

MARKET SELLOFF



SENSEX

-2.1%

NIFTY

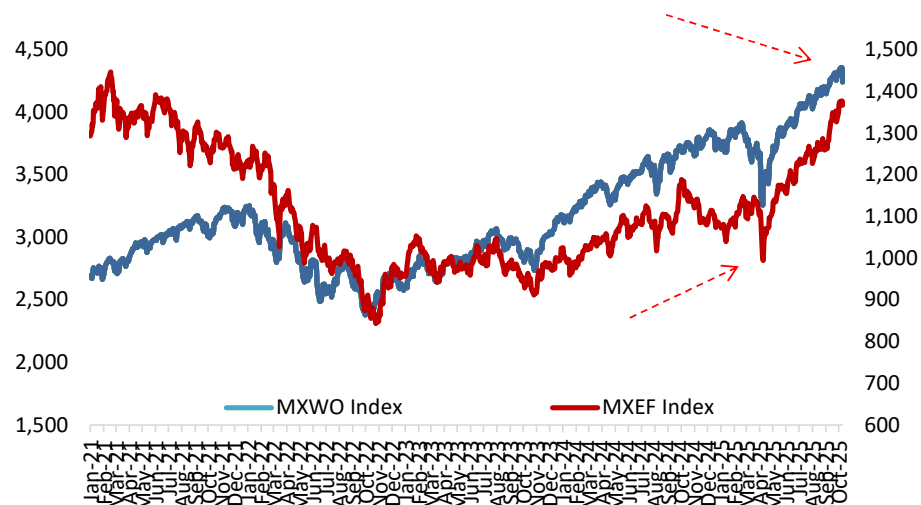
-3.1%

# 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



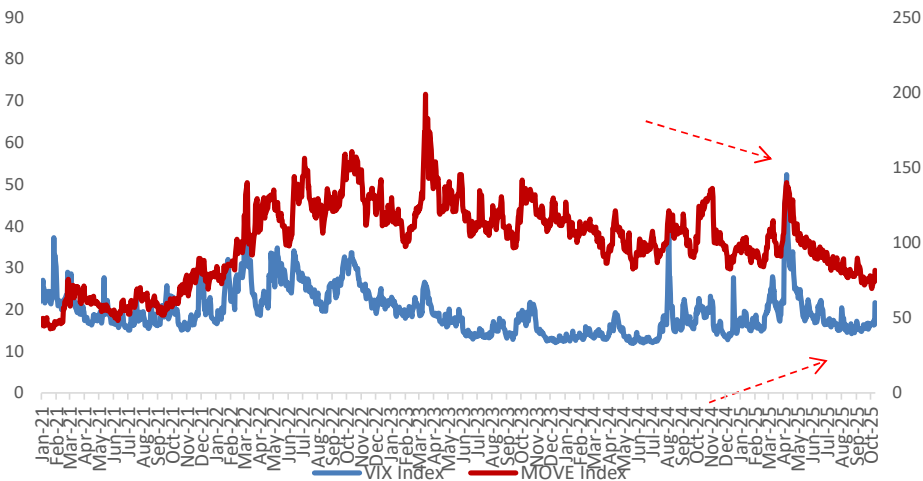
Source: Bloomberg

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

Grafik 3. Volatility Index

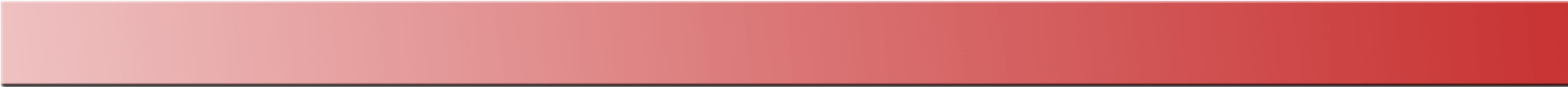


Source: Bloomberg

Tabel 3. Volatility Data

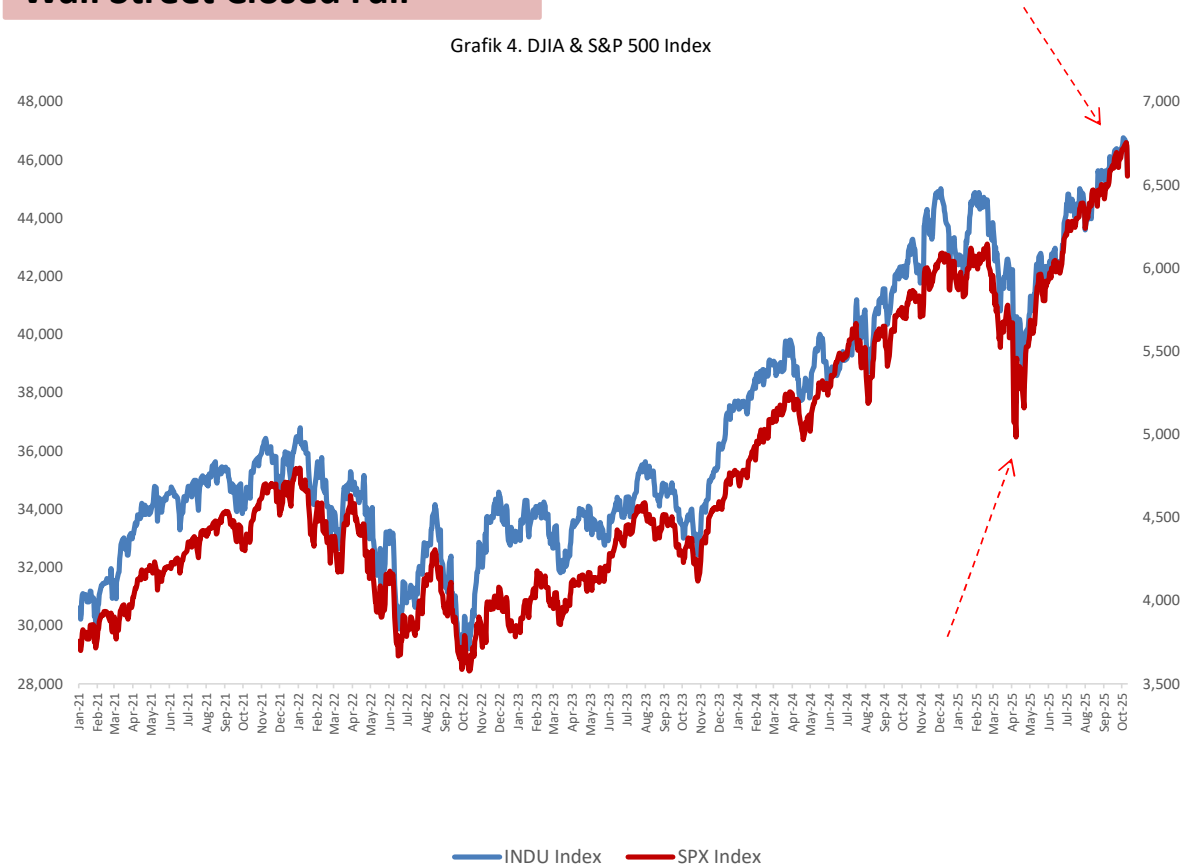
| Index | Close Price | WoW    | Weekly Range | Average 5 Year |
