



U.S. Stocks Slip, Europe Weakens, Japan Mixed, China Extends Rally Amid Policy Uncertainty

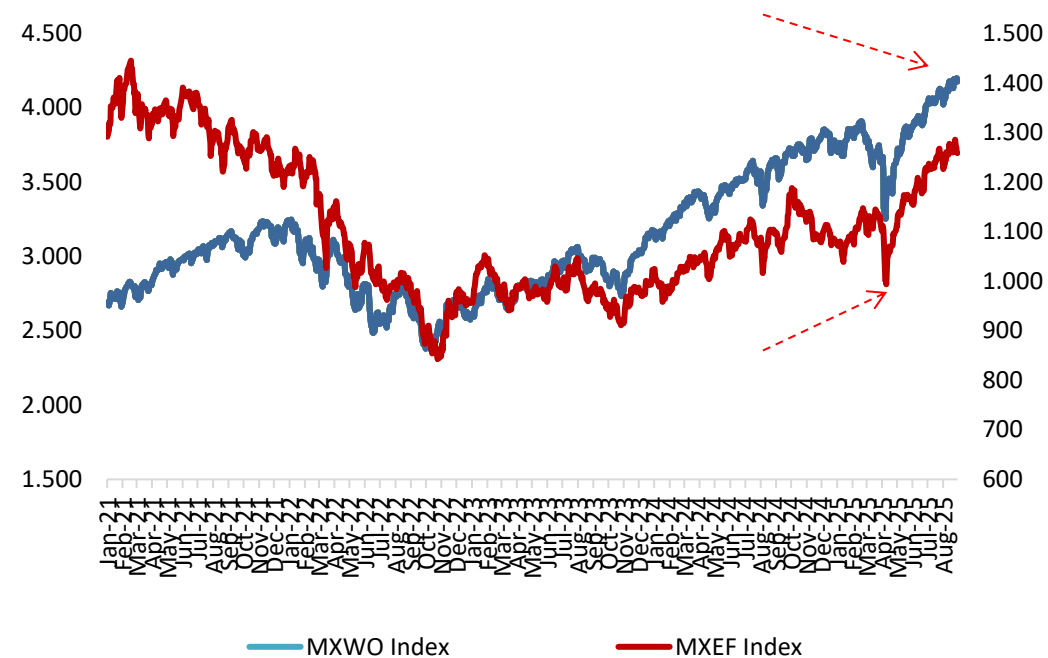
Weekly Summary 25-29 Agustus 2025

-003A1.3498A1

28017.306

General View: Global Stock Market Closed Fall

Grafik 2. MSCI Index



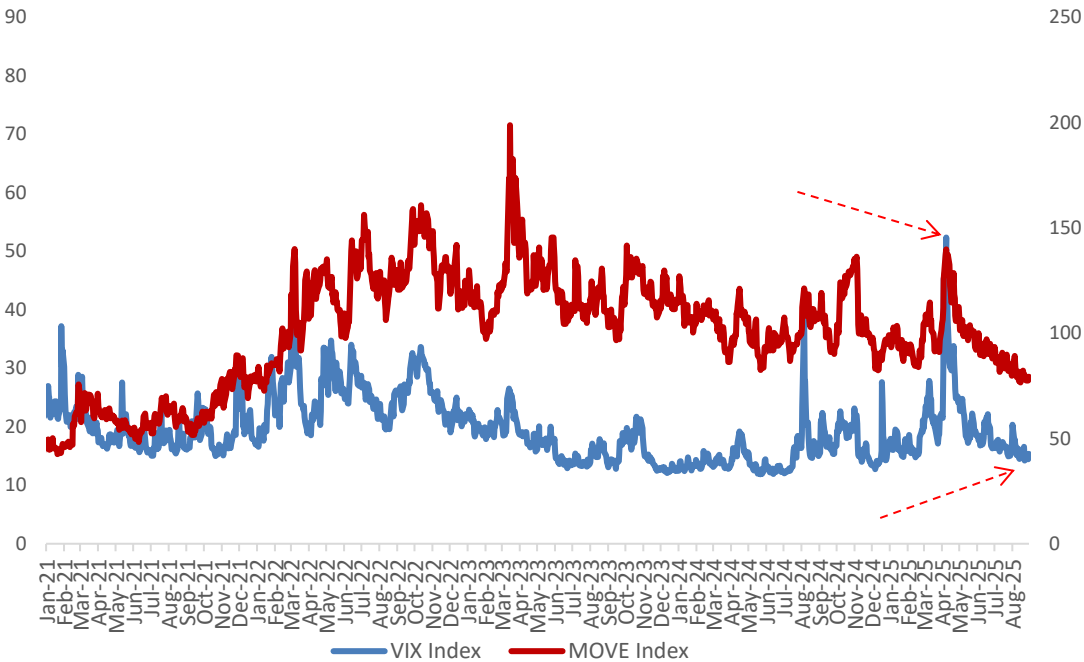
Source: Bloomberg

Tabel 2. MSCI Data

