Aldira Sunset

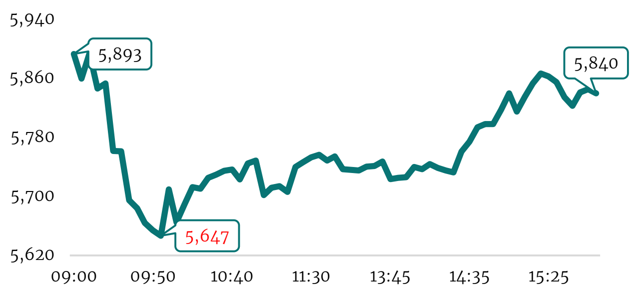
4 June 2026

aldiracita SEKURITAS INDONESIA

JCI SUMMARY

Closing Price	Change (Points)	Change (%)
5,840	-101.28	-1.70%
Previous	Highest (Day)	Lowest (Day)
5,941	5,925	5,644
Value (IDR bn)	Net Foreign Value (IDR bn)	Change YTD (%)
23,606	-1,270.7	-32.46

JCI INTRADAY CHART



SECTORAL INDICES PERFORMANCE

IDXENERGY	IDXBASIC	IDXINDUST	IDXNONCYC
-0.81%	-0.78%	-4.07%	-2.36%
IDXCYCLIC	IDXFINANCE	IDXHEALTH	IDXPROPERT
-1.48%	-2.04%	-1.81%	-3.28%
IDXINFRA	IDXTRANS	IDXTECHNO	LQ 45
-2.34%	-1.39%	-0.48%	-1.37%

Key Equity Markets	Close	Chg %	Ytd %
Asia			
Hang Seng	25,253	-1.48	-1.47
Nikkei	67,471	-1.36	34.03
KOSPI	8,639	-1.84	105.01
Shenzhen	2,801	-0.41	10.68
Sensex	74,373	0.04	-12.73
SET Thailand	1,595	0.42	26.60
ASX 200	8,686	-1.13	-0.32
Europe			
FTSE 100	10,284	-0.47	3.55
EuroStoxx 50	6,069	0.26	4.80

Macro Indicators	Close	Chg %	Ytd %
USD/IDR	17,950	-0.46	-7.45
Govt Bond 1 yrs	7.13	0.52	47.01
Govt Bond 3 yrs	6.87	1.55	31.42
Govt Bond 10 yrs	6.82	1.70	12.27

Commodities	Unit	Price	d-d %
Brent Oil	US$/barrel	98	-2.19
Gold	US$/toz	4,437	0.49
Nickel	US$/mt. ton	19,072	-2.03
Tin	US$/mt. ton	57,760	-1.19
Palm Oil	MYR/mt.ton	4,605	-1.50

MARKET REVIEW

Jakarta Composite Index

IHSG on Thursday, June 4, 2026 opened down -0.36% and extended losses throughout the session, closing down 1.70% (-101.28 points) to 5,840. The rupiah breached the psychological level of IDR 18,034/USD, amplifying macro stability concerns. The primary catalyst was renewed US-Iran hostilities, triggering broad risk-off sentiment.

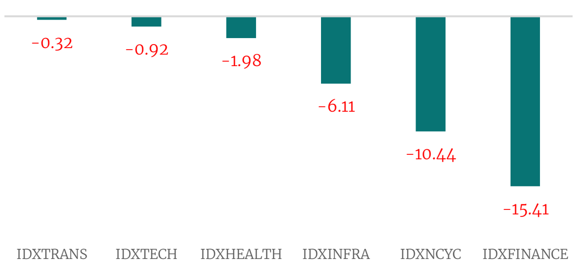
Asian Markets

Asian markets closed broadly lower. KOSPI -1.84%, Nikkei 225 -1.36%, ASX 200 -1.13%, Shanghai -0.64%. The MSCI Asia ex-Japan index fell 1.6%, pressured by US-Iran re-escalation and stronger-than-expected US ISM Services PMI, raising concerns over supply shortages and higher prices ahead.

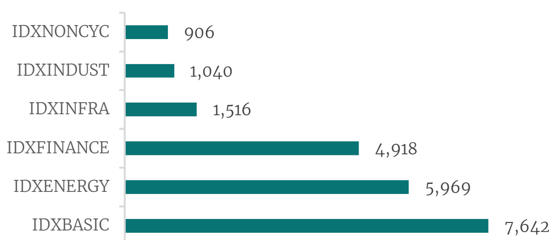
European Markets

European markets opened mixed with a slight downside bias. STOXX 600 -0.05%, FTSE 100 flat, CAC 40 +0.01%, DAX +0.22%. Sentiment remained cautious amid ongoing US-Iran conflict, partially offset by the Israel-Lebanon ceasefire agreement reached Wednesday evening.

