Prophecy, Capital and Power: A Sourced Map of End-Times Belief and Technopolitics in the US (2024–2026)

Prepared for the consortium. Pen name: Wang Lei. Version 20, 30 Oct 2026 (the Brazil verdict is final; its content is unchanged). Version 19, 30 Oct 2026 (version line and PDF brought up to date; no findings changed). Version 18, 29 Oct 2026 (the Directions renumbered to match their reading order: money and crime is Direction 6, Brazil is 7, Latin America is 8; no text was moved). Version 17, 29 Oct 2026, removed internal file names from the public text; findings and labels unchanged. Version 16, 28 Oct 2026 (Direction 6, money and crime, read before the runoff; policy and platforms folded into Direction 8; the cyber window reduced to a box). Version 15, 28 Oct 2026, followed the count, the session, the reception abroad and the cyber window. Version 14, 26 Oct 2026, added the ISER/Quaest survey and first-round church candidacies in Direction 7. Version 13, 26 Oct 2026, added the Brazil runoff in Direction 7, refreshed Direction 8 for the result, and reordered the chapters. Version 12 moved the Bibliography to the end; no content changes. Version 11 added Direction 5: Thiel's Nashville lectures. Version 10 added Direction 8 (Latin America alignment and the data-center buildout, full-text verified). Version 9 verified Direction 7 in full and added the two Revelando videos. Version 8 added Direction 7 (Brazil). Version 7 added Direction 4 (the surveillance-finance link). Version 6 added Direction 3 (the private-city pipeline). Version 5 added Direction 2 (prophecy meets policy). Version 4 added Direction 1 (contracts). Version 3, 16 Oct 2026, after a third (re-fetch) pass. Researched with AI help. Labels: [V] = checked against a fetched primary or mainstream source, linked inline. [V-s] = confirmed through search-result extracts of the named source; the full page was not fetched because of a paywall or timeout. [R] = established reporting that was not re-checked. [U] = unconfirmed or contested; what was tried is noted.

⚠ SCHEDULED UPDATES — version 20, 30 Oct 2026.

1. **Done in v16 (28 Oct 2026):** Direction 6, money and crime, placed before the runoff. The former Direction 8 is now 8.14. The cyber window is a short box. The conclusion is rewritten, and the Brazil verdict was marked as a draft (made final in v20).
2. **Done in v15 (28 Oct 2026):** the days after the file closed. Direction 7 carries the arithmetic, the challenge, the messaging channel and the cash session. Direction 8 carries the reception abroad.
3. **Done in v13 (26 Oct 2026):** the Brazil section (Direction 7) **and Brazil's alignment in Direction 8**, after the 25 Oct 2026 presidential runoff (Flávio Bolsonaro vs Lula).
4. **Done in v11 (20 Oct 2026):** Direction 5, Peter Thiel's Nashville lecture series (ended 19 Oct 2026).

Details are in the "Scheduled updates" section at the end.

1. Method note

- **Evidence:** primary documents first (FEC, Federal Register, court filings, official releases), then mainstream or scholarly reporting. Interpretation is labelled as interpretation. A meeting, donation or email is a *connection*, not proof of coordination or shared belief.
- **Materialist lens:** what material interests does each actor pursue (contracts, capital, land, energy, arms, regulatory relief), and does professed prophecy change behaviour or just justify it? A belief counts as politically causal only when its holder has policy power and the belief visibly shapes a decision.
- **The frame being avoided:** "Jewish sects plus a mafia steering US policy toward prophecy" reproduces the structure of the *Protocols* forgery. It turns named individuals into a collective

religious or ethnic agent, and it's empirically false because the actors below want incompatible things. This report keeps four things apart:
    - **Judaism:** a religion with many streams, including anti-Zionist ones (Satmar, Neturei Karta)
    - **Zionism:** a national movement, largely secular in origin
    - **Israeli religious-nationalist politics:** specific parties and movements
    - **Christian Zionism:** the largest pro-Israel constituency in the US by numbers

Across the Americas in 2024–2026, a small set of capital blocs (defense and AI, data centres and minerals, fuel and fintech, and politically connected finance) sought state guarantees, contracts and protection from regulation. In each case belief systems, from the end-times theology of US patrons to evangelical electoral machines in Brazil, worked as mobilising cover rather than as the motor. Brazil's October 2026 runoff is the test case. Washington-aligned networks (Rockbridge, CPAC and the minerals offer) backed one side. Domestic money scandals (Master, Refit and the fuel and fintech laundering traced to the PCC) cut across both camps. The vote held under heavy information and market stress. What follows the money is not a plot. It is a set of open accounts: who paid, who was guaranteed, and who is now being investigated. The accounts are Direction 6. The election is Direction 7.

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2. Actor profiles

2.1 Peter Thiel

- **Who:** co-founder of PayPal and Palantir (chairman), Founders Fund. Calls himself a "small-o orthodox Christian" (Guardian) **[V]**.
- **Antichrist lectures, first series (San Francisco, Commonwealth Club, Sept–Oct 2025):**
    - "In the 21st century, the Antichrist is a Luddite who wants to stop all science. It's someone like Greta or Eliezer." (15 Sept) **[V]** (Straits Times/WaPo)
    - He called critics "legionnaires of the Antichrist" (WaPo) **[V]**.
    - He told Musk his Giving Pledge money would go "to left-wing nonprofits that will be chosen by Bill Gates" (Reuters) **[V]**.
- **Later series:**
    - Itinerary: San Francisco (Sept–Oct 2025), **Paris (January 2026)**, **Rome (March 2026**, where Catholic commentators and Italian politicians pushed back), then Nashville (Fortune) **[V]**. *(v2 had the Rome date as unknown and omitted Paris; the Nashville Scene's "third iteration" wording doesn't count Paris.)*
    - Nashville, Grand Lodge of Tennessee, 28 Sept 2026. Journalists weren't allowed in, but the Scene obtained transcripts. Quote: "There's one existential risk that nobody seems to want to discuss … the risk of a totalitarian one-world government." (Nashville Scene) **[V]**
    - Remaining talks: "The End of Empire" (Oct 5), "Velocity of Antichrist" (Oct 12), "New Rome" (Oct 19) **[V]**. All four lectures are covered in Direction 5 (v11).
    - From recordings of the Sept 28 and Oct 5 Nashville talks obtained by Politico, as quoted by Fortune **[V; Fortune full text fetched, Politico original still blocked (403/timeout)]**:
    - "Many people know that AI is politically unpopular and want to leverage that to boost their own popularity. Both Obama and the pope fall into this category. Obama knows the Democrats have no ideas, but they can at least oppose AI."
    - On Pope Leo, whose first encyclical *Magnifica Humanitas* is about AI: "He needed something politically popular to distract from the church's child sex abuse scandals, and he found it in AI."
    - Effective altruism "has brainwashed a significant portion of the people working on AI."
    - Fortune also notes that Thiel is now out of step with AI CEOs: Altman and Musk publicly backed Dario Amodei's call (Sept 2026) to slow frontier capability growth **[V]**.

- **Political money:**
  - $15M to Protect Ohio Values PAC for Vance: $10M on 12 Mar 2021, $3.5M on 18 Apr 2022, $1.5M on 25 Apr 2022 (OpenSecrets, Politico) **[V]**.
  - At least $200K more to the same PAC through his dark-money group Per Aspera Policy (CBS) **[V]**.
  - $15M to Saving Arizona PAC for Blake Masters, rising to about $20M (Politico, OpenSecrets) **[V-s]**.
- **State contracts:** ICE paid Palantir $30M for "ImmigrationOS" (April 2025, runs to Sept 2027) (Wired, USAspending) **[V]**.
- **Yarvin:** Founders Fund invested in Yarvin's Tlon/Urbit in 2013 (a $1.1M seed round with a16z). Tlon said Thiel wasn't personally involved (The Verge) **[V]**.
- **Charter cities and Praxis:** Pronomos Capital is Thiel-backed. It invested in Praxis's seed round (with Joe Lonsdale and others) and in a later round (archive of the Praxis seed announcement, CB Insights) **[V-s]**. Pronomos and Próspera are **[R]**: there's widely reported overlap, but I didn't re-check it this pass.
- **New Zealand:**
  - Citizenship came in 2011 after only 12 days in the country, under "exceptional circumstances." In his application he wrote that NZ "aligns more with my view of the future" (NZ Herald, NYT) **[V-s]**.
  - His Wānaka lodge was refused by commissioners in Aug 2022, and the Environment Court dismissed his appeal in May 2024 (NZ Herald, ODT) **[V]**.
  - He has called *The Sovereign Individual* the book that most influenced him (Forbes 2014). The book names NZ a "domicile of choice" (Guardian 2018) **[V]**.
- **Eschatology:** Girard, plus Schmitt's *katechon*. Regulation and world government are the Antichrist's vehicle, and tech growth is the restrainer.
- **What the evidence doesn't show:** that his theology dictates specific federal decisions, or any coordination with Chabad or Israeli religious-nationalist actors. His Antichrist (a regulator promising safety) is the *opposite* of the dispensationalist one (a tech-empowered world ruler). His NZ project is now a bare, unbuildable estate, not a functioning refuge.

2.2 JD Vance

- **Who:** Vice President. Formerly at Thiel's Mithril Capital (from 2017, per CBS) **[V]**. Catholic convert (2019) **[R]**.
- **Yarvin:** on Jack Murphy's podcast (Sept 2021), from a transcript filed in federal court (CourtListener exhibit; also Vox, The Verge) **[V]**:
  - "there's this guy, Curtis Yarvin, who's written about some of these things."
  - "fire every single mid-level bureaucrat, every civil servant in the administrative state, replace them with our people. And when the courts stop you, stand before the country like Andrew Jackson did and say the chief justice has made his ruling, now let him enforce it."
  - The Verge notes this closely matches Yarvin's 2012 "RAGE" (Retire All Government Employees) proposal.
- **Policy:** in Paris (11 Feb 2025) he said "excessive regulation of the AI sector could kill a transformative industry just as it's taking off" (American Presidency Project, AP) **[V]**.
- **Doesn't show:** dispensationalist belief. His project is institutional capture (Yarvin and RAGE), which is a secular power program, not a prophetic one.

2.3 Curtis Yarvin and Nick Land

- **Yarvin:** neo-reactionary who wants a CEO-monarch and coined "the Cathedral." RAGE dates to 2012 (The Verge, above) **[V-s]**.
- **Land:** "The Dark Enlightenment," a multi-part online essay from March to December 2012, systematized Yarvin's neocameralism and "exit" (text) **[V]**. He was in the CCRU in the 1990s **[R]**.

- **Influence path:** Land → Andreessen's manifesto (2.4). Yarvin → Vance (2.2) and Thiel (Tlon).
- **Doesn't show:** religious prophecy. Land's "hyperstition" is secular and anti-humanist, and Yarvin is a secular monarchist.

2.4 Kurzweil and the AI industry

- **Andreessen's "Techno-Optimist Manifesto"** (16 Oct 2023) ends with "Patron Saints of Techno-Optimism," a list of 56 names. It includes **Nick Land**, Ray Kurzweil, F.T. Marinetti (who later co-wrote the Fascist Manifesto), Nietzsche and John Galt, plus @BasedBeffJezos (a16z) **[V]**. So Land and Kurzweil appear side by side as "saints" in a document by one of Trump-era tech's most influential investors.
- **Kurzweil:** predicts AGI by 2029 and the Singularity by 2045 (*The Singularity Is Nearer*, 2024) **[R]**.
- **Stargate:** announced at the White House on 21 Jan 2025 by OpenAI, SoftBank, Oracle and MGX, up to $500B (OpenAI, AP) **[V-s]**.
- **Federal AI policy:**
  - "America's AI Action Plan" (July 2025) ties AI-related federal funds to states not having "burdensome" AI rules (PDF) **[V]**.
  - EO 14363 "Launching the Genesis Mission" (24 Nov 2025), a DOE-led AI-for-science platform (whitehouse.gov) **[V]**.
  - EO 14365 "Ensuring a National Policy Framework for Artificial Intelligence" (11 Dec 2025) creates an AG task force to challenge state AI laws and adds funding restrictions (whitehouse.gov, Federal Register) **[V]**.
- **Musk:** left DOGE and feuded with Trump in June 2025. He posted that Trump was "in the Epstein files," then deleted the post (CNN, Time) **[V]**.
- **Doesn't show:** a shared religious eschatology. The convergence is about capital (data-center capex, preemption of state regulation) and geopolitics (China).

2.5 Jared Kushner and Chabad

- **Ties:** the Kushner family foundation gave about $342K to Chabad causes (Forward) **[V-s]**. Trump visited the Rebbe's Ohel in Queens on **7 Oct 2024** (the anniversary of Oct 7), with Ben Shapiro and the family of hostage Edan Alexander. Former ambassador David Friedman organised it (JTA, AP photos, Ynet) **[V]**.
- **Gaza:**
  - The "Riviera" proposal echoed Kushner's 2024 waterfront remarks (Reuters) **[V-s]**.
  - Kushner and Witkoff met Hamas directly to seal the Oct 2025 ceasefire (Axios, Guardian) **[V]**.
  - Both later sat on the executive board of the "Board of Peace," which governs Gaza's transition (Jan 2026) **[V-s; CFR summary]**.
- **Affinity Partners:** per minutes of the panel's 30 June 2021 meeting, all four PIF panel members present said they were "not in favor of Project Astro." They cited "the inexperience of the Affinity Fund management," due diligence "unsatisfactory in all aspects," and "public relations risks." Within days the board led by MBS approved the deal. Mnuchin's fund got $1B on cheaper terms (NYT full text) **[V]**. In short, PIF's investment panel objected to the $2B (inexperience, fees, PR risk), and the board chaired by MBS overruled it (NYT). The Senate Finance chair later probed the payments (letter) **[V]**.
- **The Rebbe's messianism:** Schneerson (d. 1994) taught that redemption was imminent, and part of the movement held that he was the Messiah. Scholarship: Berger (2001), Heilman & Friedman (*The Rebbe*, Princeton 2010) **[R; standard scholarly works]**.
- **Doesn't show:** messianic motive in Kushner's dealmaking. The documented drivers are Gulf capital, real estate and normalization. Chabad has no mechanism to direct US policy.

2.6 Christian Zionism and the evangelical bloc

- **Polling:** white evangelicals said Israel fulfils Second Coming prophecy (63%, 2003) and that God gave Israel to the Jews (82%, 2013, a higher share than US Jews) (Pew 2003, Pew 2013) **[V]**.
- **Huckabee:** met the Yesha Council at Shiloh (May 2025) and viewed red heifers raised "in preparation for the future building of the Temple" (Israel Hayom). Of a West Bank Palestinian state: "there's no room for it" (Times of Israel) **[V]**.
- **Hegseth:**
  - Secretary of Defense, with the secondary title "Secretary of War" under EO 14347 (Federal Register) **[V]**.
  - 2018: "there's no reason why the miracle of the reestablishment of the Temple on the Temple Mount is not possible" (video) **[V]**.
  - Has "Deus Vult" and Jerusalem Cross tattoos (WSJ) **[V]**.
  - Attends Pilgrim Hill Reformed Fellowship, a church in the CREC network co-founded by Doug Wilson (AP, Politico) **[V-s]**. CREC theology is postmillennial and Reformed, not dispensationalist. Hegseth's Temple enthusiasm is therefore not standard CREC doctrine.
- **Paula White-Cain:** senior advisor to the White House Faith Office (EO 14205, 7 Feb 2025) (whitehouse.gov) **[V]**.
- **CUFI / John Hagee:** claims more than 10M members (Dec 2020; this is the group's own figure) (CUFI) **[V]**.
- **Doesn't show:** that every evangelical official acts on prophecy. Hegseth's church is non-dispensationalist and Huckabee calls his settler visits "solidarity." What is shown is that officials holding Temple and biblical-land beliefs sit at the top of defense and diplomacy.

2.7 Israeli religious-nationalist actors

- **Ben-Gvir:** on 3 Aug 2025 (Tisha B'Av) he openly led prayer on the Temple Mount, breaching the status quo. Netanyahu's office said policy was unchanged (Times of Israel, Reuters) **[V-s]**.
- **Red heifers:** five were brought from Texas to Israel in Sept 2022 through Boneh Israel for the Temple Institute (Jerusalem Post, Ynet) **[V]**.
- **US money:** Haaretz (2015) found about 50 US tax-exempt charities sent roughly $220M+ to settlements in 2009–2013 (Haaretz via archive, Pulitzer Center). Evangelical settlement fundraising, from groups like HaYovel and CFOIC, was estimated at $50–65M over 10 years (Forward) **[V]**.
- **Smotrich:** Finance Minister and settlement authority **[R]**.
- **Doesn't show:** majority Israeli support. Netanyahu's office publicly disowned the change on the Temple Mount, and Haredi parties are largely non-Zionist.

2.8 Trump foreign policy as "might makes right"

- **Tariffs:** "Liberation Day," EO 14257 (2 Apr 2025), used IEEPA emergency powers (Federal Register) **[V]**. **Correction:** on 20 Feb 2026 the Supreme Court ruled 6–3 in *Learning Resources, Inc. v. Trump* that IEEPA does not authorize tariffs, striking down the "reciprocal" and "fentanyl" tariffs (opinion, CRS) **[V-s]**. Refunds run through CBP's CAPE process and litigation in the Court of International Trade continues (CBP, SCOTUSblog) **[V-s]**. This is a significant institutional check on "might makes right."
- **ICC:** EO 14203 (6 Feb 2025) cites the "baseless arrest warrants targeting Israeli Prime Minister Benjamin Netanyahu" (Federal Register). Prosecutor Khan was placed on the SDN sanctions list on 13 Feb (OFAC). State then sanctioned four judges (State) and later more, eight in total by summary count **[V; total V-s]**.
- **Iran:** Operation Midnight Hammer, 22 June 2025, struck Fordow, Natanz and Isfahan with B-2s, 14 GBU-57 bombs and Tomahawks (AP, BBC) **[V]**.
- **Venezuela:** a US operation captured Maduro on 3 Jan 2026 (AP) **[V]**.

- **Greenland:**
  - The 22 Sept 2026 deal expands Pituffik, adds two new bases and Golden Dome, and grants no mining rights. Greenland's 2021 ban on new oil exploration still stands (Al Jazeera, CNN) **[V]**.
  - Panama force not ruled out, and "51st state" remarks about Canada (AP) **[V]**.
- **Reading:** classic great-power coercion over chokepoints, bases, energy and minerals. Prophecy isn't needed to explain it, but the Israel file (ICC, settlements) is where evangelical belief and policy meet.

2.9 Jeffrey Epstein

- **Law and releases:**
  - The Epstein Files Transparency Act (PL 119-38) was signed 19 Nov 2025 after a 427–1 House vote.
  - DOJ had released about 3.5M pages by 30 Jan 2026 (DOJ). The library was last updated 11 Sept 2026 (DOJ Epstein Library).
  - The redaction report appeared in the Federal Register on 27 Aug 2026 (FR) **[V]**.
  - In *Phang v. DOJ*, Judge Sullivan found redactions unjustified and DOJ appealed (The Hill) **[V-s]**.
- **Schedules:** WSJ (2023) reported entries for CIA Director William Burns, Larry Summers, Noam Chomsky and others (WSJ). NYT (May 2023) reported Thiel's scheduled 2014 meetings, some marked tentative (NYT archive). A Sept 2014 schedule in House Oversight documents names Thiel, Barak and Staley (index) **[V]**. A scheduled entry doesn't prove a meeting took place.
- **Barak/Carbyne:** Haaretz (2019) showed Epstein funded part of Barak's stake in Reporty, later renamed Carbyne. Forbes (Feb 2026) and the Miami Herald (Mar 2026, from DOJ-released records) report: $1M from Epstein's Southern Trust to a Barak holding company in March 2015; an Indyke email saying "I thought we did not want your name associated with this investment"; Carbyne contracts with Miami-Dade police, the Florida Highway Patrol and others; and **Axon's $625M acquisition of Carbyne (2025)**, with no mention of Epstein in Axon's filings. Barak's lawyer disputes calling the investment "secret" (Haaretz, Forbes, Miami Herald) **[V-s]**.
- **Founders Fund in Carbyne (added v13).** In August 2018, Founders Fund, Peter Thiel's venture firm, joined Carbyne's $15 million Series B as a strategic investor, in a round led by Elsted Capital Partners. It was the fund's first Israeli investment, made while Ehud Barak chaired the company (TechCrunch, CTech) **[V-s]**. Carbyne has also reported municipal customers in Mexico (ISRAEL21c) **[V-s]**. The same emergency-call platform that Epstein money helped seed then had capital from both the Barak circle and the Thiel network, before Axon bought it in 2025. Shared investors are a commercial tie. They do not show coordination or intelligence direction **[U: not shown]**.
- **Intelligence claim:** the Daily Beast (2019) quoted Acosta saying Epstein "belonged to intelligence." In his 19 Sept 2025 House Oversight interview, Acosta denied saying it and said no agency approached him (Newsweek) **[V]**. **Status: unproven allegation.**
- **"Occult":** no documentary basis was found **[U]**. I searched the reporting and nothing beyond speculation about the island structure turned up.

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3. Murky and startling circumstances

Labels: DOCUMENTED = official record or multiple solid outlets; REPORTED = credible reporting, disputed or single-sourced; SPECULATION = inference, not evidence.

1. **The "full raw" Epstein jail video was edited.** DOJ/FBI released it in July 2025 as "full raw." Metadata analysed by Wired and Hany Farid shows it was assembled in Adobe Premiere from two clips, with about 2m53s trimmed right before the famous "missing minute." A government

source later told CBS an uncut original exists. **DOCUMENTED** that it was edited; the reason is **unexplained** (Wired, CBS).

2. **MCC failures on the night Epstein died.** Guards skipped rounds and falsified logs, his cellmate wasn't replaced, and most SHU cameras weren't recording because of a DVR failure. The DOJ IG (June 2023) found negligence but no evidence against the suicide finding. **DOCUMENTED** (OIG). Claims of murder remain **SPECULATION**.
3. **The "client list" reversal.** In Feb 2025 Bondi said a client list was "sitting on my desk." The July 2025 DOJ/FBI memo said no incriminating client list exists. She later said she meant the case files. **DOCUMENTED** contradiction (AP).
4. **DOJ resisting a law it is bound by.** DOJ is appealing court orders to lift Transparency Act redactions, and Senate Finance staff say FBI interview reports are still unreleased (Sept 2026). **DOCUMENTED** that the litigation exists (The Hill). Motive is **SPECULATION**.
5. **The Trump "birthday book" letter.** House Oversight released (Sept 2025) a 2003 note bearing a Trump-like signature. Trump denies writing it and is suing the WSJ for $10B. **DOCUMENTED** document; authorship **disputed** (AP, Reuters).
6. **A deleted accusation.** Musk posted that Trump is "in the Epstein files," then deleted it. **DOCUMENTED** post and deletion; the claim itself is **unsubstantiated** (Time).
7. **The Acosta quote, denied under oath.** The core "intelligence asset" source rests on an anonymous 2019 account that the person quoted denied in 2025. **REPORTED, then denied** (Newsweek).
8. **Epstein money in a police surveillance startup.** Epstein funded part of former Israeli PM Barak's stake in Carbyne, which US police departments later used. **DOCUMENTED** (Haaretz, Forbes 2026). Intelligence-operation readings are **SPECULATION**.

   8b. An Epstein-funded startup was folded into the US police-tech giant. Axon, the maker of Tasers and body cameras, bought Carbyne for $625M. Its SEC filings don't mention the early Epstein money, and Axon didn't answer the Herald's questions. **DOCUMENTED** facts; whether Axon knew is **unknown** (Miami Herald).
9. **The Saudi PIF overrode its own vetting panel** to give $2B to Kushner months after he left the White House. Kushner now leads Gaza diplomacy and sits on the Board of Peace. That's a **DOCUMENTED** conflict-of-interest concern (NYT). A quid pro quo is **unproven**.
10. **NZ citizenship after 12 days.** Granted secretly in 2011 under "exceptional circumstances," it only became public in 2017. **DOCUMENTED** (NZ Herald).
11. **Super PAC coordination loophole.** Politico reported that Vance's Thiel-funded PAC posted strategy documents on an obscure public website the campaign could use. **REPORTED**; no enforcement found (Politico). Thiel also used a dark-money group (Per Aspera), which is **DOCUMENTED** (CBS).
12. **The prophet of anti-surveillance owns surveillance.** Thiel warns of totalitarian one-world government while his company builds ICE's ImmigrationOS deportation platform. **DOCUMENTED** facts; "contradiction" is interpretation (Wired).
13. **Secrecy of the Antichrist lectures.** Recordings were banned in SF and Nashville, yet transcripts leaked within hours both times. The *Scene* also notes that Vanderbilt's chancellor appears in leaks of Thiel's private "Dialog" network; this is a local tie, not a link to the sponsor (corrected v11; see Direction 5). **REPORTED** (Nashville Scene).
14. **An ambassador at a Temple-preparation site.** Huckabee's first official settler visit included the red heifers raised for a Third Temple, a project that implies changing the status of the Al-Aqsa compound. **DOCUMENTED** (Israel Hayom).
15. **A defense chief with Temple and Crusader imagery.** A soldier flagged Hegseth's "Deus Vult" tattoo as a possible "insider threat," and he was pulled from inauguration duty in 2021. **DOCUMENTED** (WSJ).
16. **Thiel calls the Pope's AI focus a distraction from abuse scandals,** while his own companies are among the main targets of the regulation the encyclical urges. **DOCUMENTED** quote (via Politico recordings); the conflict of interest is interpretation (Fortune).
17. **Greenland claims vs. treaty text.** Trump announced "massive" drilling that the signed agreement doesn't allow. **DOCUMENTED** contradiction (AP).

Added v11 (Direction 5, Thiel's Nashville lectures):

64. Repeated attacks on the pope by the chief patron of the most prominent Catholic in US politics. At Aspen (30 June 2026) Thiel said Leo was "working for the Chinese Communists" (CNN); in Nashville (Sept–Oct) he called the AI encyclical a distraction from abuse scandals (Fortune) **[V]**. Letters from Leo (opinion) counts four attacks and notes Vance "has yet to be asked about it" (Letters from Leo). **DOCUMENTED** remarks; no Vance response found **[U: searched; unconfirmed, none found]**.

65. Tax-transparency rules as the Antichrist's "system", from a billionaire with a 12-day second citizenship and a new Buenos Aires mansion. At lecture 3 he reportedly listed the ICC and the erosion of bank secrecy (X) **[R]**; in 2025 he said "It's become quite difficult to hide one's money" (Guardian) **[V]**. He bought a US$12m house in Buenos Aires in 2026 (Forbes Argentina) **[V]**. **DOCUMENTED** facts; the lecture list is **REPORTED**; any personal motive is **SPECULATION**.

66. A "New Rome" defined by military power and payment surveillance, described by the chairman of the firm that integrates Pentagon, ICE and IRS data (§D1). He reportedly added that this restrainer can "flip" into the Antichrist (X) **[R]**. **REPORTED** lecture content; **DOCUMENTED** contracts; the irony is interpretation.

67. Thiel Macro's disclosed book is $418.7M in eight stocks, seven of them energy names tied to the AI buildout plus an Argentine shale producer, filed six weeks before a series that casts slowing AI as the Antichrist's agenda (SEC 13F) **[V]**. **DOCUMENTED.** The filing gives no reasons; "AI-focused" is the press's label.

68. Each lecture city came with a government or Palantir angle. Paris: lunch with the foreign minister on "digital regulation", while Palantir serves the DGSI (Politico Europe). Rome: lawmakers asked for transparency on the government's Palantir ties (Fortune). Nashville: Vanderbilt's chancellor appears in Thiel's private Dialog network (Nashville Scene) **[V]**. **DOCUMENTED**; no deal or decision is shown.

Added v13 (Brazil runoff, 26 Oct 2026). Items 69–84. The closed TSE file is the count. Night-of social-media leads that were not corroborated stay **[U: unconfirmed]** or **[R]**.

1. **The closed file is not the night-of snapshot.** Lula 51.79% (64,256,232) to Flávio Bolsonaro 48.21% (59,826,041), margin 4,430,191, turnout 80.78%, abstention 19.22%, file closed 23:26:38 on 25 Oct. A circulating 51.78% total does not match it. **[V]** (g1, BBC News Brasil, TSE results application).
2. **About 35,521 votes were recorded after 17:00, against a margin of 4.43 million.** g1's count of late ballots is the scale of the extension fight. **[V]** (g1). Flávio called the result "sacanagem" and said recognition was "impossible". **[V]** (Agência Brasil). A filed petition was not found on the morning of 26 Oct **[U: unconfirmed]**.
3. **The justice who certified the result is the justice Flávio helped send to the court, and the justice piauí places at Vorcaro's table.** Kassio Nunes Marques voted in 2021 to annul Coaf reports in the "rachadinha" case. **[V]** (STF). The phone-message allegations are single-outlet and denied **[R]** (piauí). No charge **[U: no charge]**.
4. **Petrobras is in the debate denial and out of the written plan.** Flávio said he would not privatize Banco do Brasil, Caixa or Petrobras. **[V]** (CNN Brasil). Folha reports that Petrobras is absent from the filed programme, and that energy coordinator Adriano Pires had floated an Eletrobras-style capitalization that dilutes the state to a minority. **[V-s]** (Folha).
5. **Flávio's economic coordinator sat on the board of a bank the Federal Police searched over Master-linked credit.** Daniella Marques, February 2024 to December 2025, Banco Digimais, controlled by Edir Macedo. The police say the bank put about R$600 million into Master-linked portfolios. She was not a target, and no wrongdoing by her is alleged. **[V-s]** (Revista Fórum, citing Metrópoles registry records, CNN Brasil). What she voted on is unpublished **[U: not shown]**.

6. **Two days before the vote, a justice froze up to R$6 billion of the lawyer behind Best Bet.** Willer Tomaz is Flávio's close friend. The freeze, the secrecy orders and the Richarlison inquiry are documented as court and police acts. Flávio's role in the island dispute is denied **[U: denied; no charge]**. **[V-s]** (Agência Brasil, g1).
7. **Master reached public pension money under the government that has just been re-elected.** Veja reports bribe offers, of R$500,000 to R$1 million, to put the bank on the Social Security Ministry's "exhaustive list" in 2024. **[R]** (Veja). A claimed final price of R$15 million is one anonymous source **[U: unconfirmed]**. No one has been charged.
8. **A Federal Police dispatch, reported by Intercept Brasil, puts fraud-linked money on the road to Havengate the day before the first remittance.** R$12 million from a company of Vorcaro's associate Fabiano Zettel to Entre Investimentos. **[R]** (Intercept Brasil). The separate "severe" gap between money sent abroad and money returned is **[V]** (g1). Illegal application of the funds is a hypothesis, denied **[U: hypothesis; no charge]**.
9. **Eduardo Bolsonaro asked foreign audiences not to recognize the election.** The video is his, on his account. **[R]** (the post). His "Polymarket 80%" figure is a betting price, not a poll. AFP had reported odds near 77% for Flávio before a result the market missed. **[V]** (AFP). A claim that Lula's gain was statistically impossible is contested by the arithmetic in item 69 **[U: contested]**.
10. **The US president questioned the result and offered no evidence.** EFE, carried by the Rio Times, quotes Donald Trump saying Brazil had applied "Joe Biden's playbook". No White House transcript was fetched, and no State Department recognition statement was found on the morning of 26 Oct. **[V-s]** (Rio Times, citing EFE). Formal recognition **[U: unconfirmed]**.
11. **Overseas markets repriced a Lula win before the São Paulo cash open, and the cash session then halted.** The EWZ fund was down about 26% in the New York premarket, Petrobras ADRs about 20%, and the dollar opened near R$5.42, up about 8.7%. **[V]** (g1). B3 then halted the cash session, the first circuit breaker since March 2020. **[V]** (B3). The close is in 7.12. A pre-open note that a halt was only an expectation is superseded by that halt **[R]** (Valor).
12. **The firm that supplies São Paulo's facial recognition shares its leadership with the consortium that holds the contract.** SentinelX replaced Camerite by addendum. From May 2025 its partners include the consortium administrator and a director of the firm it replaced. The city says it has no access to the source code or the training data. **[V-s]** (Times Brasil, Intercept Brasil). Wrongdoing by any named politician is not shown **[U: not shown]**.
13. **A US venture firm that backs Flock Safety also led the seed round of the company São Paulo tried to put inside Muralha Paulista without a tender.** Pax raised a US$40 million seed. **[V]** (Pax). A parallel Paraná tender of about R$581 million was suspended by that state's audit court. **[V]** (TCE-PR). Prodesp's partnership with Paladium (Pax), then an SSP contract of R$475,819,725.90, is reported to have been rescinded in June 2026, and the São Paulo audit court is reported to have closed the case because the object was gone. The court PDF was not re-fetched **[R]**. Ultimate owners sit in a Delaware LLC. No Thiel or Palantir stake in Pax was found **[U: unconfirmed]**.
14. **The church that owns Digimais declared itself neutral. The party in its orbit did not.** Republicanos formally backed Flávio on 7 Oct, without a whip, in a bargain aimed at the Chamber presidency. **[V-s]** (g1). IURD's neutrality is reported from internal meetings **[V-s]** (CartaCapital). Leadership symbolism is not a claim about worshippers. See 7.12.
15. **Curtis Yarvin told a newly registered Brazilian youth party that it goes beyond what the US has, and that Washington would be glad to see Jair Bolsonaro pardoned.** The visit was 29 Nov 2025, weeks after the TSE registered Missão. **[V]** (Metrópoles, Agência Brasil). No Thiel funding of Missão has been published **[U: unconfirmed]**.
16. **Buses were held in Salvador on runoff morning. The mayor is União Brasil, not a documented Flávio operative, and a flight "boycott" of the Northeast did not happen.** Procon-BA found hundreds of buses parked. **[V-s]** (g1). ANAC's cancellation rate that day was described as normal, about 0.9%, so the flight claim is dropped. Who gave the order is still contested **[U: contested]**.

Added v15 (28 Oct 2026). Items 85–92. The closed file is unchanged. These rows are what people did with it.

1. **The extra ballots have an ordinary source.** Lula gained 10,376,694 votes and Flávio Bolsonaro 3,721,538. BBC News Brasil puts the pool at 9.32 million votes for eliminated candidates, 2.96 million more voters (abstention from 21.08% to 19.22%, the largest drop between rounds since 1989), and 1.82 million fewer blank and null ballots. **[V]** (BBC News Brasil, g1). A post saying the math did not add up does not survive that sum **[R]**.
2. **The PL recognized the result on 26 Oct. The candidate did not.** Valdemar Costa Neto's note accepts the TSE proclamation and still presses the party's questions. **[V-s]** (g1). On 28 Oct, from Miami, Flávio Bolsonaro issued a letter calling himself the "true president-elect", then a later version calling himself only "leader of Brazil". **[V-s]** (O Globo).
3. **The flight and the ANDIS case are in Direction 6.3.** Perfil reports an unnamed US broker arranged and paid about US$140,000. Who that intermediary is, and who funded it, remains open. **[U: unconfirmed]**.
4. **ADPF 1178 is in Direction 6.6.** The order requisitions an inquiry and makes no finding of a transfer. **[V]** (STF).
5. **Two Instagram suspensions in the US midterms were restored the same day.** No Kings on 17 Oct and Angie Nixon's @LatinosConAngie on 27 Oct. Meta's Andy Stone called the first "clearly taken in error". **[V-s]** (Guardian).
6. **A hospital network in New Mexico went dark for part of 26 Oct.** UNM Health diverted ambulances for two hours and cancelled a day of outpatient care. Systems were back on 27 Oct. A hacker claim of stolen patient and Social Security data is unconfirmed **[U: unconfirmed]**. The outage itself is **[V]** (UNM HSC, AP).
7. **Israel's count, the same week, was not a majority.** The Central Elections Committee had the Netanyahu bloc at 53 seats, the Eisenkot bloc at 48 and the Arab parties at 19, with 93% of ordinary ballots counted (85.6% of the total) and about 600,000 double-envelope ballots still out. **[V-s]** (Times of Israel).
8. **The US stake in the Venezuelan oil vehicle is a warrant, through a parent whose investors need not be disclosed.** ProPublica, 20 Oct 2026, reads the agreement that way, with disputes in the federal court for the Northern District of Texas. **[V-s]** (ProPublica). The row in 7.4 had the 35% and the offtake. This is the corporate form.

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4. Convergence analysis

Shared material interests (strong evidence):

- surveillance and defense contracts (Palantir/ICE)
- AI capex (Stargate) and federal preemption of state AI law (EO 14365)
- arms, plus Gulf capital (PIF → Affinity)
- energy and mineral access (Greenland, Venezuela)
- charter-city "exit" capital (Pronomos → Praxis)
- legal shielding of allies from international courts (ICC sanctions)

Contradictory beliefs:

Actor	Eschatology / end-state	Conflict
Land	capital/AI supersedes humans	secular, anti-humanist
Kurzweil	humans merge with AI, immortality	humanist; yet listed beside Land by Andreessen
Dispensationalists	Rapture, Tribulation, Jews convert or perish	AI/world ruler = Antichrist
Thiel	regulator/world government = Antichrist; tech = restrainer	inverts the dispensationalist villain
CREC (Hegseth's church)	postmillennial Christendom	rejects dispensationalism

Actor	Eschatology / end-state	Conflict
Haredi anti-Zionists	state illegitimate before the Messiah	opposes religious Zionism
Religious Zionists (Ben-Gvir)	Temple and land hasten redemption	tactical ally of CUFI, not theological

Prophetic motive and policy power together: the evangelical and Christian-Zionist bloc (Hegseth, Huckabee, the Faith Office, a mass base); Israel's religious-nationalist ministers (in Israel); Thiel (sincere eschatology, money and personnel). The AI capitalists are mostly *not* prophetic, though their rhetoric borrows religious language.

