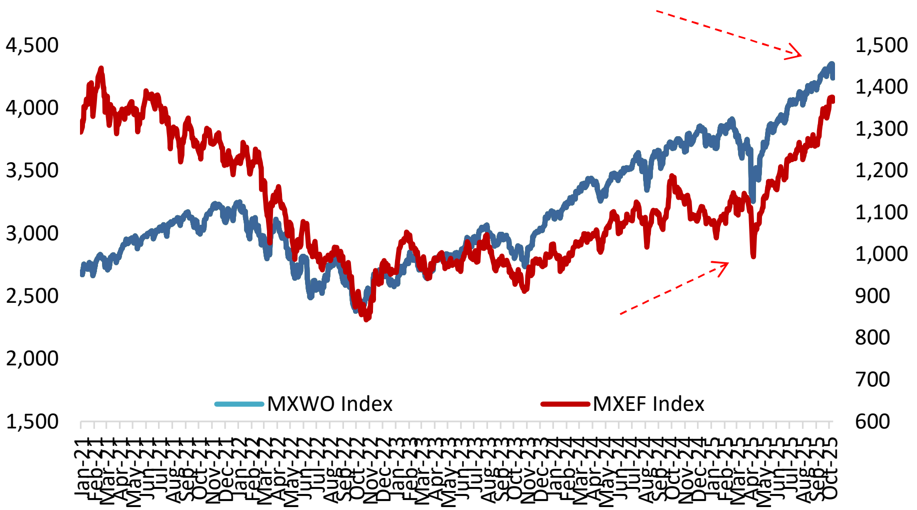
Global Stock Market Falls as Trump Tariff Emerged

Weekly Summary 6-10 Oktober 2025

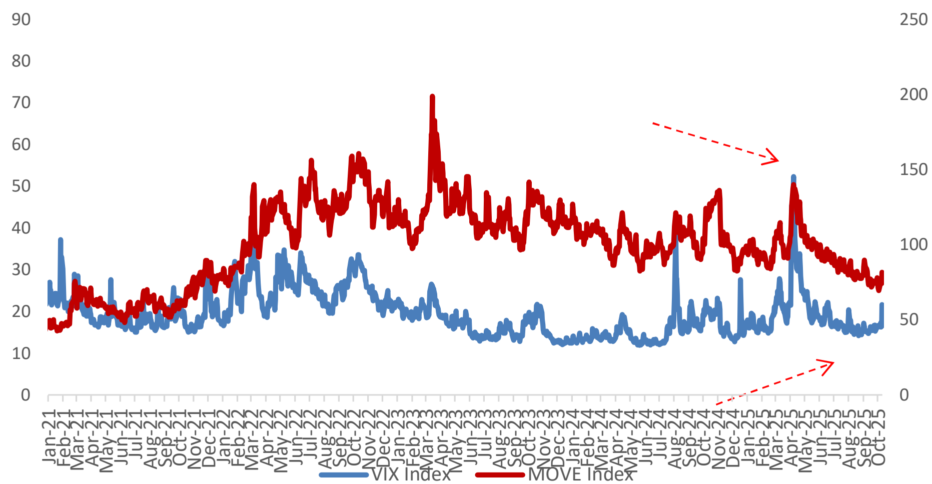
General View: Global Stock Market Closed Fall

Grafik 2. MSCI Index



Source: Bloomberg

Grafik 3. Volatility Index



Source: Bloomberg

Tabel 2. MSCI Data

Index	Close Price	WoW	Ytd
MXWO	4.237,72	-2,30%	14,29%
MXEF	1.365,67	-0,60%	26,98%

