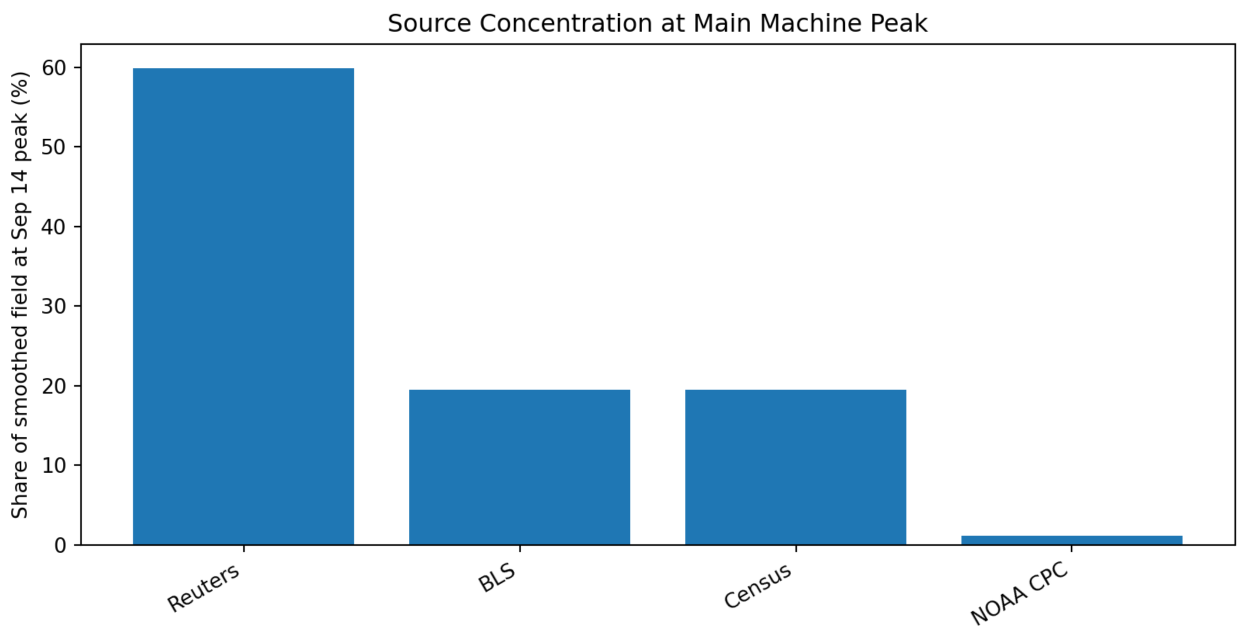

Figure 4. Main-peak source concentration. Reuters is still above the Major-ridge concentration ceiling.

5. Data Coherence Analysis and Causal Architecture

Lane	State	Independent credit	What changed	Dependence treatment
Conventional / official	HARDENING	HIGH	Jobs surprise -> inflation/Fed hinge; multiple official release anchors; El Niño state.	Independent roots across BLS/Fed/Census/BEA/NOAA.
General news / physical	HARDENING	MEDIUM-HIGH	Hormuz, Black Sea, diesel, food and rare-earth constraints.	Several stories are causal descendants of the Iran/war-energy complex; dependence collapse required.
Prediction markets	HARDENING / MIXED	MEDIUM	Kalshi shows September Fed decision nearly balanced; Polymarket ceasefire curve rises with horizon.	Original venue snapshots available, but robust motion history is incomplete.
Human predictors	AMBER / SELECTIVE	ZERO NUMERIC	FFG fresh September breadth; Jackowski active windows with repeat/contamination; astrology calendar-bound.	Shadow only by rule.
WFA	PARTIAL / NOT SCORED	MISSING BASELINE	No reproducible 1/7/14/30-day comparable corpus run in this clean-room pass.	Do not infer absence from missing collector.
HQV	MISSING	MISSING	No frozen fixed-basket query time series / QCR lead-lag run.	No query surprise or SCI score.
HBR	MISSING	MISSING	No fresh frozen group-intuition sample.	Optional lane; absence does not block run.
SWFS	WATCH ONLY	LOW	No T+7 terrestrial consequence with enough specificity recovered for numeric deposition.	Bridge gate prevents space-weather calendar from repainting field.

