TELLURIAN RESEARCH

DRC Weekly Intelligence Brief

10–16 August 2026

DRC-W-2026-33

Copper $14,545/t ▲ +2.1% **Cobalt** $56,290/t → +0.0% **Tin** $56,075/t → -0.0% **Gold** $4,390.70/oz ▲ +1.3%

Brent $88.52/bbl ▲ +5.9% **CDF per USD** 2,265.56 ▼ -0.2%

Week-on-week close from live market feeds — ICE Brent front-month · LME/Fastmarkets Cobalt · LME cash settlement, as of 16 Aug 2026. Prices pulled from source at collection, not model-generated.

Abstract

🏠 DOMESTIC

The week saw intensifying armed conflict across eastern provinces—heavy artillery clashes resumed in Kalehe (South Kivu) between FARDC and AFC/M23, while CRP militia engaged FARDC in Djugu (Ituri) and Wazalendo clashes with AFC/M23 continued in Walikale (North Kivu). Civilian toll mounted with killings reported in Mambasa, Kalehe, Masisi, and abductions on the Kiwanja–Kanyabayonga road. Domestically, President Tshisekedi referred a contested referendum law back to Parliament for reconsideration after civil society opposition, while political gatherings persisted despite a government ban on mass assemblies. Infrastructure demands (RN17, RN2) triggered strikes and youth protests in Bandundu and Mwenga. Separately, teacher salary arrears threatened school reopening in Malemba-Nkulu. Airtel Africa and Starlink launched Direct-to-Cell satellite service in the DRC on 14 August, with ARPTC facilitation. The Central Bank announced franc appreciation—its strongest since creation—and disclosed plans to accumulate monetary gold to boost foreign exchange reserves.

🌍 REGIONAL

The Ebola Bundibugyo outbreak remained in intense transmission phase, confirmed as originating from a new zoonotic spillover affecting both DRC and Uganda, while a separate Sud-Kivu outbreak ended after 42+ days without new cases. Frontline response staff in Kisangani demanded overdue salary payments, and a diocesan pilgrimage in Ituri was cancelled due to outbreak risk. The International Contact Group endorsed an FDLR disarmament protocol on 13 August—a significant diplomatic development, though previous disarmament efforts (2009, 2015, 2019) failed to achieve meaningful combatant reductions. Analyst Patrick Mbeko criticised Kinshasa's negotiating strategy with Rwanda, citing Kigali's more disciplined and centrally managed diplomatic messaging as a structural advantage.

🌐 INTERNATIONAL

President Tshisekedi undertook a working visit to Gabon on 15 August, opening a new phase in bilateral relations and signalling diversification beyond the DRC's traditional diplomatic axis. Congolese MP Christelle Vuanga was elected Coordinator of the Human Rights Commission of Parliamentarians for Global Action. Analyst Patrick Mbeko argued that US involvement in the Great Lakes region is primarily driven by strategic competition with China rather than solely by peace-building objectives, framing Washington's engagement as increasingly transactional.

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