Index	Close Price	WoW	Ytd
MXWO	4.177,72	-0,36%	12,67%
MXEF	1.258,44	-0,64%	17,01%

Source: Bloomberg

Grafik 3. Volatility Index



Source: Bloomberg

Tabel 3. Volatility Data

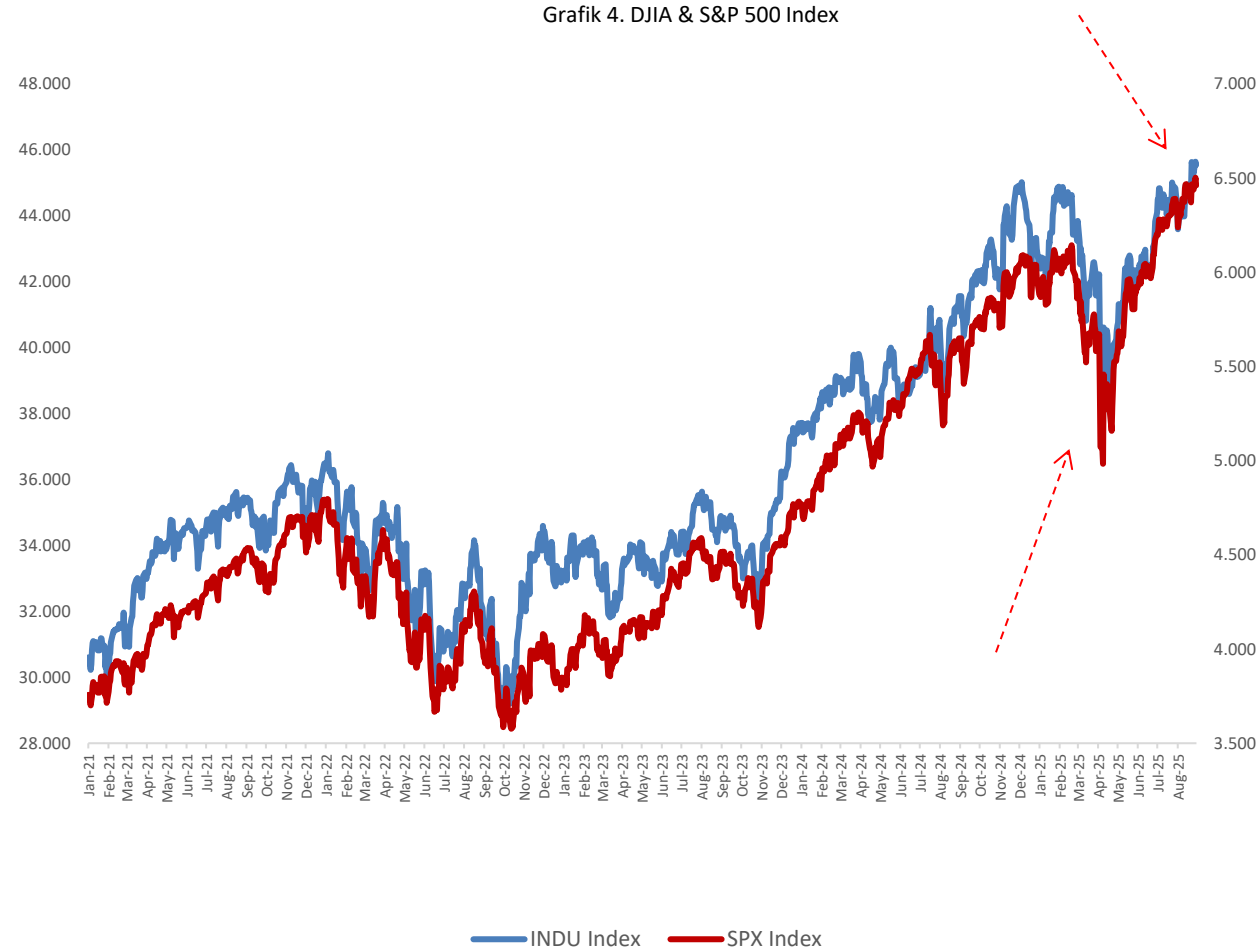
Index	Close Price	WoW	Weekly Range	Average 5 Year
VIX	15,36	8,02%	14,43-14,43	21,35
Move	79,39	1,65%	77,55-79,36	95,61