5.1 Primal drivers

- ENERGY / MARITIME: Hormuz remains the largest physical upstream driver. Reuters/Kpler reported only four commodity vessels transiting on Thursday versus a 10-day average of 15; prewar commercial traffic was about 125 vessels/day, and a Rystad economist expected low activity through November. [S11]
- FOOD / LOGISTICS: Asian importers have already shifted at least 500,000 tonnes of wheat toward Australia and Argentina to replace delayed Black Sea cargoes, paying materially higher prices. This is simultaneous disruption and adaptation. [S12]
- INFLATION / TRANSPORT: Brent and WTI rose strongly during the week; U.S. diesel hit a record average near $5.85/gallon, with seasonal farm and heating demand still ahead. [S14]
- FINANCE / POLICY: August payrolls rose 162,000 versus a Reuters poll near 56,000, holding unemployment at 4.1%. The surprise pushed September Fed-hike pricing materially higher and made CPI the next hard hinge. [S10]
- ENVIRONMENT: NOAA CPC says El Niño is strengthening with greater than 90% odds of a very strong event during Northern Hemisphere fall/winter 2026-27. [S22]
- SUPPLY-CHAIN / TECHNOLOGY: some Chinese rare-earth suppliers have paused U.S. shipments amid sanctions/licensing worries, adding a separate industrial/communications-material channel. [S15]

5.2 Independent convergence vs causal propagation

The current run should not count ENERGY -> TRANSPORTATION -> FOOD as three independent confirmations when all three descend from the same chokepoint shock. OTH therefore reports both breadth and ancestry. The September field has genuine independent convergence from domestic macro-policy timing, UN diplomatic timing, weather/climate state, and maritime/food physical state; inside the maritime/food complex, however, much of the stress is causal propagation rather than independent invention.

6. Seven-System Vector Board

System	Vector	State	Current interpretation
FOOD	↑↑	HARDENING	Black Sea substitution + FAO price index; wheat-stock buffer is a counter-signal.

System	Vector	State	Current interpretation
SHELTER	↑	WATCH	Housing starts Sep 17 / new-home sales Sep 24; FFG housing-velocity shadow overlaps, but no independent current crisis signal.
TRANSPORTATION	↑↑↑	HARDENING	Hormuz throughput, diesel, Black Sea shipping and rerouting.
ENERGY	↑↑↑	HARDENING	Hormuz impairment, oil/diesel price pressure; early-2027 EIA normalization is the long counter-arc.
COMMUNICATIONS	↑	WATCH	Rare-earth material friction can transmit into electronics/defense/telecom supply chains; no standalone comms outage atom.
FINANCE	↑↑↑	HARDENING	Jobs surprise, CPI/FOMC hinge, bond-yield pressure and dense Sep 16/Sep 30 release stack.
ENVIRONMENT	↑↑	STRUCTURAL	Very strong El Niño >90% probability across fall/winter; broad window spreads numeric mass.

The board is directional, not probabilistic. The strongest coupling remains WAR / CHOKEPOINT -> ENERGY -> TRANSPORTATION -> FOOD, while FINANCE is an independent domestic policy/data lane. That combination is why the mid-to-late-September overlap survives the calendar-stripping control.

7. Forward Horizon: H1 through H5

H1 - T+7 to T+13 | September 11-17

This is the highest institutional compression window. CPI and real earnings arrive September 11; the FOMC meets September 15-16; retail sales and import/export prices also land September 16; housing starts and the expected UN Iran sanctions-panel vote land September 17. The strong September 4 jobs result has converted the Fed meeting from a routine known-date anchor into a live unknown-outcome policy hinge. [S10][S16][S17][S18][S21]

Operational read: watch whether CPI strengthens or breaks the post-jobs hawkish repricing. If inflation prints hot enough to reinforce hike expectations while energy/diesel remain elevated, FINANCE and ENERGY channels harden together. If CPI cools sharply and Fed pricing returns toward hold, the institutional ridge should weaken even if physical logistics remain impaired.

H2 - T+14 to T+30 | September 18-October 4

This is where the physical/logistics field is strongest. The unscheduled-only control peaks near September 21 and remains elevated through roughly September 25. Meanwhile, UN General Debate/high-level events occupy September 22-29; new-home sales and BEA international transactions land September 24; durable goods September 25; JOLTS September 29; GDP/PCE and advance trade/inventory indicators September 30. [S18][S19][S20]

Operational read: the key question is adaptation versus persistence. Wheat substitution is already working, but at higher cost. If Hormuz transits, Black Sea scheduling and diesel inventories normalize, the physical field should decay. If adaptation remains expensive and partial, September pressure propagates into October pricing, margins and consumer data.