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5. Whitney Webb assessment

- **Well-sourced strands:** Epstein–Barak–Carbyne, now strengthened by Forbes and the Miami Herald in 2026. The organized-crime and intelligence history drawing on court records. The PayPal/Palantir surveillance links.
- **Critiques:**
  - Reviewers cite circular and single-source claims (such as Summers on Hoover) and implied causal chains (Lingenfelter, We Are Not Saved).
  - Michael Tracey argues she "makes stuff up," citing the Acosta quote she relied on, which Acosta later denied under oath (mtracey.net).
  - Media Bias/Fact Check rates Unlimited Hangout low-credibility (MBFC).
  - **Caveat:** these are opinion and newsletter critiques. I found no peer-reviewed scholarly assessment **[U: searched; none found]**.
- **Misuse risk:** in a 2024 Neil Oliver interview she used the phrase "Jewish mob," which led to antisemitism accusations (Jewish Chronicle). She says she meant a specific crime network (Wexner, Bronfmans), not Jews, and calls the conflation itself antisemitic **[V]**. Practical rule: use her work as a source of leads, cite the primary documents rather than her, and name individuals, never groups.

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6. Conclusion

Supported, and somewhat strengthened since v1:

- Sincere end-times believers hold real US power, chiefly through the Christian-Zionist and evangelical bloc. The Secretary of Defense/War has expressed hope for a Third Temple. The ambassador to Israel toured a Temple-preparation site on his first official settler visit. The ICC sanctions order explicitly protects Netanyahu.
- Thiel's eschatology is a sustained public project, now in a third city (Nashville 2026), and it fuses theology with anti-regulation politics. His money built Vance's career, and Vance publicly cited Yarvin's purge plan.
- The Land–Kurzweil link is explicit in Andreessen's "patron saints."
- These sit alongside, and mostly in service of, material interests: surveillance, AI capex, Gulf capital, energy, bases.
- Official handling of Epstein shows **documented anomalies**: an edited "raw" video, the client-list reversal, and resistance to the Transparency Act. These justify scrutiny.

Not supported:

- a single coordinated plot
- Chabad or "Jewish" direction of US policy
- Epstein as a proven intelligence asset (the key quote was denied under oath)
- occult motives

- elite NZ prepping tied to Chan Thomas–style cataclysm theory (the documented drivers are the *Sovereign Individual* collapse thesis and fear of unrest)

Best formulation: a convergence of interests with pockets of sincere fanaticism in key offices, plus opaque institutional behaviour around Epstein. It needs no conspiracy to be dangerous.

Directions in this report:

- **1.** Contracts. Palantir, Anduril and the related firms sell the state the capability the theology describes. The record is obligations and donations, not a shared creed. **[V]** (USAspending).
- **2.** Prophecy meets policy. Named Christian-Zionist offices won some decisions and lost others, including formal West Bank annexation. Belief supplied a constituency. It did not supply every outcome. **[V-s]** (Reuters).
- **3.** Private cities. Próspera shows how a stability contract turns repeal into a debt. It does not show a network of cities under one owner. **[V-s]** (ICSID).
- **4.** Surveillance and finance. Prediction markets, stablecoins and camera capital are commercial channels. A price is not a poll, and a camera contract is not a doctrine. **[V-s]** (Direction 4).
- **5.** Nashville. The theology's villains coincide with the constraints on Thiel's companies. No lecture is tied to a contract. **[V]** (Fortune, Guardian).
- **6.** Money and crime, read before the election. Carbono Oculto is a complaint against 16 for fuel and laundering, with the PCC named by the prosecutors. Sem Refino is an arrest order and a red notice for Magro, and a search of Castro, who is not charged. The July Treasury designations name Shimada's network and no politician. Master remains the elite-finance file in 7.1. **[V]** (MPSP, STF, Treasury).
- **7.** Brazil's runoff. Lula was re-elected, 64,256,232 votes to 59,826,041, margin 4,430,191. The extra ballots fit the eliminated candidates, the lower abstention and the smaller blank and null vote. The cash session halted and repriced a bet on the other candidate. **[V]** (g1, B3).
- **8.** Latin America. Alignment with Washington is supported for several neighbours and not for Brazil. Alignment with Israel is partial. The data-center build is happening under the government the coalition left out. Forest clearing and two restored Instagram accounts are in 8.14. They are policy facts, not a hidden hand. **[V]** (g1).
- **Cyber window.** A short box under Direction 8. PHP flaws brought offices offline. No named victim, and no link to the count, was found. **[V]** (CISA).

Brazil verdict. The vote held. The material gains on the table are a renewed term, a market session that repriced a defeated alignment, and inquiries that remain open: Master, Dark Horse, ADPF 1178, Refit and Carbono Oculto. None of those inquiries, on the documents read, shows that the runoff was bought. Who the US broker was, who funded the flight, and who profited from the 26 Oct moves, are open. **[V]** for the count (g1). **[U: unconfirmed]** for the broker, the source of the fare, and the identities of those who gained on the session.

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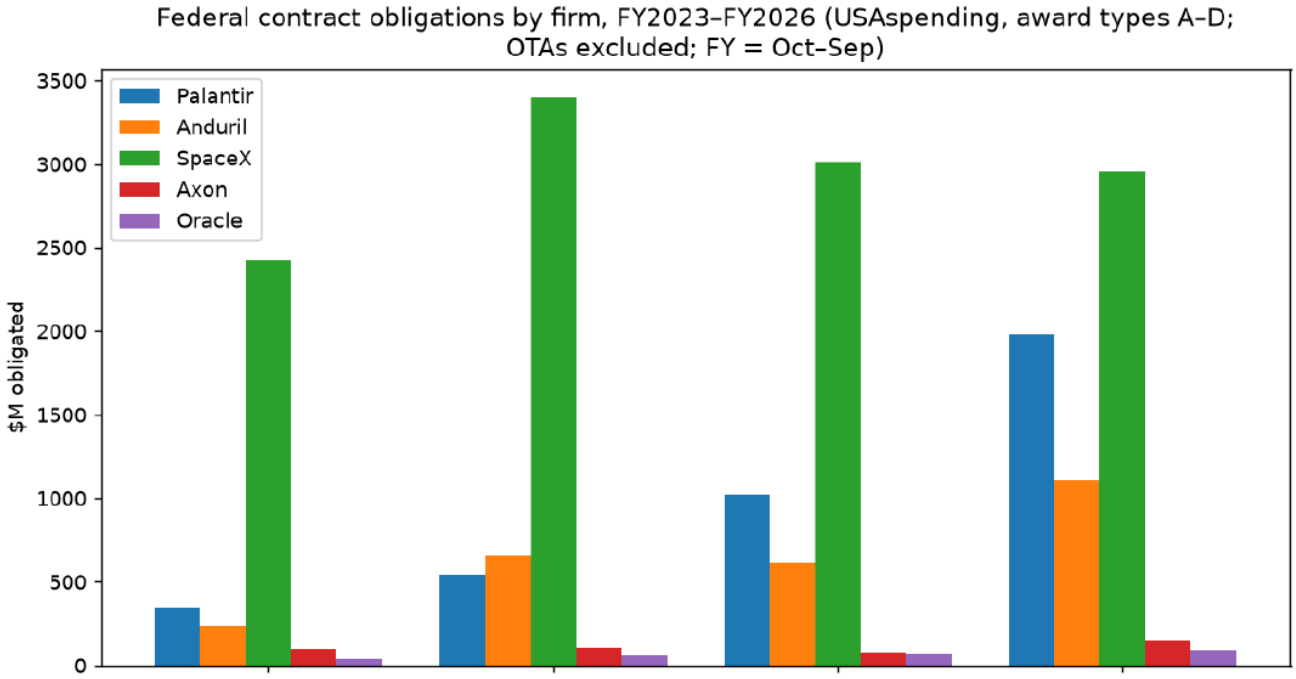
Direction 1: Following the contracts

Data pulled 16 Oct 2026 from the USAspending API (contract award types A–D; other transaction agreements, or OTAs, are not included) and the FEC API (itemized Schedule A, top 100 records per person per cycle). Files are in `contracts/`: `usaspending_obligations_by_fy.csv`, `top_awards_since_2025-01-20.json`, `competition_details.json`, `fec_itemized_top.csv`, `fec_summary.json`, `revolving_door.csv`. *Fiscal years run Oct–Sep, so FY2025 straddles the inauguration.*



Contract flows (USAspending obligations, $M)

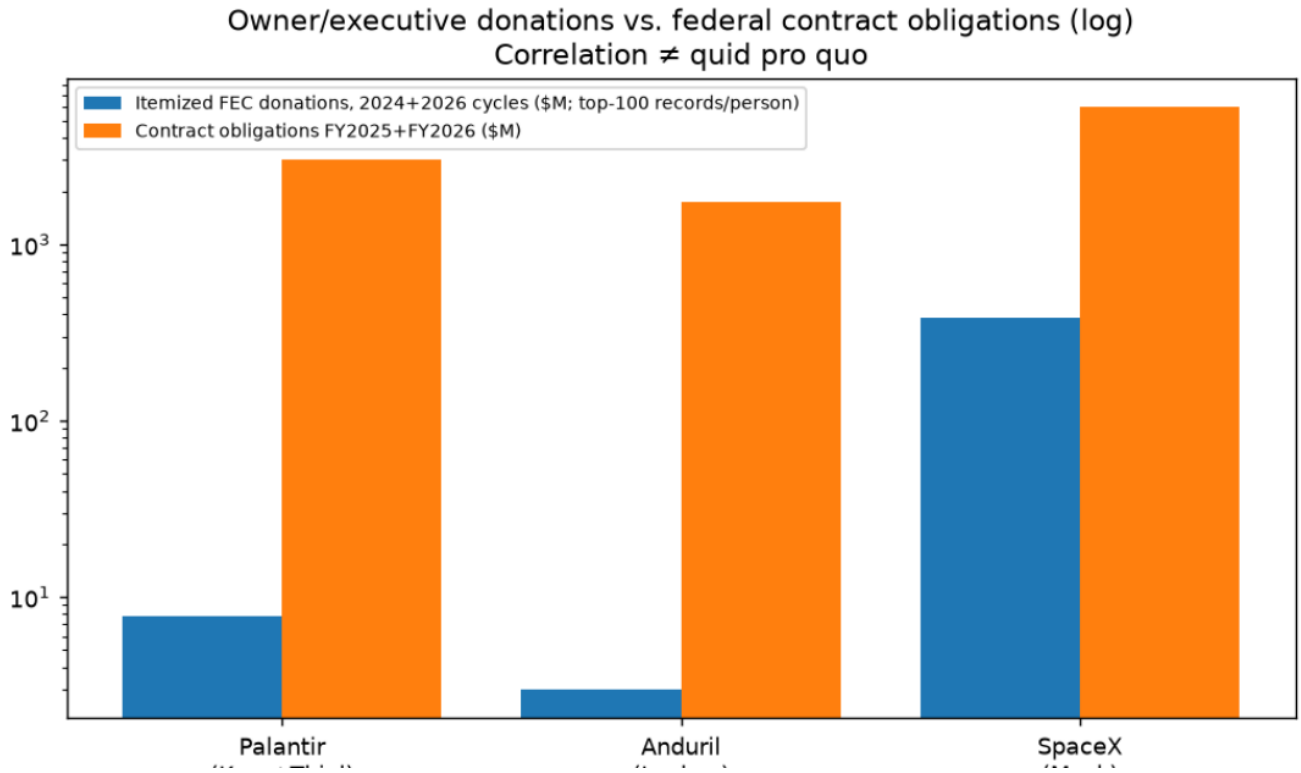
Firm	FY2023	FY2024	FY2025	FY2026
Palantir	348	541	1,021	1,979
Anduril	236	657	612	1,113
SpaceX	2,427	3,401	3,010	2,957
Axon (incl. Dedrone)	101	108	73	149
Oracle America	42	57	64	90

Findings:

1. **Palantir's federal contract obligations roughly doubled each year:** $541M in FY2024, $1.02B in FY2025, $1.98B in FY2026. That's 3.7× the Biden-era FY2024 baseline **[V; USAspending API]**.
2. **The Army Enterprise Agreement** (W519TC-25-D-0039, 31 July 2025, ceiling $10B over 10 years) consolidated 75 contracts. DoD's announcement says: "Bids were solicited via the internet with one received" (war.gov contracts, 1 Aug 2025, Army) **[V-s]**. The $10B is a ceiling, not an obligation.
    - Task orders under it are coded **"NOT COMPETED – ONLY ONE SOURCE (FAR 6.302-1)"** in USAspending **[V; competition_details.json]**:
        - $637.6M for the CDAO Maven Smart System, Oct 2025
        - $145.0M for Army Vantage, Dec 2025
        - $114.8M for FORSCOM, Aug 2025
    - By contrast, Palantir's Air Force data platform ($116M, 7 offers) and USDA farm-IT ($94.7M) orders were competed.

3. **Anduril roughly doubled in FY2026** to $1.11B. Its largest awards since the inauguration are mixed:
    - Competed: CBP border towers, $363M (Dec 2025), "full and open after exclusion of sources."
    - Sole-source: JIATF-401 Lattice licences, $142M (Mar 2026), and Navy Altius-600M loitering munitions, $94M (Feb 2025, 1 offer) **[V]**.
4. **SpaceX was flat at about $3B a year** in standard contracts, *before* Golden Dome:
    - Space-based tracking (SB-AMTI): $4.16B, 29 May 2026.
    - Space Data Network backbone: $2.29B, 26 May 2026.
    - Together about $6.45B (Bloomberg, AeroMorning) **[V-s]**.
    - SpaceX and Anduril are also among 12 firms on 20 space-based interceptor awards worth up to $3.2B (Air & Space Forces) **[V-s]**.
    - Reuters reports Anduril and Palantir are building Golden Dome software (Reuters, Mar 2026) **[V-s]**.
    - Many Golden Dome awards are OTAs and **don't appear in the USAspending numbers above**.
5. **Frontier AI:** CDAO gave Anthropic, Google, OpenAI and xAI awards with a "$200M ceiling" each (14 July 2025) (ai.mil). GSA then gave xAI a OneGov deal at **$0.42 per agency** for 18 months (GSA) **[V-s]**. Neither OpenAI nor xAI shows up as a recipient of standard contracts in USAspending. The "XAI" matches are unrelated firms (Exail, Xairos), so the awards are OTAs or not yet reported **[V; noted gap]**.
6. **Axon/Carbyne:** Axon is small and steady ($73–149M a year). ICE's July 2026 body-camera orders ($17.8M + $13.1M) are sole-source. **Carbyne has no direct federal contracts** in USAspending; its contracts were state and local (Miami Herald) **[V]**.

Political money (FEC itemized, top records)



1. **Musk:** about $250M itemized to America PAC in the 2024 cycle, plus RBG PAC ($20.5M), Senate Leadership Fund ($10M) and MAHA Alliance ($6M). In total, roughly **$293M** across his 95 itemized 2024 records. In the 2026 cycle so far, about $91M, including America PAC (about $50M), Senate Leadership Fund/SLF PAC, CLF and Fight for Kentucky ($10M each), and MAGA Inc. ($5M) **[V; FEC API]**.

2. **Andreessen and Horowitz:** $33.5M each to Fairshake (crypto super PAC) in 2024; Andreessen $25M to "Leading the Future" (AI super PAC) and $3M to MAGA Inc. in 2026 **[V]**. **Karp** gave $1M to MAGA Inc. on 12 Dec 2024 (after giving $360K to the Harris Victory Fund in 2023), then 2025 checks to NRCC/"Grow the Majority" and to Senate-candidate PACs **[V]**. **Thiel** was nearly absent in 2024 (under $3K itemized). In 2026 he gave $852K to "Grow the Majority" (25 Feb 2025) and $1.5M to Club for Growth Action **[V]**. **Luckey** gave $200K to the Trump 47 Committee (June 2024) and to the RNC and Thune **[V]**. *Name-matching caveats apply; the top-100 cap understates totals.*
3. **Revolving door** (`contracts/revolving_door.csv`):
    - **Palantir's CTO Shyam Sankar was commissioned an Army Reserve lieutenant colonel** (Detachment 201, 13 June 2025), along with executives from OpenAI and Meta (Army) **[V-s]**. Seven weeks later the Army gave Palantir the $10B single-bid enterprise agreement.
    - OSTP director Kratsios is Thiel's former chief of staff, and AI czar Sacks has invested in Palantir (FedScoop) **[V-s]**.
    - Feinberg (Cerberus) was confirmed Deputy SecDef, and Emil Michael Under Secretary for R&E **[V-s]**.
4. **DOGE → Palantir:**
    - At least three DOGE members had worked at Palantir, and Palantir's selection as chief vendor for cross-agency data work "was driven by" DOGE (NYT, May 2025, entered into the House record: PDF) **[V-s]**.
    - DOGE and Palantir built an IRS "mega API," with the goal of making Foundry the "read center of all IRS systems" (Wired) **[V-s]**.
    - The IRS stretched an existing criminal-investigations purchase agreement so IT could buy through it without a new procurement (FedScoop) **[V-s]**.

What this doesn't show

- **Correlation is not quid pro quo.** Palantir and Anduril growth began under Biden: Anduril nearly tripled from FY2023 to FY2024, and Palantir grew 55%. The Maven and ICE contracts predate Trump 2.0.
- **Sole-source can be legitimate.** FAR 6.302-1 covers proprietary software that only one vendor can supply. Consolidating existing licences is plausibly cheaper, as the Army claims.
- **The biggest donor isn't the biggest grower.** SpaceX's standard contracts were flat despite Musk's roughly $290M, though Golden Dome changes the 2026–28 picture. Palantir's executives gave little (under $8M) relative to roughly $3B in obligations.
- **Industry-wide shift.** Donations went to many GOP vehicles and some Democrats (Karp to Harris in 2023; Horowitz to BlackPAC). This looks like an industry hedging and buying access across the board, not a single deal.
- **Data limits.** OTAs, classified awards, subcontracts and state/local contracts are missing. FEC data is itemized and capped at the top 100 records per person.

New murky items

1. **A single bid for $10B, and a CTO in uniform.** The Army's Palantir enterprise agreement drew one bid. Its biggest task order ($637.6M, Maven) is coded sole-source. Palantir's CTO had been commissioned into the Army Reserve seven weeks earlier. **DOCUMENTED** facts; no impropriety is shown, but the conflict-of-interest optics are acute.
2. **DOGE staff from Palantir steering work to Palantir,** with access to IRS data, including potentially competitors' tax data. **REPORTED** (NYT, Wired). The scope of actual access is **unclear**.
3. **xAI's $0.42 government deal while its owner ran DOGE.** The price is effectively a loss-leader for lock-in, agreed after Musk's DOGE tenure. **DOCUMENTED** price; whether favoritism played a role is **SPECULATION**.

4. **Karp switched from Harris ($360K, 2023) to MAGA Inc. ($1M, Dec 2024) right after the election. DOCUMENTED** (FEC). The motive is interpretation; it's a common post-election access pattern.

Direction 2: Prophecy meets policy

Question: do prophetically motivated actors, meaning specific Christian-Zionist organizations and figures and specific Israeli religious-nationalist allies, change US policy outcomes, or mainly supply votes and legitimacy? "Evangelicals" here always means named organizations, officials or polled samples, never a monolith.

Scorecard

Decision	Position of named Christian-Zionist / religious-nationalist actors	Outcome	Evidence of causal influence	Sources
Jerusalem recognition (Dec 2017) and embassy move (May 2018)	For (CUFI/Hagee, Jeffress)	**Done.** Jeffress gave the opening prayer and Hagee the benediction	**Strong.** Trump himself: "we moved the capital of Israel to Jerusalem. That's for the evangelicals" (Oshkosh, 17 Aug 2020)	JTA, The Hill, AP, CNN **[V-s]**
Golan recognition (Mar 2019)	For	**Done**	**Moderate.** Trump grouped it with the embassy as something for the same audience ("don't forget that, we did the Golan Heights"). Netanyahu's election timing was also a factor	JTA, The Hill (above) **[V-s]**
Settlements "not per se inconsistent with international law" (Pompeo, 18 Nov 2019)	For	**Done**	**Moderate.** Pompeo framed it as law and policy ("agrees with President Reagan"). Separately, he said it is "possible" Trump was raised up like Queen Esther: "As a Christian, I certainly believe that's possible" (CBN, Mar 2019)	State/UN transcript, CBN **[V-s]**
Abraham Accords (2020)	Generally supportive	**Done**	**Weak.** Driven by Kushner, the Gulf states and arms sales (UAE F-35s); annexation was *suspended* as the price of the deal	report §2.5; **[R]** for the annexation-suspension detail
Lifting sanctions on violent settlers (Jan 2025)	For (settler movement; US allies)	**Done.** EO 14115 revoked; OFAC removed designations	**Moderate.** Day-one action matching the settler lobby; no documented lobbying record found	OFAC, Reuters **[V-s]**
Ambassador's settler outreach and red heifer visit (May 2025)	For	**Done**	**Strong (personnel).** The ambassador *is* a Christian-Zionist actor	report §2.6 **[V]**
E1 settlement (approved Aug 2025)	For	**Not opposed by the US.** Huckabee said the US doesn't oppose settlement development	**Moderate**	AP, MEE **[V-s]**

Decision	Position of named Christian-Zionist / religious-nationalist actors	Outcome	Evidence of causal influence	Sources
Iran strikes (22 June 2025)	For (Hagee urged Trump not to be "played" by Iran or by isolationists; a coalition of Christian leaders backed regime change)	**Strikes done; no regime change; quick ceasefire**	**Weak to moderate.** Politico framed the decision as a fight between MAGA restrainers and hawks; the evangelical voice was one input among Israel, the hawks and the nuclear file	Fox, JNS, Politico **[V-s]**
Formal West Bank annexation (Sept 2025 – 2026)	For (Smotrich/Ben-Gvir; US Christian-Zionist groups backing "sovereignty")	**Blocked by Trump:** "I will not allow Israel to annex the West Bank… It's not going to happen… It's time to stop now" (25 Sept 2025). The Knesset gave a preliminary nod (Oct 2025); Israel pursued *de facto* measures in 2026	**Evangelical preference LOST.** Arab leaders and the Abraham Accords/Gaza deal outweighed it	Reuters, AP, CNN, Reuters Knesset, CNN 2026 **[V-s]**
Gaza ceasefire and Board of Peace (Oct 2025 – Jan 2026)	Mixed (hostage release welcomed; Hamas contact and Arab role opposed by hardliners)	**Deal done via Kushner/ Witkoff and Egypt, Qatar, Turkey; direct Hamas talks**	**Weak.** Driven by deal-making and Gulf interests	report §2.5 **[V-s]**
ICC sanctions (Feb 2025 →)	For	**Done**	**Moderate.** The EO text cites Israel explicitly; overlaps with standing US hostility to the ICC (ASPA 2002)	report §2.8 **[V]**
Temple Mount status quo	Hegseth (2018): a rebuilt Temple is "possible"	**No US policy change found.** Netanyahu's office reaffirmed the status quo after Ben-Gvir's prayer	**None found**	report §§2.6–2.7 **[V-s]**; **[U]** for any US statement in 2025–26

Pattern: named Christian-Zionist actors win on **symbolic and legal-status decisions that cost the US little**: capitals, sovereignty recognitions, legal opinions, sanctions relief, ambassador conduct. They **lose when their preference collides with material deal-making**: annexation versus the Gulf states and the Abraham Accords, Gaza versus a hostage deal, and Iran, where the strikes were limited with no regime change. That fits the report's main thesis: prophecy sets the floor of US support, and capital and geopolitics set the ceiling.

Institutions and channels

- **Personnel is the strongest channel.** Huckabee (ambassador), Hegseth (who started a monthly Christian prayer service at the Pentagon in May 2025 with his CREC pastor Brooks Potteiger, and in Feb 2026 invited Doug Wilson to preach) and Paula White-Cain (Faith Office, EO 14205) (CNN 2025, CNN 2026, Military.com) **[V-s]**. CUFI's Action Fund ran email campaigns urging Huckabee's confirmation (political emails archive) **[V-s]**.
- **CUFI's lobbying spending:** the Senate LDA API returned **HTTP 503** both times I tried **[U]**. Not fetched; retry, or use OpenSecrets.
- **NRB and Project 2025's Israel chapter:** not researched this pass **[U]**.

Opinion base: eroding among the young

- A UNC Pembroke/Barna survey of 700 evangelicals aged 18–29 found support for Israel fell from **69% (2018) to 33.6% (2021)**; 24.3% backed the Palestinians and 42.2% neither (Times of Israel, RNS) **[V-s]**.

- A 2024 follow-up found overall evangelical support stable from 2021 to 2024, but under-30s were 47% less likely to strongly support Israel (Beliefnet summary) **[V-s; secondary]**.

Money

- Haaretz found about $220M in US tax-exempt money went to settlements in 2009–13, and evangelical fundraising added an estimated $50–65M over 10 years (report §2.7) **[V]**.
- The Jan 2025 revocation of EO 14115 removed settler sanctions **[V-s]**.
- **I found no IRS revocation** of tax-exempt status for any settlement or Temple-movement charity in 2025–26 **[V-s, absence in search results]**.
- Not pulled this pass: the specific 990s for Central Fund of Israel, Hebron Fund, Friends of Ir David and the Temple Institute's US arm **[U]**.

What this doesn't show

- **Correlation isn't causation.** Every "win" also served other drivers: Netanyahu's elections, Adelson-type donors (secular, Jewish), Republican hawks, and the long bipartisan US hostility to the ICC.
- **"For the evangelicals"** is Trump's own framing of electoral credit, which is evidence of *motive to please*. It isn't proof that lobbying by these groups produced the decision.
- **No single bloc.** CREC postmillennialists (Hegseth) and dispensationalists (Hagee) hold different theologies, and young evangelicals are diverging.
- **Not covered here:** Jewish American organizations' lobbying (AIPAC and others), which is a separate, largely secular channel. This report deliberately doesn't merge the two.

New murky items

1. **The President attributing a foreign-policy act to a religious constituency.** "That's for the evangelicals" contradicts the Dec 2017 official rationale ("best interests of the United States… pursuit of peace"). **DOCUMENTED** contradiction (The Hill).
2. **Embassy opening prayers led by pastors on record saying Jews "can't be saved" (Jeffress) and calling Hitler part of God's plan to return Jews to Israel (Hagee, per NYT). DOCUMENTED** (NYT, Guardian). Shows the theological instrumentalism inside Christian Zionism.
3. **A Christian-nationalist sermon inside the Pentagon.** Doug Wilson, who openly argues for a Christian theocracy, preached at an official-space service at the Defense Secretary's invitation (Feb 2026). **DOCUMENTED** (CNN). Raises Establishment Clause questions.
4. **Settler sanctions lifted on day four, alongside "de facto sovereignty" claims by Israeli ministers. DOCUMENTED** (OFAC, AP).

Leads for Direction 7 (Brazil/LatAm)

- **Eduardo Bolsonaro lobbied in the US for Magnitsky sanctions on Justice Moraes.** The US imposed them in 2025 and later lifted them. A Brazilian court convicted Eduardo in June 2026 of courting US interference (BBC Brasil, openDemocracy, Guardian, Al Jazeera) **[V-s]**.
- **Jair Bolsonaro's pledge to move Brazil's embassy to Jerusalem** was driven by evangelical and neo-charismatic support (BBC Brasil 2019) **[V-s]**.
- **To check:** US-based evangelical networks (CUFI-style groups, CBN Latino, Assemblies of God and neo-Pentecostal links) and Brazil's evangelical caucus (FPE).

Direction 3: The private-city pipeline

Where exit and "network state" ideology turns into land, law and treaty claims.

Project table

Project	Location	Legal vehicle	Backers	Status (Oct 2026)	Sources
Pronomos Capital (fund)	US	VC fund for charter cities (Patri Friedman, 2019)	Thiel (anchor, "more than half" of the first ~$9M), Andreessen, Balaji Srinivasan, Roger Ver; at least $13.3M raised. Partner Michael Gibson was formerly at the Thiel Foundation	Portfolio: Próspera, Praxis, Alpha City, Itana/ Talent City (Nigeria), Afropolitan, Yung Drung City, Small Farm Cities, Metropolis	Pronomos portfolio, people, Bloomberg/ Medium, Daily Beast **[V-s]**
Próspera	Roatán, Honduras	ZEDE (2013 law) plus a "Legal Stability Agreement" with 50-year guarantees	Pronomos and others; US claimants Honduras Próspera Inc. and St. John's Bay Development Co.	ZEDE law repealed unanimously (Apr 2022); Supreme Court ruled ZEDEs unconstitutional (20 Sept 2024). **ICSID ARB/23/2 under CAFTA-DR pending on the merits** (details below). Honduras left ICSID in Aug 2024 and rejoined on 16 Aug 2026 under President Asfura (Trump-endorsed, took office 27 Jan 2026), with **no new ZEDE policy announced**	ICSID case page, PO6, Rio Times, TopDisputes **[V-s]**
Praxis (Dryden Brown)	Was "the Mediterranean"; pitched Greenland (2024); **Colonia, Uruguay (2026)**	Network-state startup; says it will operate *under Uruguayan law*	Pronomos, Joe Lonsdale, Balaji; FTX/Alameda/ Paradigm in earlier rounds; "$525M" milestone financing (Oct 2024)	**Non-binding** deal for about 350,000 m² inside the +Colonia megaproject; land acquisition expected by late 2027. Brown met President Orsi. Local MPP politicians warned it must follow national law	The Block, TechCrunch, Montevideo Portal, la diaria **[V-s]**
Greenland "Freedom City"	Greenland	Proposal only	Investors pitching it; Thiel and Andreessen reported supportive; Ken Howery (Thiel's Founders Fund co-founder, Musk friend, ambassador to Denmark) "taking it seriously"	No project. The Sept 2026 US–Denmark–Greenland deal covers bases only, with no land or mining rights	Reuters exclusive, 10 Apr 2025, USA Today syndication **[V-s]**
Network School (Balaji Srinivasan)	Forest City, Johor, Malaysia → **Kazakhstan**	Private residential campus	Balaji	**Ordered to cease operations in July 2026** after its Malaysian business licence was revoked; relocated to Kazakhstan	CNA, Business Insider **[V-s]**

Project	Location	Legal vehicle	Backers	Status (Oct 2026)	Sources
Starbase	Cameron County, Texas	Ordinary Texas municipal incorporation	SpaceX (employees are most voters)	Incorporated after a **212–6** vote (May 2025)	Cameron County results, TechCrunch **[V-s]**
California Forever (Flannery Associates)	Solano County, California	Pivoted from a 2024 county ballot measure to **annexation by Suisun City** (22,873 acres) plus a shipyard and manufacturing hub	Tech investors incl. Andreessen **[R for the full investor list]**	Environmental review still at the notice stage (Nov 2025); no draft by Sept 2026. Hired Steinberg and Hertzberg to seek state fast-track legislation; pays the city $10M if the annexation is approved	CalMatters Jun 2026, CalMatters Aug 2026 **[V-s]**
US "Freedom Cities"	Federal BLM land, western states	Agenda47 pledge (2023); AEI/Charter Cities Institute proposal (Sept 2025) for 20 cities on 520 sq mi	Think tanks	**No executive order or law found**; advocates pushed for a July 4, 2026 announcement	AEI working paper, Inquirer **[V-s]**
Gaza "GREAT Trust"	Gaza	US-led "custodianship" for ≥10 years; land swapped for "digital tokens"; 6–8 "AI-powered smart cities"; "Gaza Trump Riviera"; "Elon Musk Smart Manufacturing Zone"; "MBS Ring" and "MBZ Central" highways	Israeli businessmen behind GHF; BCG modelling (BCG later said the work was unauthorized and fired the partners); two Tony Blair Institute staff in project calls	Circulated in the administration (2025). The Oct 2025 ceasefire and the Board of Peace replaced it with a governance track **[R for whether it's superseded]**	WaPo PDF of the prospectus, WaPo (archive), FT (archive), Guardian, Reuters **[V-s]**
Afropolitan, Itana, Alpha City	Africa (Nigeria etc.)	Digital residency, free-zone partnerships	Pronomos portfolio	Listed; no status check this pass **[U]**	Pronomos portfolio **[V-s]**
Bitcoin City (El Salvador); Argentina's RIGI investment regime	—	—	—	**Not checked [U]**. Infobae (Sept 2026) mentions a $1B "refuge" smart city by a Milei-adjacent businessman "after Thiel" (Infobae); a lead	**[U]**

Próspera v. Honduras: how sovereignty becomes a debt

- **Claim:** filed 19 Dec 2022 under CAFTA-DR's investment chapter, the Legal Stability Agreement and the ZEDE charter. It originally sought **$10.775B**, roughly two-thirds of Honduras's GDP. The Oct 2025 memorial asks first for *restitution*: reinstating the zone's rights over Honduran law, despite the Supreme Court ruling. The alternative is **$1.63B** plus $1M in moral damages.
- **Procedure:** the tribunal rejected bifurcation on 19 Mar 2026, so Honduras's jurisdictional objections (that the zone was improperly constituted) will be heard together with the merits. Honduras's counter-memorial came on 12 July 2026, and four amici, including two Indigenous-community advocates, filed on 7 Oct 2026. **No award yet.**
- **Politics:**
  - The Biden-era ambassador Laura Dogu publicly criticized Honduras's moves as undermining investment protection after embassy officials met Próspera investors.
  - In May 2023, 33 members of Congress led by Sen. Warren urged the State Department and USTR to back Honduras and drop investor–state arbitration (ISDS) from trade deals (Wired; House-record copy of an NYT piece, PDF) **[V-s]**.

    - Garifuna and English-speaking residents of Crawfish Rock oppose the zone, fearing it will expand onto ancestral land (Guardian 2022) **[V-s]**.
- **Mechanism:** a ZEDE law passed under one government, plus a 50-year stability contract, plus a trade treaty with investor–state arbitration, together make democratic repeal *costly*. Undoing a privatized jurisdiction is treated as an expropriation payable in dollars. Asfura's return to ICSID and his party's authorship of the ZEDE law make a settlement or quiet revival plausible **[speculation; watch]**.

Analysis

- **Personnel and money link the ideology to the state:** Thiel → Pronomos → Próspera and Praxis; Thiel → Howery → the Greenland talks; Musk → Starbase; Kushner, BCG and GHF → GREAT Trust. The *legal* tools are treaty arbitration (ISDS), special-zone statutes, municipal incorporation and annexation, and trusteeship. These are mundane instruments, not secession.
- **Results so far:** mostly failure or retreat.
    - Próspera has been stranded by the courts and is fighting an arbitration.
    - Praxis has moved from "a privatized charter state" in Greenland to a non-binding plot under Uruguayan law.
    - Network School lost its Malaysian licence.
    - California Forever lost at the ballot box and switched to annexation.
    - Freedom Cities remains a slogan.
    - The ventures that succeed are the conventional ones: a company town (Starbase) and ordinary development.

What this doesn't show

- **No coordinated plan.** Pronomos holds small stakes (a fund of about $13M) and is not a command center. Howery's interest is reported by unnamed sources.
- **No prophetic motive.** Charter-city backers frame their projects in secular libertarian and economic terms. The only overlap with Direction 2 is the Gaza plan's "Abrahamic" branding.
- **ISDS isn't unique to tech libertarians.** Mining and energy firms use the same tool far more often.
- **Plans aren't results.** The GREAT Trust was a pitch deck, not adopted policy.

New murky items

1. **A US ambassador pressuring a sovereign state on behalf of a private-jurisdiction investor** (Dogu, 2022–23), alongside an investor–state claim of about two-thirds of the country's GDP. **DOCUMENTED** (Wired, ICSID).
2. **Thiel's former partner as the ambassador negotiating Greenland,** while Thiel-backed investors pitch a "freedom city" there. **REPORTED** (Reuters, unnamed sources). Howery's role in it is unconfirmed on the record.
3. **The Gaza prospectus names a highway after MBS, one after MBZ and a factory zone after Musk.** It offers "digital tokens" for land and proposes paying about half a million people to leave. It was produced by GHF figures using BCG models that BCG says were unauthorized. **DOCUMENTED** (WaPo PDF, FT).
4. **Honduras rejoined ICSID mid-arbitration** under a Trump-endorsed president whose party wrote the ZEDE law. **DOCUMENTED.** Whether it signals a settlement is **SPECULATION**.

Leads for Direction 7 (Brazil/LatAm)

- **No Brazilian charter-city bill found.** Academic and libertarian proposals exist: the Mises Brasil journal's "Prosperity Zones" and an essay imagining a charter city in Rio ("Bossa Nova"), plus the private project Ipê City/Village (Revista Mises, REI) **[V-s]**.

- **Regional:** Praxis in Uruguay; a Milei-adjacent $1B "refuge" smart city (Infobae); Argentina's RIGI investment regime. Check Brazilian "Zonas de Processamento de Exportação" (export processing zones) and any Mises Brasil or Instituto Liberal lobbying for them.

Direction 4: The surveillance-finance link

The four strands here are money rails, identity, data integration and prediction. Unlimited Hangout (UH) leads from Appendix A are checked against primary sources.

4.1 Prediction markets

- **Founders Fund led Polymarket's $45M Series B** (May 2024, $70M across two rounds). Founders Fund partner **Joey Krug** said the firm had "a habit of checking Polymarket at times of breaking news" (Business Wire, Bloomberg) **[V-s]**. Former CFTC chair Giancarlo advises it.
- **1789 Capital** (the fund backed by Donald Trump Jr.) invested an amount reported in "the double-digit millions," and **Trump Jr. joined Polymarket as a strategic adviser** (26 Aug 2025) (Reuters) **[V-s]**.
- **The CFTC cleared Polymarket's US return** (3 Sept 2025) after it bought the licensed exchange QCEX for $112M, and issued a no-action letter on reporting requirements (Reuters) **[V-s]**. This came **one week after** the Trump Jr. investment.
- **Intercontinental Exchange (ICE, the NYSE owner)** committed up to **$2B** at an approximately $8B pre-money valuation and will distribute Polymarket data to institutions (ICE IR, 7 Oct 2025) **[V-s]**.
- **The DARPA comparison:** the 2003 Policy Analysis Market (part of FutureMAP, under Poindexter's Information Awareness Office) let people bet on Middle East events and was cancelled within days after an outcry in Congress **[R]**.
- **UH lead check:** "*Polymarket was born out of a desire to resurrect PAM; Thiel's role in privatizing failed DARPA programs.*" → **PARTLY SUPPORTED.**
    - Supported: the conceptual lineage (event markets as intelligence aggregation, with Robin Hanson's ideas behind both) and the Founders Fund/Thiel-Fellow money (Krug).
    - Supported: the IAO-to-Palantir parallel is widely noted.
    - Not shown: any documented *intent* to revive PAM, and **any government use of Polymarket data for intelligence [U: searched, none found]**. ICE's data distribution is commercial, not governmental.

