

DOVR Field Notes — June 22, 2026

Trending Conversations & Emerging Signals • 7-Day Lookback

"The secret of getting ahead is getting started."

— Mark Twain

Featured: Iran MOU Signed — But Fragile

Trump & Pezeshkian electronically signed the "Islamabad MOU" June 17. **60-day ceasefire extension**. Hormuz reopening for commercial shipping. Discussions on sanctions relief + \$25B frozen assets. Nuclear program talks underway.

But: June 19 ceremony called off. Vance delayed trip. Iran suspended talks after Trump threats. Technical talks continue with "rough start." **Deal is fragile — but economic effects are real and flowing through.**

Impact: Brent \$144 → ~\$78 (46% drop). Gas \$4.54 → **\$2.90** (below pre-war \$3.38). Mortgage rates 6.57% → **6.48%**. Cost environment actively improving.

~\$78

BRENT CRUDE
Down 46% from \$144

\$2.90

GAS \$/GAL
Below pre-war \$3.38

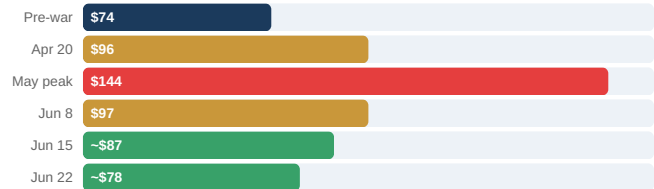
6.48%

MORTGAGE RATE
Down from 6.57%

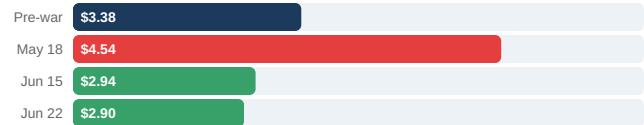
150+

SHOPIFY SPRING '26
UCP + Universal Cart

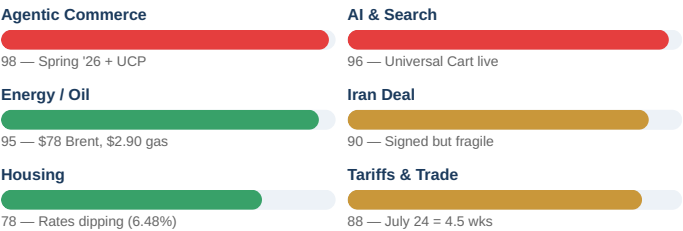
Oil Price Trajectory — 2026



Gas Prices — Below Pre-War



Signal Strength



Three Signals Worth Watching

ACT NOW

Spring '26 + Universal Cart

150+ updates. UCP backed by Amazon, Visa, Mastercard, Meta, Microsoft, Walmart. Universal Cart across Search/ Gemini/YouTube/Gmail. Product data audit is non-negotiable. AI orders 15x, AOV +30%.

ACT NOW

Oil \$78, Gas \$2.90 — Surcharges Misaligned

Gas BELOW pre-war (\$3.38). Brent down 46%. Mortgage rates dipping to 6.48%. Delivery surcharges from \$4.50+ gas are severely out of alignment. Review pricing now.

MONITOR

Iran MOU Signed but Fragile

Signed June 17. Hormuz open 60 days. But ceremony cancelled, talks disrupted, "rough start." Trajectory clear — lower oil, lower gas, lower rates. Act on reality, don't overcommit.

Action Matrix — Week of June 22

Opportunity	Priority	Timeframe
Audit product data — Spring '26 + Universal Cart	CRITICAL	This week
Review delivery surcharges — gas \$2.90, oil \$78	CRITICAL	This week
Keep FAQPage schema — 3.2x AI Overview visibility	CRITICAL	This week
Check Search Console AI reports	CRITICAL	This week
File IEEPA claims — July 24 < 5 weeks	HIGH	Now
Map supply chain — Section 301 tariffs by July 24	HIGH	This week
Create citation-worthy content (AI spam policy)	HIGH	0–30 days
Prepare consumer confidence messaging	HIGH	This week

Opportunity	Priority	Timeframe
Monitor Iran deal — 60-day window	MEDIUM	Ongoing
Invest in 3D/AR visual commerce	MEDIUM	0–60 days