Aldira Sunset

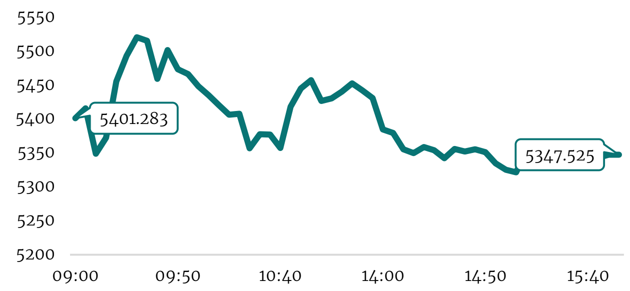
8 June 2026

aldiracita SEKURITAS INDONESIA

JCI SUMMARY

Closing Price	Change (Points)	Change (%)
5,342	-252.6	-4.52%
Previous	Highest (Day)	Lowest (Day)
5,595	5,524	5,318
Value (IDR bn)	Net Foreign Value (IDR bn)	Change YTD (%)
21,408	-447.1	-38.22%

JCI INTRADAY CHART



SECTORAL INDICES PERFORMANCE

IDXENERGY	IDXBASIC	IDXINDUST	IDXNONCYC
-4.03%	-4.00%	-6.39%	-4.36%
IDXCYCLIC	IDXFINANCE	IDXHEALTH	IDXPROPERT
-4.25%	-2.82%	-4.44%	-2.92%
IDXINFRA	IDXTRANS	IDXTECHNO	LQ 45
-6.29%	-5.58%	-4.68%	-5.50%

Key Equity Markets	Close	Chg %	Ytd %
Asia			
Hang Seng	24,657	-1.22%	-3.80%
Nikkei	64,025	-3.85%	+27.19%
KOSPI	7,484	-8.29%	+77.60%
Shenzhen	2,677	-3.14%	+5.78%
Sensex	73,524	-0.97%	-13.72%
SET Thailand	1,562	-1.32%	+23.98%
ASX 200	8,625	-0.70%	-1.02%
Europe			
FTSE 100	10,373	+0.05%	+4.45%
EuroStoxx 50	6,038	-0.41%	+4.25%

Macro Indicators	Close	Chg %	Ytd %
USD/IDR	18,020	-0.87%	-8.19%
Govt Bond 1 yrs	7.26	+0.71%	+49.71%
Govt Bond 3 yrs	7.27	+4.71%	+38.99%
Govt Bond 10 yrs	7.28	+5.85%	+19.90%

Commodities	Unit	Price	d-d %
Brent Oil	US$/barrel	93.09	+3.51%
Gold	US$/toz	4,337	-1.00%
Nickel	US$/mt. ton	18,494	-0.61%
Tin	US$/mt. ton	55,394	-5.05%
Palm Oil	MYR/mt.ton	4,492	+0.13%

MARKET REVIEW

Jakarta Composite Index

The JCI tumbled 4.52% (-252.6 pts) to close at 5,342 on Monday, June 8, 2026, touching an intraday low of 5,318. Iran's missile strikes on Israel under Operation Nasr triggered a sharp global risk-off wave. All 11 sectors closed in the red; IDXINDUST led losses at -6.39%. Net foreign selling reached IDR 447 billion.

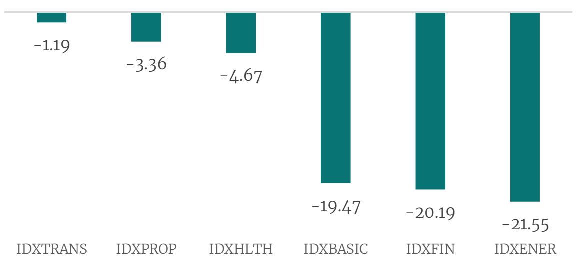
Asian Markets

Asian markets closed sharply lower. The KOSPI collapsed -8.29%, Nikkei fell -3.85%, Shenzhen dropped -3.14%, and Hang Seng slid -1.22%. FTSE Russell rebalancing effective today amplified selling across Asia, with Indonesia among the hardest hit.