H3 - T+31 to T+90 | October 5-December 3

The field falls materially from September, then forms a lower cluster around October 26-November 3. The October 27-28 FOMC meeting, October 29 Q3 GDP/PCE, and November 3 federal election provide the known-date skeleton. COP31 begins November 9 and runs through November 20. Beneath those calendars, the El Niño and energy/food arcs persist. [S16][S19][S28][S29]

The October-November astrology material preserved in the pre-survey overlaps this institutional period, but because its dates are generated from known planetary cycles it does not strengthen the OTH numeric ridge. [S06]

H4 - T+91 to T+150 | December 4-February 1

The December 8-9 FOMC meeting is the principal sharp scheduled anchor. Otherwise the field is broad: winter El Niño, residual energy/food pass-through, and whatever state the Hormuz/Black Sea systems have reached. Area normalization intentionally prevents these long conditions from generating a false winter mesa.

H5 - T+151 onward | February 2, 2027+

The principal long counter-arc is normalization: EIA expected most Middle East crude production to return near pre-conflict averages in early 2027, though some disruption was still expected through the end of 2027. That makes early 2027 a falsifiable structural handoff. If production and routing recover on schedule, energy-derived field pressure should fade; if they do not, a new state-change atom should replace this normalization expectation. [S23]

8. WFA, HQV, HBR and Prediction-Market Sensors

8.1 PMFS - current snapshots, shadow contribution

The current run has usable original-venue snapshots but not a frozen multi-snapshot motion history sufficient for a formal PMFS temporal-mass calculation. They are therefore preserved as diagnostic pressure, not used to manufacture field weight.

Market	Window	Snapshot	OTH interpretation	Ref
Kalshi - Sep FOMC	Sep 16	Hold ~55-57%; hike 25 bp ~42-45% in current crawls; >$34m event volume.	Live two-sided policy uncertainty; consistent with Reuters post-jobs repricing.	S24
Kalshi - Aug CPI	Sep 11	Current distribution centered around 0.3%-0.4% headline m/m in retrieved snapshot.	Makes CPI a high-information hinge rather than a date-only anchor.	S25
Polymarket - US/Iran ceasefire	Sep 4-Sep 30	37% Sep 4; 64% Sep 11; 71% Sep 18; 76% Sep 30 in current market page.	Market prices a rising chance of a 14-day pause as horizon extends; not evidence of a specific cessation date.	S26

8.2 WFA

WFA is PARTIAL / NOT SCORED. The fresh source scan clearly shows concept pressure around inflation, rate hikes, Hormuz, shipping, Iran, food and supply chains, but v0.98 requires a reproducible comparable corpus with 1/7/14/30-day baselines and root-event collapse. That corpus was not available in this pass, so no acceleration statistic is invented.

8.3 HQV

HQV is MISSING, not zero. No frozen fixed-basket query series with Query Cause Resolver and lead/lag clock was available. Therefore no Query Surprise, propagation map or System Coupling Index is scored from search behavior.

8.4 HBR

HBR is MISSING. The lane is optional under the tasker and its absence does not block the run.

9. Space Weather and Bridge-Gated Material

No space-weather item was promoted into the numeric field in this clean-room pass. The bridge rule is intentionally strict: an astronomical or space-weather forecast does not receive OTH mass merely because it has a future date.

It must specify a defensible T+7-or-later terrestrial consequence. This avoids the field being repainted by calendars with no operational outcome.

Item	Timing	Disposition	Reason
Sep 9 EIA STEO release	T+5 / BlinkLab range	REJECT numeric OTH deposit	Known-date release inside T+0..6; may update state after publication.
Astrology King Aug 28-Sep 6 conflict window	Mostly T+0..2 at cutoff	SHADOW / BlinkLab only	Known astronomical timing; no independent unknown-event deposit.
Current hurricanes / tropical systems	Near-field	REJECT absent explicit T+7 consequence	Current weather drama belongs to BlinkLab unless crop/port/energy consequence extends beyond T+7.
Space-weather calendar items	Future dates	WATCH ONLY	No sufficiently specific terrestrial consequence recovered for promotion.

10. Ridge Lineage After Current Freeze

Only after the current field was frozen was the August 26 report reopened for lineage comparison. That report described a broad maximum from roughly September 12 through September 27 and printed a nominal September 26 centroid; its machine label was Major but under audit hold because the run itself was non-blind. The current reconstructed field is not directly comparable in amplitude because the atom package was rebuilt rather than mechanically carried forward. The geometry comparison is still useful. [Prior OTH 2026-08-26]+

Lineage	Classification	Interpretation
Aug 26 -> current R1	PERSISTED + RESOLVED / SHIFTED EARLIER	Old broad plateau contained Sep 12-27. Fresh data split it into a distinct Sep 13-20 institutional/policy ridge with centroid Sep 16.
Aug 26 -> current physical control	PERSISTED / NARROWED	The unscheduled physical field now peaks near Sep 21 and is strongest Sep 18-25, still inside the old plateau but with clearer causal identity.
Aug 26 -> current R2	PERSISTED + SECONDARY	Late-Sep data/UN cluster remains, but is lower than the mid-Sep policy ridge in this re-sourced package.
Late-Oct feature	PERSISTED / LOWER AMPLITUDE	October remains a consequence/institutional zone, now expressed mainly as Oct 27-29 FOMC/GDP and Nov 3 election overlap rather than a strong standalone physical ridge.

