Aldira Sunset

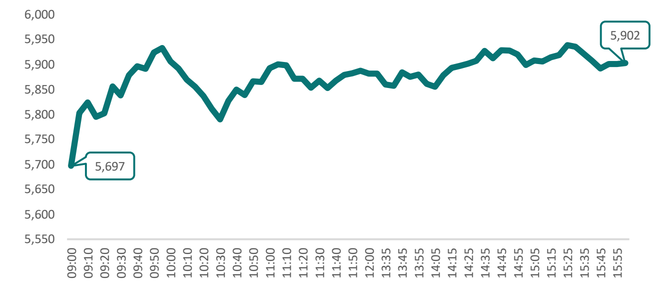
10 June 2026

aldiracita SEKURITAS INDONESIA

JCI SUMMARY

Closing Price	Change (Points)	Change (%)
5,902	+155.7	+2.71%
Previous	Highest (Day)	Lowest (Day)
5,747	5,943	5,678
Value (IDR bn)	Net Foreign Value (IDR bn)	Change YTD (%)
25,776	-3125.4	-31.74%

JCI INTRADAY CHART



SECTORAL INDICES PERFORMANCE

IDXENERGY	IDXBASIC	IDXINDUST	IDXNONCYC
+0.42%	+1.73%	+2.42%	+2.78%
IDXCYCLIC	IDXFINANCE	IDXHEALTH	IDXPROPERT
+0.81%	+0.64%	+1.05%	+4.37%
IDXINFRA	IDXTRANS	IDXTECHNO	LQ 45
+2.27%	+4.51%	+3.39%	+3.54%

Key Equity Markets	Close	Chg %	Ytd %
Asia			
Hang Seng	24,408	-0.64%	-4.77%
Nikkei	64,179	-1.89%	+27.49%
KOSPI	7,731	-4.52%	+83.45%
Shenzhen	2,688	-1.97%	+6.22%
Sensex	73,983	+0.09%	-13.19%
SET Thailand	1,564	-1.30%	+24.13%
ASX 200	8,653	+0.57%	-0.70%
Europe			
FTSE 100	10,154	-0.71%	+2.24%
EuroStoxx 50	5,991	-0.97%	+3.45%

Macro Indicators	Close	Chg %	Ytd %
USD/IDR	18,060	+0.60%	-7.04%
Govt Bond 1 yrs	7.23	-0.63%	+49.15%
Govt Bond 3 yrs	7.40	+1.59%	+41.57%
Govt Bond 10 yrs	7.34	-0.96%	+20.97%

Commodities	Unit	Price	d-d %
Brent Oil	US$/barrel	91.45	+1.22%
Gold	US$/toz	4,260	-2.21%
Nickel	US$/mt. ton	18,127	-1.55%
Tin	US$/mt. ton	51,934	+0.36%
Palm Oil	MYR/mt.ton	4,454	-0.09%

MARKET REVIEW

Jakarta Composite Index

The Jakarta Composite Index rallied 2.71%, adding 155.73 points to close at 5,902, extending its recovery to the strongest two-day gain in roughly six years. Sentiment was buoyed by Bank Indonesia's 75 bps of cumulative rate hikes over three weeks and Governor Warjiyo's commitment to allow bond yields to rise to attract foreign inflows. The rupiah gained 0.9%, its best single-day performance since May 2025.

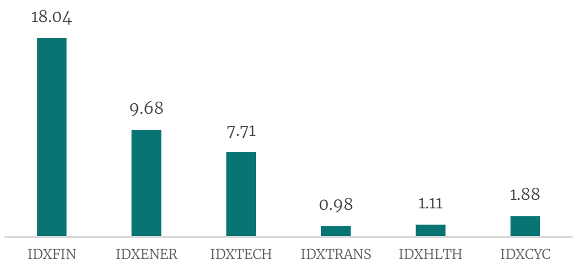
Asian Markets

Asian markets closed broadly lower ahead of the US CPI release. The Nikkei fell 1.89%, the KOSPI dropped 4.52%, and the Hang Seng shed 0.64%. US-Iran tensions escalated after an Apache helicopter was downed and US forces conducted retaliatory strikes near the Strait of Hormuz, pushing Brent crude toward USD 91 per barrel.