4.2 Stablecoins and the GENIUS Act

- **Law:** the GENIUS Act became Public Law 119-27 on 18 July 2025 (govinfo, Congress.gov) **[V-s]**. Its surveillance architecture is in the statute itself:
    - A permitted issuer "may issue payment stablecoins only if the issuer has the technological capability to comply, and will comply, with the terms of any lawful order."
    - A "lawful order" is one that "requires a person to seize, freeze, burn, or prevent the transfer of payment stablecoins."
    - Foreign issuers must have the same capability or face a trading ban.
    - The 2026 proposed rule from FinCEN and OFAC (the Treasury's anti-money-laundering and sanctions arms) would extend block, freeze and reject duties to **secondary-market** transactions (Sullivan & Cromwell) **[V-s]**.
- **The anti-CBDC flip side:**
    - The executive order of 23 Jan 2025 prohibits agencies from any action to "establish, issue, or promote CBDCs" and frames CBDCs as threats to "individual privacy" (whitehouse.gov) **[V-s]**.
    - The House passed the **Anti-CBDC Surveillance State Act** (H.R. 1919) by 219–210 on 17 July 2025, the day before GENIUS was signed (House Clerk). **Not enacted** (Congress.gov) **[V-s]**.

    - **So the state disclaims a surveillance-capable public digital dollar while legally mandating freeze and burn capability in private ones.**
- **Trump family conflict:**
    - World Liberty Financial (WLF), linked to the Trump family, launched the USD1 stablecoin in March 2025.
    - MGX, the Abu Dhabi fund, used USD1 to pay for its **$2B Binance stake**.
    - Senators Warren and Merkley called this "an unprecedented conflict of interest." WLF replied that USD1 kept the deal "denominated in U.S. dollars" instead of dirhams (Senate Banking letter) **[V-s]**.
    - Note: MGX is also a Stargate equity partner (§2.4), and the GREAT Trust plan names a highway after MBZ (§D3).
- **UH lead check:** "*the Bitcoin-dollar: stablecoins and BTC used to expand dollar dominance and absorb US debt; GENIUS is the culmination of the PayPal Mafia's efforts*" → **PARTLY SUPPORTED.**
    - The dollar-dominance and Treasury-demand rationale is the administration's own (WLF says so explicitly; Bessent's statements weren't fetched **[R]**).
    - The freeze and seize architecture is in the statute.
    - "PayPal Mafia culmination" is interpretive. Sacks, the AI and crypto czar, is a PayPal alumnus, but the bill was bipartisan.
    - "Bitcoin as debt sink" is speculative **[U]**.

4.3 Argentina: satellites, AI and Stargate

- **Satellogic–Palantir:** a five-year partnership announced 1 Feb 2022 brings Palantir's Edge AI onto Satellogic satellites ("from space to mud," Shyam Sankar) (Satellogic) **[V-s]**.
- **Stargate Argentina:** a non-binding letter of intent (10 Oct 2025) between OpenAI and **Sur Energy** for a data center of up to 500MW and up to $25B under the RIGI tax regime. OpenAI would be an "offtaker," with OpenAI for Countries "starting with the government." Sur Energy's partner quoted is **Emiliano Kargieman**, Satellogic's founder (Sur Energy, Casa Rosada, OpenAI, Reuters) **[V-s]**.
- **Milei's AI security unit** (UIAAS, July 2024): **not verified this pass [U]**.
- **UH lead check:** "*Kargieman behind Stargate Argentina; Satellogic works with Palantir (and SpaceX) on predictive satellite surveillance; the state may become the data center's user*" → **LARGELY CONFIRMED** on Kargieman and Palantir, and on the government as an intended AI user. The SpaceX tie and "predict the future" are unverified **[U]**.

4.4 Data integration

- **Palantir:** ImmigrationOS for ICE, the IRS "mega API," growing HHS work, and NYT's reporting that it was chosen as vendor for cross-agency data (§D1 items 9–10) **[V/V-s]**. Palantir's stated position is that it is "not a data company": it says it doesn't collect, store or sell personal data and can't reuse client data (Palantir) **[V-s]**. That is accurate as a business model, but integration *is* the capability that matters.
- **Flock Safety (licence-plate readers, ALPR):** a University of Washington report found immigration-enforcement access through local agencies' searches. Flock says it removed federal agencies from nationwide lookups and added filters (UW Center for Human Rights, Flock statement) **[V-s]**. Flock is a Founders Fund/a16z portfolio company **[R]**.
- **Axon/Carbyne:** see §D1 and murky item 8b. Clearview and the data-broker loophole: not re-researched **[U]**.

4.5 Digital ID

- **World (formerly Worldcoin; Altman)** launched in six US cities on 30 Apr 2025, targeting 7,500 iris-scanning Orbs. It has partnerships with Visa and Match, and Hong Kong regulators earlier ordered it to stop collecting data (World, CNBC) **[V-s]**. No federal digital-ID mandate was found **[U]**.

How the strands connect

Identity (World ID, KYC under GENIUS) + **money rails** (private stablecoins with mandatory freeze capability, issued partly by politically connected firms) + **data integration** (Palantir across agencies; ALPR feeds) + **prediction** (event markets now inside regulated finance, through ICE and the CFTC). The common pattern is **privatized infrastructure with a public enforcement backdoor**. The state disclaims building surveillance (no CBDC; "not a data company") while contracting for, or legally requiring, the same capabilities from private firms whose investors overlap (Founders Fund: Polymarket, Palantir, Anduril, Flock; MGX: Stargate, Binance/USD1).

What this doesn't show

- **No unified system.** These are separate markets and regulators. A freeze requires a "lawful order" subject to review, which is in principle more due process than Tether's discretionary freezes.
- **Existing banks already have similar powers.** Bank Secrecy Act duties and Tether/Circle freezes predate GENIUS.
- **No evidence that prediction-market data feeds intelligence agencies.**
- **Investor overlap isn't coordination.** Founders Fund invests widely.

Lead-check summary (Unlimited Hangout)

UH lead	Verdict
Polymarket as a PAM revival; Thiel/Founders Fund role	**Partly supported** (money and lineage yes; intent and government use no)
Stablecoins/"Bitcoin-dollar" serve dollar dominance; GENIUS as a PayPal-Mafia culmination	**Partly supported** (rationale and freeze powers yes; "debt sink" speculative)
Kargieman/Satellogic/Palantir and Stargate Argentina	**Largely confirmed**
HHS–Palantir expansion (PayPal Presidency I)	**Supported in general** (Palantir HHS/CDC work documented; specific HHS figures not pulled)
"Technocratic" Trump counter-elites (Iain Davis)	**Interpretive.** Consistent with §D1 data, not testable as stated

New murky items

1. **The CFTC cleared Polymarket's US return one week after the President's son invested and became an adviser. DOCUMENTED** timing (Reuters, 26 Aug and 3 Sept 2025). No causation is shown.
2. **A foreign sovereign fund settled a $2B deal in the President's family's stablecoin. DOCUMENTED** (Senate letter). A conflict of interest on its face; whether policy favors followed is **unproven**.
3. **A single founder spans Argentine satellites, Palantir integration and Stargate Argentina** (Kargieman), with the Argentine state as the intended AI customer. **DOCUMENTED** ties; any surveillance end-use is **SPECULATION**.
4. **"Anti-surveillance" branding alongside surveillance mandates:** the CBDC ban bill is titled "Anti-CBDC Surveillance State Act," passed the day before a law requiring freeze, seize and burn capability in private dollars. **DOCUMENTED.** The irony is interpretation.

Leads for Direction 7 (Brazil)

- **Pix in the US trade case:** the USTR Section 301 case named "policies that favor its national champion, Pix." It **concluded on 20 July 2026 with a 25% tariff** on certain Brazilian imports (USTR initiation, Federal Register, USTR fact sheet, docket) **[V-s]**. Worth examining: a public instant-payment rail (Pix) set against US private stablecoin and card interests.

- **Drex** (the central bank's digital-currency project), **Palantir in Brazil** and **Starlink versus Moraes**: not found or checked this pass **[U]**.

4.6 A private camera grid, and the capital behind it (added v13)

- **The leak.** In December 2025 a researcher exported 335,701 Flock Safety device records after map tokens were handed out before login. About 214,000 devices were in service. The Verge and Proton published a map on 23 Oct 2026. **[V]** (The Verge, the research paper).
- **The round.** In March 2025 Flock raised $275 million at a $7.5 billion valuation, led by Andreessen Horowitz. Founders Fund participated. Greenoaks, which later led the seed round of Brazil's Pax (7.12), was also in the round. **[V]** (Reuters, TechCrunch).
- **What it is not.** No Flock, Palantir or Founders Fund contract in a Brazilian camera programme was found in this pass **[U: unconfirmed]**. The Brazil programmes in 7.12 are a separate procurement market. The link that is documented is the investor, Greenoaks, sitting in both cap tables.

Direction 5: Thiel's Nashville lectures (added v11, 20 Oct 2026)

Question tested (the consortium's framing): in his Nashville series, does Peter Thiel's theology of the Antichrist (a one-world government or regulator that promises "peace and safety") line up with his material interests from Direction 1 (Palantir and Anduril contracts, AI deregulation, Founders Fund holdings), and how far does that overlap go?

Method note (v11). The lectures were closed-door and off the record, with no devices allowed. No full transcript or recording has been published. Everything below comes from (a) organiser pages; (b) the *Nashville Scene*, which obtained transcripts and recordings of lectures 1 and 2; (c) Politico's *Decoded*, which obtained recordings of lectures 1 and 2 (both Politico pages returned 403 or timed out, so its quotes are checked through outlets that quote it in full text: Fortune, Gizmodo, Times of India); (d) public X posts by an attending Epoch Times Capitol Hill reporter, Nathan Worcester, read in full through the X API (the only detailed source for lectures 3 and 4); and (e) commentary, marked **opinion**. **No Washington Post, NYT, Reuters or Free Press article on the Nashville series was found as of 20 Oct 2026, ~10:00 (UTC-3) [U: searched; none found]**. An attendee's X post is a first-hand account, but it is not an edited publication, so it is labelled **[R]**.

5.1 The series: format, hosts and venue

- **Format:** four Monday lectures, 28 Sept to 19 Oct 2026, presented by The Pamphleteer (a Nashville politics site) with Meriwether Academy. Each was a one-hour lecture plus an hour of Q&A moderated by Peter Robinson of the Hoover Institution. A series ticket cost $100. The events were "closed-door" and "off-the-record", with photo ID checks, security wands, no bags and no devices; the location was revealed the morning before (Tennessee Star, Luma, part 3) **[V]**. A limited number of $50 single passes were sold for the final night (Luma, part 4) **[V]**.
- **The organiser framed it as an AI series.** The Pamphleteer's announcement: "As the war for AI rages and parties push for regulation to ward off Armageddon, his thoughts have never been more pertinent" (Tennessee Star) **[V]**. The ticket page says Thiel "will examine the personalities, history, and forces behind AI through the biblical framing of apocalypse and the Antichrist" (Luma, part 3) **[V]**.
- **Venue and host:** the Grand Lodge of Tennessee, a Masonic lodge, which "opened the evening by distancing itself from the content". Davis Hunt of The Pamphleteer introduced Thiel and called Nashville "one of the last remaining regions in the Western world with authentic Christian belief where it still thrives" (Nashville Scene, 29 Sept) **[V]**.
- **Titles:** "The End of Empire" (5 Oct), "Velocity of Antichrist" (12 Oct) and "New Rome" (19 Oct); the opener's title was not published (Nashville Scene) **[V]**. The final lecture went ahead as scheduled (Pamphleteer listing, 19 Oct) **[V]**, and a reporter posted from it (X) **[R]**.

- **Audience:** "hundreds" (Nashville Scene) **[V]**. An attendee told Politico it was more than 300 people at roughly eight men to one woman, as relayed by a book site (The American Antichrist, opinion) **[R; Politico original blocked]**. Thiel himself remarked on the heavily male crowd in lecture 2 (X) **[R]**.
- **Who paid:** no sponsor beyond the two organisers and ticket sales is named anywhere **[U: searched; unconfirmed, not found]**. Thiel's representatives did not answer Politico (Fortune) **[V]**.
- **Local network:** the *Scene* noted that Vanderbilt's chancellor, Daniel Diermeier, appears in leaks as a member of Thiel's private "Dialog" network; Vanderbilt did not dispute it (Nashville Scene, June 2026) **[V]**. *Correction to murky item 13:* the *Scene* ties Dialog to Nashville through Vanderbilt, **not** through the sponsor.

5.2 What he said, lecture by lecture

Lecture 1 (28 Sept).

- Closing: "A big part of why I'm doing this series is because I believe it is dangerous to focus on just one risk. There's one existential risk that nobody seems to want to discuss … and that is the risk of a totalitarian one-world government" (Nashville Scene) **[V]**.
- On government: "As a thought experiment, which part of the U.S. government do you think runs the worst? The post office or the DMV is like a university humanities department where they're not doing anything. … The NSA is like some esoteric science thing" (same source, Nashville Scene) **[V]**.

Lecture 2, "The End of Empire" (5 Oct).

- "So by scaring you, I've shown you just how powerful the Antichrist's arguments will be. And if you were too scared, maybe you need to pray a little harder and anchor a bit more on your faith" (Nashville Scene, 8 Oct) **[V]**.
- "This is the challenge with the people making AI in Silicon Valley. Almost none of them have any other faith on which to anchor or relativize discussions about the technology" (same source, Nashville Scene, 8 Oct) **[V]**.
- In Q&A: "The undercurrent of all these lectures is that it's certainly not moral to despair. It's not right to think that something like the Antichrist is inevitable or there's nothing you can do about it" (same source, Nashville Scene, 8 Oct) **[V]**.
- The *Scene*'s paraphrase, without a full passage: he cast "woke-ism" and effective altruism as roads to American fascism, named "a world government or totalitarian empire that has nowhere left to expand" as the looming Antichrist, and argued that preventing it "may justify violence", pointing to "Christ's more militant comments". He also placed his 2009 essay on democracy and freedom in the Enlightenment tradition (same source, Nashville Scene, 8 Oct) **[V; Scene paraphrase, wording not published in full]**.
- The katechon (the "restrainer" of 2 Thessalonians) was the theme, with Carl Schmitt central. He read Stefan George's poem "The Antichrist" and argued that the Antichrist had been edited out of the history of Bonhoeffer and Schmitt (X) **[R]**. He called Hobbes's state a deliberate attempt at "constructing an antichristic system" (X) **[R]**.

Lectures 1–2, from Politico's recordings.

- On Obama and the pope: "Many people know that AI is politically unpopular and want to leverage that to boost their own popularity. Both Obama and the pope fall into this category. Obama knows the Democrats have no ideas, but they can at least oppose AI" (Fortune, Times of India) **[V; Politico original blocked]**.
- On Pope Leo's encyclical *Magnifica Humanitas*: "AI is the threat über alles of late modernity. The pope knows it. That's why he wrote his first encyclical … he needed something politically popular to distract from the church's child sex abuse scandals, and he found it in AI" (Gizmodo, Fortune) **[V; Politico original blocked]**. The reports do **not** say he called either man the Antichrist.

- On effective altruism: "one also has to take seriously that once you create a near totalitarian one-world government with the power to stop all dangerous science, it cannot easily be uncreated either … There is no precedent in human history that suggests that this global prison warden would willingly give up his or its power. The effective altruist ideology has brainwashed a significant portion of the people working on AI" (Gizmodo) **[V; Politico original blocked]**.
- Politico's verdict: "The structure is largely unchanged, and Thiel invokes religion to argue that regulation of the AI industry is evil" (Politico Decoded) **[V-s; search extract, page 403]**. On Politico's podcast, the reporter says the talks also wove in the manga *One Piece* and Schmitt (spoken.md transcript) **[V]**.
- Katechon candidates (Charlemagne, Metternich) and the line "If anti-communism is the Katechon restraining communists that are trying to create the communist one world state, then neoliberalism is anti-communism in a world where there are no communists left" (The American Antichrist, opinion) **[R; relayed from Politico, original blocked]**.

Lecture 3, "Velocity of Antichrist" (12 Oct). No newspaper report was found **[U: searched; unconfirmed, none found]**. From an attending reporter's posts:

- The Antichrist "need not be wealthy"; it could be a rich person who gives money away (he cited Sam Bankman-Fried's plans) or even an influencer such as MrBeast, but his intuition is that it will come out of politics (X) **[R]**.
- He named the Patriot Act, the International Criminal Court and the erosion of bank secrecy as parts of "the system of the Antichrist", the place where "we've had velocity" over the past quarter century (same post) **[R]**.
- He drew a laugh by explaining why the Antichrist is not Bill Gates, the pope or himself: it must be a political leader and broadly popular (X) **[R]**.
- On Schmitt's Nazi Party membership: "It's a very bad fact." He added that one should not make "a pietistic retreat from action" and said he wants the audience to figure out how to stop the Antichrist (X) **[R]**. On Strauss: "I overdosed on way too much of this stuff" (X) **[R]**. On Benedict XVI and Strauss, "the time for esotericism is over" (paraphrase) (X) **[R]**.
- A self-described attendee's blog adds a list of FATCA, the OECD's Common Reporting Standard, SWIFT and the end of the UK's non-dom status, and the line "in our gerontocracy, 66 is the new 33" (Daniel Forrester Nash, Substack, opinion) **[U: single interpretive blog; unconfirmed]**.

Lecture 4, "New Rome" (19 Oct). The organiser's summary: the inheritance of Rome and "the question of which powers have claimed, and might still claim, the role of restrainer against the end" (Luma, part 4) **[V]**. From the reporter's posts (X) **[R]**:

- The United States is the New Rome. As a restraining (katechontic) force it "runs the risk of flipping into something antichristic" **[R]**.
- A New Rome needs three things: a military superpower (Daniel 2:40), a financial superpower "that monitors and controls payments" (Revelation 13:17), and an ideological or religious superpower (Matthew 24:24) **[R]**.
- US power rests on Five Eyes/ECHELON, the SWIFT system and the dollar's reserve status; the president is something like the mayor of the United States and dictator of the rest of the world (paraphrase) **[R]**.
- "I don't like Russia" as a New Rome; on Putin, "I have my suspicions". Americans "haven't totally neutered ourselves" **[R]**.
- A joke: the US is the only country where revolution is impossible because it is the only one without a US embassy (X) **[R]**.
- An anonymous student account attributes to him "America is the last and final form of the Roman Empire", that Trump "could be the last restrainer", and that the Antichrist could be "a very bad president of the United States" (X) **[U: unconfirmed; single uncorroborated account]**.

5.3 Comparison with the earlier series

Series	Dates and venue	Access	What was said or new	Sources
San Francisco	Four lectures from 15 Sept 2025, Commonwealth Club; $200 tickets, sold out	Off the record; recordings leaked to the Guardian, the Washington Post and others	Greta and Eliezer as Antichrist types; "legionnaires of the Antichrist"; tax-haven rules as a sign ("It's become quite difficult to hide one's money"); lecture 3 on "velocity"; lecture 4: "America is, at this point, the natural candidate for katechon and antichrist, ground zero of the one-world state, ground zero of the resistance to the one-world state"	Guardian, WaPo **[V]**
Paris	Monday 26 Jan 2026, Académie des sciences morales et politiques; invited by Chantal Delsol	Closed; a 23-slide outline was given to attendees	An "expanded version" of SF lecture 1; the Antichrist is "not only a medieval fantasy"; Greta and "anti-AI altruists" named; about 30 protesters; lunch with Foreign Minister Barrot, whose aide listed "digital regulation" as a topic; Palantir serves France's DGSI and Airbus	Politico Europe, Politico Europe (FR) **[V]**
Rome	Four lectures, Sunday 15 to Wednesday 18 Mar 2026, undisclosed venue	Invitation-only	Organised by the Vincenzo Gioberti Cultural Association and the Cluny Institute; the Angelicum and the Catholic University of America disowned it; Italian lawmakers called his ideas "scandalous" and asked for transparency on the government's ties to Palantir; Benanti's essay "should we burn Peter Thiel?"	NCR (AP), CNN, Fortune **[V]**
Between Rome and Nashville	30 June 2026, Aspen Ideas; 13 July 2026, *First Things* essay with Sam Wolfe	Public	Aspen: Leo is "working for the Chinese Communists" by backing AI rules. *First Things*: "I did not come to Rome to try to be more Catholic than the pope", and Benedict XVI "believed he was living in the end times"	CNN, First Things **[V]**
Nashville	Four Mondays, 28 Sept to 19 Oct 2026, Grand Lodge of Tennessee; $100	Closed, no devices; recordings of lectures 1–2 leaked to the *Scene* and Politico	Same structure as SF. New: Obama and Pope Leo named, more on effective altruism, the ICC and bank-secrecy rules listed as the Antichrist's "system", and a final lecture naming the US as the New Rome	§5.2 **[V/R]**; Fortune **[V]**

What changed: the argument has barely moved since San Francisco; the four-part structure and the US-as-katechon finale repeat **[V/V-s; Guardian, Politico extract]** (Guardian). What changed is the **targets**. In 2025 he named activists (Thunberg, Yudkowsky). In 2026 he names office-holders and institutions: the pope (Aspen, *First Things* and Nashville), a former president, and the ICC (CNN, Fortune) **[V]**. The Nashville series also runs while Altman and Musk publicly back Amodei's call to slow frontier AI, so Thiel is now **out of step with the AI CEOs**, not speaking for them (same Fortune source) **[V]**.

5.4 The theology set against the material interests (Direction 1)

Theological claim (as reported)	Material interest it lines up with	Limits of the overlap
AI regulation and a "one-world government" that can "stop all dangerous science" are the Antichrist's path; Obama and the pope oppose AI for popularity (Fortune) **[V]**	**AI deregulation:** the federal push to pre-empt state AI laws (EO 14365, §2.4). **Palantir** sells AI platforms (Maven, $637.6M sole-source order, §D1). **Thiel Macro's** 13F lists $418.7M in eight stocks at 30 June 2026: Amazon $118.0M, Vista Energy $75.9M, Vistra $59.1M, AEP $42.2M, DTE $40.3M, FirstEnergy $39.9M, CMS $39.6M, X-Energy $3.7M (SEC 13F) **[V]**. Seven of the eight are energy names (utilities, a nuclear developer, an Argentine oil producer), which a Yahoo Finance analysis reads as a bet on AI's power bottleneck (Yahoo Finance) **[V]**	He has held the one-world-state thesis since long before the AI boom (the Guardian traces it to the 1990s) **[V]**. The filing states no thesis; "AI-focused" is the press's label. His stance now diverges from the leading AI CEOs

Theological claim (as reported)	Material interest it lines up with	Limits of the overlap
The katechon must be a military superpower; the US is the New Rome (X) **[R]**	**Palantir** ($1.98B in FY2026 obligations; the $10B single-bid Army agreement) and **Anduril** ($1.11B in FY2026) supply the US military (§D1) **[V; USAspending]**. **Founders Fund** put $1B into Anduril's $2.5B round in June 2025, its largest check ever (TechCrunch) **[V]**	The same lecture warns that the katechon can "flip" into the Antichrist, and that payment surveillance (Rev. 13:17) is a mark of both **[R]**. His theology thus also indicts the capability his firms sell. That is a tension, not proof of motive
Bank-secrecy erosion, tax-transparency regimes and the ICC are the Antichrist's "system" (X) **[R]**; in SF, "It's become quite difficult to hide one's money" (Guardian) **[V]**	**Mobility of wealth and residence:** NZ citizenship after 12 days (§2.1); a US$12m house bought in Buenos Aires in 2026, and a meeting with Milei at the Casa Rosada (Forbes Argentina) **[V]**; a $75.9M stake in Argentina's Vista Energy (13F above) **[V]**. The administration's ICC sanctions (EO 14203, §2.8) match his ICC theme **[V]**	No evidence of any tax avoidance by Thiel was found **[U: searched; none found]**. The ICC point is an ideological match with US policy, not a contract. The Night 3 list rests on attendee accounts
The pope's AI encyclical is a "distraction" from abuse scandals (Gizmodo) **[V]**	The encyclical calls for greater international AI regulation (CNN) **[V]**. Palantir does government business in Italy, where lawmakers asked for transparency on the government's ties to it during the Rome lectures (Fortune) **[V]**	The attack is also theological and long-running (Benedict, Francis, Küng in *First Things*). Sincerity is affirmed even by critics (NCR, opinion)
Paris: the Antichrist would exploit fears of nuclear war, climate change or AI to control a "frightened population" (Politico Europe) **[V]**	The same Monday he lunched with France's foreign minister, whose aide listed "digital regulation" among the topics; Palantir serves the DGSI and Airbus (Politico Europe (FR)) **[V]**	The lunch was at the minister's invitation, to discuss "differences of opinion" **[V]**. Nothing shows a deal

Reading. The overlap is real and specific. In every city, the figure he warns about (the regulator, the safety-promising world authority, the transparency regime) matches the policies that would constrain his companies and his capital. The New Rome he wants to restrain it is built from the military, payment and intelligence capability that Palantir and Anduril sell. Its **limits** are just as clear. The thesis is decades old and predates Palantir's AI revenue. He now stands against the AI CEOs, not with them. His own theology warns that the restrainer can become the Antichrist, which cuts against his firms as well. No document links a lecture to a contract, a regulation or a payment. The fair description is **a sincere theology whose villains coincide with his regulators**, not a theology invented to sell software.

5.5 Reactions (opinion sources)

These are commentary and are cited as **opinion** only.

- **National Catholic Reporter (July 2026), opinion quotes:** Massimo Faggioli (Villanova) calls the mindset "us being in a war, that whoever is not working with us is working for the enemy". David Gibson (Fordham) says it shows how Thiel "feels about anyone who would dare to set any limits on what Peter Thiel wants". Daniel Rober (Sacred Heart) says Thiel's influence on Vance "ought to inspire more concern than Thiel's own thought" (NCR).
- **Mark Howard (academic), to the *Scene*, opinion:** "I think he really means it", and his aim is to "persuade" people that disruption "is going to get worse in order to get better" (Nashville Scene).
- **Fortune analysis (July 2026), opinion:** "Thiel's Antichrist looks, with extraordinary precision, exactly like the people who want to regulate Peter Thiel" (Fortune). **Gizmodo**, opinion: "an incredibly convenient position for Thiel" (Gizmodo).

- **Letters from Leo (Christopher Hale), opinion; paywalled, headline only:** "In Fourth Attack, Peter Thiel Accuses Pope Leo XIV of Using AI to Deflect From Sex Abuse Crisis … Vance has yet to be asked about it" (Letters from Leo).
- **Paolo Benanti**, opinion: "L'hérésie américaine : faut-il brûler Peter Thiel ?" (March 2026; title only, paywalled) (Le Grand Continent).
- **The Pamphleteer (host), opinion:** a 15 Oct essay by Leonard R. Fishman notes the tension that "a restrainer that preserves order by resisting change may end up reproducing the logic it opposes" (Pamphleteer). **Nashville Scene "Advice King" humour column**, opinion (Scene).
- **Not found:** a public response from Vance, the Vatican or Obama to the Nashville remarks (Politico says none replied) **[U: searched; none found]**; any evangelical-press coverage of Nashville (Christianity Today, Baptist Press) **[U: searched; RNS blocked (403)]**.

5.6 What this doesn't show

- **No full record.** Only two lectures have published excerpts in news outlets. Lectures 3 and 4 rest on one reporter's posts, one anonymous account and one blog. Politico's two articles could not be fetched **[U: blocked, 403]**.
- **No causal link to policy or contracts.** No contract, regulation or payment is tied to a lecture. The Paris and Rome meetings show access, not outcomes **[U: searched; unconfirmed, no link found]**.
- **No claim that he called Obama or the pope the Antichrist.** He reportedly said the Antichrist must be a popular political leader, and not Gates, the pope or himself **[R]**.
- **Sincerity is not in doubt in the sources.** Critics and sympathisers alike read the theology as sincere. The overlap with his interests is a correlation, and the thesis predates the AI boom (Guardian, NCR) **[V]**.
- **No Brazil link.** No source ties the series to Rockbridge or the Bolsonaro network **[U: searched; unconfirmed, none found]**. The only Latin American thread is Argentina (house, Milei meeting, Vista stake; see Direction 8).
- **No group agency.** Nashville's evangelical scene is context the *Scene* supplies; nothing shows any religious community directing or funding the series. Attendance and gender figures are attendee estimates **[R]**.

5.7 Murky items

New items 64–68 are listed in section 3.

5.8 Gaps

- Politico's two 8 Oct pieces (403 or timeout); Le Monde on Paris (402 paywall); AP on Rome (403); Reuters on Rome (401); RNS (403); the NYT and FT on Thiel's Argentina move (403 or paywall) **[U: blocked]**.
- No transcript or recording of lectures 3 and 4; no *Scene* report on them as of 20 Oct, ~10:00 (UTC-3) **[U: searched; unconfirmed, not found]**.
- No Epoch Times article by the attending reporter was found; his posts are used instead **[U: searched; unconfirmed, not found]**.
- Ticket revenue and costs, and whether Thiel paid any fee or expense, are unknown **[U: not found]**.

Bridge. Directions 1–5 are the US side of the same question: contracts, a theology whose villains match the regulators, private jurisdictions, prediction markets and stablecoins, and a lecture series with no document tying a talk to a payment. Brazil is where that supply of guarantees met a domestic money system and an election. Direction 6 sets out the open accounts. Direction 7 is the runoff, read through those accounts rather than through a plot. **[V]** for the contract record is Direction 1 (USAspending is the method there). The election file is Direction 7 (g1).

Direction 6: Money and crime (added v16, 28 Oct 2026)

This chapter is the money that sits under the runoff. Each section states who alleges what, at what stage, and the denial. A meeting or a shared sector is not a command. Banco Master's full file stays in 7.1. The flight and ADPF 1178 are stated once here and only cross-referenced later.

6.1 Operação Carbono Oculto

On 18 Aug 2026 the São Paulo GAECO filed a criminal complaint against 16 men for adulterating fuel, document fraud, consumer fraud, tax crimes and money laundering, and for personally integrating, promoting and financing a criminal organisation. The operation itself was launched on 18 Aug 2025. The prosecutors say members of the Primeiro Comando da Capital were inside the scheme, and that the group's payments ran through payment institutions controlled by organised crime, with parallel books. **[V]** (MPSP).

Estadão, citing a 189-page complaint, puts the sum the accused are said to have taken at R$2,978,086,957.29. It names payment institution BK Bank and receivables funds (FIDCs) on Faria Lima as the channels that put the money into the formal market. Roberto Augusto Leme da Silva, known as Beto Louco, is among the 16 and is a fugitive. His defence says the facts in the complaint have nothing to do with him. Mohamad Hussein Mourad, known as Primo, is a fugitive and is not among the 16. A plea offer from the two was refused. **[V-s]** (Estadão). BK Bank was asked for comment and had not answered at publication. No charge in this complaint names a federal office-holder. Claims that the case reaches Centrão politicians were not taken from a primary document or a mainstream investigation and are not used.

6.2 Operação Sem Refino

On 15 May 2026 Justice Alexandre de Moraes authorised Operação Sem Refino in Petition 16028, secrecy lifted. The decision orders the preventive arrest of Ricardo Magro, owner of Refit, the former Manguinhos refinery, and his inclusion on Interpol's red notice. He lives in the United States. The same decision orders searches against former Rio governor Cláudio Castro and other state officials, and their removal from public duties where they still held them. The suspected offences are fraudulent management, money laundering, tax evasion, capital flight and economic crimes in the fuel trade. Castro was searched. He is not charged in the decision as fetched. His lawyer said he was surprised and available to the authorities. **[V]** (STF).

Valor reports that the same decision froze R$52 billion in financial assets and suspended the economic activity of the Fit group. **[V-s]** (Valor). The STF note fetched for this edition records the arrest, the red notice and the searches, and does not itself print the freeze amount. BBC News Brasil, citing the Federal Police and the federal tax-debtor list, puts the group's public debt near R$52 billion, a liability figure, not the freeze. **[V-s]** (BBC News Brasil). Refit denies supplying fuel to organised crime, denies falsifying tax filings, and says it is not eligible for the 2025 instalment programme. **[V-s]** (Valor, same piece). A suspected link between Refit and the PCC is a headline suspicion, not a finding in the STF note. It is left out.

6.3 The flight, and the ANDIS case

Flávio Bolsonaro left Puerto Iguazú on Baires Fly Gulfstream LV-JQW via Guayaquil to Miami. **[V-s]** (Folha, Perfil). Baires Fly S.A., recorded as owner of the Gulfstream G400 LV-JQW in the flight's general declaration, is chaired by Marcela Mabel Racana; its founder, Luis Grande, sits as alternate director. **[V-s]** (Perfil, La Nación). Baires Fly earlier flew Claudio Tapia on a Lear Jet 60, LV-JQQ, to Paraguay and then Zurich. **[V-s]** (La Nación, same piece). Clarín reports that Santiago Caputo oversaw the departure. That account was not independently checked. **[U: unverified]** (Clarín).

Perfil reports that the flight cost about US$140,000 and was arranged and paid for by an unnamed US-based broker, not by Flávio Bolsonaro directly. **[R]** (Perfil). Who that intermediary is, and who funded it, remains open. **[U: unconfirmed]**.

The company sits in a separate Argentine case. Judge Ariel Lijo, in the ANDIS inquiry, processed Sergio Daniel Mastropietro and Alan Pocovi for illicit association and aggravated money laundering, on the account of financial circuits tied to Miguel Ángel Calvete and Baires Fly S.A. Processing is an indictment-stage decision. It is not a conviction. The same resolution processed Diego Spagnuolo and 18 others, without preventive detention, and a health-ministry survey put price differences at at least 1,849,277,963 pesos. **[V-s]** (Perfil). Judge Ariel Lijo's 16 October resolution in the ANDIS case, which charges the aviation broker Sergio Mastropietro with laundering, names Baires Fly 79 times, according to El Destape; the company is not among the accused. **[V-s]** (El Destape, La Nación). The resolution describes invoices issued in Baires Fly's name to ANDIS suppliers for "national kilometres", and puts the total at over ARS 1 billion. **[V-s]** (El Destape and La Nación, same pieces). Baires Fly denies any link to ANDIS or to Mastropietro, and people close to Mastropietro deny laundering. **[V-s]** (Perfil, La Nación). The hearing of Jonathan and Emmanuel Kovalivker, of Suizo Argentina, was moved to 4 Nov 2026. The company denies the accusations and calls the investigation false. **[V-s]** (Ámbito). Nothing in the public record ties Flávio Bolsonaro to the ANDIS laundering.

6.4 Treasury sanctions, July 2026

On 1 July 2026 OFAC designated two Brazilian nationals and four companies for links to the PCC, under Executive Orders 14059 and 13224. The network is described as operating between Florida and São Paulo. The lead name is Victor Henrique Shimada. A relative who worked as his secretary was designated with him. The companies named are Victory Trading, Pixwave, Wave and a Portuguese firm, Avenidas Flutuantes. OFAC says Shimada's organisation laundered more than $30 million, including through cryptocurrency. No politician is named. **[V]** (Treasury). This is a different act from the May 2026 US designation of the PCC and the Comando Vermelho as terrorist organisations, already in 7.3.

6.5 Banco Master, and Dark Horse

Master is the elite-finance counterpart of the fintech channel in 6.1. The liquidation, the FGC loss and the family ties are the file in 7.1. No politician named there has been charged. On 28 October 2026 the Federal Police sent the Supreme Court a partial report in Inquiry 5026 (Operação Compliance Zero), formally indicting 15 people: Daniel Vorcaro, former BRB president Paulo Henrique Costa, Augusto Lima, four other former Master staff and its former lawyer, two partners of Tirreno, which the police call a front company, and five former BRB executives. **[V]** (PF, g1). The suspected crimes are fraudulent management of a financial institution, misleading a state-controlled company, false accounting information, criminal organisation and money laundering, assigned person by person. Costa is indicted for fraudulent management and criminal organisation only. **[V-s]** (CNN Brasil). The police say BRB bought about R$17.5 billion in Master credit between July 2024 and October 2025, at least R$12.2 billion of it in loans whose existence could not be shown. **[V-s]** (CNN Brasil, UOL). A police indictment is not a charge. The Prosecutor-General decides whether to charge, and the police have asked Justice André Mendonça for 60 more days. **[V]** (PF, g1). All three named men deny wrongdoing. Vorcaro's defence says no loss has been established by expert review. No politician is among those indicted. **[V]** (g1).

UOL reports the police describe, "in theory" and outside this report's scope, six properties worth R$146.6 million offered to Costa. His defence rejects this. **[R]** (UOL).

Paulo Henrique Costa was invited to run BRB by then-governor Ibaneis Rocha (MDB) in November 2018. In reports sent to the STF in October 2026, police describe Ibaneis as acting directly in BRB's expansion strategy. He is cited but not indicted, and he denies wrongdoing. **[V-s]** (g1, 16 Nov 2018, g 1, 9 Oct 2026, Estadão). The fuller file is in 7.1.

Augusto Lima built Master's payroll-card business, Credcesta, from a 2018 privatisation under Bahia's PT government. Rio's Castro government granted it exclusivity in 2021. The product's reach crossed party lines. **[V-s]** (Valor, Folha, 25 Jan 2026).

The two partners of Tirreno, which the police call a front company, were also partners in the credit fintech Cartos and in a payments firm suspended from Pix in 2025. Cartos denies originating the credits. **[V-s]** (Broadcast).