Source: Bloomberg



Wall Street Closed Fall

Grafik 4. DJIA & S&P 500 Index



Source: Bloomberg

Tabel 4. Wall Street's Data

Index	Close Price	WoW	Ytd
DJIA	45.544,88	-0,19%	7,05%
S&P	6.460,26	-0,10%	9,84%
Nasdaq	21.455,55	-0,19%	11,11%
DXY	97,77	0,06%	-9,88%

Source: Bloomberg

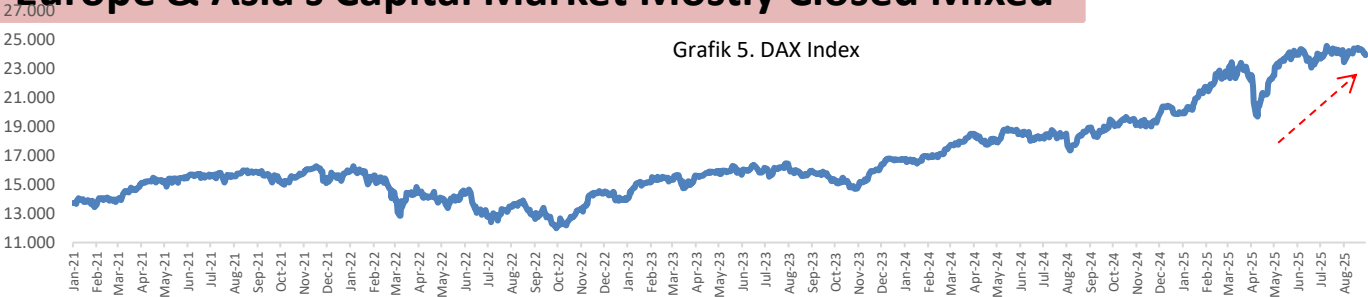
Tabel 5. US 's Economic Data

Event	Period	Survei	Actual	Prior
PCE price index (YoY)	Jul	2.6%	2.6%	2.6%
Initial Jobless Claims	Jul	230k	229k	235k

