



MYANMAR WEEKLY

19 July – 25 July 2026

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5PC
rejected

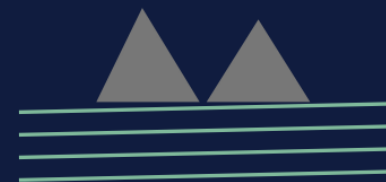
Regime backs rejection of ASEAN 5PC



officers killed in Hakha

Junta officers killed in Hakha

rains, floods slow fighting



Rains, floods interrupt the front

POLITICS

- The regime says it will honour Parliament's rejection of ASEAN's peace plan (July 24), contradicting the foreign minister's earlier assurances that the Five-Point Consensus remained in place.
- The manpower crisis deepens: new conscripts and even police and militia are pushed to the front, yet the regime keeps losing ground on the Arakan and Ayeyarwady fronts.
- The post-June-16 Beijing summit continues to anchor the regime between China, Russia and a wary ASEAN.
- Analysts read the new administration as continued military consolidation behind a civilian façade.

ECONOMY

- The parallel-market kyat weakens further toward ~4,600/USD against the pegged official 2,100.
- The Rakhine blockade keeps basic-goods prices roughly five times central-Myanmar levels.
- China-Myanmar trade near \$20 bn/year underpins Beijing's drive to protect transit corridors and Kyaukphyu.
- The AA extends its parallel economy — taxes, courts, a lottery and a nascent banking system — across Rakhine.

FOREIGN AFFAIRS

- Parliament's rejection of the ASEAN 5PC signals a hardening line even as the regime seeks summit re-entry.
- China-India corridor competition over Rakhine sharpens as the AA consolidates control.
- Bangladesh's border-fence plans draw AA warnings that security needs engagement.
- The regime continues to lean on Beijing and Moscow for support.

INTERNAL SECURITY

- The regime funnels police and civilian militia into combat to offset acute troop shortages.
- Desertions rise, now in double-digit groups of conscripts with no will to fight.
- Crime thrives along the China border despite the regime's safety assurances.
- Forced-recruitment fears persist across contested regions.

DEFENCE

- The Arakan Army sustains its assault on the Kyaukphyu and Sittwe coastal enclaves as weather clears.
- Undercover Chin operatives' Hakha assassinations underscore the regime's fragile hold on Chin State.
- The junta keeps up airstrikes on civilian targets in northern Rakhine as its map shrinks.
- The military presses its Chin/Magwe corridor campaign to secure India-border trade routes.

HEALTH

- The Rakhine blockade keeps over two million people at risk of severe food insecurity.
- Sustained attacks on healthcare continue amid intensifying airstrikes.

EDUCATION

- Violence and poverty keep nearly half of school-age children out of school.
- Conscription drives pull youth out of education and into combat.