Vorcaro's wider political ties sit in other phases of the operation: the Ciro Nogueira deposit-guarantee amendment, and Rioprevidência's roughly R$3.7 billion in Master products, which police tie to Cláudio Castro. That figure is the wider total, letras plus later fund products, not the R$970 million in letras alone. Neither man is among the 15. Castro denies directing the investments. **[V-s]** (Agência Brasil, Folha, 26 May 2026, CBN). Castro is the same former Rio governor searched, and not charged, in the Refit case (6.2).

Six Reag funds in the Master probe also appear in the PCC fuel operation (6.1). One of them, Hans 95, together with two funds it held, put at least R$849 million into Master paper. This ties the bank, not the 15. **[V-s]** (Folha, 9 Jan 2026, UOL).

This is the Master–BRB inquiry. It is not Dark Horse. On Dark Horse, the Federal Police reported a gap between more than US$12 million sent abroad and US$2.8 million returned, and on 15 Oct 2026 asked for 90 more days. **[V]** (g1). Counted from that dispatch, 90 days falls in January 2027, after this edition. Whether the court granted the extension is not in the sources read. **[U: not fetched]**.

6.5.1 The rapporteur

Justice André Mendonça holds the INSS inquiry and the Master inquiry. He took his seat in 2021 on a nomination by Jair Bolsonaro. piauí records that the appointment was discussed as that of an evangelical justice. That is a fact about the appointment. It is not used here as a reason for any later act. **[R]** (piauí).

Both cases reached him by random draw. On 25 August 2025 the Prosecutor-General objected to Dias Toffoli keeping the INSS file without a draw. Court president Luís Roberto Barroso sent it back, and Mendonça was drawn. **[V]** (Valor, Folha, Poder360). On 12 February 2026 Toffoli asked to leave the Master inquiry. A note signed by the ten ministers said the court saw no case for a suspicion ruling, and the presidency redistributed the file. Mendonça was drawn electronically. **[V]** (Agência Brasil, g1, BBC News Brasil).

On 24 August 2026 he ordered the Federal Police to identify the recipients of Vorcaro's messages, including office-holders with privileged standing. **[V-s]** (Valor). piauí reports that the dispatch set a deadline of 72 hours. **[R]** (piauí). The 218-page report was made public on 1 September, 33 days before the first round. The same day, Prosecutor-General Paulo Gonet asked that the procedure be declared null and the petition closed. He wrote that nearly 190 of the 218 pages concerned Justice Alexandre de Moraes, and that an investigation of a member of the court belongs to the full bench. **[V-s]** (Valor, Conjur). On 3 September, in the Fake News inquiry, Moraes put police intelligence reports before the court's president and alleged misconduct in Mendonça's conduct of the two cases. **[V-s]** (BBC News Brasil). On 8 September, on a request from the Novo party, Mendonça removed Federal Police director-general Andrei Rodrigues and intelligence director Leandro Almada from their posts, and suspended intelligence reports on judges. The Attorney-General's office asked that the removals be suspended. **[V-s]** (g1, BBC News Brasil).

His office says he received Vorcaro once, on 14 March 2025, at the Iter institute in São Paulo, for 20 to 30 minutes. The subject, the office says, was Suspension of Provisional Relief 976. He only listened, and he later voted against Vorcaro's position. The meeting was eleven months before he became rapporteur. **[V-s]** (UOL, BBC News Brasil). Cedro Participações, owned by Lucas Kallas, signed a convertible loan in April 2024 for up to R$5.9 million, of which R$5.2 million was paid. Iter says Mendonça and Kallas did not negotiate the terms, that the money was not converted into shares,

that repayment at the Selic rate began in January 2026, and that about 5.3% had been repaid by mid-September. It says no profit was paid out. Cedro says Vorcaro never had a corporate tie to the holding. UOL reports that Cedro and a manager linked to Vorcaro both held shares in the listed firm Biomm. Cedro says a shared holding in a listed company is not a partnership. **[V-s]** (UOL). On 3 September 2026 his office said he and his wife were leaving Iter, giving up their shares with no payment in return, and that the institute would become a nonprofit. **[V-s]** (piauí, Revista Fórum). Revista Fórum counts 55 public contracts worth R$10.85 million, 54 of them without a prior tender, and notes that a direct award is not itself unlawful. piauí, from the national procurement portal, counts about R$12 million across 55 public bodies. **[V-s]** (Revista Fórum, piauí).

piauí reports a further pattern, and states its own limits. Of 61 São Paulo municipalities that committed R$2.4 million to Iter, 30 committed R$1.45 million and also received R$59 million in amendments from deputy Cezinha de Madureira between 2021 and 2026. piauí says nothing shows that the amendments paid for the contracts. In 16 of the 30, the Iter commitment came a year before the amendment. **[R]** (piauí). piauí also reports that seven pension funds which bought Master financial letters, together about R$1.73 billion, were Iter clients: Rio, Amapá, Amazonas, Maceió, São Roque, Cajamar and Araras. It presents the overlap as a correlation. **[R]** (piauí). On search warrants in the Master file, piauí reports 75 days from the police request to a partial approval against Cláudio Castro, on 25 May, with no search of the Laranjeiras palace; 29 days for Ciro Nogueira; and 9 days for Jaques Wagner. piauí says the difference in time is not, by itself, proof of unequal treatment. **[R]** (piauí).

One court act stays outside that pattern. On 10 October 2024 Mendonça closed two Superior Court of Justice inquiries against Castro, numbers 1.481 and 1.639, on grounds of competence and of nullity in plea agreements taken by Rio prosecutors. The Second Panel upheld the closure unanimously in June 2025. **[V]** (Agência Brasil, STF). This is not the Refit search in 6.2, and it is not the Rioprevidência file.

On 14 September 2026 the Federal Police opened a further phase of Operação Transparência. The police note says there is no evidence that members of the judiciary took part. Justice Flávio Dino's decision, which authorised searches of Cezinha de Madureira, says the same. Judges appear there as people an alleged influence was meant to reach, not as participants. **[V]** (PF, CBN).

The runoff sits on two open offices. piauí reports that Mendonça is vice-president of the Superior Electoral Court, under president Kassio Nunes Marques, and that the next president finds one Supreme Court seat already open: Luís Roberto Barroso's, vacant since the Senate rejected Jorge Messias in April. Three further seats fall open by mandatory retirement: Luiz Fux in 2028, Cármen Lúcia in 2029 and Gilmar Mendes in 2030. piauí reports that nothing it examined shows Mendonça discussed appointments, impeachment or the court's presidency with Flávio Bolsonaro or the campaign. No source read for this subsection shows coordination with any campaign. **[R]** (piauí).

6.6 ADPF 1178

On 27 Oct, in ADPF 1178, Justice Flávio Dino requisitioned a Federal Police inquiry under STF supervision into the Rockbridge network co-founded by JD Vance. The order is 38 pages. It names Tallis Gomes and Pedro Sang only as "em tese ligados". It asks who paid for Polymarket posts, and it raises rare earths under Constitution articles 20 and 176, and algorithmic asymmetries. It notifies ten bodies and refuses the PT as amicus. The order makes no findings. It does not establish that Rockbridge funded Flávio Bolsonaro. **[V]** (STF, the order). The company registration, Sang's denial and the absence of a shown transfer are in 7.4.

Follow the money

Trail	Known	Open	Records to pull
Rockbridge / ADPF 1178	Dino's 27 Oct order sends the inquiry to the Federal Police under STF supervision. Gomes and Sang are "em tese ligados". No finding of a transfer. [V] STF	Who paid for reports and for Polymarket posts. Whether money crossed from a US entity.	ADPF 1178 on the STF docket. Wyoming and other US company registries for Rockbridge Brazil LLC. TSE campaign accounts for service providers.
Flight / ANDIS	Route Puerto Iguazú, Guayaquil, Miami, on LV-JQW. Racana chairs Baires Fly; Grande is alternate director. Perfil: about US$140,000, arranged and paid by an unnamed US broker, not by Flávio directly. Lijo's 16 Oct resolution names the company 79 times; it is not accused; invoices for national kilometres exceed ARS 1 billion. [V-s] La Nación [R] Perfil	Who that broker is, and who funded the payment.	The general declaration. The Lijo resolution in Juzgado Federal 11. The broker's invoice, if it surfaces.
Carbono Oculto	Complaint against 16 on 18 Aug 2026. Estadão's figure for the alleged take is about R$2.98 billion, through fuel, BK Bank and Faria Lima funds. Six Reag funds in the Master probe also appear here. The Hans 95 chain put at least R$849 million into Master paper. That overlap ties the bank, not the 15 indicted on 28 Oct. [V] MPSP [V-s] Estadão [V-s] Folha [V-s] UOL	Which of those funds the complaint itself names. Whether any political donor appears.	The 189-page complaint. CVM fund registry. Central Bank payment-institution authorisations. ANP distributor registry.
Refit	Pet 16028. Preventive arrest and Interpol red notice for Magro. Castro searched, not charged. Valor reports a R$52 billion asset freeze. The same Castro is named, and not among the 15, in the Master row. [V] STF [V-s] Valor	Extradition from the United States. Any charge against an official.	STF Pet 16028. PGFN persistent-debtor list. US extradition filings, if unsealed.
Master–BRB, separate from Dark Horse	Inquiry 5026, Operação Compliance Zero. On 28 Oct a partial report indicted 15 people and asked for 60 more days. Ibaneis Rocha invited Paulo Henrique Costa to run BRB in November 2018. October reports cite him and do not indict him. Ciro Nogueira and Cláudio Castro sit in other phases, the deposit-guarantee amendment and roughly R$3.7 billion from Rioprevidência, and neither is among the 15. Castro is the Refit search in this table. Dark Horse is a different file: more than US$12 million sent and US$2.8 million returned, with a request for 90 more days. [V] PF [V-s] g1 [V-s] CBN [V] g1	The extension ruling on the 28 Oct partial report (15 indicted, Inq. 5026). Whether the Prosecutor-General charges anyone. The Dark Horse indictment list.	STF Inquiry 5026, before Justice André Mendonça. The rapporteur's record is in 6.5.1. The Dark Horse docket, kept apart. Central Bank liquidation acts.
Markets, 26 Oct	The session prints are in 7.12. The spot close and the PTAX are different rates. [V-s] Exame	Who was positioned, and who gained.	B3 daily investor-participation file. Central Bank foreign-exchange flow. Any CVM sanctioning case.

Direction 7: Brazil (added v8; full-text verified and expanded v9, 17 Oct 2026)

Thesis tested (the consortium's framing): the Banco Master case and its ties to the Bolsonaro family show a danger to Brazilian democracy. They are one example of far-right growth in Latin America aimed at resources (rare earths, oil), with Christian Zionist evangelicals as a backing force.

Method note (v9). Most sources were re-fetched in full. An item is labelled [V] only where the passage was read in full text. Police (PF) reports are investigative findings, not charges. **As of 17 Oct 2026, no politician named below has been charged (denunciado) in the Master case.** Vorcaro is in pre-trial detention and has not been convicted. The two *Revelando* videos (Calma

Urgente) are cited **only as opinion or advocacy**. Their factual claims are sourced independently below.

7.1 Banco Master / Daniel Vorcaro

Timeline

- **Mar 2025:** BRB, the bank controlled by the Federal District (DF) government, announces it will buy 58% of Master. [V] Folha, 9 Mar 2026
- **Over time Master sold about R$22bn in assets to BRB**, part of them allegedly fabricated. Vorcaro injected about R$2bn into Master in 2025. [V] Bloomberg Línea
- **Sept 2025:** the Banco Central (BC) blocks the deal, even though CADE and the DF legislature had approved it. While reviewing it, the BC found problems in payroll-loan (consignado) portfolios that BRB had bought from Master and referred them to the PF. The PF suspects some contracts were forged and registered at a São Paulo notary in April 2025, after the BC asked for information. [V] Valor, 18 Nov 2025; DW/UOL not reachable (403) [V-s].
- **17 Nov 2025:** Vorcaro is arrested (first time) in **Operação Compliance Zero**, one of seven people detained. The PF cited a flight-risk suspicion, which he denies. **18 Nov:** the BC orders extrajudicial liquidation, hours after Master floated a purchase offer from the little-known Fictor group. Valor called it the largest failure ever in FGC terms: R$41bn of insured CDBs, twice the size of Bamerindus. [V] Valor; [V] Agência Brasil; [V] O Globo
- **Late Nov 2025:** the federal appeals court TRF-1 allows ankle monitors and release home. **Dec 2025:** the case moves to the STF under Justice Toffoli, who authorises phase 2 (14 Jan 2026). [V] Poder360
- **12 Feb 2026, Toffoli leaves the case.** His family company had been a partner of the Vorcaro-linked fund **Arleen** in the Tayayá resort (Ribeirão Claro, PR). The **PF pointed to his suspicion (suspeição)**. Toffoli called the PF findings "ilações" (insinuations) and says he never received money from Vorcaro or Zettel. After a meeting of all justices he asked for redistribution. The STF said the justices **unanimously found no grounds** for a suspicion ruling, which could have voided earlier acts. **André Mendonça** became rapporteur. The draws that gave him this file and the INSS inquiry, and the replies on the record, are in 6.5.1. [V] Folha, 13 Feb 2026; [V] Valor, 12 Feb 2026
- **Early Mar 2026:** Vorcaro is jailed again and held at the PF Superintendency in Brasília. His father, brother-in-law and cousin are also in pre-trial detention. [V] Poder360; O Globo
- **By 18 May 2026:** six phases completed. The PF says the network reached **BC directors and PF agents**. The FGC had paid about **R$49.5bn** across Master, Will Bank and Banco Pleno. [V] Agência Brasil
- **Plea deal (delação):** the PF (11 Jun) and the PGR (15 Jun 2026) rejected his second proposal. Gonet's PGR found "no robust evidence", "hearsay" stories and no commitment to repay. The FGC hole is put at more than R$50bn. On 28 Aug he signalled a third attempt; the PF has not yet sent its list of indictees (indiciados) to the PGR. **No approved deal.** [V] Poder360; O Globo
- **CPMI (joint congressional inquiry):** it had enough signatures, and creation is automatic under the rules, but Congress president Alcolumbre did not install it. Both government and opposition members, Flávio included, say they want it. [V] g1, 14 May 2026
- **Pension funds (RPPS):** 18 state and municipal institutes put **R$1.8bn** into Master *letras financeiras* (not FGC-covered) between Oct 2023 and Dec 2024. The largest were **Rioprevidência R$970m**, **Amprev (AP) R$400m**, **Iprev Maceió R$97m** and **São Roque (SP) R$93m** (Ministry of Social Security data). The ministry concluded that **states and municipalities must cover any shortfall**. Bloomberg Línea puts the total at more than R$3bn, including Cajamar. The PF's **Operação Barco de Papel** concerns Rioprevidência. [V] Folha, 19 Nov 2025; [V] Folha, 8 Jan 2026; [V] Folha, 9 Mar

Political ties (each stated as: who alleges what, at what stage)

Person	What is documented / alleged	Stage / response	Label
Ciro Nogueira (PP-PI senator, Bolsonaro's former chief of staff)	PF documents describe "a high degree of intimacy, trust and closeness": luxury hotel stays in Europe and "million-real transfers". The PF says monthly payments of R$300k, with "indications" of a later rise to R$500k, were routed through Vorcaro's cousin Felipe. Vorcaro called him "grande amigo de vida". In **2024** he filed the "emenda Master" to raise FGC cover from R$250k to R$1m; **prosecutors (MP) allege the bank drafted it.**	PF report / MP allegation. He says he "never had any inappropriate conduct" and "repudiates any insinuation".	[V] Folha; Bloomberg Línea
Ibaneis Rocha (MDB, former DF governor)	PF reports to the STF (Oct 2026) say he acted "directly" on four fronts (capital-raise amounts, BRB's expansion strategy, validating "critical operational decisions", dealing with private agents) from Oct 2024. They say Master entered BRB's shareholding indirectly through the Borneo, Verbier and Delta funds. Separately, Folha says his law firm sold fee-receivable rights to a fund of **Reag Investimentos** (investigated in the Master context) in May 2024.	PF report. His defence says he "did not pressure nor interfere" and that the report shows he was not Vorcaro's direct interlocutor. On Reag, the defence says he has been away from the firm since 2018. Former BRB president Paulo Henrique Costa is jailed.	[V] g1, 9 Oct 2026; Folha
Flávio Bolsonaro (PL senator, presidential candidate): the "Dark Horse" film	Intercept Brasil (13 May 2026) published messages and a **Sept 2025** audio in which he calls Vorcaro "irmão" and presses for payments toward **R$134m** for a Jair biopic. At least **R$61m (about US$10.6m) was sent in six operations, Feb–May 2025**. The PF calls him "a direct interlocutor of Vorcaro… including payment demands, in-person meetings". **Mendonça authorised the inquiry in July 2026.** On 16 Oct 2026 the PF asked for a 90-day extension.	Under investigation, no charge. He confirms asking for "private sponsorship", denies any quid pro quo, says "the contract was not fulfilled" and that the film cost R$75m.	[V] Câmara; g1; Bloomberg Línea; [V-s] O Globo, 11 Sept; [V-s] g1, 17 Oct
Eduardo Bolsonaro: the Havengate thread (*new in v9*)	Part of the money went from **Entre Investimentos** (which worked with Vorcaro's companies) to the **Havengate Development Fund LP** (Texas), represented by Eduardo's lawyer **Paulo Calixto**. The PF says the fund had been dormant since 2020 and was reactivated for the film. **PF hypothesis:** the money may have paid for Eduardo's stay in the US and his push for sanctions on Brazil's judiciary. The PF cites a 21 Mar 2025 screenshot attributed to Eduardo with guidance on managing the money in the US. A contract lists him as **executive producer**. On 16 Oct 2026 the PF reported a "**severe accounting divergence**" between money sent out and money returned.	Investigation; **no charge.** Eduardo denies receiving funds and says his US immigration status would not allow it. Flávio says all the money went to the film.	[V-s] Folha, 14 May; BBC Brasil; CNN Brasil; g1, 17 Oct
Jair Bolsonaro	His largest 2022 donor was Lagoinha pastor **Fabiano Zettel**, Vorcaro's brother-in-law (R$3m). Zettel was arrested in Mar 2026; the PF says he belonged to a Vorcaro group that intimidated opponents. PL president Valdemar: "everyone donates".	The donation is documented. There is no allegation against Jair in Master.	[V] Folha
Cláudio Castro (PL, former Rio governor)	Drawn in through Operação Barco de Papel (Rioprevidência). Bloomberg Línea: "the PF accused [him] of receiving benefits from Vorcaro."	PF allegation. He denies any improper relationship.	[V] Folha; Bloomberg Línea
Hugo Motta (Republicanos, Chamber president)	PF documents list him as a beneficiary of Lisbon hotel stays paid by Vorcaro, late June 2024, during the Lisbon Legal Forum ("Gilmarpalooza", linked to Justice Gilmar Mendes).	Mentioned in PF documents. He "sees no problem" with it, calling it a corporate legal event.	[V] Folha
Antônio Rueda (União Brasil president)	Offered helicopter rides at the 2024 Interlagos Grand Prix. Piauí reported that he and his sister acted as lawyers for Master (2023–24).	Reported; he did not comment.	[V] Folha

Person	What is documented / alleged	Stage / response	Label
Alexandre de Moraes / Viviane Barci	Mendonça unsealed **52 messages** from Vorcaro to Moraes (1 Sept 2026). Metadata on the "Minuta de Contrato" sent by the firm administrator shows its **last modification by a user named "Ministro Alexandre de Moraes" on 11 Jan 2024**. The contract was for **R$130m** (36 × R$3m) and included "strategic consultancy" on PF and Civil Police inquiries plus BC, Receita Federal and CADE proceedings. It does not mention any STF impediment. The messages reportedly asked for help to "disarm" and "block" actions against Master and asked about leaving the country.	**PF report; no charge.** The firm says compliance consulted Moraes about impediments, that Moraes "never judged any case involving Banco Master", and that the services were provided.	[V] g1, 1 Sept; O Globo, 11 Sept; Bloomberg Línea
Dias Toffoli	See timeline (Tayayá/Arleen).	No charge.	[V]
Jaques Wagner (PT-BA senator) / **Augusto Lima**	Former partner Augusto Lima brought the **Credcesta** payroll-loan business into Master (2019); it came from Bahia's 2018 privatisation under PT governor Rui Costa. **Federal investigators suspect** Lima's ties to PT politicians helped the deal, naming Wagner (close to Lula).	Suspicion reported. Wagner says his relationship with Vorcaro is "practically minimal".	[V] Bloomberg Línea
Lula	Met Vorcaro off his official agenda in Dec 2024, before the allegations became public. He says he receives all banks, that **Guido Mantega** asked for the meeting, and that he invited BC president Galípolo and Rui Costa.	Documented meeting; no allegation.	[V] Folha
Carlos, Michelle Bolsonaro	No Master link found.	—	[U]

Reading: Master is a **cross-party patronage machine**. It runs through the Centrão (Ciro Nogueira, Motta, Rueda), the MDB-run DF (Ibaneis/BRB), the PL (Flávio, Castro), the PT orbit (the Credcesta/ Wagner suspicion, the Mantega-brokered Lula meeting) and the top of the judiciary (Moraes's household contract, Toffoli). This does not fit a far-right-only story. **But one thread is specific to the Bolsonaros:** if the PF's Havengate hypothesis holds, a fraudulent bank's money may have helped finance the campaign for US sanctions against Brazil's own courts. That links Master directly to the sovereignty strand (7.2–7.4). It is **an investigative hypothesis, denied, with no charge.**

7.2 Bolsonaro family and democracy

- **Jair Bolsonaro**:
    - **Conviction:** STF First Panel, Sept 2025 (AP 2668): **27 years 3 months**, closed regime to start. The STF judged 31 defendants across four cases: 29 convicted, 2 acquitted. Ramagem is a fugitive in the US. The conviction became **final on 25 Nov 2025**. [V] STF; Folha
    - **Custody history:**
    - **Aug 2025:** preventive house arrest.
    - **22 Nov 2025:** house arrest revoked and moved to the PF Superintendency. Reasons cited: a vigil called by Flávio was seen as facilitating flight, and he tried to remove his ankle monitor.
    - **15 Jan 2026:** moved to "Papudinha" (19th Military Police Battalion).
    - **13 Mar 2026:** hospitalised with aspiration bronchopneumonia.
    - **24 Mar 2026:** Moraes grants **temporary humanitarian house arrest for 90 days from discharge**, with the PGR in favour and a reassessment due afterwards. As of late July 2026 he was still in house arrest (Valor). Whether it was formally extended after 90 days was not found.

  [V] STF, 24 Mar 2026; [V] BBC Brasil; [V] Valor - **Sentence-reduction bill ("Dosimetria"):** the Chamber passed it on 10 Dec 2025. Lula vetoed it, Congress overrode the veto, and

Moraes suspended its application. [V] BBC Brasil; [V] Gazeta do Povo - **US pressure and partial retreat:** - **9 Jul 2025:** Trump's 50% tariff letter. - **30 Jul 2025:** EO 14323 declares a national emergency (an extra 40%, 50% total). The fact sheet **names Paulo Figueiredo** as a US resident prosecuted for speech on US soil. [V-s] White House; g1 - **Magnitsky sanctions:** Moraes (Jul) and his wife (Sept 2025). - **Retreat:** Trump praised Lula at the UN (Sept 2025) and suspended the 40% farm tariffs (20 Nov 2025). The Treasury **lifted the sanctions on 12 Dec 2025**, calling them "inconsistent with US foreign-policy interests". This came a day after Deputy Secretary Landau praised the Chamber's Dosimetria vote. [V] BBC Brasil - **The US Supreme Court later struck down the IEEPA order.** Trump renewed the emergency anyway on 28 Jul 2026, with no practical effect. Brazil now faces **25% (Section 301)** and **12.5%** (forced-labour allegations). [V] Valor, 29 Jul 2026 - After talks failed, Trump said he "doesn't care" about Lula, whom he called "volatile". The US also warned of individual sanctions after Brazil refused visas to US electoral "observers". [V] Gazeta do Povo. The Washington Post reported a US plan to send aides who would cast doubt on the election's integrity; **Itamaraty refused visas to two State Department staff**, and the US denied any intent to interfere. [V] (as reported in Folha Ilustríssima) - **Eduardo Bolsonaro:** - Moved to the US in Feb/Mar 2025; his leave ended 21 Jul 2025. - **Lost his seat on 18 Dec 2025** (Mesa Act No. 229, for missing a third of sessions; he missed 63 of 78). [V] Câmara Mesa Act; [V] Câmara - **Convicted unanimously by the STF First Panel on 16 Jun 2026** (AP 2782) of coercion in the course of proceedings: **4 years 2 months, semi-open regime**, 50 day-fines, ineligibility until 8 years after the sentence is served, and loss of his PF clerk post. [V] STF - Final on **3 Oct 2026**, with execution ordered. [V-s] (ConJur PDF blocked, 403) - **Paulo Figueiredo** (commentator, Eduardo's partner in the US lobbying): - **Charged by the PGR in the coup case but not yet a defendant**: the STF is awaiting a US reply to a letter rogatory (pending 10+ months as of Aug 2026). [V-s] EM - About **R$4.9–5m in the federal tax-debt register** from 2020 Lava Jato "Armadeira 2" assessments, which he says were wrongly issued. [V-s] Estadão - Bought a US$1.2m house in Clermont, FL, in Nov 2025, saying it is financed. [V-s] Agência Pública/ICL - **The 26 May 2026 photo-op:** Flávio, Eduardo and Figueiredo went to the Oval Office. The meeting was off the official schedule and arranged by Eduardo with Trump's "ideological wing". Sources say it was brief: documents went to aides, then a photo with **Trump seated, the visitors standing**. **Flávio asked Trump to designate PCC and CV as terrorist organisations.** He met Vance and Rubio the next day. The real photos showed no AI traces (Aos Fatos), but a **viral "seated" image was AI-generated** (SynthID; g1 Fato ou Fake). [V] g1; [V] Aos Fatos; [V] g1 Fato ou Fake - **The Abin assessment (as an assessment, not a finding):** - **Report:** a confidential Abin report, "*Ameaças ao processo eleitoral de 2026*", sent in late Aug to the Presidency, TSE and Justice Ministry. It raised the possibility of US influence or interference to a **"nível de criticidade"**. It describes "selective intensification and reconfiguration of US pressure… without rupture of an existing structural pattern", with escalation "since May". - **US aims, per Abin:** citing US documents (Nov 2025–May 2026), Abin says Trump's aims are to deny rival powers "access to strategic assets, natural riches and infrastructure in the region, in favour of their control, direct or indirect, by the US government or US private capital". - **PCC sanctions:** Abin calls the **July 2026 US sanctions on 2 Brazilians, 3 Brazil-based firms and 1 Portuguese firm** over PCC money laundering "a change of phase". Pressure now "falls directly on financial relations, business reputation, access to the dollar… secondary sanctions". - **Caveats:** Abin does **not** allege vote manipulation, and the TSE had seen "no concrete signs" of interference.

Revealed by Mônica Bergamo (Folha, 19 Sept 2026). [V] Folha; [V] InfoMoney; [V] Opera Mundi

- **2026 election (TSE):** first round 4 Oct: **Flávio Bolsonaro (PL) 47.03%, Lula (PT) 45.16%**, Cury 2.89%, Renan Santos 2.24%, Caiado 2.18%. **Runoff on 25 Oct.** Tarcísio did not run. [V] TSE (text read via search; direct fetch 403)
- **First-round church candidacies, same day.** In the TSE candidate file, R.R. Soares's sons finished as alternates or without a seat, Marcelo Crivella was sixth in the Rio Senate race (539,598 votes, 3.39%), and the Quadrangular-linked Minas Gerais names were alternates. In São Paulo, Gilberto Nascimento (43,977), Edna Macedo (55,086) and André Santos (71,621)

were not elected. The state assembly's evangelical front lost 10 of 31 members at the ballot. Malafaia's allies, counted by Folha, did better: Carlos Portinho (PL) was elected to the Rio Senate with 4,264,932 votes, and Samuel Malafaia is the first alternate on that ticket. The full list, the ISER/Quaest survey, and the earlier endorsements are in 7.5. **[V]** (TSE, votacao_candidato_munzona_2026); the caucus and the ally count **[V-s]** (Folha, Folha, Mônica Bergamo).

7.3 US trade pressure and security designations

- **Section 301:**
  - **Opened:** 15 Jul 2025 (90 FR 34069).
  - **Actionability:** determined 1 Jun 2026; proposed action published 4 Jun 2026 (91 FR 33854); hearings 6–7 Jul; more than 360 comments.
  - **Final action:** a **25% tariff "on all imports of Brazil, with certain exemptions"**, applying from **22 Jul 2026**. Exemptions cover goods already under Section 232 and listed products. **Scope:** digital trade and **electronic payment services**, preferential tariffs, anti-corruption enforcement, IP, ethanol and deforestation. The final notice's extracted text does not name Pix itself; the Pix-specific finding comes from USTR's fact sheet and coverage [V-s].

[V] USTR final notice; [V] Federal Register

- **The 21-demand proposal (16 Oct 2025):** see 7.4. Coverage says it asked for **"competitive neutrality"** for Pix, not its abolition [V-s]. The Revelando claim that it demanded "an end to Pix" and "amnesty" for coup convicts is **not supported** by the Estadão or Folha texts read.
- **PCC/CV terror designation:** Secretary Rubio designated both as **Specially Designated Global Terrorists on 28 May 2026** and as **Foreign Terrorist Organizations effective 5 Jun 2026** (91 FR 34267). This came two days after Flávio asked Trump for it; the designation process is normally longer, so the visit is unlikely to be the sole cause. The State Department told Metrópoles the designation gives US forces "no additional powers". Brazil's government sought to reverse it. [V] State Dept; [V] Federal Register; [V] Metrópoles
- **Not re-checked in v9:** the STF ruling on Marco Civil art. 19 (2025), X vs Moraes (2024) and Rumble/Trump Media vs Moraes. [R]

7.4 Resources

The US demand for priority over Brazil's minerals (strongest documentary evidence):

- **First proposal:** a draft "Joint Statement on Security and Economic Relations between the US and Brazil" with **21 items**, handed over **16 Oct 2025** during Foreign Minister Mauro Vieira's Washington mission (meetings with USTR Greer and Rubio). Vieira declined to discuss it. The items:
  - "*Brazil shall inform the United States of possible asset transfers before a sale in the mining/critical minerals sector and offer US companies the opportunity to participate in a fair bidding process before Brazilian regulatory approval is granted.*"
  - "Brazil commits to holding free and fair presidential elections in 2026 and will not arbitrarily detain, imprison or otherwise limit the participation of political dissidents."
  - Boeing purchases.
  - Free-speech and US-sanctions-compliance clauses.
- **Second proposal:** a slimmer **9 Jan 2026** version (7 sectors, 14 items) dropped the domestic-politics clauses. Through Greer it asked Brazil to limit "investments by non-market actors and foreign entities of concern" in mining and refining, and to **review the US$500m sale of Anglo American's nickel operations to MMG (China MinMetals)**.
- **Lula's response:** "unacceptable… a country wanting priority over our mineral wealth"; "arquivo morto" (Rádio Itatiaia, 17 Sept 2026).

- **Sources:** revealed by Estadão (Felipe Frazão, 17 Sept 2026). [V] Estadão; [V] Estadão/Lula; [V] Folha (Bergamo) quoting the election clause. The full 21-item list page was paywalled (only the header was fetched).

Serra Verde (Minaçu, Goiás), Brazil's only operating rare-earth mine:

- **DFC loan:** US$465m, raised to **US$565m** in Dec 2025, announced Feb 2026 within Vance's critical-minerals bloc package. It includes a **US option for a minority stake**. DFC investment chief Conor Coleman told the FT the loan "had offtake controls ensuring [the metals] went to the United States and US-aligned parties", "tied to our financing". [V] g1; [V] Folha/FT
- **Offtake:** on 20 Apr 2026 Serra Verde signed a **15-year, 100% Phase I offtake** with a US-government-capitalised SPV, with price floors for Nd, Pr, Dy and Tb. USA Rare Earth agreed the same day to buy the company (about US$2.8bn).
- **Pentagon money:** an 8-K (event of 21 Aug 2026) records **US$750m of US government funding to the SPV**, plus a US$500m bank facility commitment and **at least US$300m of US government forward purchases over five years**. USAR's release names the Department of War as the investor. **v8's [R] is now [V].** [V] SEC 8-K; [V] Serra Verde release (Ex. 99.2)
- **Closing:** USAR **closed the acquisition on 3 Sept 2026** (US$300m cash plus 126.8m shares). [V-s] USAR
- **Goiás vs the federal government:** Governor Caiado's team met Deputy Secretary of State **Christopher Landau** in Feb 2026 and signed a **state-level MoU with the US in March**. Federal minister Márcio Elias Rosa replied: "Brazil's subsoil belongs to the Union… and whoever establishes relations with other countries is the Union." [V] Valor International; [V] A gência Brasil

Brazil's legislative response: Lei 15.506 (16 Sept 2026) created the National Critical and Strategic Minerals Policy (PNMCE) and a coordinating council (CIMCE) at the Presidency. It aims to expand domestic processing, transformation and industrialisation, cites sovereignty and defence, and offers up to R$1bn a year in tax credits (2030–34). Whether it *mandates* local processing is not confirmed. [V-s] Planalto; MDIC

Resource base (USGS MCS 2026): world rare-earth reserves are above 75 Mt: **China 44 Mt, Brazil 11 Mt (second, about 15%)**. USGS revised Brazil down from 21 Mt. Brazil supplies about **93% of world niobium output** and is the **4th** natural-graphite producer. [V-s] USGS REE; USGS graphite; MME guide

- **Energy Fuels' Bahia Project** (17 concessions, Prado–Caravelas): closed Feb 2023 (US$27m agreed, US$21.9m paid at closing). Energy Fuels has an **MoU (Aug 2025)** to supply oxides to magnet maker **Vulcan Elements**. **1789 Capital** (Omeed Malik; Donald Trump Jr. is a partner) took part in Vulcan's US$65m Series A. This is an **indirect, three-step** link from Trump-family capital to Brazilian ore, not a stake. [V-s] Energy Fuels; Bloomberg Law

The Flávio camp's minerals offer:

- **CPAC Dallas, 28 Mar 2026:** Flávio called Brazil "America's solution to break dependence on China for critical minerals, especially rare earths", citing the 70% figure for US imports from China. He also asked for international diplomatic pressure on Brazil's election. [V-s] Nexo
- **The "Prosperity Partnership" deck (re-labelled in v9):**
  - **Author: André Marinho** (Novo candidate for Rio governor; son of **Paulo Marinho, Flávio's Senate alternate**). A 22-page English deck dated **19 Mar 2026**, branded "Flávio Bolsonaro | 2026 Campaign".
  - **Contents:** six pillars, including licensing acceleration, US-backed demand and price stability, domestic processing, US capital, and a US-aligned "critical minerals club".
  - **Marinho's account:** he confirms authorship but calls it a "hypothetical exercise". He says it was **not sent to the campaign or to any US official** and that the campaign did not commission it.

    - **Meetings:** he met **VP Vance in early April**, a meeting brokered by RFK Jr., the father of his brother-in-law. He says they discussed organised crime. He also says he visited Rockbridge in Dallas in March to discuss a Brazilian arm, an idea dropped in May.

[V] CNN Brasil (authorship and denial); [V-s] EM; Opera Mundi (original: Amado Mundo, not directly reachable)

- **Rockbridge Brazil LLC (new in v9):**
    - **Registration:** incorporated in **Wyoming on 12 May 2026**. Organiser: **Chris Applegate**, described by the NYT and Folha as the Vance aide who manages donor relations and advises the RNC and Rockbridge. A Faria Lima consultancy helped; Cogency Global is the registered agent. Owners are undisclosed.
    - **Pedro Sang:** a "Technology Council" document names him as CEO of Rockbridge Brasil and says the council would help the Flávio campaign. Folha's six campaign sources say he produced monitoring reports and used an office at Flávio's São Paulo HQ.
    - **Denials and filings:** Sang denies being part of Rockbridge or having a campaign role and says the plan has been suspended since May. The PT and Missão have filed petitions with the TSE and STF. **No evidence of money transfers has been published.** The 27 Oct order is Direction 6.6.

[V-s] Folha, 26 Sept; Folha, 1 Oct; Intercept Brasil; [V] CNN Brasil (PT petition)

- **Eduardo** offering minerals: not found. [U]

Oil: Ibama gave Petrobras an operating licence on **20 Oct 2025** for the exploratory well in block FZA-M-059 (175 km offshore, 500 km from the Amazon mouth; about 5 months; "does not authorise any production activity"), with 29 conditions. **This was a Lula-government decision.** [V] Valor; [V] g1; [V] O Globo

Regional pattern (pressure → aligned ruler → resource instrument), from primary or mainstream sources:

Country	Pressure / political event	Resource instrument	Label
Venezuela	US operation captures Maduro, 3 Jan 2026; Delcy Rodríguez is "interim" leader; Feb 2026 OFAC easing for oil majors [V-s, Reuters 401]	**31 Aug 2026** (signed by Rubio and Hegseth): 100-year concessions for 17 fields (about 65bn bbl) to the private **NABEP**. The US Department of War's Office of Strategic Capital gets **35% of NABEP's parent**, a board veto, and 20% of off-take at production cost. Caracas and PDVSA say **25 years** (the 2026 law caps contracts at 25+15). NABEP is Barbados-based and headed by Alejandro Betancourt.	[V-s] White House; Transparencia Venezuela; EncuadreVe
Argentina	Trump, 14 Oct 2025: "If he loses, we are not going to be generous with Argentina" (US$20bn support)	US–Argentina critical-minerals framework, **4–5 Feb 2026**	[V-s] Guardian; State Dept
Colombia	Trump-endorsed Abelardo de la Espriella wins, 21 Jun 2026 (49.66%); inaugurated 7 Aug	Critical-minerals and civil-nuclear MoUs signed by Rubio in **Barranquilla, 8 Sept 2026**	[V-s] AP; State Dept
Brazil	Tariffs (2025), Section 301 (2026), sanctions (lifted), 21 demands (refused), PCC/CV designation, Abin "critical"	DFC loan, Pentagon-backed offtake, USAR takeover of Serra Verde, Goiás MoU; **no federal minerals deal**	as above

The Venezuela cell above records a 35% stake for the Department of War and a Barbados vehicle headed by Alejandro Betancourt. ProPublica's reading of the agreement, 20 Oct 2026, is more precise about the form. The US–NABEP oil pact gives Washington a 35% warrant stake in Alejandro Betancourt's firm through a Barbados parent whose investors need not be disclosed, with disputes

settled in North Texas federal court. **[V-s]** (ProPublica). The warrant is how the stake is taken. It is not a finding that any Brazilian campaign was paid from it.