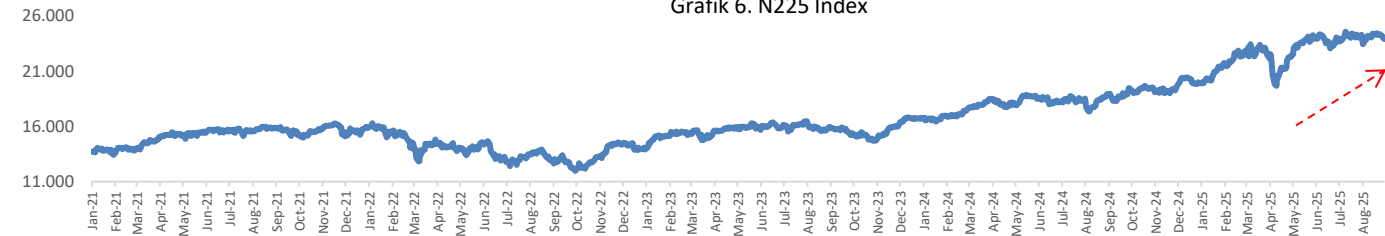
Source: Bloomberg

Europe & Asia's Capital Market Mostly Closed Mixed

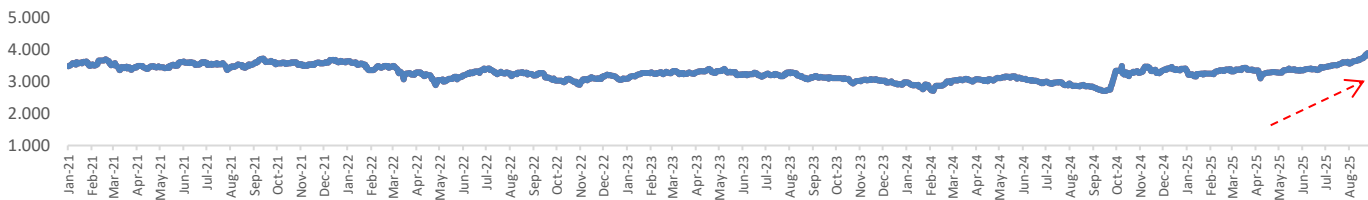
Grafik 5. DAX Index



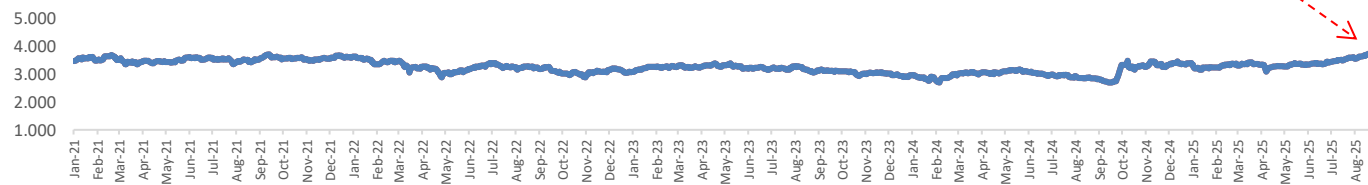
Grafik 6. N225 Index



Grafik 7. SSEC Index



Grafik 8. Kospi Index



Source: Bloomberg

Tabel 6. Europe & Asia's Capital Market Data

Index	Close Price	WoW	Ytd
German DAX	23.902,21	-1,89%	20,06%
Japan N225	42.718,47	0,20%	7,08%
China SSEC	3.857,93	0,84%	15,10%
Korea Kospi	3.186,01	0,55%	32,78%
USDEUR	0,86	0,28%	-11,40%
USDJPY	147,05	0,07%	-6,46%
USDCNY	7,13	-0,51%	-2,31%
USDKRW	1.389,90	0,50%	-5,57%

Source: Bloomberg

Tabel 7. Europe & Asia's Economic Data

Event	Period	Survei	Actual	Prior
Consumer Confidence Final	Aug	-15.5	-15.5	-14.7
Jobless Rate YoY (Japan)	Jul	2.5%	2.5%	2.9%
Tokyo CPI YoY (Japan)	Aug	2.6%	2.6%	2.9%