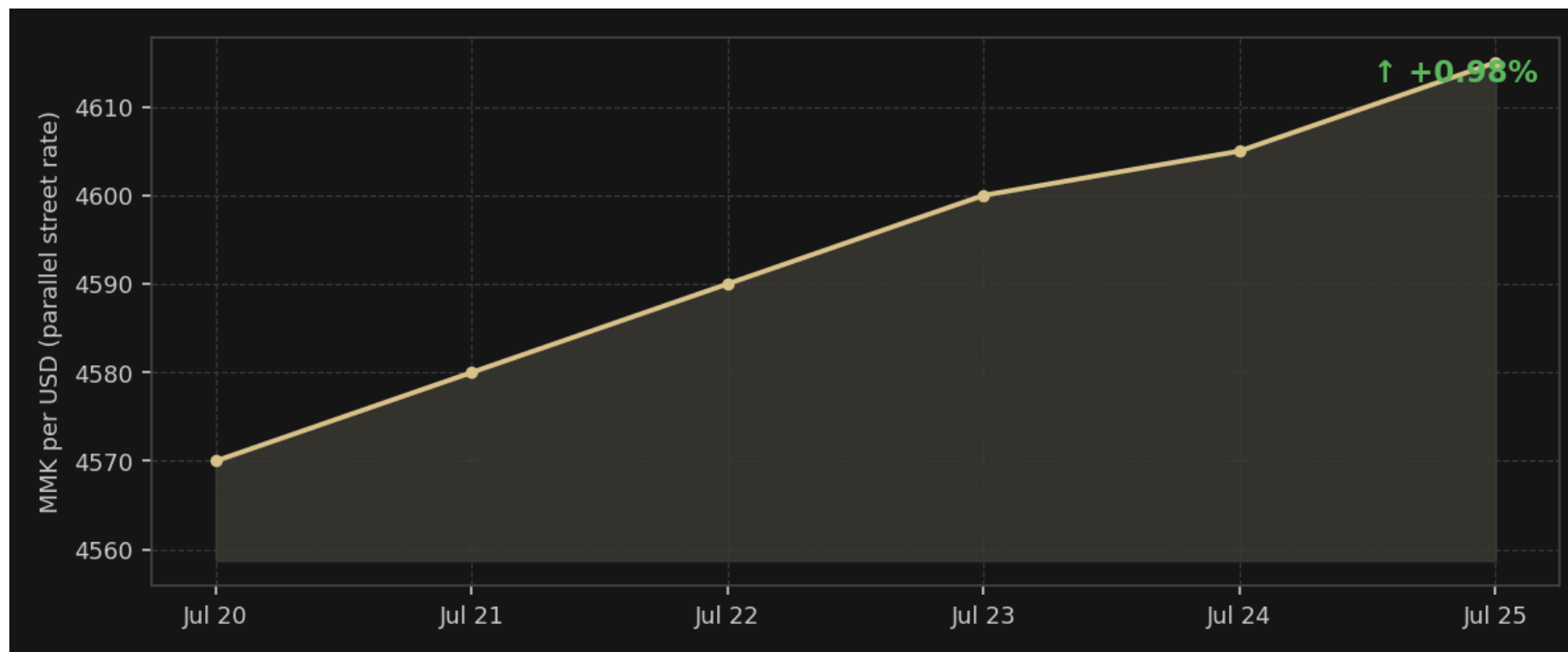
SOCIETY

- Displacement mounts across the Arakan and Ayeyarwady fronts as villagers flee raids and airstrikes.
- The AA's parallel administration deepens, from courts to a public lottery.
- Statue removals and symbol changes continue as the regime reshapes public space.
- Diaspora and exile media mark the mounting civilian toll of the air war.

Sr No	Date	Sector	News Headlines	Source
1	20 Jul 2026	Defence	AA sustains its Kyaukphyu and Sittwe assault as weather clears	The Irrawaddy
2	21 Jul 2026	Internal Security	Regime funnels police and militia into combat to offset troop shortages	The Irrawaddy
3	22 Jul 2026	Politics	Analysts read the new administration as continued military consolidation	The Irrawaddy
4	22 Jul 2026	Economy	Parallel-market kyat weakens toward ~4,600/USD against the official 2,100	The Irrawaddy
5	22 Jul 2026	Foreign Affairs	China-India corridor competition over Rakhine sharpens as the AA consolidates	The Irrawaddy
6	23 Jul 2026	Defence	Junta keeps up airstrikes on civilian targets in northern Rakhine	The Irrawaddy
7	23 Jul 2026	Society	Displacement mounts on the Arakan and Ayeyarwady fronts	The Irrawaddy
8	23 Jul 2026	Economy	Rakhine blockade keeps basic-goods prices roughly five times central-Myanmar levels	The Irrawaddy

Sr No	Date	Sector	News Headlines	Source
9	24 Jul 2026	Politics	Regime says it will honour Parliament's rejection of ASEAN's peace plan	The Irrawaddy
10	24 Jul 2026	Foreign Affairs	5PC rejection signals a hardening line even as the regime seeks summit re-entry	The Irrawaddy
11	24 Jul 2026	Internal Security	Desertions rise, now in double-digit groups of conscripts	The Irrawaddy
12	24 Jul 2026	Defence	Military presses its Chin and Magwe corridor campaign toward India-border routes	The Irrawaddy
13	25 Jul 2026	Education	Violence and poverty keep nearly half of school-age children out of school	The Irrawaddy
14	25 Jul 2026	Health	Over two million in blockaded Rakhine face severe food insecurity	The Irrawaddy
15	25 Jul 2026	Society	The AA's parallel administration deepens, from courts to a public lottery	Shan Herald
16	25 Jul 2026	Foreign Affairs	Regime continues to lean on Beijing and Moscow for support	The Irrawaddy