Most important change: the current run separates a “known-date decision clock” from an “unscheduled consequence clock.” That makes the September result more interpretable and more falsifiable than a single centroid printed from a broad plateau.

11. Falsifiers, Boring Explanation and Operational Watch

11.1 Strongest boring explanation

A large fraction of the September field can be explained without invoking anomalous foresight: already-visible war and chokepoint disruption have forward logistics consequences; a strong jobs report makes the next CPI/FOMC sequence more consequential; official statistical calendars naturally cluster; the UN General Assembly creates a predictable diplomatic concentration; and weather/climate conditions create broad seasonal arcs. In other words, OTH is detecting overlapping future consequence windows from known present states. That is useful even if no “surprise event” occurs.

11.2 What would make the main ridge fade?

- CPI materially cools and September Fed-hike pricing collapses toward hold, reducing the finance/policy component.
- Hormuz transits improve durably rather than for one day, with oil/LNG flows and insurance/freight costs normalizing.
- Black Sea vessel queues and grain-export delays clear while substitution supply arrives without persistent price penalty.
- Diesel inventories/prices retreat enough to break the energy -> transport -> food cost chain.
- Rare-earth licensing/shipment restrictions ease and no broader supply-chain propagation appears.
- No new independent state-change atoms appear in late September; old physical conditions then decay or spread thinly under fixed-mass kernels.

11.3 What would harden it?

- Hot CPI/PPI or other inflation evidence paired with a stronger move toward a September hike.
- Fresh tanker attacks, mine threats, blockade tightening or another measurable fall in Hormuz/Bab el-Mandeb throughput.
- New Black Sea port/vessel damage that lengthens export delays into October.
- Food/fertilizer or diesel price acceleration that moves from commodity markets into consumer/retail data.
- Independent official or market recognition of the same timing window from sources not descended from the Reuters/event cluster.
- A prospectively frozen predictor artifact becoming materially more specific before the corresponding conventional lane moves - useful for the experiment, but still not allowed to alter this run retroactively.

11.4 Operational watch list

Window	Watch	Question
Sep 9-11	PPI/CPI and EIA update	Does inflation/energy state validate or relax the jobs-driven Fed repricing?
Sep 15-17	FOMC + retail/import prices + housing + UN Iran vote	Highest institutional compression. Watch cross-market response and whether geopolitics adds a fresh independent root.
Sep 18-25	Hormuz / Black Sea / diesel / food flow	Highest unscheduled physical-consequence zone in the clean-room control.
Sep 22-30	UNGA + new homes + durable goods + JOLTS + PCE/GDP	Second data/diplomatic cluster; determines whether September pressure propagates into October.
Oct 27-Nov 3	FOMC + Q3 GDP/PCE + federal election	Lower-amplitude but broad institutional cluster.
Nov 9-20	COP31 + winter climate/energy setup	Watch climate/energy policy narrative versus actual winter physical data.
Early 2027	EIA recovery arc	Structural falsifier: does Middle East production/routing actually normalize?

12. Lay-Reader Forward View

If this report is reduced to one sentence, it is this: mid-to-late September remains the dominant forward-information zone, but the clean rerun now shows why - the first half of the zone is dominated by U.S. policy/data and Iran diplomacy, while the second half is dominated by physical energy, transport and food consequences.

The cleanest operating interpretation is September 14-25, not September 14, 16, 21, 24 or 27 as a one-day prophecy. Inside that range, September 16-21 is where the most independent systems overlap. The fact that the unscheduled-only field peaks near September 21 is especially useful because it survives removal of the generic economic calendar. That is the part of the result worth watching hardest.

The predictor lane is interesting but still unproven. FFG has the freshest September-specific multi-viewer material; Jackowski carries date windows but also substantial contamination/repetition problems; the astrology material is inherently calendar-generated. The experiment should continue prospectively: freeze before news, preserve misses, compare first-move timestamps, and make every source earn weight.