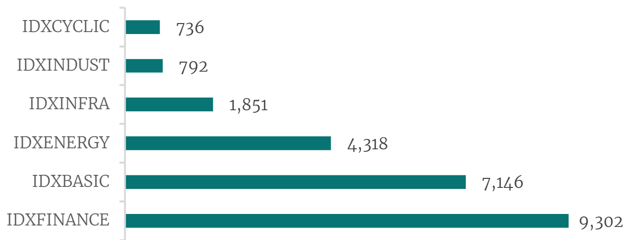
European Markets

European markets opened cautiously. The FTSE 100 fell 0.71% and EuroStoxx 50 declined 0.97%, with investors concerned that a hot US inflation print could spur faster Fed rate hikes. Gold slid toward USD 4,000 amid rising real rate expectations, keeping risk appetite subdued across global markets.

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	4,080.74	13.89%
2	TPIA	3,280.67	11.17%
3	BBRI	2,006.61	6.83%
4	BMRI	1,503.11	5.12%
5	DSSA	1,420.41	4.84%
6	BRPT	1,177.55	4.01%
7	ANTM	1,141.49	3.89%
8	BUMI	1,110.01	3.78%
9	CUAN	1,058.89	3.61%
10	TLKM	1,051.10	3.58%

JCI Leading	Last	Chg (%)	Index Pts
BBCA	5,650	+9.71%	+47.10
TLKM	2,810	+7.25%	+19.94
BBRI	2,880	+3.23%	+14.19
BMRI	4,260	+4.16%	+13.37
DSSA	790	+17.04%	+10.20
CASA	1,500	+11.11%	+7.92
DCII	180,150	+3.83%	+6.63
BBNI	3,450	+5.50%	+5.86
BRPT	1,760	+6.02%	+5.66
BREN	4,220	+3.18%	+4.82

JCI Lagging	Last	Chg (%)	Index Pts
SMMA	21,500	-10.42%	-17.42
EMAS	7,100	-4.05%	-3.11
AMMN	3,310	-2.93%	-3.06
TPIA	1,810	-7.42%	-3.01
ANTM	2,750	-4.51%	-2.45
BRMS	505	-2.88%	-2.26
CUAN	730	-5.81%	-1.81
MSIN	530	-7.02%	-1.52
ENRG	1,355	-2.87%	-1.04
INCO	4,550	-3.40%	-0.78

Source: Bloomberg

NEWS

Global – US Strikes Iran After Helicopter Downed

US forces struck Iranian air defense and radar sites near the Strait of Hormuz after President Trump blamed Tehran for downing an American military Apache helicopter patrolling the area. Iran responded with drone strikes targeting US bases in Bahrain, Jordan, and Kuwait. The episode threatens the April ceasefire and a peace accord Trump had described as near completion, with both sides signaling intent to contain rather than fully escalate. Brent crude rose sharply (Bloomberg).

BI – Signals Higher Bond Yields to Attract Inflows

Bank Indonesia Governor Perry Warjiyo signaled in a virtual session with European and US investors on Tuesday that BI will allow bond yields to rise and may hike rates further to attract capital inflows and stabilize the rupiah. BI will refrain from purchasing bonds with tenors of 10 years or more, reopen repo facilities to absorb liquidity, and reduce hedging costs for foreign investors. Consensus expects another 25 bps hike at the June 18 RDG meeting (Bloomberg).