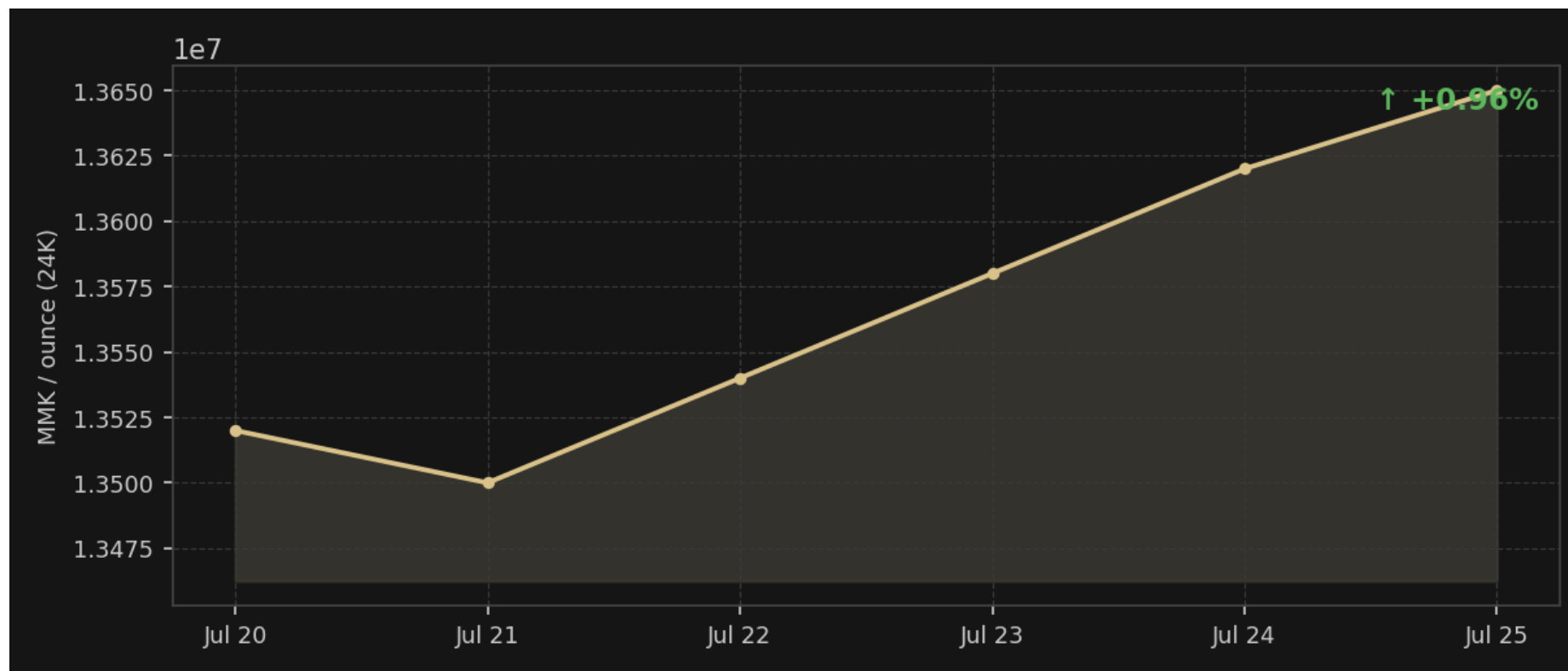
USD/MMK Exchange Rate (Parallel Street Rate)



The street rate weakened toward ~4,600/USD; the official CBM rate stays pegged far stronger at 2,100.

Indicative weekly series compiled from reported market data; interim points are approximations where official daily closes were unavailable.