October and November matter, but at lower current field intensity. The late-October FOMC/GDP/election cluster is real and easily auditable. The winter story is less about sharp dates and more about whether El Niño and the energy/food pass-through arcs amplify or normalize. Early 2027 provides a strong structural checkpoint because EIA explicitly expects most Middle East crude production to recover toward pre-conflict levels.

Appendix A - Qualifying Future-Atom Ledger

Atom	Source	Domain	Window	Eff. wt.	Calendar	Ref	Claim
CPI_AUG	BLS	FINANCE	09-11 to 09-11	0.05000	generic	S17	August CPI and real earnings release.
ELNINO_FW	NOAA CPC	ENVIRONMENT	09-11 to 02-28	0.32000	unscheduled	S22	NOAA CPC: >90% chance of a very strong El Niño in Northern Hemisphere fall/winter 2026-27.
BLACKSEA_WHEAT_SEP	Reuters	FOOD	09-11 to 09-30	0.12186	unscheduled	S12	Asian buyers replace delayed Black Sea wheat with higher-cost Australian/Argentine cargoes; disruption remains active through September.
DIESEL_WINTER	Reuters	TRANSPORTATION	09-11 to 11-30	0.09139	unscheduled	S14	Record U.S. diesel prices plus seasonal agricultural/heating demand create forward cost pressure.
FOOD_PRICE_PRESSURE	Reuters	FOOD	09-11 to 11-30	0.05712	unscheduled	S13	FAO food index reaches highest since 2022; grains at a three-year high, with weather and conflict supply risks.
HORMUZ_LOW_NOV	Reuters	ENERGY	09-11 to 11-30	0.11424	unscheduled	S11	Hormuz commodity traffic remains far below prewar norms; Rystad expects low activity through November.
RAREEARTH_SUPPLY	Reuters	COMMUNICATIONS	09-11 to 10-31	0.09139	unscheduled	S15	Some Chinese rare-earth suppliers pause U.S. shipments amid geopolitical/licensing concerns.
IMPORT_PRICES	BLS	FINANCE	09-16 to 09-16	0.05000	generic	S17	August import/export price indexes.
RETAIL_AUG	Census	FINANCE	09-16 to 09-16	0.05000	generic	S18	August retail sales release.
FED_SEP_OUTCOME	Reuters	FINANCE	09-16 to 09-16	0.14280	unknown_scheduled	S10	Strong August jobs keep a September rate hike live; inflation is the next decision hinge.
HOUSING_STARTS	Census	SHELTER	09-17 to 09-17	0.05000	generic	S18	August housing starts/building permits.
UN_IRAN_PANEL	Reuters	GEOPOLITICS	09-17 to 09-17	0.11424	unknown_scheduled	S21	Expected Security Council vote on Iran sanctions-monitoring panel before mandate expiry.
UNGA_HIGH_LEVEL	UN	GEOPOLITICS	09-22 to 09-29	0.04800	generic	S20	UN General Debate/high-level meetings, including nuclear-weapons plenary.

Atom	Source	Domain	Window	Eff. wt.	Calendar	Ref	Claim
BEA_INTL_TX	BEA	FINANCE	09-24 to 09-24	0.05000	generic	S19	Q2 international transactions and investment position.
NEW_HOME_SALES	Census	SHELTER	09-24 to 09-24	0.05000	generic	S18	August new-home sales.
DURABLE_GOODS	Census	INDUSTRY	09-25 to 09-25	0.05000	generic	S18	August durable-goods report.
JOLTS_AUG	BLS	FINANCE	09-29 to 09-29	0.05000	generic	S17	August JOLTS release.
GDP_PCE_SEP30	BEA	FINANCE	09-30 to 09-30	0.08000	generic	S19	Q2 GDP third estimate plus August personal income/outlays.
FOMC_OCT	Federal Reserve	FINANCE	10-28 to 10-28	0.05000	generic	S16	October FOMC decision.
GDP_Q3	BEA	FINANCE	10-29 to 10-29	0.05000	generic	S19	Q3 GDP advance estimate and September personal income/outlays.
MIDTERM_US	FEC	POLITICS	11-03 to 11-03	0.06250	generic	S28	Regularly scheduled federal general election.
COP31	UNFCCC	ENVIRONMENT	11-09 to 11-20	0.04000	generic	S29	COP31 in Antalya, Türkiye.
FOMC_DEC	Federal Reserve	FINANCE	12-09 to 12-09	0.05000	generic	S16	December FOMC decision.
EIA_OIL_RECOVERY	EIA	ENERGY	01-01 to 03-31	0.25600	unscheduled	S23	EIA expects most Middle East crude production to return near pre-conflict averages in early 2027, with residual disruption.