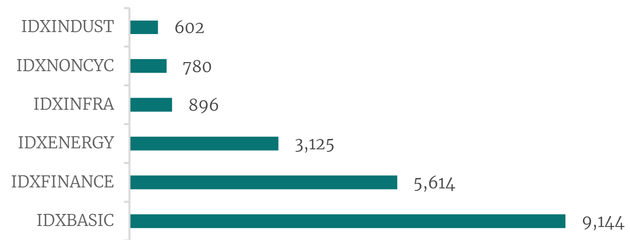
European Markets

European markets opened mixed. The DAX declined -1.26%, CAC 40 fell -1.03%, STOXX 600 slipped -0.33%, while FTSE 100 edged up +0.05% on energy strength. Brent crude surged +3.51% to USD 93.09/barrel on Iran-Israel supply disruption fears.

JCI MOVERS (Points)



TOP 6 SECTORS BY TRANSACTION VALUE (IDR Bn)



TOP 10 STOCKS BY TRANSACTION VALUE			
No.	Stock Name	Value (IDR bn)	% of Total
1	BBCA	3,472.90	17.06%
2	TPIA	2,529.45	12.42%
3	BBRI	1,661.17	8.16%
4	BMRI	1,462.06	7.18%
5	TLKM	810.08	3.98%
6	ANTM	712.79	3.50%
7	BUMI	612.65	3.01%
8	AMMN	497.76	2.44%
9	BRPT	456.03	2.24%
10	BBNI	451.07	2.22%

JCI Leading	Last	Chg (%)	Index Pts
SMMA	20,975	+4.88%	+6.79
TPIA	1,605	+22.99%	+6.24
MSIN	580	+7.41%	+1.52
BYAN	9,600	+0.79%	+1.20
ADMR	1,450	+3.57%	+0.53
MBMA	440	+1.38%	+0.39
SILO	2,420	+7.08%	+0.35
CTBN	7,450	+19.68%	+0.25
PSAB	540	+8.00%	+0.18
APIC	525	+1.94%	+0.17

JCI Lagging	Last	Chg (%)	Index Pts
TLKM	2,350	-14.86%	-43.04
BBRI	2,590	-5.47%	-23.65
BBCA	4,850	-4.43%	-21.19
BMRI	3,710	-3.39%	-10.23
DCII	170,000	-5.69%	-10.22
ASII	4,360	-4.60%	-8.42
MORA	5,300	-7.02%	-7.21
IMPC	1,305	-14.71%	-6.85
BBNI	3,010	-6.23%	-6.51
SRAJ	10,750	-10.42%	-5.79

Source: Bloomberg

NEWS

Global – OPEC+ Raises July Output by 188,000 bpd

Seven OPEC+ members, including Saudi Arabia and Russia, agreed Sunday (June 7) to raise production targets by 188,000 barrels per day starting July 2026, marking the fourth consecutive monthly increase since the US-Iran war disrupted Strait of Hormuz flows. Despite higher quotas, actual OPEC+ output has declined sharply, with group production averaging approximately 33.2 million bpd in April, down from 42.8 million bpd in February (Reuters).

BI – BI & Kemenkeu Raise Asset Yields to Attract Inflow

Bank Indonesia and the Ministry of Finance on Saturday (June 6) agreed to increase the yield attractiveness of Indonesian financial assets to draw portfolio inflows and support the rupiah, after persistent foreign outflows weighed on the currency. Governor Perry Warjiyo stated BI would raise the remuneration rate on government cash deposits held at BI, a move also intended to alleviate rating agency concerns over Indonesia's fiscal dynamics (Reuters).

