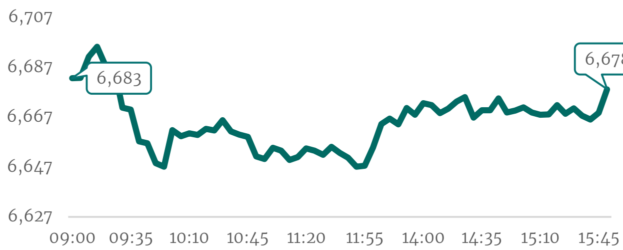
# Aldira Sunset
9 September 2026

## JCI SUMMARY

| Closing Price | Change (Points) | Change (%) |
|---|---|---|
| 6,678 | -8.2 | -0.12% |
| Previous | Highest (Day) | Lowest (Day) |
| 6,686 | 6,707 | 6,642 |
| Value (IDR Tn) | Volume (Bn) | Change YTD (%) |
| 16.16 | 34.50 | -22.77% |

## JCI INTRADAY CHART




## SECTORAL INDICES PERFORMANCE

| IDXENERGY | IDXBASIC | IDXINDUST | IDXNONCYC |
|---|---|---|---|
| +0.77% | +0.85% | +0.95% | -0.39% |
| IDXCYCLIC | IDXFINANCE | IDXHEALTH | IDXPROPERT |
| -1.23% | -0.57% | -1.33% | -0.85% |
| IDXINFRA | IDXTRANS | IDXTECHNO | LQ 45 |
| +0.42% | +2.41% | -0.96% | -0.20% |

| Key Equity Markets | Close | Chg % | Ytd % |
|---|---|---|---|
| **Asia** | | | |
| Hang Seng | 25,275 | -0.17% | -1.39% |
| Nikkei | 65,143 | -0.19% | +29.41% |
| KOSPI | 7,052 | +1.40% | +67.33% |
| Shenzhen | 2,526 | -0.03% | -0.19% |
| Sensex | 74,895 | -0.90% | -12.12% |
| SET Thailand | 1,618 | -0.25% | +28.44% |
| ASX 200 | 8,911 | -0.11% | +2.26% |
| **Europe** | | | |
| FTSE 100 | 10,760 | -0.48% | +8.34% |
| EuroStoxx 50 | 6,326 | -1.36% | +9.23% |

| Macro Indicators | Close | Chg % | Ytd % |
|---|---|---|---|
| USD/IDR | 17,630 | +0.67% | -4.70% |
| Govt Bond 1 yrs | 6.84 | -0.25% | +41.11% |
| Govt Bond 3 yrs | 6.83 | +0.68% | +30.63% |
| Govt Bond 10 yrs | 7.10 | -0.13% | +17.04% |

| Commodities | Unit | Price | d-d % |
|---|---|---|---|
| Brent Oil | USD/barrel | 97.92 | +2.80% |
| Gold | USD/toz | 4,405 | -0.05% |
| Nickel | USD/mt. ton | 16,563 | +1.01% |
| Tin | USD/mt. ton | 54,837 | -0.56% |
| Palm Oil | MYR/mt.ton | 4,688 | -0.43% |

## MARKET REVIEW

### Jakarta Composite Index

*The JCI slipped 0.12% to 6,678.20 after trading between 6,642.15 and 6,707.31. The decline was led by BBCA (-2.25%), BMRI (-0.90%) and ASII (-1.62%), which offset gains in basic materials (+0.85%), energy (+0.77%), industrials (+0.95%) and transportation (+2.41%). Turnover reached IDR 16.16tn on 34.50bn shares. AMMN, IMPC and AADI were the largest contributors, while BBCA, BMRI and ASII were the main drags.*

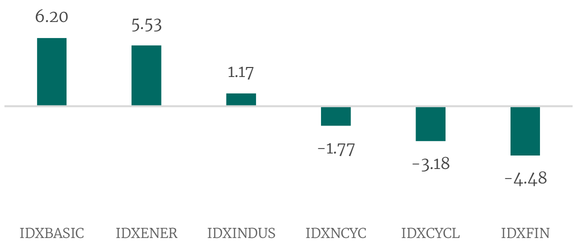
### Asian Markets

*Asian markets were mixed. KOSPI gained 1.40%, while Hang Seng fell 0.17%, Nikkei 225 lost 0.19%, Sensex declined 0.90%, SET fell 0.25% and ASX 200 eased 0.11%; Shenzhen was broadly flat. The divergence reflected selective buying in Korea against broader caution toward regional risk assets.*