BI – Consumer Confidence Softens in May 2026

Bank Indonesia's Consumer Survey showed the Consumer Confidence Index eased to 120.9 in May 2026 from 123.0 in April, driven by a decline in the Current Economic Conditions Index to 112.2 from 116.5. The Expectations Index edged slightly higher to 129.7, indicating continued optimism for the next six months. Confidence remained in positive territory across all spending categories and age groups (Kontan).

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Domestic – Pertamina Raises Pertamax to IDR 16,250/liter

Pertamina raised the price of Pertamax non-subsidized fuel to IDR 16,250 per liter in Jakarta effective Wednesday, up IDR 3,950 from the prior IDR 12,300. Prices in Sumatra, Kalimantan, Sulawesi, and Papua are set at IDR 16,650–IDR 17,000 per liter. Pertamax Green also rose to IDR 17,000 per liter. Subsidized Pertalite and non-subsidized solar products remained unchanged (Bloomberg Technoz).

Currency – Rupiah Posts Biggest Gain in 13 Months

The Indonesian rupiah strengthened as much as 0.9% to 17,903 per US dollar on Wednesday, its largest single-day gain since May 2025, as officials intensified efforts to reassure foreign investors. The 10-year government bond yield fell 13 bps to 7.29% as the bond selloff eased. The JCI extended its rally to a second session, rising as much as 3.4% and recording a two-day gain not seen in approximately six years (Bloomberg).

Commodity Sector – Gold Slides on Fed Hike Concerns

Gold extended its decline toward the USD 4,000 level last seen in November, as investors positioned cautiously ahead of the US CPI release, which could prompt earlier Fed rate hikes following a stronger-than-expected jobs report. Asian equities fell modestly while oil futures remained contained despite US-Iran clashes. A hot inflation print would likely hammer tech stocks and test regional currency stabilization efforts by Indonesia and other central banks (Bloomberg).

Global – China CPI Stalls Despite Factory Price Surge

China's consumer-price index rose 1.2% year-on-year in May, missing the Bloomberg consensus of 1.3%, while producer prices accelerated to 3.9% from 2.8% in April, their fastest pace in nearly four years. AI-driven demand for electronics and metals along with Iran-war-related energy costs lifted output prices, but weak domestic demand prevented pass-through to consumers. Bloomberg Economics expects the economy-wide GDP deflator to end three years of declines this quarter (Bloomberg).

ANTM – Declares IDR 5.04 Trillion Cash Dividend

PT Aneka Tambang (ANTM) at its RUPST approved a dividend of IDR 5.04 trillion, or IDR 210 per share, representing 70% of fiscal year 2025 net profit and implying a dividend yield of 7.63% at Wednesday's closing price of IDR 2,750. Net profit surged 106% to IDR 7.92 trillion in FY2025, supported by a 22% rise in revenue to IDR 84.64 trillion, with gold sales contributing approximately 79% of total revenue (CNBC Indonesia).

Dividend – DSNG, MTDL, TSPC Approve Cash Dividends

PT Dharma Satya Nusantara (DSNG) approved a FY2025 dividend of approximately IDR 498 billion or IDR 47 per share (yield ~4.3%). PT Metrodata Electronics (MTDL) approved IDR 331.5 billion or IDR 27 per share (yield ~5.5%, payout 40.7%). PT Tempo Scan Pacific (TSPC) will distribute a final dividend of IDR 50 per share with cum-date June 15 and payment July 9; combined with an IDR 100 interim, total FY2025 payout ratio reaches approximately 48% (Information Disclosure).

FORU – Plans Massive Rights Issue for Coal Pivot

PT Fortune Indonesia (FORU) announced plans to issue up to 219.5 billion new shares at IDR 126 per share via a rights issue (PMHMETD I), increasing total shares by approximately 472x. Controlling shareholder IMR Asia Holding will contribute a 49% stake in PT Borneo Prima, a coking coal miner in Central Kalimantan with 87.7 million tonnes of JORC reserves valued at USD 1.3 billion. FORU will pivot from media and printing to a mining holding company (Information Disclosure).

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