Source: Bloomberg

Prices of Essential Commodities Closed Rose

Grafik 9. BCOM Index



Source: Bloomberg

Tabel 8. Bloomberg Commodity Index Data

Index	Close Price	WoW	Ytd
Bloomberg Cmdty Index	102,79	1,14%	4,08%

Source: Bloomberg

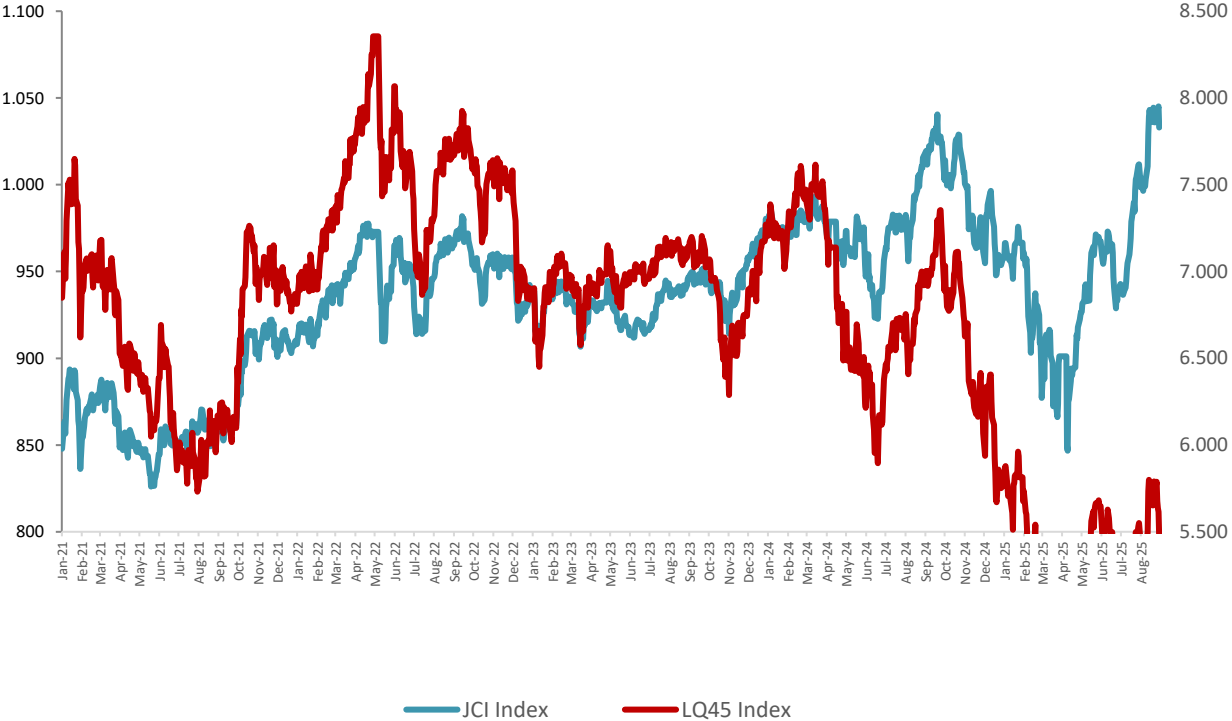
Tabel 9. Commodity Data

Index	Close Price	WoW	Ytd
WTI	64,01	0,55%	-10,75%
Brent	68,12	0,58%	-8,74%
Emas	3.447,95	2,26%	31,38%
nickel	15.421,00	2,13%	0,61%
tin	35.018,00	3,58%	20,41%
cpo	4.308,00	-3,26%	-11,38%
Copper	9.902,00	1,08%	12,93%
coal	111,50	0,18%	-10,98%

Source: Bloomberg

JCI Closed Strong

Grafik 10. JCI Index



Source: Bloomberg

Tabel 10. JCI's Data

	Close Price	WoW	Ytd
JCI	7.830,49	-0,36%	10,60%
LQ45	797,12	-3,05%	-3,57%
Foreign Net Buy (Equity)		Rp 1.49 triliun	Rp - 50.38 triliun
Foreign Net Buy (Bond)		Rp 4.88 triliun	Rp 73.08 triliun
USDIDR	16.490,00	0,89%	2,41%
Market (P/E)	13.9		

Source: Bloomberg

Tabel 11. JCI's Sector Data

Indeks	29/08/2025	22/08/2025	WoW
Industry	3082,931	3030,074	7,18%
Properties & Real Estate	1267,588	1182,686	2,85%
Energy	1635,915	1633,742	1,74%
Transportation & Logistic	1594,087	1588,69	0,34%
Infrastructure	10357,62	10397,54	0,17%
Basic Material	1462,766	1461,191	0,13%
Financial	1874,673	1871,467	0,11%
Healthcare	708,112	722,404	0,03%
Technology	796,348	811,963	-0,38%
Consumer Cyclical	864,492	840,537	-1,92%
Consumer Non-Cyclical	1708,79	1708,274	-1,98%

Source: Bloomberg

Economic Data & What to Expect one Week Ahead

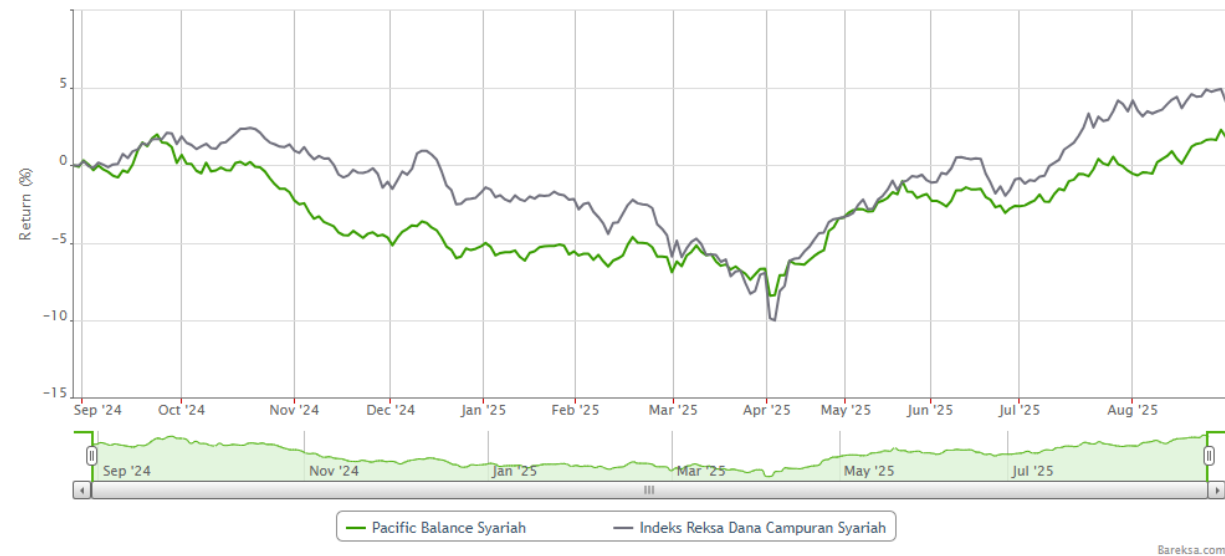
Tabel 11. JCI’s Forecast

JCI Forecast	Support	Resistance
Pivot (1 - 4 September 2025)	7,759.44	7,907.70
	7,688.39	7,984.91
Statistical (1 - 4 September 2025)	7.716,85	8.000,85

