

RCG Forecast Set – Q3 2025 (locked on 2025-07-29 10:20 UTC)

AU■US■01 | Australia ↔ U.S. – Virginia■class transfer contract (≥ 3 boats) ratified | P=80%
Window: 1 Aug 2025 → 30 Jun 2026

AU■US■02 | Australia co■invests $\geq$ US\$2.5■bn in U.S. submarine yards | P=65%
Window: 1 Aug 2025 → 30 Jun 2026

KR■US■03 | Tariff■relief mini■deal cuts auto duty ≤ 15 ■% for $\geq$ US\$100■bn SK investment | P=70%
Window: 1 Aug 2025 → 30 Jun 2026

KR■US■04 | KORUS 2.0 AI■chip/cloud security chapter launched | P=55%
Window: 1 Aug 2025 → 30 Jun 2026

CA■US■05 | Exemption & US\$5■bn stockpile fund for Canadian crude/minerals | P=75%
Window: 1 Aug 2025 → 30 Jun 2026

CA■US■06 | Softwood■lumber WTO / CUSMA arbitration filed | P=60%
Window: 1 Aug 2025 → 30 Jun 2026

MX■US■07 | USMCA roadmap defers broad tariffs ≤ 10 ■% to 31 Jan 2026 | P=55%
Window: 1 Aug 2025 → 30 Jun 2026

MX■US■08 | U.S. imposes ≥ 20 ■% produce tariff; Mexico files dispute | P=65%
Window: 1 Aug 2025 → 30 Nov 2025