APBN – OECD Cuts Growth to 4.7%, Warns Deficit May Hit 3%

The OECD's June 2026 Economic Outlook projected Indonesia's fiscal deficit will widen to 3.0% of GDP this year, above the government's 2.7% target, noting that a compensating policy mix of approximately 0.3% of GDP may be needed. The organisation also revised Indonesia's GDP growth forecast down to 4.7% for 2026, before a recovery to 5.0% in 2027, citing higher energy costs and elevated policy uncertainty weighing on consumption and investment (Bisnis).

Currency – Forex Reserves Fall 5th Straight Month to USD 144.9bn

Bank Indonesia reported foreign exchange reserves fell to USD 144.9 billion at end-May 2026, down USD 1.3 billion from April and the lowest since June 2024, marking five consecutive months of decline from USD 154.6 billion in January. The drop was driven by government external debt repayments and BI's rupiah stabilisation interventions. Reserves remain equivalent to 5.6 months of import coverage, above the international adequacy threshold (ANTARA).

Domestic – Kemendag Issues 3 Rules on Commodity Export Centralisation

The Ministry of Trade on Monday (June 8) formally issued Permendag No. 15, 16, and 17 of 2026, establishing the technical mechanism for centralised export of coal, palm oil, and ferroalloy through state-owned PT Sumberdaya Indonesia (DSI). The regulations allow existing exporters to continue operations during a transition period through end-2026, with full single-channel export via DSI mandated from January 2027 (Kontan).

Domestic – Bahlil: No Gross Split in Mining, Rules Unchanged

Minister of Energy and Mineral Resources Bahlil Lahadalia on Monday (June 8) firmly confirmed the gross split production sharing scheme will apply only to oil and gas and will not be extended to the minerals and coal sector. The existing revenue-sharing arrangement for mining will remain permanently unchanged, Bahlil stated, providing clarity after earlier remarks in May 2026 triggered market concern over potential policy shifts in the sector (Kontan).

Domestic – Bahlil to Relax Minerba Production Quotas Amid Price Rise

Minister of Energy and Mineral Resources Bahlil Lahadalia announced Monday (June 8) that the government will implement a measured relaxation of annual Work Plan and Budget (RKAB) production quotas for the minerals and coal sector in response to rising global commodity prices. Bahlil stressed there is no change to overall RKAB policy, only targeted quota increases where commodity prices justify higher output to optimise state revenue (Bisnis).

EMAS – 445k-Oz Resource Discovered at Kolokoa Prospect

PT Merdeka Gold Resources (EMAS) established an initial mineral resource estimate of approximately 445,000 ounces of gold at the Kolokoa Prospect in Pohuwato, Gorontalo, following an exploration program from November 2025 to April 2026. The discovery, located approximately 500 metres from the Pani Gold Mine, increases total Pani mineral resources by approximately 6% to around 7.4 million ounces, supporting the company's target of 500,000 ounces peak annual production (Bisnis).

PGEO – Secures USD 477.87M International Financing for 3 Projects

PT Pertamina Geothermal Energy (PGEO) secured commitments for concessional international financing totalling approximately USD 477.87 million across three geothermal projects that entered Bappenas' Green Book 2026 as of June 3. Funding is sourced from JICA (USD 307.83 million for PLTP Lumut Balai Units 3 and 4) and the World Bank (USD 170.04 million for PLTP Lahendong Unit 7-8), delivered through Indonesia's subsidiary loan agreement mechanism.

TLKM – RUPS Approves FY25 Dividend, ~9.4% Indicated Yield

PT Telkom Indonesia's Annual General Meeting on Monday (June 8) approved the distribution of a final dividend for fiscal year 2025 with an indicated yield of approximately 9.4%, based on a dividend per share of IDR 212.47 and an ex-dividend date of June 11, 2026. The announcement represents a significant yield support amid today's sharp price decline to IDR 2,350, driven by FTSE Russell rebalancing-related forced selling (Bisnis).

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