Context: the US–Israel strikes on Iran began **28 Feb 2026** and Iranian state media confirmed Khamenei's death. [V-s] Reuters; NPR. Trump's reported remarks on Iranian oil and "20 tankers" are [R].

7.5 Evangelicals

- **Frente Parlamentar Evangélica:** 219 deputies and 26 senators in 2025. President Gilberto Nascimento (PSD-SP) beat Otoni de Paula 117–61 in its first contested election. [V] Câmara. The 2026 count (213 + 26) is [V-s]: the register page was fetched but the count was not parsed. The FPE is a sign-up register, not a voting bloc.
- **Voting (Datafolha, 1 Oct 2026, total votes):** among evangelicals, **Flávio 52% vs Lula 26%** in the first round and **62% vs 32%** in a runoff. Among Catholics, Lula 50% vs 32%, and 55% vs 38% in a runoff. Margin: ±4 pts for evangelicals, ±3 for Catholics. [V] Folha. **About a third of evangelicals back Lula.**
- **Christian Zionism (leadership level):**
  - Scholarship traces a dispensationalist Christian Zionism in Brazil, shaped by US pre-millennialist influence, Holy Land pilgrimages and the New Apostolic Reformation. **Silas Malafaia**, René Terra Nova and Valnice Milhomens are named as leading Christian Zionists, whose discourse became openly Zionist in the 2000s.
  - Universal's (IURD) **Temple of Solomon** is read as **"Judaising" and philo-Semitic** rather than political Zionism. At its opening Macedo dressed as a rabbi but "made no defence of the State of Israel nor reference to the end times".
  - Pastor Caio Fábio is a dissenting voice who criticises Israel's "expansionist project".

[V] SciELO, *Genealogia do sionismo evangélico*; [V] BBC Brasil (Israeli flags at rallies, the term "Christian Zionism")

- **The Jerusalem embassy pledge shows material interests overriding theology.** On 31 Mar 2019 Bolsonaro **retreated** from moving the embassy and announced a trade office instead. G1 reports this followed objections from **the government's military wing and agribusiness (ruralistas)**, who feared a "billion-real loss" with Arab buyers of Brazilian beef and chicken. The Apex office opened on 15 Dec 2019 with Netanyahu and Eduardo present; Eduardo called it "the first step" toward moving the embassy, which never happened. [V] g1; [V] Agência Brasil
- **Lagoinha** (Belo Horizonte megachurch network): its pastor Zettel is the money link between Vorcaro and Jair's 2022 campaign (7.1). This is a **religious-institutional node inside the patronage network**, not evidence of theological motive.
- Even a right-wing ex-minister, General Santos Cruz, names **"vigarice religiosa"** (religious swindling) as a national danger. This is opinion and targets leaders, not believers.
- **Still unchecked in this pass:** Record's runoff coverage, Damares's current role, and organised anti-Bolsonaro evangelical groups beyond the Frente already in 7.12. **[U: not fetched]**.

Worshippers and the pulpit (ISER/Quaest, Jan–Feb 2026)

The figures below come from the ISER/Quaest survey. The candidate totals come from the TSE open-data file for the 4 Oct first round. A church-press count is marked separately.

- **Survey.** ISER and Quaest, *Religião e Vida Pública no Brasil*: 15,000 face-to-face interviews in 412 municipalities, fieldwork 14 January to 10 February 2026, margin of about one point. Evangelicals are 29% of the population in this survey, and 70% of those evangelicals are Pentecostal. **[V]** (ISER/Quaest PDF).

- **Against using the service as a campaign.** Among people who have a religion, 83% oppose leaders indicating a vote, 82% oppose political discussion in services, and 90% oppose campaigning in churches. **[V]** (ISER/Quaest PDF).
- **What people recall from 2022.** 11% said they were told to vote for Bolsonaro and 5% for Lula. Among Pentecostals the recalled instruction was 23%, and among Protestants 20%. In the Universal Church the split was 27% for Bolsonaro and 12% for Lula. **[V]** (ISER/Quaest PDF).
- **Guns, by the report's own breakdown (p. 63).** Opposition to making purchase or ownership easier: Pentecostals 68%, Protestants 64%, evangelicals without a church 67%. **[V]** (ISER/Quaest PDF).

The survey describes respondents. A large majority of people with a religion reject the pulpit as a place that directs a vote. Recalled instruction in 2022 was a minority practice, higher in Pentecostal churches, and more often for Bolsonaro than for Lula. The gun answers are a policy preference inside that population. They are not a decision taken by a leadership.

First-round candidacies (TSE file, 4 Oct 2026)

- **R.R. Soares's sons.** All finished as alternates, or without a seat. David (federal deputy, São Paulo, Podemos) 61,366 votes. Daniel (state deputy, São Paulo, União) 53,812. Marcos (federal deputy, Rio de Janeiro, PSDB) 23,228. Filipe (state deputy, Rio de Janeiro, PSDB) 19,284. André, first alternate on Waguinho's Senate ticket, which took 116,453 votes and was not elected. **[V]** (TSE, votacao_candidato_munzona_2026).
- **Marcelo Crivella** (Republicanos), Rio de Janeiro Senate: 539,598 votes, 3.39%, sixth. **[V]** (TSE, votacao_candidato_munzona_2026).
- **Quadrangular-linked names in Minas Gerais.** Leandro Genaro (state deputy, PSD) 40,423. Flamarion Rolando (federal deputy, PSD) 28,135. Stefano Aguiar (federal deputy, PSD) 20,205. All three are alternates. **[V]** (TSE, votacao_candidato_munzona_2026). A church-press count says no Quadrangular-linked candidate was elected in Minas Gerais. That count prints 40,023 for Genaro and places him in the federal race. This edition uses the TSE file. **[V-s]** (Itabira Gospel).
- **São Paulo losses in the same file.** Gilberto Nascimento (federal deputy, Podemos) 43,977. Edna Macedo (state deputy, Republicanos) 55,086. André Santos, a Universal bishop (federal deputy, Republicanos) 71,621. None was elected. **[V]** (TSE, votacao_candidato_munzona_2026, g1).
- **The São Paulo assembly caucus.** Of 31 members of the state assembly's evangelical front, 10 were not re-elected. Two others won federal seats, so the loss of state seats is larger than those 10. **[V-s]** (Folha).
- **Malafaia's counted slate.** Folha's Mônica Bergamo column of 8 October, using a count supplied by his allies, reports that 20 of 36 Senate candidates he backed won, and about 27 winners in all. **[V-s]** (Folha).
- **Names in the TSE file on that side of the result.** Carlos Portinho (PL) was elected to the Rio Senate with 4,264,932 votes. The first alternate on his ticket is Samuel Malafaia, the pastor's brother. Sóstenes Cavalcante, 170,290 votes, elected. Alexandre Isquierdo, 83,461 votes, elected. Feliciano, 122,119 votes, elected. **[V]** (TSE, votacao_candidato_munzona_2026).

Church-brand candidacies in the list above did not take a seat. The wins the allies' count gives to Malafaia ran through the PL and through candidates who were not standing as a church's own ticket, apart from his brother sitting as alternate on an elected Senate slate. That is a party network and a personal one. The ISER shares are a reason to keep those wins separate from a bloc of worshippers.

- **Endorsements moved with the election.** In 2002 Malafaia asked for votes for Lula. Folha republished the recording in 2024, and he confirmed the support. **[V-s]** (Folha, 10 Oct 2024). On 28 September 2010 he backed José Serra. **[V-s]** (Folha). In 2010 Edir Macedo backed Dilma, and a Universal service asked worshippers to vote for her. **[V-s]** (Folha, 30 Oct 2010).

Robson Rodovalho, of Sara Nossa Terra, later told Folha that he had endorsed Dilma in that election. **[V-s]** (Folha, 16 Jan 2026).

These are leadership decisions in different years. They show an endorsement that switched. They are not a theology of the people in the pews.

The last Datafolha evangelical subsample, already in 7.12, is unchanged: Flávio 70% and Lula 30% of valid votes. **[V]** (UOL, reporting Datafolha). The last national Quaest had Flávio at 51% and Lula at 49% of valid votes, against a closed result of Lula 51.79%. **[V-s]** (g1, reporting Quaest). The count is **[V]** (g1).

7.6 Regional network

- **Eduardo and Bannon:** CEBRI says Eduardo was chosen by Bannon as **The Movement's representative for Latin America**; v8 said "South America", now corrected. They first met in New York in 2018. Agência Pública counted **125 meetings with continental far-right figures** and covered Eduardo amplifying Bannon's attacks on electronic voting at CPAC Mexico (Nov 2022). He signed the **Madrid Charter** (Vox/Abascal's Fundación Disenso, Oct 2020). [V] CEBRI; [V] Pública
- **CPAC Brasil 2024** (Balneário Camboriú, 6–7 Jul 2024): the PL's Instituto Álvaro Valle paid **R$250k** on 1 Jul 2024 into the Instituto Conservador Liberal chaired by Eduardo. [V] PlatôBR. Gettr's sponsorship of 2022–23 events was not confirmed in the fetched text and is downgraded to [R].
- **Atlas Network:** partner institutes and their leaders formed a triangle with the Bolsonaro economic team. The study calls Atlas "a tool of US hegemonic maintenance". [V] SciELO RBCP. Atlas is libertarian and secular, so the tie to the evangelical bloc is a coalition, not shared theology.
- **New in v9: the Rockbridge Network** (co-founded by Vance in 2019; members include Peter Thiel per Nexo) attempted a Brazilian arm in 2026 (7.4). This connects Direction 7 to the report's US actors.
- **Milei and the Colombian election:** Milei campaigned for Flávio (Gazeta headline) [R]. The Trump-endorsed Colombian win is covered in 7.4.

7.7 Thesis-test table (v9)

Claim	Evidence	Verdict	Sources
Master shows Bolsonaro-family ties to a fraudulent bank	Flávio's "Dark Horse" money (at least R$61m; under investigation). The Zettel R$3m donation. The PF's Havengate hypothesis on Eduardo (denied)	**Supported** (documented ties; criminal liability not established)	Câmara, g1, BBC, Folha
Master is a *far-right* scheme	The ties run through the Centrão, MDB, PL, the PT orbit and the STF	**Unsupported as framed** (cross-party patronage)	Folha, Bloomberg Línea
The Bolsonaro movement endangered Brazilian democracy	Final coup conviction (27y3m); Eduardo convicted for coercion via foreign sanctions	**Supported** (court judgments, contested by the defendants)	STF
The US acted to shield Bolsonaro	Tariff letter and EO citing "persecution" (and Figueiredo), Magnitsky sanctions. The 21-demand election clause. Lifted Dec 2025, then partly revived (sanction threats, Abin "critical")	**Supported, transactional and reversible**	White House, BBC, Estadão, Folha

Claim	Evidence	Verdict	Sources
US pressure is aimed at resources	**The written US demand for priority over Brazilian mineral-asset sales** (Oct 2025) and the anti-China mining clause (Jan 2026). The Pentagon/ DFC lock on Serra Verde output. Abin's reading. But Section 301's grounds are payments, digital trade and ethanol	**Supported in part. Resources are an explicit, documented aim alongside payments and Big Tech** (v8: "partly")	Estadão, SEC 8-K, USTR
Far-right alignment is traded for resource access	Flávio's CPAC offer ("America's solution"). A campaign-branded minerals deck (author denies any campaign link). Rockbridge Brazil LLC alongside the campaign (denied; no money shown). Caiado's state MoU. The regional sequence (Argentina, Colombia, Venezuela). **No signed quid pro quo**; the US also extracted the DFC/offtake deal under Lula	**Partly, with direct evidence that the US linked minerals to Brazilian political conditions**	Estadão, Nexo, CNN Brasil, Folha, State Dept
Oil is the motive in Brazil	Equatorial Margin drilling was licensed by the Lula government; Petrobras is a state company	**Unsupported for Brazil**	Valor, g1
Oil is the motive in Venezuela	After Maduro's capture, a 100-year (disputed) concession deal with a 35% US Department of War stake and cost-price off-take	**Supported**	White House fact sheet
Christian Zionist evangelicals are a backing force	52–62% of the evangelical vote for Flávio, a large FPE, documented Christian Zionism among leaders. But a third back Lula, and **the embassy pledge was dropped for agribusiness interests**	**Partly** (leadership-level ideology and electoral weight; ideology gives way to material interests in policy)	Datafolha, SciELO, g1
A coordinated transnational far-right network exists	Bannon's Movement, CPAC, the Madrid Charter, Atlas, Rockbridge's Brazilian attempt	**Supported (as a network, not a command structure)**	CEBRI, Pública, Folha

7.8 What this doesn't show

- **No conviction or charge against any named politician in the Master case.** Vorcaro has not been convicted. PF hypotheses (Havengate, Ciro's payments, Ibaneis's role, Moraes's contract edits) are investigative findings, and the people named contest them.
- It does not show the Master fraud was organised **for** the far right or **for** resource access. It shows a bank buying protection across the spectrum. The one far-right-specific thread, Havengate, is unproven.
- **The 21 demands were made to Lula's government and rejected.** They show US *intent* to tie minerals to politics, not Bolsonaro *agreement*. Flávio's camp has publicly offered alignment, but no deal exists.
- Rockbridge: a company registration and one person's reported role are **not** evidence of campaign financing. The PT's and Missão's allegations are unproven.
- Evangelical theology does not drive the minerals or trade decisions in the documents examined. The drivers there are US–China industrial strategy and US payments and platform interests.
- The *Revelando* episodes are campaign advocacy. Several of their specific claims were wrong or overstated.

7.9 Murky items (34–53)

1. **Moraes's household contract with Master (R$130m).** File metadata shows a last edit by "Ministro Alexandre de Moraes" (11 Jan 2024), and the contract covered "strategic consultancy" on PF inquiries. 52 messages from Vorcaro were unsealed. *PF report; no charge; the firm denies any impediment.*
2. **Toffoli's negotiated exit.** The PF pointed to his suspicion; the STF unanimously found no grounds. *Documented.*

3. **The PF says the network reached BC directors and PF agents.** *PF finding (Agência Brasil).*
4. **The CPMI was blocked** although creation is automatic once signatures are met. *Documented; the "acordão" (backroom deal) claim is an allegation.*
5. **(Corrected in v9)** Chinaglia (PT) said Flávio's audio was sent "two days before" Vorcaro's arrest. The Câmara, g1 and Intercept date the audio to **September 2025**, while the arrest was 17 Nov 2025. *Contradiction; the timing claim is unsupported* (downgraded from "reported").
6. **The Lagoinha pastor Zettel** links Jair's top 2022 donation to the alleged intimidation group. *Donation documented; the intimidation is a PF allegation.*
7. **Trump renewed an emergency order the US Supreme Court had struck down.** *Documented.*
8. **A US stake option and offtake controls over Brazil's only rare-earth mine**, then a Pentagon-funded SPV taking 100% of Phase I output for 15 years, then a US takeover. *Documented (FT/Folha, SEC 8-K).*
9. **The US tied mineral-asset priority to Brazil's election conditions in one draft** (16 Oct 2025), revealed 11 months later. *Documented (Estadão; Folha quotes the clause).*
10. **Abin rated US interference risk "critical"** and read US aims as control of "natural riches". *Documented assessment (leaked).*
11. **The PCC/CV designation came two days after Flávio asked Trump for it** (26 → 28 May 2026). *Documented timing; causation not shown.*
12. **The photo-op** (Trump seated, visitors standing) was arranged by a brother on trial for organising foreign sanctions, during the Dark Horse crisis, and an AI fake image circulated before the real photos. *Documented.*
13. **The campaign-branded minerals deck** was written by the son of Flávio's Senate alternate, followed by a Vance meeting brokered by RFK Jr. *Documented; the author denies any link to the campaign or to officials.*
14. **The viral AI image of Flávio and Eduardo "seated" with Trump**: its source is unknown. *Documented fake (SynthID).*
15. **Havengate:** Vorcaro-linked money went to a dormant Texas fund run by Eduardo's lawyer, with a PF hypothesis that it funded the sanctions campaign. The PF reports a "severe accounting divergence". *Investigation; denied; no charge.*
16. **Rockbridge Brazil LLC** was organised in Wyoming by a Vance aide, with no owner disclosure, while its reported Brazilian CEO worked from Flávio's HQ. *Registration documented; role reported and denied; no money shown.*
17. **The White House cited Paulo Figueiredo** as a free-speech victim in a national-emergency order. He has a tax-debt register entry and a pending coup charge. *Documented.*
18. **The US Department of War owns 35% of a Barbados-based private company holding Venezuelan oil concessions.** Washington says 100 years; Caracas says 25. *Documented contradiction.*
19. **Minerals instruments followed political alignment** in Argentina (Feb 2026, after the conditional bailout) and Colombia (a month after inauguration). *Documented sequence; it supports a pattern, not proof of coordination.*
20. **Ibaneis's law firm sold fee receivables to a fund of the investigated Reag group** (May 2024), close in time to the Master–BRB operations. *Documented (Folha/O Globo); his defence says he has been away from the firm since 2018.*

7.10 Opinion sources (cited as opinion only)

- **General Carlos Alberto dos Santos Cruz** (retired, former Bolsonaro minister, self-described right-winger), interviewed by Bruno Torturra for *Revelando* (recorded about 22 Sept 2026). He calls the Bolsonaro camp's pursuit of US intervention "treason", "voluntary submission" and "vigarice", and says the Goiás rare-earth arrangement "needs to be reviewed".
- **Wagner Moura's *Revelando: Pátria Submissa*** (16 Oct 2026) frames the same facts as a "plot to loot Brazil".

- **Channel:** Calma Urgente, distributed with ICL, Mídia Ninja, 342 Artes and Intercept Brasil. Openly anti-Flávio campaign journalism.
- **How they are used here:** none of their claims is relied on without independent sourcing. See the two video files for the claim-by-claim checks.
- **Ronilso Pacheco, Intercept Brasil, 21 Oct 2026.** An opinion essay on the evangelical vote. It argues that there is no bloc and that leadership campaigning was a strategy. It is commentary. The survey figures and the candidate totals in 7.5 are taken from the ISER PDF and the TSE file, not from this essay. (Intercept Brasil).

7.11 Gaps

- Reuters pages (Venezuela OFAC easing, Iran) returned 401.
- The full 21-item Estadão list was paywalled (header only).
- The ConJur PDF on Eduardo's sentence start returned 403. Amado Mundo was not reachable.
- The statute text of Lei 15.506: does it *mandate* domestic processing?
- Who ran each RPPS institute that bought Master paper.
- Whether Jair's humanitarian house arrest was extended after 90 days.
- STF Marco Civil, X and Rumble items.
- Evangelical leaders' current roles; anti-Bolsonaro evangelicals.
- The Milei–Flávio campaign link.
- Primary sources for Trump's Iran-oil remarks.
- The runoff result (25 Oct). Closed in v13. See 7.12.

7.12 Runoff update (26 Oct 2026)

This section is the scheduled update. It does not replace 7.1–7.11. Figures are those of the TSE results file closed at 23:26:38 on 25 Oct 2026 (Brasília time), as displayed by the TSE application and repeated by g1 and BBC News Brasil. The application is client-side, so a fetch of the page shell does not contain the numbers. A night-of note of 51.78% and 64,224,880 votes does not match the closed file, and it is not used. The cash session of 26 Oct is in this section. Police findings are not charges. The flight, the letter and ADPF 1178 were added on 28 Oct.

The count

Lula (PT) was re-elected to a fourth term. Flávio Bolsonaro (PL) led the first round and lost the second. The closed file, 100% of 499,248 sections:

- Lula, 64,256,232 votes, 51.79% of valid votes. **[V]** (g1, BBC News Brasil, TSE results application).
- Flávio Bolsonaro, 59,826,041 votes, 48.21%. Margin on the valid vote: 4,430,191. One g1 sentence prints 4,392,907. That figure does not equal these two totals. The edition uses the subtraction. **[V]** (g1, BBC News Brasil).
- Valid votes 124,082,273. Blank 1,430,496 (1.12%). Null 2,723,305 (2.12%). Turnout 128,236,074 (80.78%). Abstention 30,509,005 (19.22%) of an electorate of 158,745,502. g1 rounds abstention to 19.21%. **[V]** (g1, BBC News Brasil).
- First round, already in 7.2: Flávio 47.03% (56,104,503), Lula 45.16% (53,879,538). Lula added 10,376,694 votes. Flávio added 3,721,538. Together that is 14,098,232 votes, which rounds to 14.10 million. Rounded the same way, Lula gained 10.38 million and Flávio 3.72 million. BBC calls it the first comeback between rounds in a Brazilian presidential election. **[V]** (BBC News Brasil, g1, TSE).

Those extra ballots are not new voters invented on the night. They are the first-round vote for candidates who did not reach the runoff, plus people who had stayed home, plus a smaller blank and null vote. Abstention fell from 21.08% to 19.22%. BBC News Brasil describes that fall as the largest between rounds since 1989. **[V]** (BBC News Brasil).

The box is the accounting. The three legs are rounded to hundredths of a million and sum to the rounded combined gain of 14.10 million. The candidate totals above are the exact figures.

Line	Figure	Label
Votes for candidates eliminated in round one	9.32 million	[V] BBC News Brasil
More voters the second time (abstention 21.08% to 19.22%)	2.96 million	[V] BBC News Brasil
Fewer blank and null ballots	1.82 million	[V] BBC News Brasil
Sum of those three legs	14.10 million	[V] g1
Lula's gain, exact	10,376,694	[V] g1
Flávio Bolsonaro's gain, exact	3,721,538	[V] g1

Elon Musk posted that the math did not add up. The post drew about 7.3 million views. **[R]**. Eduardo Bolsonaro called the gain statistically impossible. That claim is checked in the polls subsection below. A runoff is not a second printing of the first round. The eliminated candidates, the lower abstention and the smaller blank and null vote are large enough to hold the gain. The impossibility claim treats a different electorate as if it were the same one.

g1 reports that the TSE called the result at 21:08 São Paulo time, while the official file closed at 23:26. Both times are in the record. **[V]** (g1).

Where the votes moved

Lula won 13 states. Flávio won 13 states and the Federal District. Lula took every northeastern state, plus Amazonas, Amapá, Pará and Minas Gerais. Flávio took the South, the Centre-West, the Federal District, and São Paulo, Rio de Janeiro and Espírito Santo. **[V]** (g1).

The closest large state was Minas Gerais: Lula 50.43%, Flávio 49.57%. Piauí was Lula's strongest state, at 75.88%. Roraima was Flávio's, at 72.46%. Bahia, where the bus dispute was sharpest, went to Lula by 71.31%. **[V]** (g1).

Regional totals, read off a panel that says it uses the TSE file, are **[V-s]** until added from the bulk file itself (panel):

- Northeast: Lula 69.37% (24,450,432), Flávio 30.63% (10,796,736). **[V-s]** (panel).
- North: Lula 50.01% (5,024,626), Flávio 49.99% (5,023,547). A few hundred votes. **[V-s]** (same panel).
- Southeast: Flávio 52.76% (26,844,501), Lula 47.24% (24,037,731). **[V-s]** (same panel).
- South: Flávio 62.58% (11,385,893), Lula 37.42% (6,809,370). **[V-s]** (same panel).
- Centre-West: Flávio 60.01% (5,603,867), Lula 39.99% (3,733,919). **[V-s]** (same panel).

The national result is the sum of valid votes, not a count of states. Flávio's map was wider. Lula's margins in the Northeast were larger.

The voting day

Buses were held back in Salvador, Feira de Santana and Lauro de Freitas. Procon-BA found 944 buses parked in nine garages and at least 75 prevented from leaving. **[V-s]** (g1). Mayor Bruno Reis (União Brasil) blamed PT stickers that owners had ordered removed, and said service was normal by mid-morning. **[V-s]** (g1). He is not a Bolsonaro-party mayor. Whether other capitals did the same, and how many voters missed the close, was not established **[U: unconfirmed]**. A claim of a Northeast flight boycott does not survive the aviation figures cited against it (about 0.9% of flights cancelled, a normal day) and is left out.

The Federal Police opened an inquiry in Sergipe and preliminary procedures in Bahia, São Paulo, Alagoas and Piauí, for obstructing the vote. **[V-s]** (Correio). Who gave the order is contested between

city hall, the concessionaires and the unions **[U: contested]**. Nothing published shows a federal Flávio campaign order.

Both campaigns asked for more time. Lula's campaign went to the Supreme Court over transport. Flávio's campaign asked the TSE for extensions in São Paulo and parts of the South, citing rain. **[V]** (BBC News Brasil). Justice Cristiano Zanin, drawn as rapporteur, ordered voting extended to 19:00. The decision reached the press at about 17:03, after the statutory close. Closed machines cannot be reopened. Kassio Nunes Marques, the TSE president, had not issued an extension before 17:00. He later told regional courts to apply the extension only where stations were still open. **[V]** (Folha, g1).

g1 counts 35,521 votes cast after 17:00. That is the entire population of the extension, set against a margin of 4.43 million. **[V]** (same g1). Kassio said the extension changed nothing in the count, and that he had "absolute security" in the process. **[V]** (g1, Folha).

Flávio called the result "sacanagem", said it was "impossible" to recognize it, and said his lawyers would seek annulment. He described Zanin, Lula's former lawyer, as changing the rules during the game. **[V]** (Agência Brasil, BBC News Brasil). His own campaign had asked for a longer day in the South and Southeast. No annulment petition was found filed by the morning of 26 Oct **[U: unconfirmed]**. TSE ministers, speaking anonymously, told g1 the challenge should not prosper, because of the margin and because the extension did not alter the total. **[R]** (g1). Folha reported that Kassio intended to align with Supreme Court president Fachin so that unfounded challenges would not proceed. **[V-s]** (Folha).

Kim Kataguiri (MBL) was reported as the first elected official to call for annulment on procedural grounds, without assigning the benefit to either side. **[R]**. Nikolas Ferreira ("we win, or we win") and Lucas Pavanato ("we do not accept losing"), posted in the hour before the close, are a pre-delegitimation pattern. Coordination is not shown **[U: not shown]**. Pavanato's office was not re-checked against the chamber roll in this pass **[U: not fetched]**.

Flávio's claim that PL inspectors were removed from the TSE "sala-cofre" during the count was denied by the court: the strongroom is not open to visitors, and the totalisation room stayed open to party inspectors, observers, lawyers and prosecutors. **[V-s]** (Folha's account of the TSE note).

English-language posts that the election "could be annulled", or that a coup was under way, are contested commentary. A 4.43 million margin is the fact that makes annulment implausible. They are not evidence **[R]**.

After 26 October

On 26 Oct the PL recognized the result while still pressing its questions. The note is signed by Valdemar Costa Neto. **[V-s]** (g1). Poder360, quoting the campaign, says the annulment request was not being pursued and that the legal path had shifted to an electoral investigation of political and economic abuse. **[V-s]** (Poder360). CNN Brasil, citing anonymous sources, says Flávio Bolsonaro dropped the annulment request and is pursuing about 20 cassation actions. **[R]**. Cassation is a case against a particular candidacy or a particular section. It is not an annulment of the national count.

Kassio Nunes Marques affirmed the result. The PL and the running mate, Alfredo Gaspar, accept it. **[V-s]** (g1).

From Miami, Flávio Bolsonaro released a letter on 28 Oct calling himself Brazil's "true president-elect". Its first version carried the pre-1968 "Estados Unidos do Brazil" crest. It was reissued within minutes, and a later version called him only "leader of Brazil". **[V-s]** (O Globo, O Globo, the crest). O Globo, Metrópoles and CNN Brasil carried the letter. Its fraud claim conflicts with TSE data. Justice Zanin extended voting to 19:00. g1 counts 35,521 votes after 17:00. A figure of about 34,400 for the same hours, used against the letter, is the same order of magnitude. Both are under 1% of Lula's margin of 4,430,191. **[V-s]** (g1, O Globo).

The flight, the aircraft and the ANDIS case are in Direction 6.3. Perfil reports that an unnamed US broker arranged and paid about US$140,000, not Flávio Bolsonaro directly. **[R]** (Perfil). Who that intermediary is, and who funded it, remains open. **[U: unconfirmed]**.

A Federal Police request for searches, backed by the PGR, was before Justice Alexandre de Moraes. A UOL headline said he denied it. The same article then said the court had recorded no decision, and that the operation did not go out. The outcome is unclear. **[U: unclear]** (UOL).

The WhatsApp channel

The channel called "Exército do Lula" is run by André Janones, a deputy from Minas Gerais (Rede-MG). It is a campaign list. The military word in the name is branding. It reached 10 million followers on 23 Oct, as Poder360 reported, and 10.8 million in the figure BBC carried. **[V-s]** (Poder360).

The channel sent share missions, ran a 24-hour livestream, and was addressed by Lula as "our General". That is turnout work: a deputy with a large list asking supporters to forward messages. It is not a command structure, and it does not show that the messages changed a measurable number of votes.

On 11 Oct, TSE president Kassio Nunes Marques suspended the channel at Flávio Bolsonaro's request. On 14 Oct he restored it, once it was registered as a campaign channel. **[V]** (Folha). The court's own inspector had refused an earlier takedown. Floriano de Azevedo Marques later ruled that any new takedown had to go to the full court. **[V]** (Folha).

Meta found no policy violation. **[V-s]** (G1, Exame). A viral post claimed the channel had broken a Meta blockade. That description is misleading. The block that mattered was a court order, and the court lifted it when the channel's legal status changed. Meta's rule book is a different instrument from a TSE decision.

A Japanese-language thread added pyramid groups, a Telegram relay and a fact-check bot. Those details are unverified. **[U: unverified]**.

Holzhacker and Goulart, commenting on the channel, say its effect on votes cannot be measured, and that mobilisation in the street mattered. **[R]**. A forwarding list can raise the supply of a message. It does not, by itself, tell you how many ballots moved.

Polls, prediction markets, and the evangelical vote

No exit poll was found. **[U: unconfirmed]**. The last Datafolha, interviewed 23–24 Oct and registered as BR-09540/2026, had Flávio at 51% of valid votes and Lula at 49%, inside a two-point margin. Among evangelicals (28% of that sample) the same survey had Flávio 70% and Lula 30%. Among Catholics, Lula 56% and Flávio 44%. **[V]** (UOL, reporting Datafolha). An earlier Datafolha, 20–22 Oct, had evangelicals at 73% to 27% of valid votes, with a four-point margin on that subgroup. **[V]** (Folha). Quaest, 17–20 Oct, had Flávio at 58% and Lula at 30% among evangelicals on total intentions, a different base from valid votes, so the two series should not be averaged. **[V-s]** (UOL).

About 30% of evangelical respondents in the last Datafolha were with Lula. That is a large minority inside the group 7.5 already separated from the leadership. It is not a bloc vote.

The last national Quaest, interviewed 23–24 Oct and registered as BR-09158/2026, had Flávio at 51% of valid votes and Lula at 49%, inside a two-point margin. The closed file has Lula at 51.79%. The survey and the count sit on opposite sides of a tie that margin does not settle. The evangelical subsample above, 70 to 30, is a different population from this national reading, and the two are not averaged. **[V-s]** (g1, reporting Quaest). The count is **[V]** (g1).

Eduardo Bolsonaro's English video tells foreign audiences not to recognize the election and asks for international pressure. It does not name a US official or the Bahia buses. **[R]** (the post). Three of its claims do not survive a check. Polymarket prices are bets, not polls. AFP reported the Brazilian right

treating odds near 77% for Flávio as if they were a survey, and Polymarket told AFP they are not polls. The market was wrong. **[V]** (AFP). "Fourteen of fifteen polls had Flávio winning" was not re-tallied poll by poll here **[U: not fetched as a full set]**. The last Datafolha and the last Quaest were both 51–49 on valid votes, with Flávio ahead. That is not an 80% forecast. The Quaest reading is the paragraph above. "Lula's gain of about 11 million, 20%, is statistically impossible" treats a runoff as a repeat of the first round. The gain was 10.4 million, from other candidates' votes and from people who had stayed home. **[V]** (BBC and g1, above). The claim is contested by that arithmetic **[U: contested]**.

Evangelical leadership, and the Digimais seat

Leaders and worshippers are different populations. The vote shares above are survey estimates of worshippers. The decisions below are institutional.

Republicanos, the party in the Universal Church's orbit, formally backed Flávio on 7 October. The backing was not a blank cheque. Northeastern members allied with Lula were left free, and the party's stated stake was the presidency of the Chamber in February 2027. Tarcísio de Freitas brokered the meeting. **[V-s]** (g1, Folha). The Universal Church itself told pastors not to endorse either candidate, and stayed out of the pro-Flávio church effort. **[V-s]** (CartaCapital). A motive tied to Digimais's balance sheet is speculation **[U: unconfirmed]**.

The public symbolism of that church's leadership is documented and stays with the leadership. BBC Brasil records Israeli flags at evangelical rallies and the term Christian Zionism applied to named pastors, Silas Malafaia among them (BBC News Brasil) **[V]**. The scholarship already used in 7.5 reads the Temple of Solomon as Judaising and philo-Semitic, and records that at the opening Edir Macedo dressed as a rabbi but made no defence of the State of Israel and no end-times claim (SciELO) **[V]**. That is a description of a church's leadership and its building. It is not a description of evangelicals at large, and it is not an ethnic or religious network.

On the other side, the Frente de Evangélicos pelo Estado de Direito endorsed Lula from the first round. **[V-s]** (O Globo). Valdemiro Santiago hosted Flávio and Tarcísio. R.R. Soares said on 22 Oct that he would vote for Flávio. Michelle Bolsonaro, elected senator for the Federal District, had worked church contacts in August and then stayed near Brasília during the runoff, close to Jair's house arrest. **[V-s]** (Folha, O Globo). On runoff day Malafaia accused the PT of trying to win in the courts after Zanin's extension. **[V-s]** (Estado de Minas). Record's coverage, and several leaders' legal situations, were not re-checked **[U: not fetched]**.

The first-round file, set out in 7.5, splits the same leadership map into results. Church-brand names, including R.R. Soares's sons, Crivella, and the Quadrangular-linked Minas Gerais candidates, finished as alternates or without a seat. The TSE file also shows Carlos Portinho elected to the Rio Senate, with Samuel Malafaia as first alternate, and Sóstenes Cavalcante, Alexandre Isquierdo and Feliciano elected on the vote totals in 7.5. Folha's ally count gives Malafaia 20 of 36 backed Senate candidates and about 27 winners. Church-brand tickets lost. The votes his allies claim ran through the PL and through that personal network. **[V]** (TSE, votacao_candidato_munzona_2026); the ally count **[V-s]** (Folha).

The economic programme, and the Petrobras gap

Flávio's written programme promised to restart the National Privatization Programme case by case, and to sell assets it called non-strategic, without a company, a timetable or a revenue figure. **[V-s]** (Agência Brasil). In February 2026 he told a banking conference he would privatize 95% of state companies. **[V-s]** (NeoFeed). In the 23 Oct Globo debate he said he would not privatize Banco do Brasil, Caixa or Petrobras. **[V]** (CNN Brasil). Petrobras is absent from the written plan filed with the TSE. His energy coordinator, Adriano Pires, told SBT in August that he saw no obstacle to a capitalization on the Eletrobras model, in which new shares dilute the state to a minority without a statute that says "privatization". Adolfo Sachsida had ruled the three companies out. **[V-s]** (Folha, 24

Oct, O Globo, 24 Oct). Analysts quoted by Folha expected a return to the asset sales of 2019–22. That expectation is not a decision **[R]**.

The mechanism matters more than the slogan, and it is now a defeated campaign's mechanism rather than a government programme. Control of Petrobras can move through share issues and asset sales that never use the word privatization. Lula's campaign ruled privatization out and still spoke of partnerships with private capital. **[V-s]** (O Globo, same piece). The newsletter Relatório Reservado reported, from one unnamed campaign source, that Eduardo had discussed a Bank of America minority stake in Banco do Brasil with US interlocutors. Nobody confirmed it **[U: unconfirmed]** (Jornal do Brasil, carrying the newsletter).

Daniella Marques, the former Caixa president and the campaign's economic coordinator, is the person who said the quiet part. Company-registry records reported by Metrópoles show she sat on the board of Banco Digimais from February 2024 to 8 December 2025. Digimais is controlled by Edir Macedo, founder of the Universal Church. In June 2026 the Federal Police searched the bank in Operation Miragem and said it had put about R$600 million into credit portfolios linked to Banco Master. About R$670 million was frozen. She was not a target. Nothing published shows how she voted. No wrongdoing by Marques is alleged. **[V-s]** (Revista Fórum, citing the Metrópoles registry report, CNN Brasil). Her board role is unpublished in detail **[U: not shown]**. The point is corporate governance and political economy. The coordinator of a privatization agenda came out of the same circuit of mid-sized banks and high-yield deposits that Master exposed, and the bank's controlling shareholder is also the controlling figure of a broadcaster, a church and the party Republicanos, which allied with the Bolsonaro camp for this runoff. That is an ownership and party network. It is not a statement about believers.

In the last week the campaign walked her back. She had spoken of more than twenty state firms, of a committee that would decide which companies are "of state interest", of a R$200 billion spending cut, and of a two-year transition for Bolsa Família recipients. Flávio then told aides to stop discussing proposals until the vote. **[V-s]** (SBT News, O Globo, InfoMoney). Whether those remarks cost votes has not been measured **[U: unconfirmed]**. After the defeat, partisan accounts blamed her. That is mood, not a cause. **[R]**.