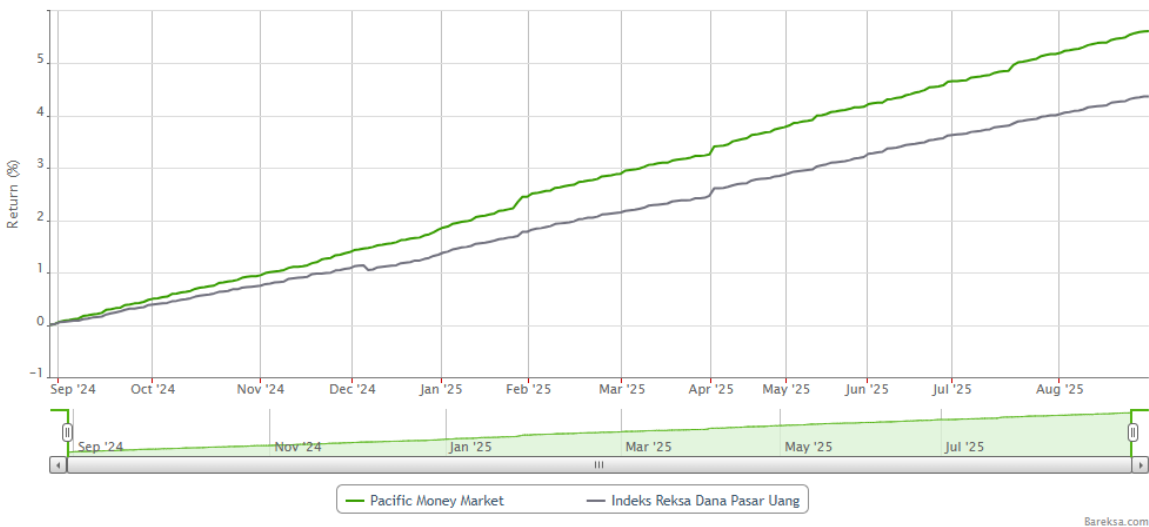
Source: PCI

PCI's Mutual Funds Performance vs Benchmark

Grafik 11. PBS Performance



Grafik 12. PMM Performance



Tabel 14. PCI Mutual Funds performance vs Benchmark

Indeks	1 Minggu	1 Bulan	3 Bulan	6 Bulan	Ytd	1 Tahun
PBS	0,38%	1,74%	3,76%	9,39%	7,47%	1,84%
IRCS	-0,30%	-0,04%	5,17%	10,66%	6,04%	4,15%
PMM	0,12%	0,44%	1,39%	2,65%	3,73%	5,62%
IRPU	0,08%	0,36%	1,13%	2,17%	2,99%	4,37%
PFI	0,09%	0,97%	2,48%	3,73%	4,72%	4,78%
IRFI	0,24%	1,05%	2,46%	3,69%	4,79%	4,66%

Source: Bareksa, PCI

Thank You

Disclaimer On: Informasi ini ditujukan sebagai tambahan informasi yang mungkin bermanfaat bagi nasabah. Informasi ini diperoleh dari berbagai sumber dan data sekunder dan kami berusaha menyajikan data tersebut dengan prinsip kehati-hatian, namun kami tidak dalam kapasitas untuk menjamin validitas, kebenaran, ketepatan penggunaan informasi tersebut sebagai bagian pengambilan keputusan oleh nasabah. Investasi memiliki risiko, dengan demikian nasabah harus melakukan analisa terhadap setiap informasi terkait dengan suatu produk investasi, dan setiap keputusan investasi yang diambil merupakan keputusan individu. Material ini bukan dimaksudkan untuk menawarkan dan/atau menyarankan suatu produk investasi dan didistribusikan secara terbatas hanya kepada pihak-pihak yang memiliki hubungan dengan produk investasi yang diterbitkan oleh PT Pacific Capital Investment.