JCI MOVERS (Points)



TOP 6 SECTORS BY TRANSACTION VALUE (IDR Bn)



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TOP 10 STOCKS BY TRANSACTION VALUE			
No.	Stock Name	Value (IDR bn)	% of Total
1	TPIA	3,735	15.6%
2	BBCA	2,964	12.4%
3	BBRI	1,392	5.8%
4	BMRI	1,307	5.5%
5	AMMN	859	3.6%
6	ANTM	857	3.6%
7	ASII	746	3.1%
8	DSSA	727	3.0%
9	CUAN	725	3.0%
10	BUMI	714	3.0%

JCI Leading	Last	Chg (%)	Index Pts
SMMA	19,000	5.70	7.14
AMMN	3,500	5.74	5.80
TLKM	2,900	1.75	5.25
MDKA	2,490	7.33	4.49
MSIN	570	24.45	4.27
EMAS	7,300	5.04	3.63
ANTM	2,760	5.75	2.83
BELI	330	10.00	2.12
ADRO	2,270	4.13	1.71
TINS	3,060	7.37	1.23

JCI Lagging	Last	Chg (%)	Index Pts
BBRI	2,810	-3.10	-14.19
BBCA	5,425	-1.81	-9.42
BRPT	1,615	-8.50	-8.49
ASII	4,630	-4.34	-8.42
BMRI	3,970	-1.98	-6.29
BREN	4,000	-3.85	-5.94
CPIN	3,420	-11.40	-5.55
TPIA	1,375	-14.86	-4.99
MORA	6,100	-4.31	-4.96
BBNI	3,420	-4.20	-4.88

Source: Bloomberg

NEWS

Global – US-Iran Peace Talks Stall

Iran's Foreign Minister stated that no meaningful progress has been made in negotiations for a temporary peace agreement with the United States. Tensions escalated after Iran launched missiles at Kuwait and Bahrain in retaliation for attacks on its oil tankers. Meanwhile, clashes continue in southern Lebanon despite the U.S.-brokered ceasefire between Israel and Hezbollah (Bloomberg).

Global – BOJ Considers June Rate Hike

Officials at the Bank of Japan (BOJ) are considering raising interest rates by 25 basis points to 1% at the upcoming June policy meeting. The move is being considered due to persistent inflationary pressures and still-low real interest rates. In addition, the BOJ plans to unveil a gradual reduction plan for its government bond purchases. The Japanese yen strengthened against the U.S. dollar following reports of potential monetary policy tightening (Bloomberg).

Domestic – Indonesian Market Rout Deepens

Indonesia's financial markets continued to slide, with the rupiah breaching the 18,000 per U.S. dollar level and the Jakarta Composite Index (JCI) falling to its lowest level in six years. Investors remain concerned about fiscal policy uncertainty under President Prabowo Subianto's administration and the growing burden of energy subsidies amid elevated oil prices. Bank Indonesia confirmed that it has intensified market intervention efforts to stabilize the weakening rupiah (Bloomberg).

Domestic – Key Changes in the Revised P2SK Law

The revision of the P2SK Law introduces 17 key provisions that strengthen the roles of Bank Indonesia (BI), the Financial Services Authority (OJK), and the Indonesia Deposit Insurance Corporation (LPS). The House of Representatives (DPR) is now authorized to periodically evaluate the performance of these three institutions. The new provisions also cover the demutualization of the Indonesia Stock Exchange (IDX), the legal framework for Danantara debt instruments, and debt write-off mechanisms for MSMEs. These reforms aim to deepen the capital market and enhance the stability of Indonesia's financial system (DPR RI).

Domestic – Finance Minister Denies Resignation Rumor

Finance Minister Purbaya Yudhi Sadewa denied rumors suggesting that he plans to resign from his position. He emphasized that the reports are entirely false and merely a hoax. Previously, Purbaya had jokingly remarked that the role of Finance Minister carries a much heavier workload than his previous position at LPS, but clarified that the comment was unrelated to any intention of stepping down from the cabinet (Detik Finance).

Domestic – IDX Denies MSCI Downgrade Rumor

The Indonesia Stock Exchange (IDX) firmly denied rumors that MSCI plans to downgrade Indonesia's capital market status to a frontier market. The Acting President Director of IDX stated that the information circulating through social media screenshots is false and constitutes misinformation. IDX remains confident that Indonesia will retain its emerging market status, supported by ongoing efforts to improve market quality and liquidity (Kompas).

NISP – Acquires OCBC Sekuritas

PT Bank OCBC NISP Tbk has signed an agreement to acquire a 98.9932% stake in PT OCBC Sekuritas Indonesia (PTOS) for IDR 453.45 billion. The transaction will be funded through the bank's internal cash reserves as part of the establishment of the OCBC Group Financial Conglomerate in Indonesia. The strategic move aims to comply with OJK regulations regarding financial conglomerate structures (Information Disclosure).

UNVR – Distributes Full Dividend

PT Unilever Indonesia Tbk (UNVR) has approved a total dividend distribution of IDR 201 per share for the 2025 financial year. This represents a 100% payout ratio of the company's net profit, which amounted to IDR 3.5 trillion. Following the payment of the interim dividend, the remaining final dividend of IDR 114 per share will be distributed to shareholders on June 30, 2026 (Information Disclosure).

VKTR – Updates Rights Issue

PT VKTR Teknologi Mobilitas Tbk will offer up to 25 billion new shares through a rights issue with a ratio of 7:4. Approximately 80% of the proceeds will be injected into its subsidiary, PT Sarana Ekomobilitas Indonesia, to procure electric vehicle fleets under the e-MaaS (Electric Mobility-as-a-Service) scheme. The remaining funds will be allocated to working capital. The rights trading period is scheduled for August 3–7, 2026 (Information Disclosure).

WGSH – Plans Private Placement

PT Wira Global Solusi Tbk (WGSH) plans to conduct a private placement of up to 208.5 million new shares without pre-emptive rights. The proceeds will be used to support business expansion and strengthen the company's working capital. Existing shareholders may face a maximum ownership dilution of 9.09%. The proposal will be submitted for approval at the Extraordinary General Meeting of Shareholders (EGMS) on June 19, 2026 (Information Disclosure).

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