Weights are current-run effective weights before area-normalized temporal deposition. They are not probabilities. Broad long windows deposit less mass per day than narrow windows. Generic scheduled events use the frozen 0.25 calendar multiplier; unknown scheduled outcomes use 0.75; unscheduled physical consequences use 1.00.

Appendix B - Bridge / Rejection Ledger

Item	Timing	Disposition	Reason
Sep 9 EIA STEO release	T+5 / BlinkLab range	REJECT numeric OTH deposit	Known-date release inside T+0..6; may update state after publication.
Astrology King Aug 28-Sep 6 conflict window	Mostly T+0..2 at cutoff	SHADOW / BlinkLab only	Known astronomical timing; no independent unknown-event deposit.
Current hurricanes / tropical systems	Near-field	REJECT absent explicit T+7 consequence	Current weather drama belongs to BlinkLab unless crop/port/energy consequence extends beyond T+7.
Space-weather calendar items	Future dates	WATCH ONLY	No sufficiently specific terrestrial consequence recovered for promotion.

Appendix C - Predictor Source-State Ledger

Source	State	Fresh artifact	Current read	Disposition	Ref
P1-FFG-A	HARDENING	Aug 28 public debrief; sessions recorded Aug 26	September: multi-viewer seismic convergence; Iran unrest/diversion; hazmat; transport anomalies. Public summary is date-stamped; full notes gated.	P1 / shadow only	S01
P1-FFG-BLUESKY	HARDENING	Aug 26 public debrief; three independent sessions	September: disaster/weather load, consumer strain, housing velocity, Hormuz,	P1 / shadow only	S02

Source	State	Fresh artifact	Current read	Disposition	Ref
			airport drones, battlefield robotics.		
P1-JACKOWSKI-SEP9-17	UNCHANGED / REPEAT	July creator-content transcript archive	A serious/violent Iran event was placed in Sep 9-17; current war state creates high contamination and makes incremental specificity modest.	P1 / shadow only	S04
P1-JACKOWSKI-SEP20	SOFTENING	Aug 31 recording reported Sep 2	After Sep 20: worsening around Poland/Russia; critique documents near-identical Sep 20 language from 2022 that did not resolve as specified.	P1 / heavy repeat penalty	S03
P1-HAMILTON	UNCHANGED	Jun 25 creator video	Broad next-six-month geopolitical escalation including Iran; useful as long-window register, weak timing specificity.	P1 / shadow only	S05
P1-ADAMS	UNCHANGED	Sep 4 creator-original post	October-November reversals/delays, Wall Street and Midterm complications; explicitly calendar-generated astrology.	P1 / symbolic-calendar	S06
P1-ASTROLOGYKING	UNCHANGED	Sep 1 creator-original post	Aug 28-Sep 6 conflict window from Mars/Sirius/Saturn; mostly BlinkLab range at cutoff and calendar-generated.	P1 / symbolic-calendar	S07
P1-FARSIGHT	MISSING	No fresh suitable public predictive-news artifact recovered	No current bounded public atom available for clean scoring.	P1 / missing	
P2-BIGGS	INSUFFICIENT_BASELINE	Prior discovery only	Original prospective artifact for widely retold oil-price claim remains insufficiently established for skill credit.	P2 / no scoring	

Appendix D - Prediction-Market Snapshot Register

Market	Window	Snapshot	OTH interpretation	Ref
Kalshi - Sep FOMC	Sep 16	Hold ~55-57%; hike 25 bp ~42-45% in current crawls; >$34m event volume.	Live two-sided policy uncertainty; consistent with Reuters post-jobs repricing.	S24
Kalshi - Aug CPI	Sep 11	Current distribution centered around 0.3%-0.4% headline m/m in retrieved snapshot.	Makes CPI a high-information hinge rather than a date-only anchor.	S25
Polymarket - US/Iran ceasefire	Sep 4-Sep 30	37% Sep 4; 64% Sep 11; 71% Sep 18; 76% Sep 30 in current market page.	Market prices a rising chance of a 14-day pause as horizon extends; not evidence of a specific cessation date.	S26

Crawl values can change quickly. These are preservation snapshots only; they should not be treated as exact historical closes unless the venue provides timestamped series export.