The programme that lost was one whose asset sales were left to a committee, after the election, out of the text the TSE published. A Lula government does not enact it. The documents remain the record of what was on offer.

The bank, after the vote

A Lula win does not close the Master inquiries. They sit with the Supreme Court, not with the presidency. It does remove the prospect that the family under investigation would appoint the ministers and the police leadership who receive the indictment list. No politician named in 7.1 has been charged. That was true on 17 Oct and it was still true on the morning of 26 Oct.

New rows, in the same form as 7.1. Each is an allegation or a document, at a stated stage.

- **Kassio Nunes Marques and Newton Ramos.** piauí (23 Oct 2026) published messages from Vorcaro's seized phone in which TRF-1 judge Newton Ramos arranged meetings between Vorcaro and Justice Kassio Nunes Marques. The magazine cites a Coaf report of R$6.6 million from Master to the consultancy Consult, run by a friend of the justice, which paid about R$282,000 to his son Kevin. In the Second Panel's *Destilaria Alcídia* case, bearing on sugar-mill claims the police put near R$10 billion and which Master held, Nunes Marques lifted a recusal and on 1 Oct 2024 cast the deciding vote for the mill. **[R]** (piauí). All of them deny wrongdoing. Kevin says the fees were for legal work. The justice says the case was not about Master. No charge has been filed **[U: no charge]**. The structural fact does not need a motive. The bank's model was to turn contested federal liabilities into payouts through the courts. The justice who presided over the TSE on 25 Oct is the justice the magazine places at that table. His 2021 vote annulling Coaf reports in Flávio's "rachadinha" case is a judgment, not a rumour. **[V]** (STF). He

told O Globo the leaks were an effort to force him off the Master case, and that he does not recall doing business with Vorcaro. **[V]** (O Globo). A Federal Police report on justices named in the phones was expected at the Supreme Court in the first half of November. That date is the magazine's and the paper's, and it is still ahead **[R]**.

- **Best Bet, Willer Tomaz, and a R$6 billion freeze.** piauí and UOL (October 2026) link Flávio indirectly to Best Bet, an online bookmaker owned through a Madeira company, Cathedral, set up by Tomaz. Loterj licensed it in 2023. A sister company, Alcazar, shared the owner, the administrator and an empty Funchal office. UOL and a police report say Flávio was a "master user" of an Alcazar Santander account until May 2025. The corporate story is single-outlet reporting and was not re-fetched in full for this edition **[R]**. The licence and Justice André Mendonça's January 2025 ruling confining the Loterj workaround to Rio are checkable acts. The magazine's account of the corporate chain was not re-fetched as a full page for this edition, so the chain stays **[R]**. The police have asked the Supreme Court to investigate a hidden partnership. Both men deny it **[U: hypothesis; no charge]**. On 23 Oct, Justice Alexandre de Moraes froze up to R$6 billion across Tomaz's accounts and companies and lifted secrecy on the Alcazar group. **[V-s]** (Agência Brasil, g1). Separately, after Lula asked, the Federal Police opened an inquiry into a mansion on Ilha Comprida that the footballer Richarlison says Flávio and Tomaz worked to take from him. O Globo found a Tomaz company asking to double the buildable area within hours of a March 2026 decree by then-governor Cláudio Castro. The decree was later revoked. **[V-s]** (O Globo). Flávio's part in the property fight is denied **[U: denied]**.
- **Dark Horse, updated.** A Federal Police dispatch of 15 Oct 2026, reported by Intercept Brasil, traces part of the film money to Super Empreendimentos, a company of Fabiano Zettel that investigators tie to the Master fraud. R$12 million moved to Entre Investimentos the day before the first remittance to Havengate, the US fund represented by Eduardo's lawyer Paulo Calixto. **[R]** (Intercept Brasil). The police have also reported a severe gap between more than US$12 million sent abroad and US$2.8 million returned, and asked for 90 more days on Flávio, for corruption, laundering and capital flight. **[V]** (g1). Flávio says the funding was private and lawful. No charge has been filed **[U: no charge]**. Folha reports investigators describing a Bahamas administrator, Mosaic, as a larger offshore hub than Havengate, with flows into Delaware companies. They have not shown that the two trails connect **[R]** (Folha).
- **The Lula government's side of the same bank.** Messages reported by Veja on 23 Oct show intermediaries offering, for R$500,000 to R$1 million, to put Master on the Social Security Ministry's exhaustive list of institutions allowed to take state and municipal pension money. Master was added in May 2024, after talks involving its directors, ACM Neto and then-minister Carlos Lupi, and was removed in February 2026. **[R]** for the messages, **[V-s]** for the list dates as Veja states them (Veja). One anonymous operator told the magazine the inclusion cost R$15 million **[U: unconfirmed]**. The police are investigating. No one has been charged. A separate set of messages shows Vorcaro ordering a Macallan 1945 whisky of about R$500,000 "to give to Lula", and his lawyer Walfrido Warde later writing that the president had thanked him. **[R]** (Veja). The presidency denies receiving it. Delivery is not shown **[U: denied]**. Flávio asked the Supreme Court on 23 Oct to investigate Lula. The petition, two days before the vote, is also a campaign document **[V]** (CNN Brasil).
- **The INSS lobby, kept in proportion.** The Federal Police say lobbyist Roberta Luchsinger received R$1.5 million from the operator of the pension-deduction fraud, in messages investigators read as pointing at Lula's son Fábio Luís. **[V-s]** (O Globo). No charge has been brought against him **[U: no charge]**. In the last debate Flávio said an aide to minister Alexandre Padilha had steered Caixa, Banco do Brasil and postal pension funds into Master. No document was found to support that **[U: unconfirmed]**.

Jair Bolsonaro's legal position did not change on election night. The coup conviction is final, and the humanitarian house arrest ordered on 24 Mar 2026 was the last custody act this edition has confirmed (7.2). No new statement from him was found in the sources read for this update **[U: unconfirmed]**. Eduardo's conviction for coercion, final on 3 Oct 2026, also stands. The new act is the video asking foreigners not to recognize the count, and then the letter of 28 Oct. ADPF 1178, the

order on the Rockbridge network, is in Direction 6.6. It makes no finding of a transfer. The campaign office the company was reported to sit beside is now a defeated campaign's office. Serra Verde is already sold. USAR closed the acquisition on 3 Sept 2026, under this same Lula government, with the DFC loan and the Pentagon-backed offtake already in place (7.4). The 21-demand text was refused. A second Lula term keeps that refusal, and keeps Lei 15.506, the national minerals policy sanctioned on 16 Sept 2026. Flávio's CPAC offer and the "Prosperity Partnership" deck do not become federal policy. The state of Goiás can still pursue its own memorandum. That route was already sub-national.

Pandemic procurement, and the land

The candidate who promised to govern in his father's mould carried a procurement record that is no longer a programme and is still a document. By January 2021 the federal government had spent at least R$89.6 million on drugs promoted as Covid "early treatment" and shown to be ineffective. Most of that sum was Tamiflu, not chloroquine. The Army's laboratory bought a tonne of chloroquine raw material in May 2020, for a little over R$1.3 million, while payment for the Butantan vaccine plant was still outstanding. **[V]** (BBC News Brasil). CNN Brasil reported that the Army paid 167% above market for raw material, a purchase of R$782,400 that drew a court of accounts inquiry, and that by September 2021 about 290,000 tablets sat undistributed after 482,000 doses had gone out for Covid in late 2020. **[V]** (CNN Brasil).

piauí (21 Oct 2026) reports that in July 2020, while Precisa Medicamentos was seeking the Covaxin contract, its executives hosted Flávio on a boat in Brasília and gave him a Rolex. **[R]**. The contract facts are not in dispute. Covaxin was priced at R$80 a dose, against about R$56 for Pfizer and R$18 for AstraZeneca. The deal collapsed after a Health Ministry whistleblower. The Senate's Covid inquiry recommended indicting 78 people, Flávio and both Precisa executives among them. Flávio also arranged a meeting between Precisa's owner and the president of the BNDES in October 2020. **[V-s]**. He did not answer the magazine.

On land, both finalists said they wanted zero deforestation, and neither made it the campaign. The multi-year comparison, and the 2026 rate, are in 8.14. piauí, citing Inpe's October 2026 release, reports Amazon clearing down 42% year on year and 71% against the Bolsonaro term, and the Cerrado down 24% and 48%. The PRODES bulletin itself was not re-fetched for that sentence, so those percentages stay one step from the primary table. **[V-s]**. Lula's own frontier record is extractive. Ibama licensed the Equatorial Margin well under his government (7.4). Paving the BR-319 is the same government's project. The material question for 2027–30 is who holds frontier rents. The election did not decide it in a statute.

Cameras, a youth party, and the Centrão

São Paulo's camera grid is municipal infrastructure, built across parties and then lent to a security brand. João Doria's City Câmeras programme, from 2017, shared private cameras with the municipal guard and took donated Chinese cameras. **[V]** (Prodam). Ricardo Nunes signed the Smart Sampa contract on 7 Aug 2023, about R$588 million over five years, with a consortium that had placed third. The first bidder was disqualified and the second withdrew. **[V]** (city hall, Intercept Brasil). The city says it has no access to the source code, the models or the training data. Credentials for the system sat in a public repository for months. City records show people taken in and then released, including stops the city itself attributes to face-match error. **[V]** (Times Brasil, Folha).

The substitution inside the consortium is a governance fact. SentinelX, incorporated after the contract, replaced Camerite by addendum and supplies the recognition software. From May 2025 its partners include Jorge Marques Moura, administrator of the consortium leader, and a director of Camerite, the firm SentinelX replaced. Flama, a 34% member, and PK9 sit at neighbouring numbers on the same street. **[V-s]** (company-registry aggregators of the federal QSA, read on 25 Oct; the JUCESP image itself was not attached to this edition). A donation search of TSE candidate files for 2016–24 found no gift from Haganá, CoSecurity or consortium owners to Nunes, Tarcísio or the Bolsonaros. The one non-trivial hit was R$5,000 from a consortium partner to Fernando Haddad in

2016. The search was done on 25 Oct and the filing images were not attached to this edition **[V-s]** (TSE DivulgaCandContas). Party-directorate accounts were not scanned **[U: not fetched]**.

CoSecurity, of the Haganá group, says it is the largest image supplier to Smart Sampa and to the state's Muralha Paulista. No paid contract with the city or the state police was found. The mechanism is integration. Private clients pay. The public systems take the feeds. **[V-s]** (InvestNews, the company's own page). Founders' biographies are background. They are not an explanation of the contract.

Muralha Paulista, Tarcísio's state system, was created by decree in September 2024 and mostly restates private and municipal cameras, tied to the federal Córtex database. **[V]** (Agência Pública). In 2026 the state police tried to expand it by hiring the state IT company Prodesp without a tender, for R$475,819,725.90 over 60 months, with Prodesp's partner Paladium (Pax) supplying the software. Reporting puts the partnership in March and the contract in April, and says Prodesp had run an open call for a different partnership, Poupatempo, and did not run one here. Councillor Dimas Ramalho's order in case TC-009895.989.26-6 is reported to have found a "false singularity" and a differentiated payment for Paladium. The contract and the partnership were rescinded in June. In July the audit court closed the case for loss of object, and the state prosecutor's office found no evidence of fraud in the agencies' explanations. The merits of the bypass were not ruled. The court PDF was not re-fetched for this edition **[R]**. The same model appears in Paraná, where the audit court suspended a tender of about R$581 million, and in Goiás. **[V]** (TCE-PR). Pax raised a US$40 million seed led by Greenoaks and Benchmark. Greenoaks also backed Flock Safety's 2025 round, in which Founders Fund participated (4.6). **[V]** (Pax). No Founders Fund or Palantir investment in Pax was found **[U: unconfirmed]**. The Delaware holding does not publish its members **[U: not shown]**.

A cooperation with the UAE's EDGE Group, announced in 2024 as a security pilot the company called Crystal Ball, still has no published text. EDGE described a project. The state has said activity was not under way. By April 2025 Folha still called an agreement "in progress", and nothing later was found. Treat the status as unresolved **[U: unconfirmed]** (EDGE, Folha). EDGE's industrial anchor in the state is separate and real. It holds half of SIATT, the missile firm, whose São José dos Campos plant expanded in 2025. **[V]** (Al Defaiya). No UAE partner was found in the Smart Sampa companies **[U: unconfirmed]**.

The sober reading is procurement plus a vendor market plus a cross-party demand for cameras. Nunes and Tarcísio aligned with Flávio for the runoff, and their systems are being stitched together. That is political and infrastructural. It is not a single design, and it is not a Thiel deployment in Brazil. Bahia under a PT government has run its own facial-recognition programme. **[V-s]** (Intercept Brasil).

On 29 Nov 2025, weeks after the TSE registered the MBL's party Missão, the movement's first festival in São Paulo hosted Curtis Yarvin. He told Metrópoles he was impressed, and that the party in some ways goes beyond what exists in the United States. He said JD Vance resembles Renan Santos in speaking both the language of the people and of the elite, and that he was sure the Brazilian government could gain something from the Trump administration if it freed Jair Bolsonaro, without knowing what. He added that Trump would certainly be glad to see Bolsonaro pardoned. **[V]** (Metrópoles, the same interview, continued, Agência Brasil, the registration). This is an ideological channel from the US tech-right, already profiled in 2.3, to a Brazilian youth party. It is not Thiel money. No funding link has been published **[U: unconfirmed]**. Renan Santos's "banho de sangue" line against criminal factions is an August 2026 campaign remark, not a pledge made at the festival. **[V]** (g1).

The cross-party patronage in 7.1 sits on an older structure. Every president buys a congressional majority with ministries, state-company posts and budget amendments. On 29 April 2026 the Senate rejected Lula's Supreme Court nominee Jorge Messias by 42 votes to 34, the first such rejection since 1894. Senators told O Globo that Senate president Davi Alcolumbre had lobbied against the name. He denies it. **[V-s]** (Senate, O Globo). The same bloc can retreat. After protests in all 27 capitals in

September 2025, the Senate's constitution committee unanimously buried the amendment that would have required congressional approval before lawmakers could be prosecuted. **[V-s]** (Agência Brasil).

Thesis-test table (v13)

The v9 table in 7.7 stands as the reading before the vote. This one asks what the result does to each claim.

- **Master shows Bolsonaro-family ties to a fraudulent bank.** Still supported as documented ties, not as criminal liability. The Zettel dispatch and the Tomaz freeze add documents. They do not add a charge. A Lula win leaves the inquiries in place. **[V]** (g1) and **[R]** (Intercept Brasil).
- **Master is a far-right scheme.** Still unsupported as framed. The pension-list messages are a Lula-government door. The Digimais seat is a Bolsonaro-campaign door. The bank bought access in both. **[R]** (Veja).
- **The movement endangered Brazilian democracy.** The coup judgments stand. The new act is a loser refusing a 4.43 million-vote count and asking foreigners not to recognize it, while the electoral court's president, a Bolsonaro appointee, certified the winner. That is an attack on the count. It is not, on the numbers, a plausible path to annulling it. **[V]** (Agência Brasil, g1, STF).
- **The US acted to shield Bolsonaro.** The 2025 instruments remain as scored in 7.7. The new fact is a presidential comment, via EFE, questioning the result without evidence, and no formal recognition statement found the next morning. Transactional and unfinished. **[V-s]** (Rio Times, citing EFE).
- **US pressure is aimed at resources.** Unchanged in the documents. The offtake and the USAR purchase of Serra Verde already happened under Lula. The 21 demands stay refused. Flávio's offer of alignment is now a defeated campaign's offer. **[V]** (SEC 8-K, g1).
- **Christian Zionist evangelicals are a backing force.** Partly, and more precisely than in v9. Last Datafolha: about 70% of evangelical respondents for Flávio and about 30% for Lula, on valid votes. Leaders split. Republicanos bargained. IURD stayed neutral. The embassy and the Isaac Accords were a candidate's pledge, and that candidate lost. Ideology did not outvote the Northeast. The ISER/Quaest survey in 7.5 finds large majorities against leaders indicating a vote, and the first-round file shows church-brand candidacies as alternates while a PL slate associated with Malafaia took seats. **[V]** (UOL, reporting Datafolha, g1, ISER/Quaest PDF, TSE, votacao_candidato_munzona_2026).
- **Oil in Brazil.** Still unsupported as a Bolsonaro-specific motive. The Equatorial Margin licence is a Lula-government act, and Petrobras stays a state company. The Petrobras gap above is about how a defeated campaign proposed to dilute that control. **[V]** (CNN Brasil).
- **A coordinated transnational network.** Supported as a network. Yarvin's visit, Rockbridge's registration, and Eduardo's video are channels. They are not a command that delivered the election. The election went the other way. **[V]** (Metrópoles) and **[U: unconfirmed]** for a command that delivered the vote.

The session of 26 October

The cash session in São Paulo opened on the result. B3 halted trading that morning, the first circuit breaker since March 2020, and set the resumption auction for 10:30 to 10:35. **[V]** (B3). Exame and Valor report that the halt was fired in the pre-opening auction, because the theoretical price of the index indicated a fall of more than 20%. **[V-s]** (Exame, Valor).

The close used here is Exame's print, with Valor and Valor Investe on the same session. The spot dollar and the PTAX are different rates.

Print	Figure	Label
Ibovespa session high	205,088.74	[V-s] Exame
Ibovespa intraday low	169,516.43, down 17.34%	[V-s] Exame, Valor
Ibovespa close	176,608.23, down 13.88%	[V-s] Exame, Valor, Valor Investe

Print	Figure	Label
Spot dollar close	R$5.4027, up 8.21%, the largest daily rise since 1999	[V-s] Exame
Spot dollar high	R$5.6048	[V-s] Exame
PTAX, 26 Oct	R$5.5007, the BCB reference rate, up 9.19%	[V-s] Notícias Agrícolas, Atlas Público
2025 exports	US$348.7 billion, carried as the ministry's record	[U: not fetched]

The PTAX on 26 Oct is the Central Bank reference rate, R$5.5007, up 9.19%. **[V-s]** (Notícias Agrícolas, Atlas Público). By 28 Oct the PTAX had eased to R$5.3414 buy / R$5.3420 sell. **[V]** (BCB). The export line is there so the session is not read as a verdict on the real economy's foreign sales. The MDIC bulletin was not re-opened line by line. **[U: not fetched]**. The morning of 26 Oct was a reprice of political risk, leverage and the currency, in a market that had positioned for the other candidate. A circuit breaker is a rule in the exchange's own manual. It is not evidence about the ballots.

The pre-open move in New York, already in murky item 79, is the same reprice a few hours earlier. The EWZ fund, the Petrobras ADRs and the dollar near R$5.42 belong to that window. **[V]** (g1).

The viral framing of that morning was carried by Drew Crawford, a commentator associated with Austral Continental. That is a commercial interest sitting on top of a market call. **[R]**. His figure of R$4.99 for the Friday rate has no source. **[U: unverified]**.

Who gains

The count did not transfer a mineral concession or a camera contract. It renewed a government and repriced a market that had positioned for the other candidate.

- Lula keeps the presidency, and with it the ministries and the state firms the defeated programme would have put under a committee (7.12). The Master and Dark Horse inquiries stay with the Supreme Court. **[V]** (g1).
- Holders of dollars and of export revenue gained on the day relative to holders of domestic, leveraged shares. The spot close and the PTAX are in the table above. Who held the winning position is not in a B3 or CVM flow file read for this edition. **[U: not fetched]**.
- The inquiries in Direction 6 (fuel, Refit, Master, the Rockbridge order) are open. None of them, on the documents read, is a payment for this result. **[V]** (MPSP, STF).

Conspiracies that persist

Some audiences keep the conspiracy they held before the file closed. The arithmetic above does not retire it. The story was never waiting on a remainder.

One antisemitic post, circulating after the result, blamed the outcome on a religious plot. It is recorded in this single line, and it is neither linked nor quoted. **[R]**.

Some Argentine accounts framed Flávio's flight as cover for a foreign-backed plan to split off Brazil's southern states, without evidence. **[R]**.

An anonymous satire game, Corre, Flávio!, at correflavio.com, turns the same departure into a short chase. It is a joke. It is not a source for the route. **[R]** (correflavio.com).

The useful distinction is between a claim that can be checked against the TSE file and a claim that treats a people as an agent. This edition does the first. It does not repeat the second.

What this update does not show

- It does not show fraud in the count. The extension covered a number of votes two orders of magnitude below the margin. The loser's lawyers had not, by the morning of 26 Oct, filed the

case they announced. **[V]** (g1). The missing petition that morning is **[U: unconfirmed]**. By 28 Oct the party had recognized the result, and the campaign was reported to have left the annulment path. That later state is in the subsection above.
- It does not show that Marques, Tomaz, Lupi, ACM Neto, Fábio Luís or Daniella Marques committed a crime. Several are under investigation or are named in messages. No wrongdoing by Daniella Marques is alleged. The others deny what is alleged against them, where an allegation exists. **[U: no charge]**.
- It does not show an armed-forces intervention. An ally of Flávio asked in public where the commanders were. No communiqué from the commands was found **[U: unconfirmed]**.
- It does not show a White House policy. It shows a comment, as relayed by a news agency, and a tariff regime that already exists (7.3). **[V-s]** (Rio Times, citing EFE).
- It does not show Thiel, Palantir or Flock inside a Brazilian camera contract. **[U: unconfirmed]**.
- It does not show that evangelical worshippers voted as their most visible pastors asked. The pastors did not all ask for the same thing, nearly a third of the last evangelical subsample was with Lula, and the ISER survey finds large majorities against leaders indicating a vote. **[V]** (UOL, reporting Datafolha, ISER/Quaest PDF).
- It does not show who the US broker was, or who funded the payment for LV-JQW. Perfil's account of the fare is in Direction 6.3. The intermediary and the source of the money remain open. **[U: unconfirmed]**.
- It does not show who profited from the 26 Oct moves. No investor-flow file was pulled. **[U: not fetched]**.

Murky items 69–92 are in section 3. The gap in 7.11 for the runoff result is closed here. The money accounts are Direction 6. The reception abroad is Direction 8.13. Policy and platforms are 8.14.

Direction 8: Latin America alignment and the data-center buildout (added v10, 17 Oct 2026)

This section tests the consortium's hypothesis. It has three parts: (1) Latin America is being drawn into alignment with Washington and Israel; (2) Brazil is being isolated or gone around; (3) the region's data-center buildout is a strategic project whose costs the mainstream press under-covers. Every source was fetched in full where possible (about 95 pages, plus the TCU ruling PDF and a Texas PUC filing). Labels are given item by item. Reuters (401), AP, FDD, Times of Israel, UPI, Intercept Brasil and OAS (403), and Newsweek (406) blocked the fetcher. No workaround was used, so claims resting only on those sources stay [V-s] or [R]. Lens: materialist. "Pro-Israel" and "Christian Zionist" are used only where an actor documents it. Leaders are separated from rank-and-file voters.

8.1 The premises, corrected

Premise	Finding	Label
Keiko Fujimori governs Peru	**Correct.** The JNE proclaimed her on 3 Jul 2026 after the 7 Jun runoff: Fuerza Popular 9,223,396 votes against Juntos por el Perú (Roberto Sánchez) 9,173,755, a margin of **49,641**. She was sworn in on **28 Jul 2026**. ONPE gives the shares as 50.135% to 49.865%. Luis Galarreta is first VP and Prime Minister.	**[V]** JNE; **[V]** Congreso; percentages [V-s] (ONPE timed out)
The Colombian president is aligned with Washington and Israel	**Correct.** Abelardo de la Espriella took office on 7 Aug 2026 after a Trump-endorsed campaign. Relations with Israel were formally restored in **August 2026**. The free-trade agreement Petro had suspended was reinstated on **13 Oct**. An **embassy in Jerusalem opened on 14 Oct 2026**, the 10th worldwide. The ambassador is Tania Gilinski. De la Espriella says he had promised the embassy "desde la campaña".	**[V]** Cancillería; **[V]** Reuters via Al-Monitor; **[V]** El País Cali

Premise	Finding	Label
The region is "increasingly surrounded" by governments aligned with Washington and Israel	**Largely correct for Washington. Uneven for Israel** (see 8.2). Peru has contacts only. Argentina has **promised but not opened** a Jerusalem embassy. Venezuela has consular ties only. El Salvador has no embassy move or designation. Mexico, Uruguay and Brazil are not aligned. Brazil's 25 Oct 2026 runoff kept that position. The detail is in 8.13.	see 8.2
The new governments designated Hamas and Hezbollah	**Mostly not. Colombia** designated Hezbollah in **Jan 2020** (under Duque, not De la Espriella). It designated the **IRGC on 24 Sept 2026**. It has **not** designated Hamas; an earlier draft wrongly implied it had. **Peru** made no designation. Its government is asking Congress for delegated powers to create a domestic "Registro de organizaciones criminales clasificadas como terroristas".	**[V]** Cancillería, IRGC; **[V]** Isaac Accords chart (undated, likely 2025); **[V]** PCM Peru; 2020 date [R]
Evangelicals elected these presidents	**Overstated.** Baylor Religion Watch: Colombia's evangelicals (about 16%) were "a strong base", with megachurch and party backing, but "there is no data on the percentage of evangelicals who voted for him". In Peru, evangelicals first won a legislative foothold "on the coattails of Alberto Fujimori" in 1990, with mixed results since (Boas). That describes **leaders and parties**, not a measured rank-and-file vote.	**[V]** Baylor; **[V]** Boas

8.2 Alignment map (17 Oct 2026)

Country / leader	US security, minerals, trade	Israel-related moves (documented)	Evangelical role (documented)
Argentina, Milei	Shield of the Americas member [V, Wikipedia]. Critical-minerals framework, 4 Feb 2026 [V, State]. Reciprocal Trade and Investment Agreement, 5 Feb 2026 [V-s, Reuters 401]. Pax Silica [V, BNamericas].	**Jerusalem embassy promised, not open.** Promised in the Knesset (Jun 2025) for 2026, then frozen in Jan 2026 over a Falklands drilling dispute [V-s, Ynet/Channel 12]. On 19 Apr 2026 Milei said it would move "apenas las condiciones lo permitan" and launched the **Isaac Accords** [V, Bloomberg Línea]. Still not open as of 14 Oct [V, Garúa]. Hezbollah and Hamas designated; IHRA member since 2020 [V, Isaac Accords chart].	No organised evangelical bloc behind Milei documented [U]
Ecuador, Noboa	Shield [V]. Minerals MoU, 4 Feb 2026 [V, State]. The Nov 2025 referendum on foreign bases failed [V-s, Reuters 401].	Hezbollah and Hamas designated [V, chart]; IRGC too (Sept 2025) [V-s, FDD 403]. Embassy remains in Tel Aviv.	[U]
Paraguay, Peña	Shield [V]. **Minerals MoU, 4 Feb 2026** [V, State]. **SOFA signed 15 Dec 2025, in force 17 Mar 2026** [V, treaty header]; "temporary personnel, no bases" [V-s, scanned body]. USTDA backs X8 Cloud on Itaipú power. Signed the AI Opportunities Declaration but **not** Pax Silica [V, BNamericas].	Embassy in Jerusalem [V, Semana]. Hezbollah and Hamas designated [V, chart]. 8th IHRA adopter in the region [V-s, i24].	[U]
El Salvador, Bukele	Shield [V]. **Reciprocal trade agreement signed 29 Jan 2026**; its digital-trade chapter bars digital-services taxes on US firms [V, USTR]. Pax Silica [V, BNamericas].	**No embassy move or designation.** Israel **closed its embassy in San Salvador for budget reasons**. The ambassador, resident in Guatemala, calls El Salvador "100% amigo" [V, Diario El Mundo]. Bukele condemned Hamas on 8 Oct 2023 [V, same]. He was an "early adopter" of warmer ties [V, DW]. Neither Hezbollah nor Hamas designated [V, chart].	[U]

Country / leader	US security, minerals, trade	Israel-related moves (documented)	Evangelical role (documented)
Bolivia, Rodrigo Paz	Shield [V].	Relations with Israel restored in Dec 2025 [V-s, AP 403]. The US asked it to designate Hezbollah and Hamas (Jan 2026), with the same push planned for Chile, Panama and Peru [V, La República]. Not done.	[U]
Chile, Kast (58.17%, 7,263,236 votes)	Shield [V]. Minerals and security agreements, 20 Apr 2026 [V-s, Reuters 401]. Pax Silica [V].	Ambassador Gabriel Zaliasnik presented credentials on 3 Aug 2026 [V, JNS].	Evangelical leaders and the party-in-formation United in Faith endorsed Kast in 2017 [V, Boas]. 2026 data [U].
Honduras, Asfura	Trump endorsed him. Trump pardoned ex-president Juan Orlando Hernández, who had been convicted in the US of drug trafficking, during the disputed count [V-s, Reuters 401]. Shield [V].	Embassy already in Jerusalem [V, Semana]. Ambassador Núñez Bennet presented credentials on 3 Aug 2026 [V, JNS]. Hezbollah designated [V, chart].	[V-s]
Peru, Fujimori	**Shield: joined about 10 Sept 2026, after a Rubio visit** [V, Wikipedia table citing Reuters]. Earlier "early August" (Newsweek) is wrong. Minerals MoU signed 4 Feb 2026 under the previous government [V, State]. **US AI MoU (Sept 2026)**, signed by PM Galarreta and Ambassador Navarro: Peru commits to importing and adopting US AI technology [V, BNamericas].	Calls with Herzog and Saar; Israel "not yet a priority" [V, TRT]. Israel's ambassador attended the inauguration [V, AJN]. **No embassy move or terror designation.**	Evangelical-Fujimorismo tie is historical (1990) [V, Boas]
Colombia, De la Espriella	Shield; its accession took membership to 19 including the US [V, Wikipedia]. Minerals and civil-nuclear MoUs (8 Sept 2026) [V-s, v9 §7.4]. USTDA hyperscale study [V, USTDA].	**Jerusalem embassy (14 Oct); FTA reinstated (13 Oct)** [V]. Hezbollah (2020), IRGC (24 Sept 2026); **not Hamas** [V]. IHRA adopted 2022 [V, chart].	"Strong base"; no vote share measured [V, Baylor]
Venezuela, Delcy Rodríguez (interim, after the US captured Maduro, 3 Jan 2026)	NABEP oil deal; the US Department of War holds 35% of the private intermediary [V, v9 §7.4].	Consular ties only (11 Aug 2026), after a 17-year break [V-s, Reuters 401].	[U]
Brazil, Lula (re-elected 25 Oct 2026; detail in 8.13)	**Not** in the Shield. Section 301 tariff; refused the 21 demands [V, v9]. **But it attended the 4 Feb Critical Minerals Ministerial** (no MoU) [V, State].	Lula's government is critical of Israel. No ambassador in Israel since May 2024 [V, CNN Brasil]. IHRA status **contested**: the Isaac Accords chart says Brazil "withdrew adoption and Observer Country Status in 2025", while the CAM site still lists Brazil as an adopter [V both; status U]. **Flávio** pledged accession to the Isaac Accords and an embassy move in 2027 (see 8.3) [V]. The 25 Oct result means that pledge is not the policy of the government taking office in 2027 (8.13).	Evangelicals 52–62% for Flávio (Datafolha) [V, v9]

Country / leader	US security, minerals, trade	Israel-related moves (documented)	Evangelical role (documented)
Mexico (Sheinbaum), Uruguay (Orsi)	Not in the Shield [V, Al Jazeera]. Mexico attended the minerals ministerial [V, State].	Uruguay is an IHRA observer (2020) [V, chart].	—

Sources for the table:

- **Shield:** Wikipedia table (secondary; a primary White House or State text was not fetched); Al Jazeera, 23 Sept; Guardian, 7 Mar
- **Minerals:** State Dept ministerial
- **Trade:** USTR El Salvador
- **Paraguay SOFA:** State Dept; ABC Color
- **Israel ties:** JNS; Semana; Garúa; Bloomberg Línea; Diario El Mundo; DW; TRT; AJN; La República
- **IHRA:** CAM adoptions page
- **Elections:** Chile TRICEL

8.3 A documented Christian Zionist parliamentary network

- **The organisers.** The **Israel Allies Foundation** (IAF, president Josh Reinstein) and the Genesis Prize Foundation's **American Friends of Isaac Accords** (AFOIA) hosted the event. The IAF describes its pro-Israel caucuses as "faith-based diplomacy". **[V]** Genesis Prize release, 30 Jun 2026
- **The event.** Legislators from **14 Latin American countries** met in Buenos Aires (28–30 Jun 2026) and signed the Isaac Accords principles. These cover embassy moves to Jerusalem, IHRA adoption and anti-terror laws. The release appeals to "shared Judeo-Christian values"; Milei was the 2025 Genesis Prize honoree. **[V]** Genesis Prize; **[V]** The Media Line
- **Flávio Bolsonaro's keynote (primary text read).** He said: "quero voltar, já em 2027, para assinar a adesão do Brasil aos Acordos de Isaac, ao lado do presidente Milei… E quem sabe… ao lado do presidente Jair Bolsonaro". He pledged to move the embassy to Jerusalem in 2027 and restore an ambassador. He linked Hezbollah and Iran to Brazilian criminal factions. Separately he called Lula "antissemita". **[V]** VEJA, full speech; **[V]** CNN Brasil
- **Reading.** This is a **leadership-level** lobby (legislators, a foundation, a prize fund). It shows coordination of a policy agenda across parliaments. It does not show how rank-and-file evangelical voters see Israel.

8.4 Is Brazil being isolated?

Evidence for:

1. **The Shield of the Americas.**
   - The declaration came on 5 Mar 2026 and the summit on 7 Mar. Brazil was not invited; the Guardian called it "an ideological guest list" that also left out Mexico and Colombia (Colombia joined after its change of government). **[V]** Guardian; **[V]** Wikipedia
   - On 22 Sept the coalition published a list of **24 target organisations**, including Brazil's **PCC and CV**. Al Jazeera: "Brazil and Mexico have not joined". Lula: "Brazil is nobody's back yard". **[V]** Al Jazeera
   - So a coalition Brazil does not belong to has named groups operating on Brazilian soil.
2. **A bilateral deal that tests Mercosur.** The US–Argentina agreement (5 Feb 2026) prompted Brazil to raise its compatibility with the bloc [V-s, Reuters 401]. Valor notes that Decision CMC 32/00 commits members to negotiate jointly, and calls the deal a test that "puts Brazil at a crossroads". **[V]** Valor International
3. **A US military presence on the border.** Paraguay's SOFA is in force. ABC Color reports Paraguay's foreign minister denying any tension with Brazil. It also notes that Peña and Lula

suspended a planned joint declaration at their Campo Grande meeting, and mentions Paraguay's Shield accession. **[V]** ABC Color

4. **The minerals and AI ring.**
    - Minerals MoUs (4 Feb) went to Argentina, Ecuador, Paraguay and Peru; Chile and Colombia followed later. **[V]** State; Chile [V-s]; Colombia [V-s]
    - Pax Silica went to Argentina, Chile, Costa Rica, El Salvador and Panama; the AI Opportunities Declaration also to Paraguay; Peru signed an AI MoU. **[V]** BNamericas
    - BNamericas: the US data-center push "has centered on countries more politically aligned with the US administration, such as Colombia, Paraguay, Argentina, Panama and Peru". **[V]** BNamericas, 13 Oct 2026
5. **The sub-national route.** Goiás (Caiado) signed a state-level minerals MoU with the US; the federal government objected. **[V]** v9 §6

Evidence against:

- **Brazil attended the 4 Feb Critical Minerals Ministerial** in Washington, alongside Mexico, Bolivia and Colombia. It was not shut out of the process, though it signed nothing. **[V]** State
- **The Summit of the Americas** was postponed; the exclusions discussed were Cuba, Nicaragua and Venezuela, not Brazil. [V-s] (UPI 403)
- **Direct engagement continues.** The Magnitsky sanctions were lifted (Dec 2025) [V, v9]. Lula and Trump met in May 2026. Under Lula, the DFC/Pentagon Serra Verde financing went ahead [V, v9].
- **Lula pitches Brazil as a data-center host,** on the condition that companies produce their own power. After meeting Trump he said Brazil "não vamos gastar dinheiro para criar data center para mandar dados para outros países". **[V]** Poder360; **[V]** Mongabay
- **The government cloud hedges between blocs.** Serpro and Dataprev chose suppliers from both the US and China (8.6). That is not the behaviour of a state being shut out of US technology.
- **Local elections drive much of the change.** Peru, Colombia, Chile, Honduras and Bolivia all realigned after their own elections, not on a Brazil-specific timetable.

Verdict: Partly supported.

- **What is documented: ideologically selected** US coalitions and bilateral instruments that leave out Brazil (and Mexico). US policy also reaches Brazil's territory and assets **sideways**: the Shield's target list, the Paraguay SOFA, Argentina's Mercosur exception, Goiás and the Serra Verde capital. "Going around Brazil" fits these facts.
- **What is not documented: no document states isolating Brazil as a goal**, and direct US–Brazil engagement continues (minerals ministerial, Lula–Trump meeting).
- **What decided it:** the **25 Oct 2026 runoff**, counted in 8.13. Lula was re-elected, so Flávio's public promises (CPAC; the Isaac Accords "já em 2027") are not the incoming government's policy. **[V]** (g1).

