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Brief Notes

Iranian Oil Selling for Record Low Prices: Discounts on Iranian oil sales to China have grown to their highest level in over a year, as tightened sanctions on both Russia and the Islamic Republic disrupt logistics and heighten buyer anxiety. According to one benchmark, offers for Iranian Light crude slipped to discounts wider than $8 a barrel for December arrival, compared with a discount of about $6 in September and around $3 in March. China-based trade sources have told Reuters that bids recently sank to discounts of around $10 a barrel.

Armed Incidents in Border Provinces Continue: Regime forces have arrested several alleged members of the U.S.-designated terror group Jaish al-Adl in a "complex and targeted operation." The location and date of the operation have not been reported. The individuals arrested in the operation are accused of being part of a "terrorist team" within Jaish al-Adl that killed ten police officers in Iran's Sistan and Baluchestan Province in October 2024. Following their arrests, the individuals allegedly confessed, likely under duress, to having received training in Pakistan, where they spent ten days at a Jaish al-Adl base before returning to Iran with Kalashnikov rifles.

Limited IAEA Inspections on Regime Nuclear Facilities: U.N. nuclear watchdog chief Rafael Grossi said the IAEA is carrying out inspections in Iran, though not at the three sites hit by the U.S. in June. Speaking to reporters in New York, Grossi said, "We are inspecting in Iran. Not at every site that we should be doing it, but we are gradually coming back." When asked about what the IAEA has observed in Iran, Grossi said, "We do not see anything that would give rise to hypotheses of any substantive work going on there."

Beijing Helping Tehran Rebuild Missile Arsenal

The Islamic Republic is rebuilding its ballistic missile program despite the reimposition of UN sanctions banning missile activity and arms sales last month. According to European intelligence sources, Tehran has imported 2,000 tons of sodium perchlorate, a key chemical for solid missile propellant, from China since late September, with shipments arriving at Bandar Abbas just days after the snapback mechanism was triggered.

Several ships and Chinese firms involved are already under U.S. sanctions. While sodium perchlorate is not explicitly listed as banned, experts say it directly supports the Islamic Republic's missile production, placing it in the scope of sanctions.

China, which has rejected the legality of snapback sanctions on the Islamic Republic, argues it is not violating UN rules.

Halloween Crackdown on Violations of 'Islamic Norms'

The Islamic Republic Law Enforcement Command has issued a statement notifying Iranians that all Halloween-related events, promotions, and sales in public venues are banned, warning of "strict penalties" for violators.

The move follows recent widely circulated videos of unveiled women attending live music performances in Tehran, prompting hardline backlash against "immoral behavior."

This month, the regime has arrested and extracted forced confessions for "unconventional and controversial works" from several Iranian rappers; shut down numerous businesses, including cafes, restaurants, and wedding halls throughout the country for serving unveiled patrons; and announced their intent to mobilize 80,000 "clothing and chastity" enforcers in Tehran.

On the Radar

- On October 26, Faezeh Hashemi Rafsanjani claimed in a podcast that her father, Akbar Hashemi Rafsanjani, a founding figure of the Islamic Republic who served as its president from 1989 to 1997, did not die of a heart attack, but was rather killed by "domestic elements." Rafsanjani, who died at age 82 on January 8, 2017, was officially reported to have suffered a heart attack while swimming in Tehran. His daughter claims he had become a "thorn in the side of the establishment." She did not specify who she believes was responsible for the death. Many believed her comments were a reaction to the Supreme Leader's military advisor, Yahya Rahim Safavi, who said earlier this month that he would prefer to be "martyred" rather than die "in a pool." Today, the regime's judiciary reportedly filed a case against Faezeh Rafsanjani, as well as the podcast on which she made her comments, and has summoned her to court.

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