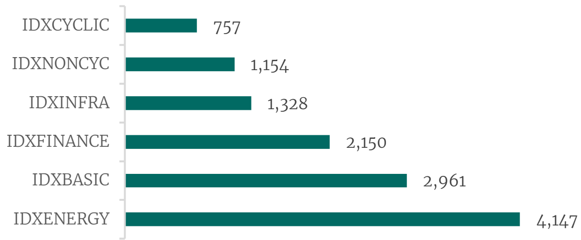
### European Markets

*European equities opened lower, with STOXX 600 down 0.26%, DAX 40 off 0.53% and CAC 40 lower by 0.72%, while FTSE 100 was near flat. Brent rose 2.80% to USD 97.92/barrel, keeping energy-price and inflation risks in focus for 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 | 1,267 | 7.84% |
| 2 | ANTM | 651 | 4.03% |
| 3 | BIPI | 645 | 3.99% |
| 4 | AMMN | 590 | 3.65% |
| 5 | BMRI | 552 | 3.41% |
| 6 | BBRI | 533 | 3.30% |
| 7 | BUMI | 358 | 2.22% |
| 8 | PTBA | 321 | 1.98% |
| 9 | TLKM | 317 | 1.96% |
| 10 | INDY | 310 | 1.92% |

| JCI Leading | Last | Chg (%) | Index Pts |
|---|---|---|---|
| AMMN | 4,910 | +5.14% | +10.17 |
| IMPC | 1,785 | +9.51% | +4.69 |
| AADI | 12,450 | +5.96% | +2.42 |
| ANTM | 3,200 | +3.90% | +2.32 |
| BBRI | 3,420 | +0.29% | +1.47 |
| TINS | 4,600 | +4.55% | +1.20 |
| INDY | 3,120 | +11.03% | +1.03 |
| EMAS | 8,600 | +1.18% | +0.94 |
| TLKM | 2,660 | +0.38% | +0.93 |
| PTBA | 3,100 | +3.33% | +0.87 |

| JCI Lagging | Last | Chg (%) | Index Pts |
|---|---|---|---|
| BBCA | 6,525 | -2.25% | -13.31 |
| BMRI | 4,390 | -0.90% | -3.28 |
| ASII | 4,850 | -1.62% | -3.28 |
| BELI | 298 | -6.88% | -1.66 |
| BBNI | 3,820 | -1.29% | -1.66 |
| BUMI | 222 | -1.77% | -1.48 |
| BRPT | 1,735 | -1.42% | -1.46 |
| NATO | 1,110 | -9.02% | -1.33 |
| VKTR | 855 | -2.29% | -1.24 |
| CPIN | 3,260 | -2.40% | -1.03 |

*Source: Bloomberg*

## NEWS

### OJK – Prepares Mineral Exchange Rules

Financial Services Authority is preparing two regulations and the supporting infrastructure for Indonesia's Mineral and Strategic Commodities Exchange, targeted to begin operations on 1 January 2027. One regulation will govern the transition of trading, while the other will cover exchange governance. OJK is also preparing the exchange, clearing, warehousing, quality inspection and verification ecosystem, with regulations targeted for completion by 17 September 2026 (Kompas).

### BI – Consumer Confidence Improves

Bank Indonesia's Consumer Confidence Index rose to 118.5 in August from 116.8 in July, reflecting stronger views of current economic conditions and the six-month outlook. The Current Economic Conditions Index increased to 109.4, while the Consumer Expectations Index rose to 127.6. Better job-availability and durable-goods purchase perceptions supported the current-conditions measure, and all expectation components improved during the month (Kumparan).

### ASSA – Secures IDR 600bn Facility

Adi Sarana Armada signed a credit agreement with OCBC NISP for IDR 600bn in new facilities, comprising a IDR 500bn term loan and a IDR 100bn demand loan. The funding will support additional working capital, including vehicle purchases for leasing to customers. ASSA expects the financing to help expand its rental fleet, increase revenue and support further development of its operating businesses (SWA).

### BMAS – Plans IDR 1tn Rights Issue

Bank Kasikorn Indonesia plans a rights issue of 2.87bn new shares at IDR 350 each, targeting proceeds of about IDR 1tn. Major shareholder Kasikorn Vision Financial Company will exercise 2.54bn rights and act as standby buyer for any remaining unsubscribed shares. Net proceeds will be used as working capital to expand lending, strengthen the bank's capital base and support wider intermediation growth (EmitenNews).

### BYAN – Haji Isam Bids Stake

Andi Syamsuddin Arsyad, known as Haji Isam, has made a cash offer of USD 3bn for the Low family's 62% controlling stake in Bayan Resources. The proposal values the coal producer at roughly USD 4.8bn, more than 80% below its market capitalisation of about USD 26bn. Discussions remain ongoing, and a transaction could be completed before year-end if all parties agree on terms (Bloomberg).

### FOLK – Supports Cikarang Data Centres

Multi Garam Utama, through its 99.9%-owned Traya Hydro unit, will provide water and wastewater-treatment solutions for two large data-centre projects in Cikarang. The projects are being developed by international operators and form part of a cluster with announced investment exceeding USD 6bn, combined capacity above 600 MW and potential expansion to 1 GW. Traya Hydro will support cooling-water, domestic-water and wastewater-recycling requirements (EmitenNews).

### MBSS – Starts Mandatory Tender Offer

Wibowo Group Capital began a mandatory tender offer for up to 306.26mn MBSS shares, or 17.5% of paid-up capital, at IDR 2,915 per share. The offer runs from 9 September to 8 October, with maximum consideration of IDR 892.75bn and payment expected on 15 October. The new controller acquired 82.5% of Mitrabahtera Segara Sejati in July and plans to retain its maritime-logistics operations (Kontan).

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