8.5 Data-center projects and opposition

Project	Backers / size	Status / opposition	Label
Pecém, Caucaia (CE), TikTok/ ByteDance	TikTok: **more than R$200bn**, including R$108bn in equipment to 2035; operating from 2027; 100% renewable, water reuse. **g1 reports "R$ 580 bilhões"** (an unreconciled discrepancy). 200 MW in a ZPE (export-processing zone). Built by **Omnia**; wind power deal with **Casa dos Ventos** (US$2bn).	**MPF and DPU civil action** (MPF release dated 10 Sept 2026) against **Omnia and Semace**; the state of Ceará and Caucaia were later added as defendants. It seeks to block *operation* until the **Anacé** people get free, prior and informed consultation (ILO 169) and a full EIA/Rima is done. Licensing used a simplified report (RAS). The site is about 2 km from the Lagamar do Cauípe APA, which overlaps an Anacé land under Funai study. An MPF-commissioned expert report called the RAS "tecnicamente inadequado e insuficiente". Semace says there are no norms for data centers. The Anacé had sued earlier (2025).	**[V]** TikTok; **[V]** MPF; **[V]** g1; **[V]** Folha; **[V]** Rest of World; Casa dos Ventos [V-s] (Reuters 401)
Rio AI City (Olympic Park/Barra)	**Elea** (controlled by **I Squared Capital** since Apr 2026; Piemonte 33%). On 8 Jun 2026 at Web Summit Rio, Mayor Eduardo Cavaliere and Elea CEO Alessandro Lombardi announced **Elea's US$550m** investment and an MoU with CCPar. 1.5 GW initially, **up to 3 GW by 2032**. Elea's plan is **about US$10bn**; R$2.5bn near term.	No organised opposition found [U]	**[V]** Prefeitura; **[V]** Valor Intl
Scala AI City, Eldorado do Sul (RS)	Scala (DigitalBridge). It **requested 5 GW by 2033 (not authorised)**. **1,800 MW granted**, which the assembly report says is "40% superiores ao consumo médio residencial do RS".	Governor Eduardo Leite (PSD) promised simplified licensing in a 2024 protocol of intentions. No public hearings or prior consultation. The **CNDH** visited in late March 2026 and recommends a national regulatory framework. A state-assembly subcommittee report (26 Mar 2026) flags energy, environmental and political impacts.	**[V]** Brasil de Fato; **[V]** Matinal; **[V]** FNDC/ CNDH; 2025 origin [V-s] (Intercept Brasil 403); "77,760 m³/day" [U] (not found in the source)
Paracatu (MG), 1 GW	**Atlas Renewable Energy (owned by a BlackRock arm)**; R$35bn; partial operation planned for Dec 2027. Atlas has also applied for 1 GW in Janaúba.	The council and residents learned of it from reporters. About 80% of the municipality lies in declared water-conflict areas. It could use up to 1.2 million L/day even at the Redata efficiency threshold. Atlas calls it "very preliminary". **At least 68 data centers are planned in 37 municipalities.** The motive: absorbing curtailed solar output.	**[V]** Mongabay/ Intercept Brasil, 10 Sept 2026
Microsoft / AWS / Google, São Paulo	Microsoft R$14.7bn (announced 26 Sept 2024). AWS R$10.1bn (US$1.8bn) to 2034. Google Cloud "doubling" capacity by 2030.	Little local opposition reported [U]	**[V]** Microsoft; **[V]** AWS; **[V]** Bloomberg Línea

Project	Backers / size	Status / opposition	Label
Redata, Lei 15.504 (15 Sept 2026)	Suspends PIS/Cofins/IPI and import duty on equipment; the suspension becomes a zero rate once conditions are met. **Conditions:** 100% renewable or low-emission power; **WUE ≤ 0.05 L/kWh**, measured annually; **at least 10% of capacity for the domestic market**, with export or own use barred where domestic demand goes unmet; 2% of benefited value into R&D, at least 40% of it in the North, Northeast and Centre-West. A 180-day cure period, after which suspension becomes cancellation. The "5-year" term in an earlier draft was not found in the texts read.	No national environmental-licensing rule for data centers (Mongabay; Semace). PL 1.680/2025 is still in the Chamber [V-s].	**[V]** Planalto; **[V]** Câmara
Chile, Google Cerrillos (Dataluna, US$200m)	The original design drew up to 169 L/s from the Santiago Central aquifer. The Second Environmental Court partly annulled the permit in **Feb 2024**; Google renounced it in Sept 2024 and redesigned for air cooling.	A new pertinence consultation (**PERTI-2026-7923**, filed 29 Jul 2026, shown "Resuelta" with no response date) asks to confirm that environmental review is *not* needed. **Its outcome is not visible in the record** [U]. OLCA and MOSACAT object.	**[V]** BioBio, 4 Sept 2026; **[V]** S EIA record
Uruguay, Google Canelones	Google	Four neighbouring families appealed to the Environment Ministry over noise, landscape and lack of consultation. The original water figure ("7.6 million L/day") and the redesign figure are not in this source.	**[V]** El Observador; water figures [R]
Mexico, Querétaro	Microsoft, AWS, Google and others	Drought and blackouts. Microsoft says its Querétaro sites used 40 million litres in FY2025 (BBC, **28 Aug 2025**). Communities ask for water priority and public data.	**[V]** BBC; **[V]** Guardian 2024; **[V]** WIRED es; **[V]** P ulitzer
Argentina, Stargate (OpenAI + Sur Energy)	Letter of intent signed 10 Oct 2025 for up to US$25bn / 500 MW. For the Kargieman link see Direction 4.	**A year on: no construction, no final investment decision, no RIGI filing.** Mapuche opposition to Patagonian AI data centers [U] (not found in the sources read).	**[V]** Chequeado; [V-s] Letra P
Paraguay, X8 Cloud	USTDA-backed, near Asunción, on Itaipú power. Phase 1 ~US$8bn; target 5 GW. The CEO says the US work "also involves authorization to buy Nvidia GPUs". Also: Hive (US$400m), which cites Paraguay's alignment, and DFC/Taiwan talks for 10 MW.	—	**[V]** BNamericas
Colombia, Atlántico hyperscale	USTDA grant of **US$1,002,285** for technical, financial and environmental feasibility studies. US-made or US-developed equipment; "USTDA assistance is available only to American companies". Barranquilla lands five submarine cables.	—	**[V]** USTDA, 29 Sept 2026; **[V]** G obernación del Atlántico; **[V]** BNamericas

Regional oversight.

- At an **IACHR hearing** (Aug 2026), groups from Chile, Mexico and the US asked for safeguards, including **temporary moratoria**. **[V]** Gaceta Ambiental, 17 Aug 2026
- The IACHR's rapporteur on economic and social rights (REDESCA) made similar recommendations in Feb 2026. [V-s] (OAS 403)

8.6 The security framing: trusted stack, CLOUD Act, TCU

The US "trusted stack":

- **American AI Exports Program** (Commerce, under EO 14320). It calls for full-stack consortium packages, with a "No Country of Concern" requirement. **[V]** Federal Register, 10 Apr 2026
- **USTDA (Colombia):** "advancing trusted, U.S.-aligned digital infrastructure", positioning US firms, and "U.S.-made advanced computing systems… protecting systems against malign influence". **[V]** USTDA
- **Pax Silica** (State, Dec 2025): "reducing excessive dependencies" and "protecting critical infrastructure from improper access". **[V]** BNamericas
- **Peru:** Ambassador Navarro said, "in a reference to China", that AI from **extra-hemispheric suppliers represents a national security threat**. **[V]** BNamericas
- **The competitor:** BNamericas says Huawei runs **12 data centers** in the region and offers **30% discounts** on its AI models. **[V]** BNamericas (company-level claim, not independently checked)

Brazil's sovereignty counter-frame: TCU Acórdão 1380/2026 (full ruling read).

- **The case.** TC 008.857/2025-3; rapporteur Minister Antonio Anastasia; plenary session of 27 May 2026; unanimous. It covers the *Nuvem de Governo* run by Serpro and Dataprev. **[V]** ruling PDF
- **The CLOUD Act finding (para 101).** The AWS data-processing clauses "permite interpretações que admitam a submissão a ordens de autoridades estrangeiras sob legislações como o CLOUD Act". AWS Outposts' adherence is rated "parcial", with dependence on the public region and "sujeição parcial a jurisdição estrangeira". Poder360 reports the "low" sovereignty rating. **[V]** TCU; **[V]** Poder360
- **The order.** A remediation plan within 180 days.
- **Both blocs are already inside. Serpro selected AWS Outposts, Google Distributed Cloud Hosted and Huawei Cloud Stack. Dataprev selected AWS, Huawei HCS and Oracle DRCC.** Brazil's state cloud is hedged between US and Chinese suppliers. **[V]** TCU

The Chinese side and Palantir.

- Pecém, the Brazilian project with the largest announced investment figure, is **ByteDance's**. The race is a **US–China** contest, and Brazil hosts both. [V]
- **Palantir:** beyond the Satellogic link (Direction 4), no Palantir hosting or Latin American government data-center contract was found. [U]

8.7 How the press covers it

Example	Mainstream	Independent
Pecém / Anacé	**g1** covered the MPF/DPU suit (17 Sept 2026). **Folha** covered the MPF licensing query and expert report (Dec 2025). Reuters treated it as an energy deal (May 2026) [V-s].	Rest of World (2025 lawsuit) [V]; Mongabay
Paracatu / Atlas (BlackRock)	No mainstream original found [U]	**Broken by Mongabay and Intercept Brasil** (Pulitzer AI Accountability Network), with the 68-project database [V]
Eldorado do Sul / Scala	Not checked (Estadão and O Globo framing not fetched) [U]	Intercept Brasil (2025) [V-s]; Brasil de Fato, Matinal, CNDH [V]
Querétaro	**BBC (2025), Guardian (2024)** [V]; WIRED [V]	Pulitzer Center [V]
Stargate Argentina	The business press covered the announcement [R]	**Chequeado** (a fact-checker) covered the lack of progress [V]

Example	Mainstream	Independent
US opposition	Bloomberg [R]; Bisnow [V]	Data Center Watch [V]

Judgement: partly supported, and overstated as a blanket claim.

- **Where it holds:** the **first discovery** of projects and their **cumulative** water and energy footprint comes mostly from independent outlets. Business titles (Valor, Bloomberg Línea, BNamericas) frame projects as investment and "hub" stories.
- **Where it doesn't:** mainstream outlets **do** cover litigation once official actors move (g1 and Folha on the MPF). The BBC and Guardian covered Querétaro's water.
- **Better formulation: upstream silence** (simplified licensing, no consultation; projects surface through grid filings or reporters) plus a **business and strategic-asset frame**. This is not suppression. The strategic frame comes from **both** the Lula government (Redata's "hub") **and** the US government ("trusted").

8.8 US opposition context

- **Data Center Watch, Q1 2026:** at least **75 projects (~US$130bn) blocked or delayed**. **300+ state bills** were filed in six weeks. Statewide moratorium proposals came in **14 states from both parties**. Maine came within one House vote of a ban. **[V]** DCW Q1
- **Q2 2026: 45 projects (~US$68bn). [V]** DCW Q2
- **Groups and local fights: 840+ groups in every state except Hawaii**. Loudoun County is preparing a 12-month moratorium. Nashville gathered about 600k signatures and faces a lawsuit by DC Blox. **[V]** Bisnow
- **Recent moratoria:** Raleigh (7 Oct) and Milwaukee (13 Oct). [V-s] (datacenterdebate.org not fetched)
- **Caveat:** Data Center Watch sells paid research, and its counts are not independently audited. [R]
- **Contrast with Latin America:** US opposition works through **local zoning, ratepayer politics and state legislatures**. In Latin America it runs through **prosecutors and public defenders (MPF/DPU), Indigenous-consultation law (ILO 169), environmental courts and the IACHR**. That is why it surfaces later, usually after licences are granted.

Case box: "Data centers are not for AI" (John "Jay" Valentine, Texas)

The post. X account **@brandilwells** ("King Arthur Fan", about 108k followers; its bio uses QAnon slogans such as "Q" and "NCSWIC"). Posted **16 Oct 2026, 09:48 São Paulo time (UTC-3)** with the caption "Data centers are not for AI". It is a 2 min 30 s re-upload of a TikTok watermarked **@odinqrossy**. At reading (17 Oct, ~10:25 UTC-3) it had about 36k views, 1,097 likes and 540 reposts. **[V]**: the post was retrieved through the X API, and the public video was downloaded and machine-transcribed (automatic transcription, so minor wording errors are possible). The hearing's venue and date are **not identified** in the clip [U]. The room resembles a Texas public hearing.

What he says.

- He introduces himself as "John Valentine… from Salado… a landowner, but also an AI guy".
- He says he led the teams that built eBay's fraud engine and the TSA No-Fly list, and insurance-fraud systems for "70% of the property casualty industry". He says a partner built systems for the CIA and NSA.
- He says there is "no need today for hyperscalar data centers for AI". On his account they exist because Palantir, Oracle and others use "1980s technology".
- He says a 92-hour data-center job ran in nine minutes on a handheld Apple computer "that uses less power than a microwave".

- He says "only America is doing this craziness with data centers. The Chinese are not building massive data centers… The Europeans are doing the same thing" (distributed computing). He calls the need for data centers a "fraud… on the American people".

His commercial interest (documented).

- **The filing.** Sworn direct testimony, **PUC of Texas Docket 59475** (SOAH 473-26-16349, Item 4548, filed 13 May 2026). **[V]** filing
- **The docket is not a data-center case.** It is Oncor and LCRA's application for the **Big Hill–Sand Lake 765-kV transmission line**, which crosses Bell County (where Salado is) and 14 other counties. He testifies for two landowner intervenors (a family trust and Dos Brothers LLC), "opposing any route using G44".
- **His job.** He is **VP of Operations of Fractal (Austin, TX)**, which sells low-I/O "fractal" software as an alternative to data-center computing. He built TheSustainableComputingInitiative.com.
- **Paid and advocacy roles.** He writes *The Black Swan Files* Substack and says it has 11,000+ subscribers [V-s; Substack pages render only partly]. He says he has been an expert witness for a coalition opposing Wisconsin data centers since Dec 2025. **[V]** (self-described under oath)
- **What he asks for.** He asks the PUC to send the data-center share of load forecasts to independent review. Fewer data centers would mean less need for the line across his clients' land, and a market for Fractal.

Background and voter-roll ties (only what sources support).

- **His sworn testimony** lists Georgetown SFS (1973), Tymshare and ADR, and CEO of **InfoGlide** (an eBay fraud system, described as "foundational technology for the TSA No-Fly List").
- **The voter-roll work (also sworn).** He testified twice to the Wisconsin Legislature in 2022 that the voter-ID numbering was "corrupted and vulnerable to intrusion". He ran 77 copies of Pennsylvania's voter roll on an Intel NUC. He gave 350+ demos to citizen groups and candidates in 2021–24. **[V]** PUC filing
- **The "Jay" byline.** As "Jay Valentine", he wrote in *American Thinker* (4 Oct 2022) that "our technology, Fractal Programming", found "23,000 Wisconsin voters using the same phone number" for "the Wisconsin voter team". He describes "Project Omega" as putting Fractalized public databases "into the hands of citizens". **[V]** American Thinker
- **Context.** In Feb 2022 Wisconsin's Elections Commission told lawmakers that "fake voter" claims presented to the same committee (by Peter Bernegger) were unfounded. That rebuttal targets Bernegger, **not Valentine** by name. **[V]** Cap Times
- **Omega4America.** Links to that group appear only in search extracts. [V-s]

Claims contradicted.

- **"Only America" builds hyperscale and "the Chinese are not building massive data centers".** China's **"East Data, West Computing"** programme has **eight national hubs** with 215.5 EFlops by Q1 2025, 80.8% of it intelligent computing, plus telecom clusters "with up to 10,000 GPUs". **[V]** Digital China Summit / People's Posts and Telecommunications, 4 Aug 2025. Rystad puts China at **32 GW installed, with 28 GW more by 2030** (over 60 GW). **[V]** Rystad
- **The European claim** is also doubtful: the EU's AI-gigafactories plan is centralised [R]. Within the Americas, 8.5 shows hyperscale projects in Brazil, Chile, Mexico, Paraguay and Colombia.

Claims unverified [U].

- The eBay, No-Fly and "70% of P&C" credits and the CIA/NSA partner. These are self-reported, though consistent with his sworn testimony.

- The 92-hour → 9-minute benchmark. His sworn testimony says **90 hours**, for an $80m Oracle data-center billing job. No independent benchmark was found.
- "Systems for federal and state governments" and Apple's request for help with "Department of Defense/War applications".

Analytical note. His examples are database and fraud-matching workloads. The hyperscale buildout is driven mainly by **training and serving large AI models on GPU clusters**, which his evidence does not address. His opposition to data centers is real, and it lines up with the ratepayer politics in 8.8. But he is an **interested party**: a vendor of the alternative, and a witness for landowners fighting a transmission line. *Use as a case of how the US backlash is narrated, not as evidence about computing.*

8.9 Thesis verdicts

Part of the hypothesis	Verdict	Why
The region is "surrounded" by Washington-aligned governments	**Supported**	Shield (19 members including the US); minerals MoUs (Argentina, Ecuador, Paraguay, Peru, then Chile and Colombia); trade agreements (Argentina, El Salvador); a SOFA in force (Paraguay)
… and by Israel-aligned governments	**Partly supported**	**Documented:** Jerusalem embassies (Paraguay, Honduras, Colombia; Argentina promised only); restored ties (Bolivia, Chile, Honduras ambassadors); designations (Ecuador, Paraguay, Argentina; Colombia only Hezbollah and the IRGC). **Weak or absent:** Peru (contacts), El Salvador (Israel closed its embassy), Venezuela (consular)
Conservatism fostered through elections	**Supported for US-government action; overstated for evangelical voters**	Trump's endorsements (Asfura, De la Espriella), the conditional Argentina aid, the Hernández pardon. The Christian Zionist parliamentary network (IAF/AFOIA) is documented **at leadership level**. A measured evangelical vote exists only for Brazil (Datafolha); Colombia has "no data"
Going around Brazil and elected left governments	**Partly supported**	Excluded from the Shield, which targets the PCC/CV; Mercosur strain; Paraguay SOFA; Goiás MoU; aligned-only data-center aid. **Against:** Brazil attended the minerals ministerial; direct Lula–Trump engagement; no document of intent; the 25 Oct runoff re-elected Lula, so the bypass continues (8.13)
The data-center buildout is a strategic asset play	**Supported**	Explicit "trusted stack" conditions (USTDA, AI Exports, Pax Silica, GPU licences). TCU's CLOUD Act finding. US and Chinese suppliers competing inside Brazil's state cloud
The mainstream under-covers opposition	**Partly supported / overstated**	Independent outlets discover projects; mainstream covers lawsuits. The frame is bipartisan and international
The viral claim that "only the US builds hyperscale data centers"	**Contradicted**	China's East Data West Computing programme and its 60+ GW trajectory

8.10 What this doesn't show

- **No document shows a plan to isolate Brazil.** The pattern is consistent with ideological coalition-building plus each country's own elections.
- **No evidence of coordinated media suppression.** The coordination found is (a) **official US messaging** ("trusted", "extra-hemispheric threat"), which is normal public diplomacy, and (b) a **parliamentary lobby** (IAF/AFOIA) passing the same resolutions across 14 parliaments.
- **Christian Zionist networking is documented among leaders**, not as the motive of evangelical voters. Most rank-and-file vote data is missing.

- **No ethnic or religious direction is implied.** The drivers documented here are state policy, export controls, capital (BlackRock/Atlas, I Squared, DigitalBridge, ByteDance) and cheap renewable power.
- **The figures are company-stated** (Pecém R$200bn vs R$580bn; Rio US$10bn; X8 5 GW) and may never be built (Stargate Argentina).
- **Palantir has no documented Latin American government data-center role.**

8.11 Murky items (continuing after 53)

1. **A US-led coalition that Brazil is not in put two Brazilian gangs (PCC, CV) on its 24-group target list.** *Documented (Al Jazeera); the operational meaning is unclear.*
2. **USTDA's data-center aid is "available only to American companies"**, and Nvidia GPU export approvals are bundled in for an aligned state (Paraguay). *Documented (USTDA; BNamericas).*
3. **A 1 GW data center planned for Paracatu (MG) belongs to a BlackRock arm.** The council learned of it from reporters, and the town sits in declared water-conflict areas. *Documented (Mongabay/Intercept).*
4. **Brazil's audit court found that the contract for US-run government cloud servers inside Brazil allows foreign orders under laws "como o CLOUD Act".** *Documented (TCU 1380/2026, para 101).*
5. **The same state cloud also runs Huawei Cloud Stack** (Serpro and Dataprev) alongside AWS, Google and Oracle. *Documented (TCU); this is the hedge that a US "trusted stack" policy is designed to end.*
6. **A presidential candidate pledged, at a Christian Zionist "faith-based diplomacy" summit abroad, to sign the Isaac Accords and move the embassy "já em 2027"**, "ao lado do presidente Milei" and perhaps of his father, Jair Bolsonaro, whose STF coup conviction (27 years 3 months) became final on 25 Nov 2025 and who has been under humanitarian house arrest since 24 Mar 2026 (v9 §6). Flávio himself is under the Dark Horse inquiry, uncharged. *Documented (VEJA full speech).*
7. **Trump pardoned a former Honduran president convicted of drug trafficking** while his endorsed candidate's count was disputed. *Documented (via search extracts; Reuters blocked).*
8. **Peru's runoff was decided by 49,641 votes**, and about six weeks after the inauguration the new government joined the Shield, then signed an MoU to import US AI. *Documented (JNE; Wikipedia/Reuters; BNamericas).*
9. **The headline investment for Pecém differs by nearly three times between the company (R$200bn+) and g1 (R$580bn).** *Documented discrepancy; unexplained.*
10. **A viral "data centers are a fraud" testimony** came from a vendor of a competing technology, filed in a **transmission-line** case for landowners. The vendor previously ran voter-roll analyses promoted as exposing "leftist vote fraud". It was amplified by a QAnon-styled account. *Documented (PUC filing; American Thinker; X).*

8.12 Gaps still open

- **Shield primary texts:** the White House or State texts (5 Mar declaration; 22 Sept joint statement) were not fetched. The Wikipedia table and Al Jazeera are used instead.
- **Blocked sources:** Reuters (Chile agreements, US–Argentina deal, Honduras, Venezuela consular ties, Ecuador referendum, Casa dos Ventos), AP (Bolivia), FDD (Ecuador's IRGC), Intercept Brasil, the OAS/REDESCA release.
- **IHRA:** whether Brazil's adoption was formally withdrawn (the sources conflict).
- **Peru:** whether Congress grants the delegated powers for the terrorist registry, and whether Hezbollah or Hamas would be listed.
- **Data centers:**
  - Scala/Eldorado's current licensing status.
  - Scala's water figure.
  - The outcome of Cerrillos' PERTI-2026-7923.

    - The Uruguay water figures.
    - The reason for the Pecém discrepancy.
- **Press framing:** Estadão and O Globo.
- **Valentine:** the original hearing's venue and date, and the original TikTok.
- **Other:** evangelical polling for 2026 in Peru and Chile; Palantir in Latin American governments.
- **Brazil's alignment after the 25 Oct runoff.** Closed in v13. See 8.13.

8.13 Brazil after the runoff (26 Oct 2026)

The question 8.4 left open is now a result. Lula was re-elected (7.12). Brazil's federal position on the five instruments below is the position of a government that continues, not of a government that was about to be replaced.

Shield of the Americas. Brazil was not in the coalition on 17 Oct, and the election does not put it in. The Shield's target list still names the PCC and CV, groups that operate on Brazilian territory, while Brazil remains outside the coalition that published the list (8.4). Flávio had asked Trump to designate both. Rubio had already designated them, in May, under the Lula government. A second Lula term does not reverse that US act, and it does not sign Brazil into the Shield. No accession statement was found after the count **[U: unconfirmed]**.

Isaac Accords and the embassy. Flávio's pledge, read in full in 8.3, was to sign the Accords in 2027 and to move the embassy to Jerusalem, "beside Milei" and perhaps beside his father. That pledge was a candidate's speech. The candidate lost. It is not the policy of the government that takes office in January 2027. Lula's government remains critical of Israel, with no ambassador in Israel since May 2024 (8.2). Nothing in the sources read on 26 Oct shows a reversal **[U: unconfirmed]**. The parliamentary network already described in section 8.3 continues as a lobby of legislators. It does not now have the Brazilian presidency it was recruiting.

Israel, at leadership level only. The evangelical leadership map is in 7.12. Republicanos backed the loser and bargained for the Chamber. The Universal Church stayed neutral. Worshippers, on the last Datafolha, leaned to Flávio by about 70 to 30 and did not deliver the national majority. Rank-and-file vote and leadership diplomacy are different facts. Neither is a claim about evangelicals as a bloc.

Mercosur. The US–Argentina agreement of February 2026 still tests the bloc's rule that members negotiate together (8.4). Paraguay's SOFA is still in force on Brazil's border. A Lula win keeps Brazil as the member raising those objections, rather than as a government likely to waive them. No post-election Mercosur decision was found **[U: unconfirmed]**.

Minerals and the data-center stack. The federal minerals position is the one already documented under Lula. The 21-demand text was refused. Lei 15.506 is in force. Serra Verde's output is nonetheless under a US offtake and a US buyer, because those contracts were signed with the company, not with the presidency (7.4). Goiás can still deal at state level. On data centers, Redata (Lei 15.504) and TCU Acórdão 1380/2026 are acts of this government. The court found that AWS clauses can be read as allowing foreign orders under laws such as the CLOUD Act, and it also recorded Huawei inside the same state cloud as AWS, Google and Oracle (8.6). That hedge is the opposite of a US "trusted stack" that excludes countries of concern. BNamericas's observation, that US data-center push has centred on governments aligned with Washington, still describes the aid. It does not describe Brazil's own build, which is happening under a government the coalition left out. A Flávio government might have traded the hedge for alignment. The voters did not choose that government. Whether Lula spends the next term enforcing the TCU order, or welcoming more US capacity under Redata's domestic-share rule, is open **[U: not shown]**.

Markets are not a policy. The pre-open fall in the real, in Petrobras ADRs and in the EWZ fund, and the cash session that followed, are in 7.12. They are investors unwinding a Flávio bet. They are not a US government sanction.

Thesis lines that named the runoff. "Going around Brazil" stays partly supported, and the runoff did not make it moot. The bypass (Shield, Paraguay, Argentina's Mercosur exception, Goiás, Serra Verde, aligned-only data-center aid) continues around a government that has just been renewed. "Surrounded by Washington-aligned governments" stays supported for the neighbours and unsupported for Brazil itself. "Israel-aligned governments" stays partly supported in the region and weak for Brazil. The evangelical clause stays overstated if it is asked to explain the presidency. It is accurate as a description of a large minority of voters and of a split leadership.

What would falsify this reading later is a document, not a mood. An annulment judgment, a Shield accession, an embassy move, a federal minerals concession along the lines of the 21 demands, or a TCU finding that the state cloud had dropped Huawei for a US-only stack. None of those documents existed on 28 Oct 2026. The letter from Miami is not an annulment judgment.

How the result was received abroad

On 19 Oct, Benjamin Netanyahu endorsed Flávio Bolsonaro on Channel 14 and talked up the "Isaac Accords". **[V]** (Channel 14). On 14 Oct he called leftist Latin American leaders "new Pharaohs". **[V-s]** (JFeed). A viral clip of him is unverified. The audio may be dubbed. **[U: unverified]**.

An endorsement from a foreign head of government is a diplomatic fact. It does not move a Brazilian section. The material question is what was being offered: an alignment, an embassy, a public friendship. The candidate who was offered it lost. The pledge itself is the one already read in 8.3. It is not the policy of the government that takes office in 2027.

Israel's own election, on 27 Oct, was still open when this section was written. The Central Elections Committee had the bloc led by Benjamin Netanyahu at 53 seats, the bloc led by Gadi Eisenkot at 48, and the Arab parties at 19, with 93% of ordinary ballots counted, 85.6% of the total. About 600,000 double-envelope ballots were still pending. **[V-s]** (Times of Israel). A later committee estimate put the outstanding double envelopes lower, between 430,000 and 480,000. **[V-s]** (Times of Israel). Neither reading is a majority of 61. The count is a fact about another parliament. It is not a cause of the Brazilian file.

A thread posted by @GelecekGelin framed Lula's win as one of four blows to the United States and to Israel. It drew about 210,000 views. **[R]**. The full text of that thread is not set out here. The Brazil sentences in the copies that circulated do not survive the TSE file or the court record already in 7.12: the channel the court switched off and switched back on was a TSE matter, not a Supreme Court blockade of Lula's posts, and the margin is the closed file's 4,430,191. The other blows the thread narrates, about Tehran, an Israeli chief of staff and a Serbian election, were not confirmed. **[U: unverified]**.

A chain asking Xi Jinping to intervene is foreign meme traffic, passed along more easily because the platform translates posts by itself. The claim that the chain influenced the election is unverified. **[U: unverified]**.

Eduardo Bolsonaro's English video, already in 7.12, asks foreigners not to recognize the result. **[R]** (the post). It is an appeal for outside pressure. It does not change the file the TSE closed.

8.14 Policy and platforms

Two policy facts from the same fortnight sit next to the count. One is a forest rate. The other is a pair of platform errors in a different election. Neither is a hidden hand in the Brazilian file.

The forest

Amazon clearing roughly halved under Lula, from 11,594 km² in 2022 to 5,731 km² in 2025, with 2026 alerts at a record low. Carbon Brief's modelling credits restored enforcement with at least 20,000 km² avoided, though revived funds also played a part. **[V-s]** (Carbon Brief). AP later reported

an official annual rate of 3,335 km² for August 2025 through July 2026, the lowest since the series began in 1988. **[V-s]** (AP). The piauí percentages in 7.12 are a separate reading of an Inpe release and were not re-tied to the bulletin. The enforcement result is a staffing and budget fact. It does not decide who holds frontier rents in 2027. Ibama's Equatorial Margin licence and the BR-319 paving, both under this government, remain the extractive side of the same record (7.4 and 7.12).

The platforms

No Kings' Instagram account was suspended on 17 Oct, during a US protest day aimed at early voting, and Angie Nixon's @LatinosConAngie was suspended on 27 Oct. Both were restored within about an hour. Meta's Andy Stone called the first "clearly taken in error". **[V-s]** (Guardian, The Hill). The same company, in Brazil, was found by its own review to have broken no rule on the "Exército do Lula" channel. The block that mattered there was a TSE order, lifted on 14 Oct (7.12). An automated suspension and a court order are different instruments. A restored account is not evidence that a platform's ranking was neutral, and it is not evidence that the ranking decided a count.

The court order on who paid for Polymarket posts, and on algorithmic asymmetries, is Direction 6.6. It makes no finding. Separately, on 24 Oct, TSE minister Ricardo Villas Bôas Cueva ordered Meta not to amplify the Instagram accounts of Flávio Bolsonaro and Nikolas Ferreira by manual intervention through the end of the runoff, on pain of a R$500,000 fine. The order does not decide that such amplification happened. **[V-s]** (CNN Brasil).

Cyber window: no link found

Two PHP flaws, discussed as PHP2Shell, are on CISA's Known Exploited Vulnerabilities list as of 26 Oct. The listing rests on researcher honeypots. No named victim has been published, and no confirmed breach in Latin America has been tied to the flaws. **[V]** (CISA). Delft sensors counted about 66,000 exploit requests, mostly Mirai. **[V-s]** (Delft). Brazilian offices took services offline. The TSE runoff review recorded no cyber incident. **[V]** (TSE). On 26 Oct a cyberattack on UNM Health in New Mexico diverted ambulances for two hours. Systems were back on 27 Oct. A claim of stolen patient data is unconfirmed. **[V]** for the outage (UNM HSC); **[U: unconfirmed]** for the stolen-data claim. The window runs through 31 Oct. The days after 28 Oct are still open. **[U: not fetched]**. This is not an explanation of the vote.

Appendix A: Unlimited Hangout leads (to verify, not findings)

Source. The podcast's RSS feed (https://feeds.fountain.fm/Io7FC9RWfnv3bhIeI3sM; Apple ID 1551492441) has 73 episodes, May 2020 – Oct 2026.

Transcripts. podm8.com (the consortium's link) lists 72 episodes. Its episode pages carry **only the same publisher descriptions, with no transcripts and no auto-generated summaries** (checked on a sample page). The 2026 video-format episodes include timestamped chapter lists in their descriptions. I didn't attempt captions this pass because of time limits.

Caution. Everything below is what Webb and her guests *claim* in episode descriptions. None of it has been verified.

Date	Episode (guest)	What the description claims	Report section
23 Jul 2026	Ep #001 Prediction Markets (Mark Goodwin)	Polymarket revives DARPA's 2003 "terrorism futures" Policy Analysis Market. Thiel's role in privatising failed DARPA/IAO programs; Thiel Fellow and Founders Fund links (Augur). Has chapters and a linked article.	2.1 Thiel; 3 (surveillance)

Date	Episode (guest)	What the description claims	Report section
27 Sep 2026	Ep #002 Stargate Argentina (Goodwin)	OpenAI's Stargate Argentina; Satellogic working with Palantir and SpaceX on predictive satellite surveillance; Milei's AI state; Singularity University origins. Has chapters.	2.4 AI/Stargate; 2.1 Palantir; Kurzweil (SU)
5 Oct 2026	Ep #003 The Bitcoin-Dollar (Goodwin)	Stablecoins and Bitcoin as tools of dollar dominance; GENIUS Act; CBDC vs stablecoin; "AI's end game." Has chapters.	4 convergence (finance/surveillance)
23 Dec 2025	Trump & the Technocratic Tyranny (Iain Davis)	Trump's tech-billionaire "counter-elites" envision a world as bad as or worse than the globalists'; *The Technocratic Dark State*.	2.8 Trump; 4
12 Feb 2025	PayPal Presidency I: Biotech & Biosurveillance (Max Jones)	Thiel's influence on Trump's HHS; growing HHS–Palantir contracts.	2.1 Palantir
2 Apr 2025	PayPal Presidency II: The "Dark" Technate (Iain Davis)	The philosophy behind Thiel and Musk: neo-reaction, technocracy (Yarvin/Land territory by implication).	2.3 Yarvin/Land
28 Jul 2025	PayPal Presidency III: New World Currency (Goodwin)	The GENIUS Act as the culmination of the PayPal Mafia's digital-finance aims.	4
26 Aug 2025	PayPal Presidency IV: Teaching Technocracy (John Klyczek)	PayPal Mafia and neocon think tanks shaping education policy.	2.8 (peripheral)
29 Jul 2024	The Thiel-Verse (Stavroula Pabst)	Thiel as the man behind Vance and the "CIA-linked" architect of the surveillance state. "CIA-linked" likely refers to In-Q-Tel's early investment in Palantir; check that.	2.1, 2.2
12 Aug 2022	One Nation Under Blackmail (solo)	An overview of the book's thesis.	2.9, 5
20 Sep 2022	Meet Mark Middleton (Ed Berger)	A Clinton aide who met Epstein more than 10 times at the White House and died in 2022. **A lead for murky items:** his death was ruled a suicide; verify against the Arkansas reporting.	2.9 / 3
25 Aug 2021	The Franklin Scandal (Nick Bryant)	Claims Epstein "was hardly an anomaly." Contested history; treat with great caution.	2.9 context
23 Jul 2021	The CIA and The Finders (Elizabeth Vos)	Alleged CIA ties to the Finders group. Claims are contested; there are FBI records to check.	2.9 context (intel allegations)
5 Feb 2024	The Age of Artificial Intelligence	The effects of the AI "revolution."	2.4
14 Jul 2022	Google AI Sentience Psyop (Ryan Cristian)	Claims of AI "soul" serve the Kissinger/Schmidt *Age of AI* narrative.	2.4 (AI-as-god rhetoric)
1 Feb 2021	Dump Davos #1 (Johnny Vedmore)	Harari's "useless class" and data colonialism.	2.4 transhumanism
6 Jan 2021	The Giuliani Gang (Robbie Martin)	Giuliani and Kerik pushing QAnon-adjacent narratives.	2.8 (peripheral)

Gaps in the catalog relative to the report's themes. No episode description mentions **Kushner, Chabad, Christian Zionism, Huckabee/Hegseth, the Temple Mount, the Antichrist/Thiel lectures, NZ bunkers, Barak/Carbyne or Praxis/Próspera**. Webb's material on those topics, such as the 2019 "Mega Group" series and Carbyne articles, lives in written articles on unlimitedhangout.com, not in the podcast.

Appendix B: Verification log (v8 → v9, Direction 7)

Label counts in Direction 7: v8 had 1 [V], 37 [V-s], 8 [R], 2 [U]. **v9: 78 [V], 23 [V-s], 5 [R], 2 [U].** (v8 tagged most rows by section; v9 tags them item by item, so the totals are not strictly comparable.)