Source: Bloomberg

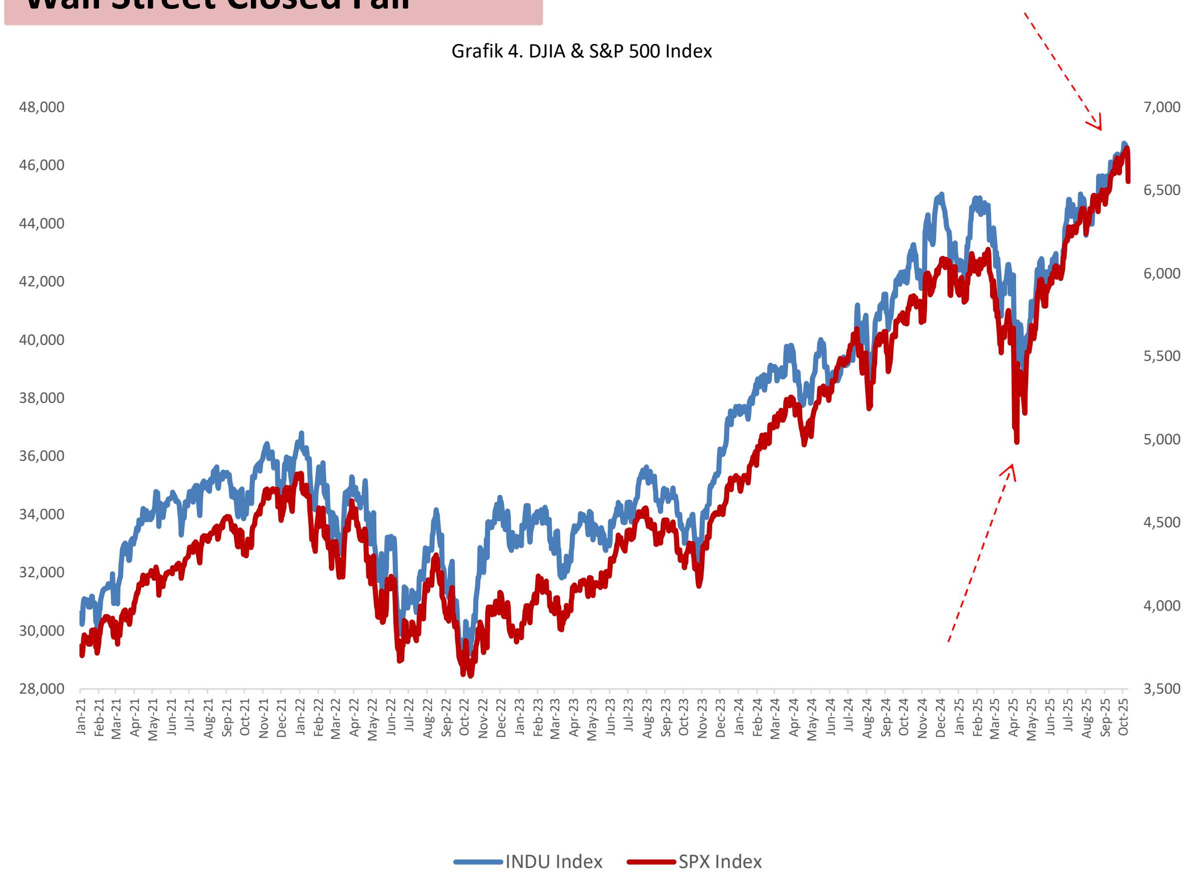
Tabel 3. Volatility Data

Index	Close Price	WoW	Weekly Range	Average 5 Year
VIX	21,66	30,09%	16,30-21,66	20,36
Move	81,65	17,43%	72,99-81,65	96,56

Source: Bloomberg

Wall Street Closed Fall

Grafik 4. DJIA & S&P 500 Index



Source: Bloomberg

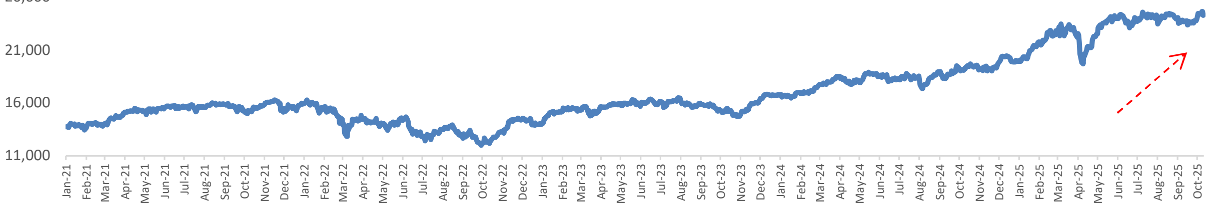
Tabel 4. Wall Street's Data

Index	Close Price	WoW	Ytd
DJIA	45.479,60	-2,73%	6,90%
S&P	6.552,51	-2,43%	11,41%
Nasdaq	22.204,43	-2,53%	14,98%
DXY Curncy	98,98	1,28%	-8,77%