Appendix E - Collector Completeness / Missing Data

Collector / test	Status	Effect
Official calendars	GOOD	Fed/BLS/Census/BEA/FEC/UN/UNFCCC sources recovered.
Current conventional news	GOOD / SELECTIVE	Fresh Reuters physical/market/state-change coverage recovered across key domains.
Predictor public summaries	PARTIAL	FFG summaries accessible; full session notes gated. Craig video metadata accessible. Farsight fresh bounded public atom not recovered.
WFA reproducible corpus	MISSING	No frozen comparable 1/7/14/30-day corpus in this pass.
HQV fixed baskets	MISSING	No query time series / geographic lead-lag package.
HBR	MISSING	No current sample.
PMFS motion history	PARTIAL	Current original-venue snapshots recovered; robust frozen motion series not assembled.
SWFS consequence mapping	PARTIAL	No promoted T+7 terrestrial consequence; no zero imputed.
Formal low/central/high weight perturbation	SPECIFICATION GAP	Required by tasker but no frozen numeric perturbation map exists; not invented after seeing field.

Appendix F - Freeze and Reproducibility Record

Artifact	SHA-256	Internal filename
Pretasker packet	4bf2f5864649f1ebbde51b99069be02d782a3b6d7f5640b1f9abb7a49f1ce6c3	OTH_PRETASKER_v0.2_FROZEN_HANDOFF_2026-09-04_CLEANROOM.txt
Source registry	007c72bbcaf7be58c264e86a7f536e1e0c6d17aa5b566bbaba5b68eb65932a76	source_registry_20260904_cleanroom.csv
Atom ledger	cf93b93f293e0df0d45ad0550bac3cc18a40ffbd8fad815414446c3a588900d0	qualifying_atoms_20260904_cleanroom.csv
Temporal field	3869da74e3818e303866cea32651df797c82401282e567e6f020768be1b4e290	temporal_field_daily_20260904_cleanroom.csv
Tasker	e5bcd51bc7f11f47259ec66b02393879112fde46677dc3cdd700ac22cfadc9b3	Over_the_Horizon_Software_Tasker_v0.98.txt

Control	Value
Current-run atom computation	FRESH REBUILD
Prior processed outputs as numeric inputs	NO
Prior outputs for lineage	YES - only after current freeze
Predictor temporal mass	0
Predictor Major confirmation	PROHIBITED
Source/day cap	1.5 x strongest same-source atom
Kernel	Area-normalized triangular
Smoothing	7-day centered
NCD central half-life	7 days; persistent physical-state items not erased by article age
Strict blindness	NOT CERTIFIED - model-context exposure acknowledged

Appendix G - Source Notes

ID	Publisher	Title / source	Date	URL
S01	Future Forecasting Group	A September to Remember: Seismic Convergence, a Six-Year Anomaly, and the Strangest Data of the Year	2026-08-28	https://www.ffgrv.com/a-september-to-remember-seismic-convergence-a-six-year-anomaly-and-the-strangest-data-of-the-year/
S02	Future Forecasting Group	Blue Sky Team's September World Events: Celebrity Deaths and Natural Disasters Spike	2026-08-26	https://www.ffgrv.com/blue-sky-teams-september-world-events-celebrity-deaths-and-natural-disasters-spike/
S03	Nasza Polska	Jasnowidz Jackowski zapowiada wojnę po 20 września...	2026-09-02	https://naszapolska.pl/jasnowidz-krzysztof-jackowski/
S04	Przepowiednie Jackowskiego	Przygotowania Do Wielkiej W - Wizja Na Żywo (transcript archive)	2026-07	https://przepowiednie-jackowskiego.pl/filmy/7E80CLFU0ck
S05	Craig Hamilton-Parker / YouTube	The Next 6 Months Will Change Everything | Psychic Predictions	2026-06-25	https://www.youtube.com/watch?v=DwMc2xtFtBo
S06	Jessica Adams	The Scorpio Retrogrades	2026-09-04	https://www.jessicaadams.com/2026/09/04/blog/the-scorpio-retrogrades/