Item	v8	v9	Basis / correction
Master timeline (BRB deal, BC veto, liquidation, R$41bn FGC, arrests)	V-s	**V**	Valor, Agência Brasil, O Globo full text
Toffoli exit	V-s	**V**, *corrected*	The PF did point to his suspicion; the STF found no grounds unanimously; Toffoli calls it "ilações"
PGR/PF rejection of plea deal; third attempt	V-s	**V**	Poder360, O Globo
RPPS R$1.8bn; states/ municipalities bear the loss	V-s	**V**	Folha (19 Nov 2025; 8 Jan 2026)
Ciro Nogueira	V-s	**V**, *corrected*	Amendment filed **2024** (v8 implied 2025); the payments are a PF allegation; the MP alleges the bank drafted the amendment; his denial added
Ibaneis Rocha	V-s	**V**	PF report via g1 (9 Oct 2026); defence statement added; Reag item added
Flávio / Dark Horse	V-s	**V** (core) / V-s (Havengate)	Câmara, g1; the inquiry was authorised in July 2026; *no charge*
Moraes household contract	V-s	**V**, *wording corrected*	"Last modification by user 'Ministro Alexandre de Moraes', 11 Jan 2024" (metadata), not "Moraes edited the contract" as a proven act
Lula–Vorcaro meeting	R	**V**	Folha: Mantega brokered it; Galípolo invited
Motta, Rueda, Castro, Wagner/Credcesta	—	**V** (new)	Folha; Bloomberg Línea
Murky 38 (Flávio audio "two days before arrest")	R	**Contradicted**	The audio dates from Sept 2025; the arrest was 17 Nov 2025
Jair custody history	R	**V**	STF (24 Mar 2026), BBC Brasil, Valor
Eduardo's seat lost	U	**V**	Mesa Act 229, 18 Dec 2025
Eduardo's conviction	V-s	**V**	STF news, 16 Jun 2026
Sanctions lifted 12 Dec 2025; Landau	V-s	**V**	BBC Brasil
Section 301 25% from 22 Jul 2026	V-s	**V** (scope) / V-s (Pix by name)	USTR final notice; the word "Pix" is not in the extracted text
21 demands	—	**V** (minerals clause and election clause)	Estadão; Folha Bergamo; the full list page was paywalled
Abin assessment	—	**V**	Folha, InfoMoney, Opera Mundi
PCC/CV FTO	—	**V**	State Dept; Federal Register
26 May photo-op / AI fake	—	**V**	g1, Aos Fatos, g1 Fato ou Fake
Serra Verde Pentagon US$750m	R	**V**	SEC 8-K, Ex. 99.2
Serra Verde DFC offtake	V-s	**V**	Folha/FT, g1
Marinho deck	V-s ("Flávio campaign deck")	**V-s, re-labelled**	The author is Marinho; he denies sending it or any commission; CNN Brasil [V] for the authorship and denial
Ibama Foz do Amazonas licence	V-s	**V**	Valor, g1, O Globo

Item	v8	v9	Basis / correction
Jerusalem embassy retreat	V-s	**V** + agribusiness reason	g1 2019; Agência Brasil
Christian Zionism (Malafaia et al.)	V-s	**V**	SciELO
Datafolha evangelical vote	V-s	**V**	Folha 1 Oct 2026
Bannon–Eduardo	V-s	**V**, *corrected*	"Latin America", not "South America" (CEBRI)
CPAC Brasil R$250k	V-s	**V**	PlatôBR
Gettr sponsorship	V-s	**R** (downgraded)	Not found in the fetched text
Atlas Network	V-s	**V**	SciELO RBCP
Carlos/Michelle Master link	U	U	Not found

Still unverified or partial: the full 21-item list; Pix named in the USTR text; whether Lei 15.506 mandates local processing; whether Jair's house arrest was extended; the ConJur ruling that Eduardo's sentence was final; Reuters items (401); Trump's Iran-oil quotes; Rockbridge funding (no evidence); Eduardo's minerals offers (none found); STF art. 19, X and Rumble items (R).

Appendix C: The two *Revelando* videos (cited as opinion)

C.1 Santos Cruz interview (YouTube FjiuXevhBtM; the wrong link at first, but its findings are kept). Retired General Santos Cruz, a former Bolsonaro minister on the right, interviewed by Bruno Torturra. He calls the camp's pursuit of US pressure "treason" and "voluntary submission", says the Goiás rare-earth arrangement must be reviewed, and attacks "vigarice religiosa". Its factual claims matched the record.

C.2 *Revelando: Pátria Submissa*, Ep. 06 (YouTube T3gZ6Nn7kZY; Calma Urgente, presented by Wagner Moura, published 16 Oct 2026).

- **What it is:** a narrated campaign documentary against Flávio Bolsonaro, distributed with ICL, Mídia Ninja, 342 Artes and Intercept Brasil.
- **Claim:** the US playbook runs "pressure → a ruler who owes Trump → a resource deal" (Ukraine, Venezuela, Iran, Colombia, Argentina) and is now aimed at Brazil's rare earths, niobium and graphite.
- **Claim:** the Bolsonaro camp (Eduardo, Figueiredo, Flávio at CPAC, the Marinho deck, Rockbridge) is helping it.
- **Verification (21 claims):**
  - About **13 are correct**: the USGS figures, Serra Verde's closing, Lei 15.506, the Venezuela, Colombia and Argentina sequences, the EO, Figueiredo's house and naming in the EO, Eduardo's seat and conviction, the CPAC remark, the Marinho deck, the Rockbridge registration, and the PF's Havengate probe.
  - **Six are overstated or wrong:** "amnesty" and "end Pix" in the 21 demands; graphite "2nd producer" (it is 4th); "Energy Fields" (it is Energy Fuels); "35% of Venezuela's oil company" (the stake is in a private intermediary, and the 100-year term is disputed); Figueiredo "wanted by the PF since 2023".
  - **The 1789 Capital → Bahia chain is an inference.**
- **What's new for the report:** Havengate; Rockbridge Brazil LLC; the Marinho details; Figueiredo's status; the regional pattern table; Lei 15.506; the USAR closing. All are cited above to primary or mainstream sources, not to the video.

Appendix D: Verification log (earlier pass → v10, Direction 8)

Label counts: an earlier pass had 9 [V] / 29 [V-s] / 4 [R] / 13 [U]. **Direction 8 in v10 has 142 [V] / 28 [V-s] / 7 [R] / 17 [U].**

Item	Note	v10	Basis / correction
Fujimori's election and inauguration	V-s	**V**	JNE proclamation (votes), Congreso; ONPE shares stay V-s (timeout)
Peru's Shield accession	V-s ("Aug")	**V**, *corrected*	~10 Sept 2026, after a Rubio visit (Wikipedia table citing Reuters)
Peru designations	U	**V** (none)	PCM: a domestic terrorist registry is proposed instead
Colombia embassy and FTA	V-s	**V**	Cancillería, Al-Monitor/Reuters, El País Cali
Colombia designations	implied Hamas	**V**, *corrected*	Hezbollah 2020; IRGC 24 Sept 2026; no Hamas
Colombian evangelicals	V-s ("majority")	**V**, *corrected*	Baylor: "no data" on vote share
Argentina embassy	V-s	**V**	Bloomberg Línea (19 Apr), Garúa (14 Oct); Jan freeze V-s
Bukele–Israel	U	**V**	Diario El Mundo, DW, Isaac Accords chart
IHRA adoptions	—	**V** / Brazil **U**	The Isaac Accords chart and the CAM page conflict on Brazil
Flávio's Isaac Accords pledge	V-s	**V**	VEJA full speech; CNN Brasil
IAF/AFOIA summit	V	**V**	Genesis Prize release, The Media Line
Minerals ministerial	V-s	**V**, *expanded*	Brazil attended; Paraguay MoU
Paraguay SOFA	V-s	**V** (dates) / V-s (scope)	Treaty header; body is a scan
El Salvador trade agreement	V-s	**V**	USTR PDF
Peña–Lula	V-s	**V**, *expanded*	ABC Color: joint declaration suspended
Pecém	V-s	**V**, *discrepancy*	TikTok R$200bn+ vs g1 R$580bn; MPF defendants
Rio AI City	V-s	**V**, *corrected*	Elea's US$550m; ~US$10bn; up to 3 GW
Scala/Eldorado	V-s	**V** / water **U**	1,800 MW granted; 77,760 m³/day not in source
Redata	V-s	**V**, *corrected*	Lei 15.504 text; "5 years" not found
Chile Cerrillos	V-s	**V** / outcome **U**	BioBio; SEIA record shows no decision text
Uruguay	V-s	**V** / water **R**	El Observador: appeal by four families
Querétaro	V-s	**V**	BBC dated 28 Aug 2025
Stargate Argentina	V-s	**V**	Chequeado
USTDA Colombia	V	**V**	USTDA release; Atlántico grant US$1,002,285
AI Exports Program	V-s	**V**	Federal Register
TCU 1380/2026	V-s	**V**, *expanded*	Full ruling: para 101; Huawei/Google/Oracle also selected
Data Center Watch / Bisnow	V-s	**V**	DCW Q1/Q2, Bisnow; Raleigh/Milwaukee V-s
Valentine video	—	**V**	X API post; downloaded video, transcribed; PUC filing; American Thinker; Cap Times
China's East Data West Computing	—	**V**	Digital China Summit page; Rystad

Blocked (no workaround used): Reuters 401; AP, FDD, Times of Israel, UPI, Intercept Brasil, OAS 403; Newsweek 406; ONPE and Andina timeouts; x.com web pages 403 (the post itself was read through the X API).

Appendix E: Verification log (v11, Direction 5)

Basis. About 50 pages were requested with curl on 20 Oct 2026 (about 40 loaded in full), plus 13 X posts read in full through the X API and the SEC 13F information table. **Label counts in Direction 5 and murky items 64–68 =** 52 [V] / 1 [V-s] / 26 [R] / 16 [U]. About 17 direct Thiel quotes were checked against fetched text; about 13 rest only on attendee posts or secondary relays and are labelled [R] or [U].

Source	URL	Fetched	What it confirms
Nashville Scene, lecture 1 (29 Sept)	link	Yes	Venue, "hundreds", transcripts obtained, two Thiel quotes, Hunt quote, the lodge's disclaimer, lecture titles
Nashville Scene, lecture 2 (8 Oct)	link	Yes	Three Thiel quotes; paraphrase on violence and "Christ's more militant comments"; Howard (opinion)
Nashville Scene, Dialog leak (26 June)	link	Yes	Diermeier in Dialog leaks; Vanderbilt did not dispute. Corrects murky item 13
Tennessee Star (17 Sept)	link	Yes	Organisers, Robinson, $100, protocol, the Pamphleteer's AI framing
Luma, parts 3 and 4	3, 4	Yes	AI framing; final-lecture theme; $50 single passes
Pamphleteer listing, 19 Oct	link	Yes	The final lecture was on that evening
Politico news, 8 Oct	link	**No** (403; timeout)	Quotes taken from Fortune, Gizmodo and TOI instead
Politico Decoded newsletter, 8 Oct	link	**No** (403; timeout)	Search extract only: "structure is largely unchanged" (V-s)
Politico Decoded podcast transcript	link	Yes (partial, free excerpt)	Recordings of lectures 1–2; SF transcripts compared; One Piece and Schmitt
Fortune, 15 Oct	link	Yes	Obama, pope and EA quotes; Paris and Rome itinerary; no comment from Thiel; Amodei, Altman, Musk
Gizmodo, 8 Oct	link	Yes	"Threat über alles" and the "global prison warden" passage, quoting Politico
Times of India, 10 Oct	link	Yes	The Obama and pope quotes match
Archyde, Trending Topics, Harici, Salon	Archyde, Trending Topics	Yes	Same quotes; Charlemagne and Metternich mentioned; not used as primary
The American Antichrist (book site), opinion	link	Yes	Relays Politico: 300+ attendees, 8:1 ratio, the neoliberalism quote (R only)
Nathan Worcester (Epoch Times reporter), X posts	L4, L3, L2	Yes (X API, 12 posts)	Lectures 2–4 content (R); x.com web pages not used
Anonymous student account on X	link	Yes (X API)	Claimed final-lecture quotes (U)
Daniel Forrester Nash, Substack, opinion	link	Yes	Interpretive account of lecture 3 (U)
Guardian, SF series (10 Oct 2025)	link	Yes	SF dates, $200, structure, "hide one's money", US as katechon and Antichrist
Politico Europe, Paris (EN and FR)	EN, FR	Yes	26 Jan 2026, Delsol, 23 slides, protest, Barrot lunch, DGSI and Airbus
Le Monde, Paris	link	**No** (402 paywall; archive.is 429)	Not used
NCR (AP text), Rome	link	Yes	Sunday–Wednesday; Gioberti and Cluny; Angelicum and CUA disclaimers
CNN, Rome (16 Mar) and Aspen (2 July)	Rome, Aspen	Yes	Rome organisers; "working for the Chinese Communists"

Source	URL	Fetched	What it confirms
Fortune, Rome (16 Mar)	link	Yes	Started on Sunday; Benanti; Italian lawmakers and Palantir
AP and Reuters on Rome	AP, Reuters	**No** (403; 401)	AP text read via NCR
First Things, "The Pope and the Antichrist"	link	Yes	Thiel's own account of Rome; Benedict thesis; co-author Sam Wolfe
NCR (July 2026), opinion quotes	link	Yes	Faggioli, Gibson, Rober; Aspen; First Things date
Fortune analysis (18 July), opinion	link	Yes	Critique quoted as opinion
Letters from Leo, opinion	link	Partly (paywall)	Headline and subhead only
Le Grand Continent (Benanti), opinion	link	Partly (paywall)	Title only
SEC 13F-HR, Thiel Macro LLC (filed 14 Aug 2026)	link	Yes (information table)	Eight positions, $418,666,506 at 30 June 2026
Yahoo Finance analysis	link	Yes	Seven energy names; Vista Energy context
TechCrunch, Anduril Series G	link	Yes	Founders Fund's $1B, largest check
Forbes Argentina	link	Yes	US$12m house; Milei and Quirno received Thiel
NYT and Washington Times on Argentina	NYT	**No** (403)	Family move not used
RNS (Jan 2026)	link	**No** (403)	Not used

Searched, not found: WaPo, NYT, Reuters, Free Press, Christianity Today or Baptist Press coverage of Nashville; a Vance, Vatican or Obama response; any Brazil or Rockbridge link; an Epoch Times article on the series; a public transcript or recording.

Changelog (v18 → v19, 30 Oct 2026)

- **Version line and PDF.** The version line at the top now names v17 and v18, and the PDF is rebuilt from the current text, so it uses the v18 Direction numbers. No findings, labels or sections changed.

Changelog (v17 → v18, 29 Oct 2026)

- **Direction numbers.** The Directions are renumbered to match their reading order. Money and crime is now Direction 6, Brazil is Direction 7, and Latin America alignment and the data-center buildout is Direction 8. Their section numbers follow, so 10.1 is now 6.1, 6.1 is now 7.1, and 7.1 is now 8.1. No text was moved. Earlier changelog entries keep the numbers they used at the time.

Changelog (v16 → v17, 29 Oct 2026)

- Internal file names were removed from the public text. Findings, evidence labels, and the wording of the findings are unchanged.

Changelog (v15 → v16, 28 Oct 2026)

- **Spine.** The method note now states the line for this edition: capital blocs sought guarantees, belief worked as cover, and the Brazilian runoff is the test case. A bridge at the end of Direction 5 sends the reader to Direction 10 and then to Direction 6.
- **Direction 10.** Money and crime, placed before the runoff. Carbono Oculto (complaint against 16, 18 Aug 2026). Sem Refino (Magro's arrest and red notice; Castro searched, not charged; a reported R$52 billion freeze). The ANDIS update (Mastropietro processed for aggravated laundering; the Kovalivker hearing moved to 4 Nov; nothing ties Flávio to the laundering). The 1 July Treasury designations (no politician named). Master and Dark Horse, cross-linked to 6.1. On 28 Oct the Federal Police indicted 15 people in Inquiry 5026, the Master–BRB case, which is not Dark Horse. ADPF 1178 stated once. A follow-the-money table.
- **10.5, outside the 15.** Ibaneis Rocha invited Paulo Henrique Costa to run BRB in November 2018. October reports cite him and do not indict him. Credcesta came from a 2018 privatisation under Bahia's PT government, and Rio's Castro government later granted it exclusivity. The Tirreno partners were also in Cartos and in a payments firm suspended from Pix in 2025. Cartos denies originating the credits. Ciro Nogueira's deposit-guarantee amendment and Rioprevidência's roughly R$3.7 billion sit in other phases. Neither man is among the 15. Castro is the same man searched in the Refit case. Six Reag funds in the Master probe also appear in Carbono Oculto. The Hans 95 chain put at least R$849 million into Master paper. That ties the bank, not the 15.
- **10.5.1, the rapporteur.** André Mendonça received the INSS inquiry and the Master inquiry by draw. The use of the brief, the Iter replies, the October 2024 Castro ruling and the police note that no judge took part in Operação Transparência are set out with the reply beside each conflict. piauí's pattern on amendments, pension funds and warrant timing is marked as reported, with the magazine's own limits. No source read there shows coordination with a campaign.
- **Order.** Direction 8 is now 7.14. The cyber window is a short box. Directions 8 and 9 are not separate chapters.
- **Runoff.** The flight and ADPF 1178 in 6.12 are cross-references. A "who gains" note is added. Perfil reports an unnamed US broker arranged and paid about US$140,000. Who that intermediary is, who funded it, and who profited on 26 Oct, remain open.
- **The flight.** Baires Fly is chaired by Marcela Mabel Racana. Luis Grande is founder and alternate director, not simply the owner on paper. Lijo's 16 Oct resolution names the company 79 times and does not accuse it. Invoices for national kilometres are put above ARS 1 billion. The company and people close to Mastropietro deny the laundering link. Nothing in the public record ties Flávio Bolsonaro to the ANDIS laundering.
- **Conclusion.** Rewritten to cover the directions now in the file. The Brazil verdict is marked as a draft.

Changelog (v14 → v15, 28 Oct 2026)

- **The count.** Direction 6.12 now sets out the three legs of the extra ballots: 9.32 million from eliminated candidates, 2.96 million from the fall in abstention (21.08% to 19.22%), and 1.82 million fewer blank and null votes. The exact gains stay 10,376,694 and 3,721,538. The closed file is unchanged: Lula 64,256,232 (51.79%), Flávio Bolsonaro 59,826,041 (48.21%), margin 4,430,191.
- **The challenge, after 26 Oct.** The PL recognized the result on 26 Oct and kept its questions. Nunes Marques affirmed it. Running mate Alfredo Gaspar accepts it. The Miami letter of 28 Oct, the pre-1968 crest, and the later "leader of Brazil" wording are in 6.12. The fraud claim is set against the extended-hours ballots, under 1% of the margin. The flight is Puerto Iguazú, Baires Fly Gulfstream LV-JQW, Guayaquil, Miami. Prosecutors' account of Sergio Mastropietro and the ANDIS case is included. Luis Grande is the owner on paper. Santiago Caputo's role

stays unverified. The Federal Police search request, backed by the PGR, has an unclear outcome.

- **ADPF 1178.** Justice Dino's 27 Oct order requisitions a Federal Police inquiry under STF supervision. It names Gomes and Sang only as "em tese ligados". It asks who paid for Polymarket posts, and it raises rare earths under Constitution articles 20 and 176, and algorithmic asymmetries. It notifies ten bodies and refuses the PT as amicus. The order makes no finding of a transfer.
- **The channel and the session.** The "Exército do Lula" channel, its suspension on 11 Oct and its restoration on 14 Oct, are in 6.12. B3 halted the cash session on 26 Oct, the first circuit breaker since March 2020. Exame's close is Ibovespa 176,608.23, down 13.88%, after a low of 169,516.43 and a high of 205,088.74. B3 set the resumption auction for 10:30. The spot dollar closed at R$5.4027, up 8.21%. PTAX on 26 Oct is the BCB reference rate, R$5.5007, up 9.19%. By 28 Oct it had eased to R$5.3414 buy / R$5.3420 sell.
- **Abroad.** Direction 7 records Netanyahu's 19 Oct endorsement, the Israel seat count (53/48/19, with double-envelope ballots still out), the Arabic-language thread as reception, and one line on the Xi meme.
- **Policy and platforms.** Direction 8 carries the Amazon comparison (11,594 km² in 2022 to 5,731 km² in 2025, and Carbon Brief's avoided-clearing estimate) and the two restored Instagram suspensions. The NABEP warrant stake, the Barbados parent and the North Texas forum are in 6.4, from ProPublica.
- **Black October.** Direction 9 summarises the PHP2Shell window: CISA's exploited listing, no named victim, no confirmed breach in Latin America, the Delft count, the Brazilian office outages, and the 26 Oct outage at UNM Health. The window stays open through 31 Oct.
- **Conspiracies.** One antisemitic post is recorded in a single line, without a link or a quotation. An Argentine claim about splitting the southern states is marked as without evidence. The satire game Corre, Flávio! is noted as a joke, not a source.

Changelog (v13 → v14, 26 Oct 2026)

- **Evangelicals.** Section 6.5 gains the ISER/Quaest survey *Religião e Vida Pública no Brasil* (15,000 face-to-face interviews, 412 municipalities, 14 Jan–10 Feb 2026). Among people with a religion, 83% oppose leaders indicating a vote, 82% oppose political discussion in services, and 90% oppose campaigning in churches. Recalled 2022 instruction was 11% for Bolsonaro and 5% for Lula, higher among Pentecostals (23%) and in the Universal Church (27% Bolsonaro, 12% Lula). Opposition to easier gun purchase or ownership, on page 63, is 68% among Pentecostals, 64% among Protestants, and 67% among evangelicals without a church. Evangelicals are 29% of the population in the survey, and 70% of them are Pentecostal. The primary document is the ISER PDF.
- **First round.** The TSE file `votacao_candidato_munzona_2026` is the source for church-linked candidacies, summarised in 6.2 and set out in 6.5. R.R. Soares's sons finished as alternates or without a seat. Crivella (Republicanos) took 539,598 votes (3.39%) for the Rio Senate, sixth. Quadrangular-linked names in Minas Gerais were alternates; a church-press count says none was elected, and this edition uses the TSE totals where that count disagrees. In São Paulo, Gilberto Nascimento (43,977), Edna Macedo (55,086) and André Santos (71,621) were not elected. Folha reports that the state assembly's evangelical front lost 10 of 31 members at the ballot, with two others moving to federal seats.
- **Where the seats went.** Folha (Mônica Bergamo, 8 Oct, an allies' count) reports 20 of 36 Senate candidates backed by Silas Malafaia won, and about 27 winners in all. The TSE file shows Carlos Portinho (PL) elected to the Rio Senate with 4,264,932 votes, Samuel Malafaia as first alternate, and Sóstenes Cavalcante (170,290), Alexandre Isquierdo (83,461) and Feliciano (122,119) elected. Church-brand candidacies lost. The wins ran through the PL and through Malafaia's network.

- **Earlier endorsements.** Malafaia asked for votes for Lula in 2002 (Folha, the recording republished in 2024). Macedo and Rodovalho backed Dilma in 2010. Malafaia backed Serra on 28 Sep 2010 (Folha).
- **Polls.** The last Datafolha evangelical subsample stays Flávio 70 / Lula 30 of valid votes, as in v13. The last national Quaest (23–24 Oct, BR-09158/2026) had Flávio 51 / Lula 49 of valid votes. The closed result remains Lula 51.79%.
- **Opinion only.** Ronilso Pacheco's 21 Oct Intercept Brasil essay is cited as commentary in 6.10. It is not a source for the figures.
- **Left out.** Figures that do not appear in the ISER PDF are not used.

Changelog (v12 → v13, 26 Oct 2026)

- **Runoff.** Direction 6 gains section 6.12, dated 26 Oct 2026. The TSE results file closed at 23:26:38 on 25 Oct shows Lula re-elected with 51.79% (64,256,232) to Flávio Bolsonaro's 48.21% (59,826,041), a margin of 4,430,191. A night-of snapshot of 51.78% does not match that file. The section records turnout, the regional split, the pre-election evangelical polls (no exit poll was found), the voting-hour extension and the annulment claim, institutional and US reactions, the pre-open market move, and what the result leaves in place for Master, Havengate, privatization, minerals and evangelical leadership.
- **Direction 7.** Section 7.13 restates Brazil's position after a Lula win: still outside the Shield of the Americas and the Isaac Accords, Israel ties unchanged, the Mercosur strain unchanged, and the data-center hedge (Redata, TCU 1380/2026, US and Chinese suppliers together) still federal policy. Lines that had waited on the runoff now point there.
- **Folded in**, with labels: Nunes Marques and Newton Ramos; Best Bet and the Willer Tomaz asset freeze; the Dark Horse dispatch tying a Vorcaro associate to the Havengate remittance; Master's place on a Lula-government pension list; the Petrobras gap between a debate denial and a capitalization mechanism; Daniella Marques's seat on the board of Banco Digimais (no wrongdoing is alleged); the pandemic-procurement record; Inpe's deforestation release as reported; the Missão visit by Curtis Yarvin; coalition presidentialism; and the São Paulo camera contracts. Direction 4 notes Founders Fund's place in Flock Safety. Section 2.9 notes Founders Fund's 2018 round in Carbyne.
- **Thesis tables** are re-scored in 6.12 and 7.13. Murky items 69–84 are in section 3.
- **Chapter order.** Sections were moved and not rewritten, into the approved sequence: method, actors, murky circumstances, convergence, Whitney Webb, conclusion, bibliography, Directions 1–7, Appendices A–E, then this edition history. The 26 Oct scheduled update is marked done.
- **Not yet official, or not found, on the morning of 26 Oct:** a filed annulment petition; a White House or State Department recognition statement; an armed-forces communiqué; an exit poll; the Ibovespa cash close; a Rockbridge filing after the vote.

Changelog (v11 → v12, 22 Oct 2026)

- Bibliography moved to the end of the report; no content changes.

Changelog (v10 → v11, 20 Oct 2026)

- **New: Direction 5, Thiel's Nashville lectures** (28 Sept – 19 Oct 2026). It is placed after Direction 4. It contains:
    - the format, hosts and venue (The Pamphleteer and Meriwether Academy, the Grand Lodge of Tennessee, Peter Robinson's Q&A);
    - what he said, lecture by lecture, with each quote checked against fetched text or labelled [R] or [U; unconfirmed];
    - a comparison table with San Francisco (2025), Paris (26 Jan 2026), Rome (15–18 Mar 2026), Aspen and *First Things*;

    - a table setting the theology against Direction 1's material interests (Palantir, Anduril, Founders Fund, AI deregulation), with the limits of each overlap;
    - reactions (opinion only), "What this doesn't show", gaps, and murky items 64–68 in section 3;
    - Appendix E, the verification log.
- **Sources:** the *Nashville Scene* (lectures 1–2), Politico's recordings via Fortune, Gizmodo and Times of India (Politico itself blocked), an attending Epoch Times reporter's X posts (lectures 2–4, read through the X API), organiser pages, and an SEC 13F filing. No WaPo, NYT, Reuters or Free Press article on Nashville was found.
- **Labels in Direction 5 and murky items 64–68 =** 52 [V] / 1 [V-s] / 26 [R] / 16 [U].
- **New facts:**
    - Paris was a single talk on 26 Jan 2026 at the Académie des sciences morales et politiques; Rome ran Sunday 15 to Wednesday 18 Mar 2026.
    - Thiel Macro's 13F (30 June 2026): $418.7M in eight stocks, seven of them energy names, including Argentina's Vista Energy.
    - A US$12m Buenos Aires house and a Casa Rosada meeting (2026).
- **Correction:** murky item 13 said the Nashville *sponsor* ties back to Thiel's "Dialog" network. The *Scene* ties Dialog to Nashville through Vanderbilt's chancellor, not the sponsor. Item 13 is corrected.
- **Scheduled updates:** the 20 Oct update is done; the 26 Oct runoff update is still pending.

Changelog (v9 → v10, 17 Oct 2026)

- **New: Direction 7, Latin America alignment and the data-center buildout.** It is placed after Direction 6. It tests the consortium's hypothesis about regional alignment with Washington and Israel, the isolation of Brazil, and data centers. It contains:
    - an alignment map and the isolation evidence for and against;
    - a projects table and the security framing (trusted stack, TCU 1380/2026);
    - press coverage and the US opposition context;
    - a verdict table, "What this doesn't show" and murky items 54–63;
    - a case box on the viral John "Jay" Valentine testimony.
- **Full-text pass.** About 95 pages were fetched, plus the full TCU ruling, a Texas PUC filing and the X post's video (transcribed). An earlier count had 9 [V] / 29 [V-s] / 4 [R] / 13 [U]. **Direction 7 has 142 [V] / 28 [V-s] / 7 [R] / 17 [U]**, tagged item by item, so the totals are not strictly comparable.
- **Corrections to that earlier count:**
    - Colombia has **not** designated Hamas. It designated Hezbollah in 2020 and the IRGC on 24 Sept 2026.
    - Peru joined the Shield about **10 Sept 2026**, not "early August".
    - Colombian evangelicals: "majority for De la Espriella" becomes "a strong base; **no data** on vote share".
    - Rio: the US$550m is **Elea's** investment, not City Hall money. The "US$65bn" figure is removed (Valor gives ~US$10bn). Capacity is up to 3 GW by 2032.
    - Scala: 5 GW was *requested*; **1,800 MW was granted**.
    - Chile Cerrillos: the "no review needed" outcome is **not visible** in the SEIA record, so it is now [U]. The partial annulment was Feb 2024.
    - Pecém: g1 gives R$580bn against TikTok's R$200bn+ (discrepancy flagged). The MPF action targets Omnia and Semace.
    - Mexico: the BBC article is dated 28 Aug 2025.
    - Redata: the "5-year" term was not found in the law text and is dropped.
    - Paracatu is no longer called Brazil's "largest" project.
    - Paraguay signed the AI Opportunities Declaration, **not** Pax Silica.
- **Downgrades:**
    - Scala "77,760 m³/day" → [U].

    - Uruguay water figures → [R].
    - Mapuche opposition in Patagonia → [U].
    - Brazil's IHRA status → contested [U].
- **Gaps closed:**
    - Argentina's embassy (promised, frozen in Jan 2026, reaffirmed in Apr, still not open).
    - Peru and Colombia designations.
    - IHRA adoption list.
    - A primary text of Flávio's Isaac Accords pledge (VEJA, full speech).
    - Bukele–Israel (Israel closed its San Salvador embassy; no move or designation).
    - The Valentine video and his background.
- **Additions:**
    - Brazil attended the Feb 2026 Critical Minerals Ministerial (counter-evidence to isolation).
    - Paraguay's minerals MoU.
    - The suspended Peña–Lula joint declaration.
    - The Brazilian state cloud's mix of AWS, Google, Oracle **and Huawei** (TCU).
- **Scheduled updates:** the 26 Oct runoff update now also refreshes Direction 7.

Changelog (v8 → v9, 17 Oct 2026)

- **Full-text pass on Direction 6.** About 75 sources were fetched in full. Brazil-section labels went from 1 [V] / 37 [V-s] / 8 [R] / 2 [U] to 78 / 23 / 5 / 2.
- **Corrections:**
    - Ciro Nogueira's "Emenda Master" dated to 2024.
    - Moraes contract wording made precise (metadata "last modification", 11 Jan 2024).
    - Toffoli: the PF did point to suspicion; the STF unanimously found no grounds.
    - Jair's custody history: PF Superintendency → Papudinha → humanitarian house arrest from 24 Mar 2026.
    - Bannon's Movement: "Latin America", not "South America".
    - Marinho re-labelled: Novo gubernatorial candidate and son of Flávio's Senate alternate, plus his denials.
    - Murky item 38 downgraded (timing contradiction).
    - Gettr sponsorship downgraded to [R].
- **Upgrades:** Pentagon US$750m to the Serra Verde SPV, now [V] via the SEC 8-K; most Master, STF and Abin items now [V].
- **Additions:**
    - The 21-demand US proposal (Estadão) and the 9 Jan 2026 follow-up.
    - The Abin assessment; the PCC/CV designation; the July 2026 PCC sanctions; the 26 May photo-op; Eduardo's lost seat (18 Dec 2025).
    - The Havengate/"Dark Horse" PF hypothesis; Rockbridge Brazil LLC; Figueiredo's status.
    - Lei 15.506; USAR closing Serra Verde; USGS 2026 figures.
    - The regional pattern table (Venezuela NABEP deal, Argentina, Colombia); the embassy retreat driven by agribusiness.
    - New names in the Master table: Motta, Rueda, Castro, Wagner/Credcesta.
    - Murky items 42–53; opinion-source note; Scheduled-updates notices.

Changelog (v7 → v8, 16 Oct 2026)

Added Direction 6: Brazil (Banco Master, Bolsonaro convictions, Section 301, rare earths/Serra Verde, oil/Venezuela, evangelicals, regional network); murky items 34–41.

Changelog (v6 → v7)

- Added "Direction 4: The surveillance-finance link" (prediction markets, the GENIUS Act and anti-CBDC moves, Argentina, data integration, digital ID), Unlimited Hangout lead verdicts, murky items 30–33 and Brazil leads (Pix in the Section 301 case).

Changelog (v5 → v6)

- Added "Direction 3: The private-city pipeline": an 11-row project table, the Próspera ICSID analysis, murky items 26–29 and Brazil leads.

Changelog (v4 → v5)

- Added "Direction 2: Prophecy meets policy": a 12-row scorecard, institutions and channels, the youth-opinion trend, money, murky items 22–25 and Brazil leads. The LDA (lobbying disclosure) API returned 503, so CUFI's lobbying spend is unfetched.

Changelog (v3 → v4)

- Added the section "Direction 1: Following the contracts," with USAspending and FEC pulls, two charts, a revolving-door table and murky items 18–21. Data files are in `contracts/`.

Changelog (v2 → v3)

- **Re-fetch pass:** each [V-s] source was retried with direct curl (25s limit), then Wayback Machine snapshots. Lines whose every source loaded in full and contained the claim were upgraded to [V]. Sources still blocked (Reuters 401; Politico, The Hill and parts of AP 403 or timeout; archive.ph rate-limited at 429) keep [V-s].
- **Corrections:**
  - IEEPA tariffs: the Supreme Court struck them down on 20 Feb 2026 (6–3, *Learning Resources v. Trump*). v2 listed this as unchecked.
  - Thiel's tour includes Paris (Jan 2026) and Rome (Mar 2026). v2 had the Rome date as unknown.
- **Added:**
  - Direct Thiel quotes on Obama, Pope Leo and effective altruism (Fortune, citing Politico's recordings).
  - NYT full-text detail on the PIF panel's unanimous objection.
  - Miami Herald full-text detail on Epstein–Carbyne, including Axon's $625M acquisition.
  - Murky items 8b and 17.
  - Appendix A, "Unlimited Hangout leads."
- **No full-text read contradicted a v2 claim.** The full texts only added detail.

Changelog (v1 → v2)

- **Upgraded to [V]/[V-s]:**
  - Vance–Yarvin quote (exact wording, from a court-filed transcript)
  - Thiel's $15M to Protect Ohio Values (FEC/OpenSecrets dates) and the $15M→$20M to Masters's PAC
  - Andreessen's "patron saints" list, which does name Nick Land, and Ray Kurzweil
  - Trump's Ohel visit (7 Oct 2024)
  - ICC sanctions (EO 14203, Khan, judges)

    - Iran strikes (22 June 2025, Operation Midnight Hammer)
    - Red heifer import (Sept 2022, Texas, Boneh Israel)
    - Hegseth–CREC (AP)
    - Epstein schedule entries (WSJ 2023, House Oversight document)
    - Founders Fund → Tlon
    - Pronomos → Praxis
    - Thiel's NZ citizenship (12 days) and the Wānaka lodge refusals
    - *Sovereign Individual* influence
    - Haaretz settlement-funding investigation
    - Palantir's ImmigrationOS contract
    - Faith Office EO 14205
    - CUFI's membership claim
    - Land's 2012 essay
    - AI policy executive orders (EO 14363 Genesis, EO 14365 state-law framework) and Stargate
    - Liberation Day EO 14257
    - Vance's Paris quote
    - Kushner's Gaza deal role and the PIF panel objection
    - Ben-Gvir's Temple Mount prayer
    - Acosta's denial
- **Corrected:**
    - Hegseth's title is now "Secretary of War" as a secondary title (EO 14347, 5 Sept 2025). The defense department's legal name is unchanged.
    - The ICC sanctions covered Prosecutor Khan in Feb 2025, then four judges in June 2025, then more later. v1 just said "later extended to judges."
    - The Acosta "belonged to intelligence" line is now marked as **denied under oath** (Sept 2025).
    - Thiel–Praxis is narrowed to "via Pronomos Capital (Thiel-backed)." There's no direct personal investment documented.
    - The AI Action Plan didn't itself preempt state laws. EO 14365 (Dec 2025) did the preemption push.
- **Added:**
    - Thiel's **second and third Antichrist series**: Rome (date unconfirmed) and Nashville (Sept 28–Oct 19, 2026), where he criticised Obama and Pope Leo.
    - A new section 3, "Murky and startling circumstances."
- **Removed:** the unsourced "lifted into ethnic-cabal narratives that she doesn't make" phrasing about Webb. It's replaced with her actual documented remark and her response.

Scheduled updates

Current document: Version 15, 28 October 2026. The runoff update below is done. Version 14 adds the ISER/Quaest survey and the first-round church candidacies in Direction 7 (7.2, 7.5 and 7.12). It does not replace 7.12. Version 15 follows the file through 28 Oct: the arithmetic, the challenge, the channel, the cash session, the reception abroad, policy and platforms, and the cyber window.

1. **Direction 5: Peter Thiel's Nashville lecture series. Done in v11 (20 Oct 2026).** The series ended 19 Oct 2026. Direction 5 covers what he said (lectures 1–4, labelled by source), the hosts and venue, the comparison with San Francisco, Paris and Rome, the material-interest overlap and its limits, murky items 64–68 and Appendix E. No Brazil or Rockbridge link was found. *Still open:* Politico's full text, any transcript of lectures 3–4, and any later reporting.

2. **Brazil's presidential runoff (Flávio Bolsonaro vs Lula). Done in v13 (26 Oct 2026).** The runoff was 25 Oct 2026. Direction 7.12 and Direction 8.13 now cover:
    - the official TSE result, the state and regional split, and the evangelical figures that exist (pre-election Datafolha and Quaest; no exit poll was found);
    - Flávio's refusal to concede, the voting-hour extension, and the absence so far of a filed annulment petition or a formal US recognition statement;
    - what a Lula win means for the 21-demand agenda, Serra Verde and Lei 15.506, Section 301, and the Master investigations;
    - re-scored thesis tables;
    - Brazil's row on the Shield, the Isaac Accords, Israel, Mercosur, and the data-center security framing (TCU 1380/2026, Redata).
3. **The days after the file closed. Done in v15 (28 Oct 2026), with the cyber window still open.** Direction 7.12, Direction 8.13 and the former Directions 8 and 9 now cover the arithmetic of the extra ballots, the challenge as it stood on 28 Oct, the messaging channel, the 26 Oct cash session, the reception abroad, the Amazon rate and the platform suspensions, ADPF 1178, and the PHP window. *Still open:* the MDIC bulletin, line by line; the days after 28 Oct in the cyber window, through 31 Oct.
4. **Money and crime. Done in v16 (28 Oct 2026).** Direction 6 is the accounts under the runoff. The Brazil verdict in the conclusion is a draft. *Still open:* who the US broker was, and who funded the fare; who profited on 26 Oct; the MDIC bulletin; the cyber days after 28 Oct.

The count, the session and Direction 6 are current as of 28 Oct 2026. Direction 5 is current as of 20 Oct 2026. Version 14 adds the ISER/Quaest survey and the first-round church candidacies in 7.2, 7.5 and 7.12.