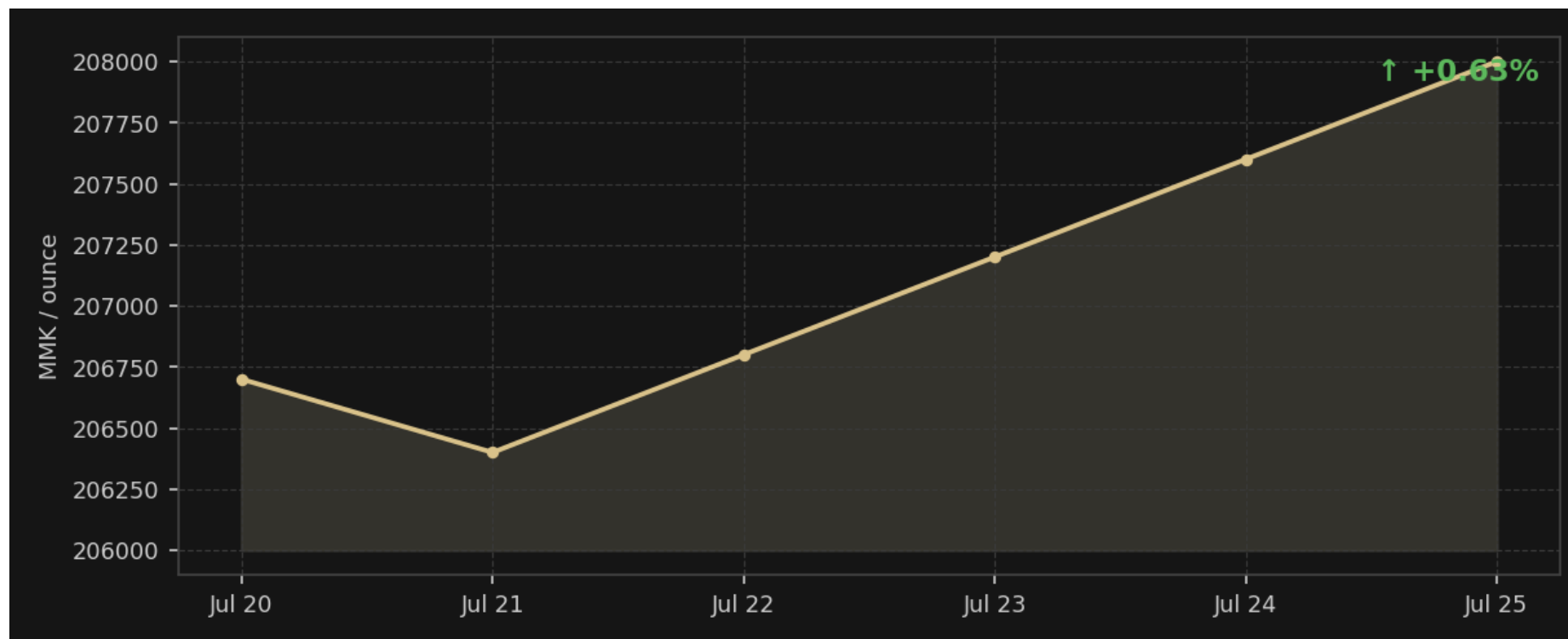
Gold Prices (in Myanmar Kyat/Ounce)



Kyat gold recovered modestly late in the week (24K, ≈market quotes).

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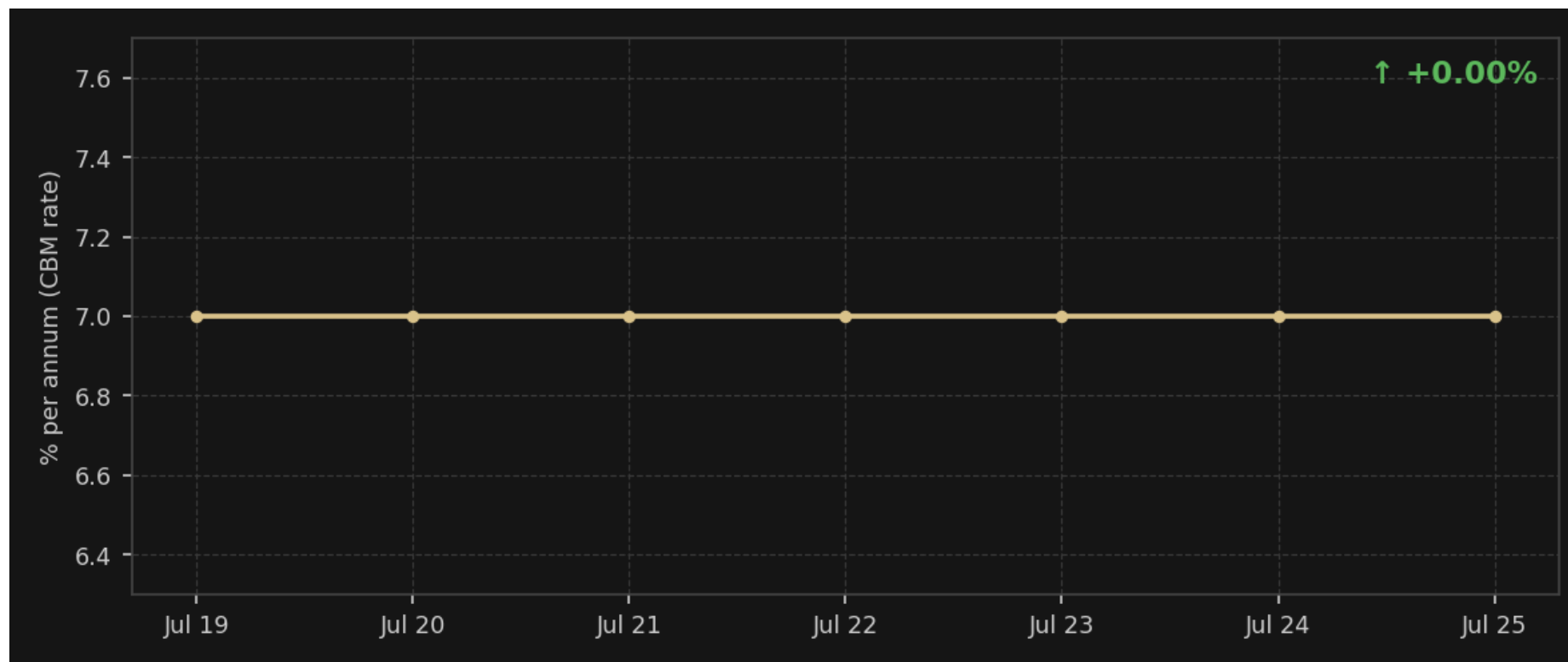
Silver Prices (in Myanmar Kyat/Ounce)