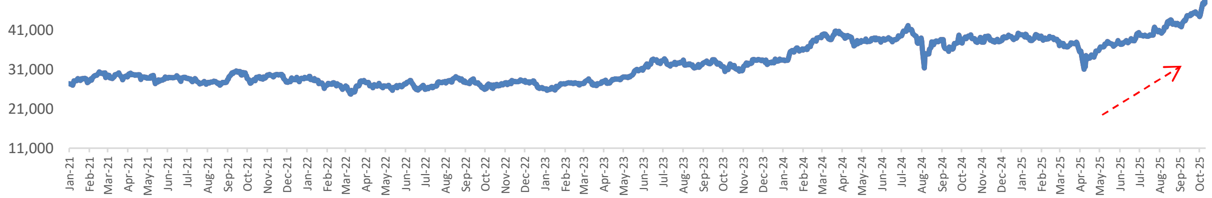
Source: Bloomberg

Europe & Asia's Capital Market Mostly Closed Mixed

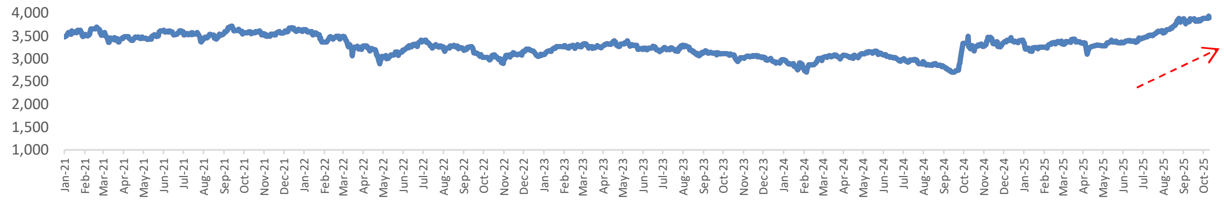
Grafik 5. DAX Index



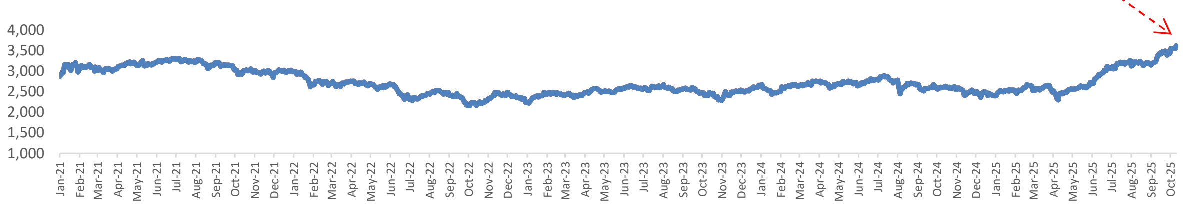
Grafik 6. N225 Index



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	24.241,46	-0,56%	21,76%
Japan N225	48.088,80	5,07%	20,54%
China SSEC	3.897,03	0,37%	16,27%
Korea Kospi	3.610,60	1,73%	50,47%
USDEUR	0,86	1,06%	-10,90%
USDJPY	151,19	2,52%	-3,82%
USDCNY	7,14	0,18%	-2,25%
USDKRW	1.425,30	1,35%	-3,17%