ID	Publisher	Title / source	Date	URL
S07	Astrology King	Mars Conjunct Sirius - September 2, 2026	2026-09-01	https://astrologyking.com/mars-conjunct-sirius-2026/
S10	Reuters	US nonfarm payrolls blow past expectations in August; unemployment rate steady at 4.1%	2026-09-04	https://www.reuters.com/business/us-nonfarm-payrolls-surge-august-unemployment-rate-steady-41-2026-09-04/
S11	Reuters	Gulf shipping traffic via Hormuz keeps below 10-day average, data shows	2026-09-04	https://www.reuters.com/world/middle-east/gulf-shipping-traffic-via-hormuz-keeps-below-10-day-average-data-shows-2026-09-04/
S12	Reuters	Asian buyers turn to Australian, Argentine wheat amid Black Sea disruptions	2026-09-03	https://www.reuters.com/world/asia-pacific/asian-buyers-turn-australian-argentine-wheat-amid-black-sea-disruptions-2026-09-03/
S13	Reuters	World food prices at highest since 2022 as supply risks mount, FAO says	2026-09-04	https://www.reuters.com/world/europe/world-food-prices-highest-since-2022-supply-risks-mount-fao-says-2026-09-04/
S14	Reuters	Oil ends week higher on renewed US-Iran strikes, diesel hits record	2026-09-04	https://www.reuters.com/business/energy/oil-set-steepest-weekly-gain-since-mid-july-over-intensifying-us-iran-tensions-2026-09-04/
S15	Reuters	China rare earth firms halt some US shipments over geopolitical worries, sources say	2026-09-04	https://www.reuters.com/business/aerospace-defense/china-rare-earth-firms-halt-some-us-shipments-over-geopolitical-worries-sources-2026-09-04/
S16	Federal Reserve	FOMC meeting calendars and September 2026 calendar	2026-09-04 accessed	https://www.federalreserve.gov/monetarypolicy/fomccalendars.htm
S17	Bureau of Labor Statistics	Schedule of Selected Releases for September 2026	2026-09-04 accessed	https://www.bls.gov/schedule/2026/09_sched_list.htm
S18	U.S. Census Bureau	Economic Indicator Release Schedule - List View	2026-09-04 accessed	https://www.census.gov/economic-indicators/calendar-listview.html
S19	Bureau of Economic Analysis	Release Schedule	2026-09-04	https://www.bea.gov/news/schedule
S20	United Nations General Assembly	Mandated events / General Debate Sep 22-28, 2026	2026-09-04 accessed	https://www.un.org/pga/80/mandated-events-80th-session/
S21	Reuters	UN faces contentious Iran nuclear vote ahead of General Assembly	2026-09-01	https://www.reuters.com/world/china/un-faces-contentious-iran-nuclear-vote-ahead-general-assembly-2026-09-01/
S22	NOAA Climate Prediction Center	ENSO Diagnostic Discussion	2026-08-13	https://www.cpc.ncep.noaa.gov/products/analysis_monitoring/enso_advisory/ensodisc.html
S23	U.S. Energy Information Administration	Short-Term Energy Outlook	2026-08-11	https://www.eia.gov/outlooks/steo/outlook.php
S24	Kalshi	Fed decision in September?	2026-09-04 accessed	https://kalshi.com/markets/kxfeddecision/fed-meeting/kxfeddecision-26sep
S25	Kalshi	CPI month-over-month in August 2026?	2026-09-04 accessed	https://kalshi.com/markets/kx/test/kxeconstatcpi-26aug
S26	Polymarket	US x Iran Effective Ceasefire begins by...?	2026-09-04	https://polymarket.com/event/us-x-iran-effective-ceasefire-begins-byptptpt-2-week-pause/us-x-iran-effective-ceasefire-by-september-30
S27	Reuters	US and allies push IAEA board to report Iran to UN Security Council, diplomats say	2026-09-04	https://www.reuters.com/world/europe/us-allies-want-iaea-board-report-iran-un-security-council-diplomats-say-2026-09-04/
S28	Federal Election Commission	Election and voting information - 2026 general election date	2026-09-04 accessed	https://www.fec.gov/introduction-campaign-finance/election-results-and-voting-information/
S29	UNFCCC	UN Climate Change Conference - Antalya, November 2026	2026-09-04 accessed	https://unfccc.int/cop31

Appendix H - Scoring Rules Applied

The run uses the frozen v0.5 multiplicative atom weighting inherited by v0.98:

ATOM_WEIGHT = provenance × event specificity × geographic specificity × temporal specificity × independence × contamination multiplier × origin multiplier × calendar multiplier; then multiplied by NCD weight before temporal deposition.

Component score	0	1	2	3	4	5
Specificity	0.10	0.25	0.40	0.60	0.80	1.00
Provenance	0.00	0.20	0.40	0.60	0.80	1.00
Independence	0.10	0.25	0.45	0.65	0.85	1.00

Component score	0	1	2	3	4	5
Contamination multiplier	1.00	0.85	0.65	0.45	0.25	0.10

Calendar type	Multiplier
Unscheduled / unknown timing	1.00
Scheduled event with specific unknown outcome	0.75
Generic known scheduled event	0.25
Symbolic astronomical timing	0.20

Candidate ridge: >=75th percentile plus >=3 independent root/ancestry groups OR >=2 distinct sensor lanes. Major ridge: >=90th percentile, >=3 independent roots, no single source >50%, and stable under weight and news-half-life sensitivity. Because the numerical weight-perturbation map remains unfrozen, this report does not award Major status on the basis of an improvised after-the-fact sensitivity test.