Spot-derived silver firmed slightly in kyat terms.

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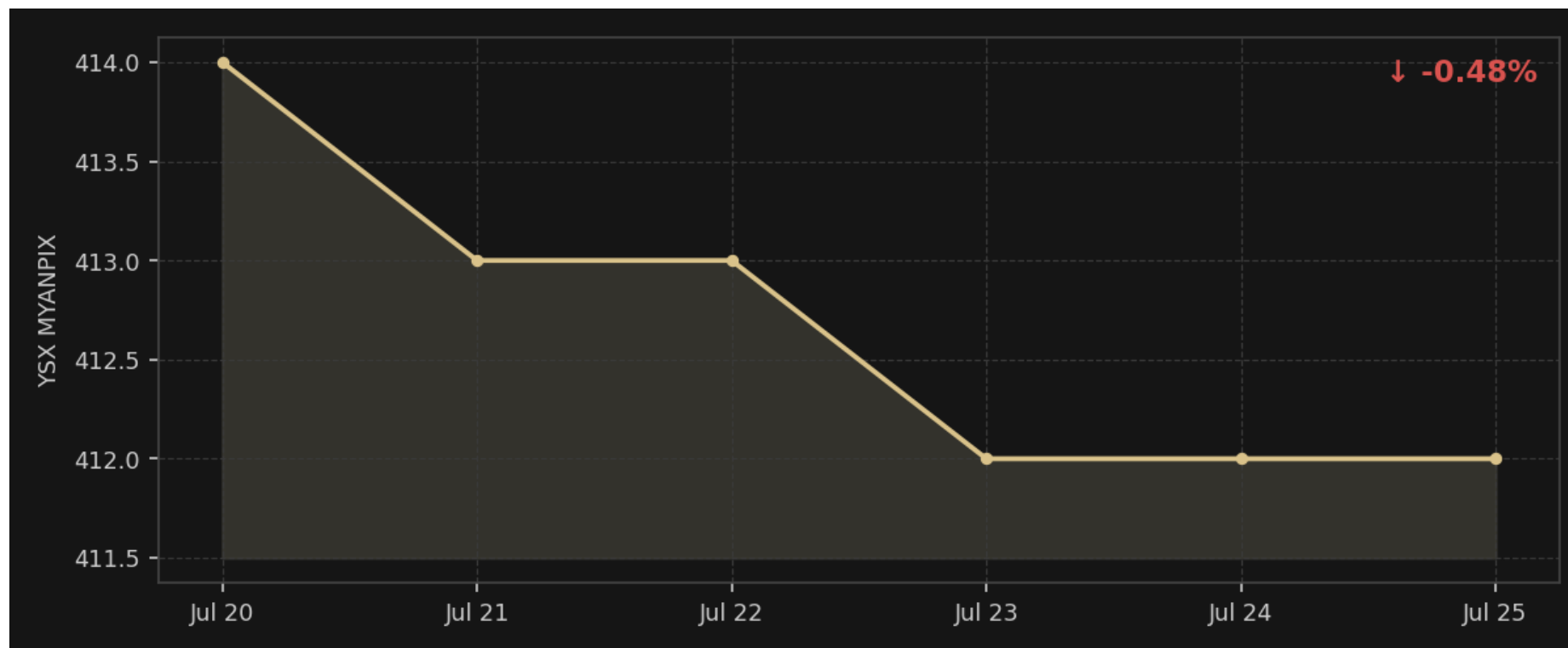
Central Bank of Myanmar — Central Bank Rate



The CBM's key rate was unchanged at 7.0% through the week.

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Yangon Stock Exchange — MYANPIX Index



The thinly traded MYANPIX drifted marginally lower amid minimal turnover.

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