Source: Bloomberg

Tabel 7. Europe & Asia's Economic Data

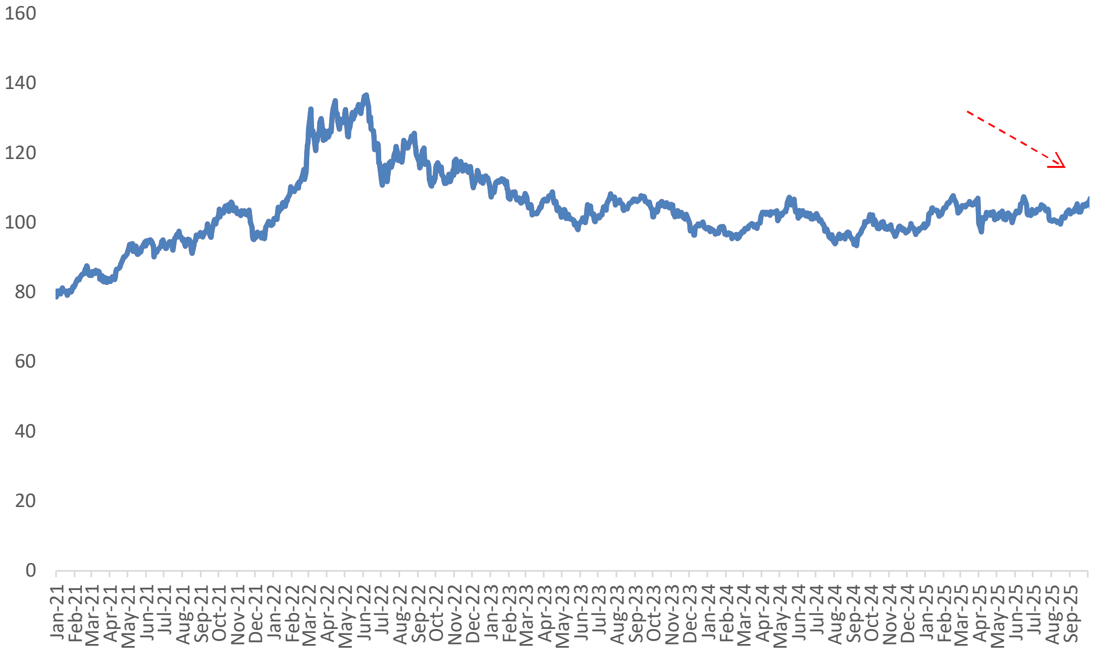
Event	Period	Survei	Actual	Prior
Retail Sales MoM (Euro)	Aug	**0.1%**	**0.1%**	-0.4%
PPI YoY (Japan)	Sep	2.5%	**2.7%**	2.7%

Source: Bloomberg

Pacific Capital INVESTMENT

Prices of Essential Commodities Closed Fall

Grafik 9. BCOM Index



Source: Bloomberg

Tabel 9. Commodity Data

Index	Close Price	WoW	Ytd
WTI	58,90	-3,25%	-17,88%
Brent	62,73	-2,79%	-15,96%
Emas	4.017,79	3,38%	53,09%
nickel	15.280,00	-0,99%	-0,31%
tin	36.173,00	-3,42%	24,38%
cpo	4.468,00	1,55%	-8,08%
Copper	10.518,00	-1,84%	19,96%
coal	104,55	-0,43%	-16,53%

Source: Bloomberg

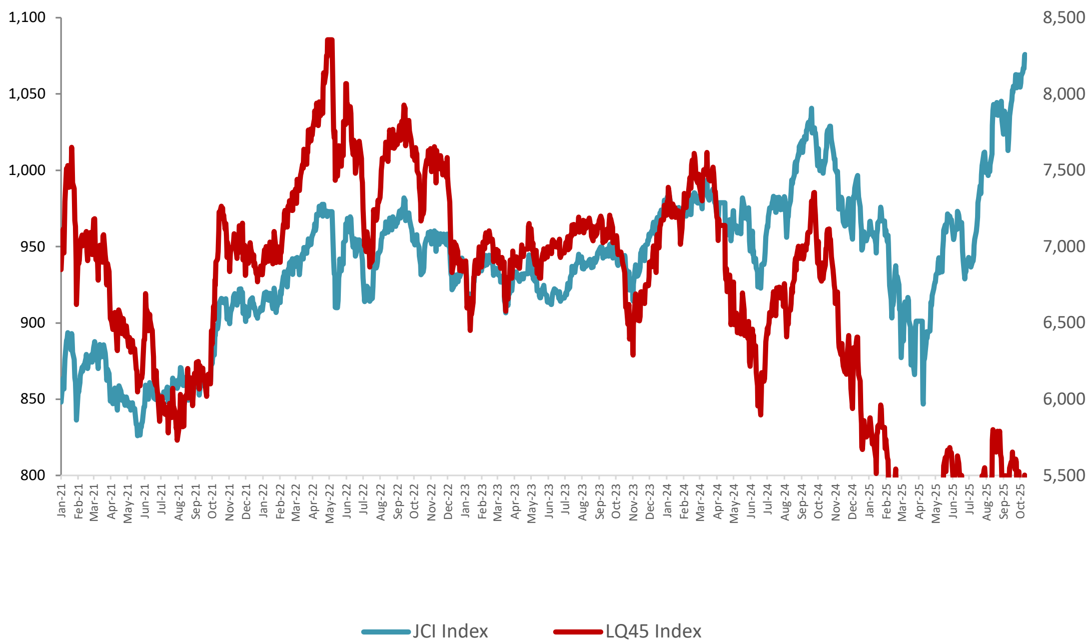
Tabel 8. Bloomberg Commodity Index Data

Index	Close Price	WoW	Ytd
Bloomberg Cmdty Index	104,09	-1,20%	5,39%

Source: Bloomberg

JCI Closed Strong

Grafik 10. JCI Index



Source: Bloomberg

Tabel 10. JCI's Data

	Close Price	WoW	Ytd
JCI	8.257,86	1,72%	16,64%
LQ45	793,61	1,07%	-4,00%
Foreign Net Buy (Equity)		Rp. 3,21 triliun	Rp -52,93 triliun
Foreign Net Buy (Bond)		Rp - 6,24 ttiliun	Rp 19.99 triliun
USDIDR	16.553,00	0,08%	2,80%
Market (P/E)	14.97		

Source: Bloomberg

Tabel 11. JCI's Sector Data

Indeks	10/10/2025	03/10/2025	WoW
Energy	3773,92	3528,606	6,95%
Industry	1661,937	1635,315	1,63%
Basic Material	2080,967	1997,841	4,16%
Transportation & Logistic	1780,579	1613,943	10,32%
Technology	11512,77	11470,98	0,36%
Financial	1440,725	1459,999	-1,32%
Infrastructure	1991,268	1866,586	6,68%
Consumer Non-Cyclicals	816,888	803,576	1,66%
Consumer Cyclicals	920,068	919,62	0,05%
Properties & Real Estate	973,705	959,526	1,48%
Healthcare	1834,273	1831,545	0,15%

Source: Bloomberg

Economic Data & What to Expect one Week Ahead

Tabel 11. JCI's Forecast

JCI Forecast	Suppport	Resistance
Pivot (13-17 Oktober 2025)	8,211.16	8,287.44
	8,164.47	8,317.03
Statistical (13-17 Oktober 2025)	8.108,65	8.407,07

Source: PCI

Pacific Capital INVESTMENT

PCI's Mutual Funds Performance vs Benchmark

Grafik 11. PBS Performance

Source: Bareksa, PCI

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	2,39%	3,47%	7,33%	13,40%	11,16%	5,68%
IRCS	1,96%	6,51%	10,64%	20,62%	12,82%	9,64%
PMM	0,09%	0,43%	1,37%	2,69%	4,31%	5,54%
IRPU	0,08%	0,35%	1,10%	2,18%	3,47%	4,35%
PFI	0,89%	1,87%	3,30%	5,21%	6,66%	7,02%
IRFI	0,43%	1,28%	2,74%	5,10%	6,13%	5,57

Source: Bareksa, PCI

Thank You