|-------|-------------|--------|--------------|----------------|
| VIX   | 21,66       | 30,09% | 16,30-21,66  | 20,36          |
| Move  | 81,65       | 17,43% | 72,99-81,65  | 96,56          |

Source: Bloomberg



Wall Street Closed Fall

Grafik 4. DJIA & S&P 500 Index



Source: Bloomberg

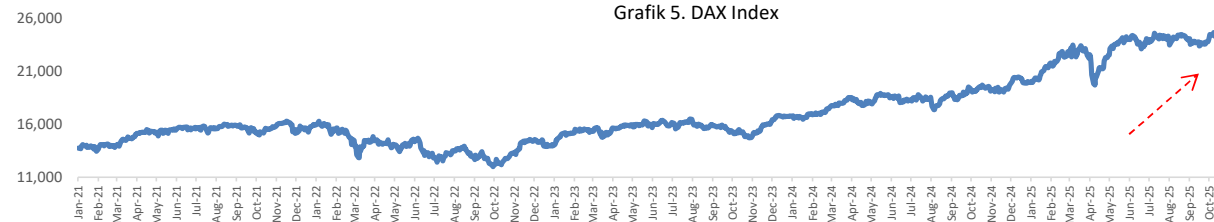
Tabel 4. Wall Street's Data

| 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% |

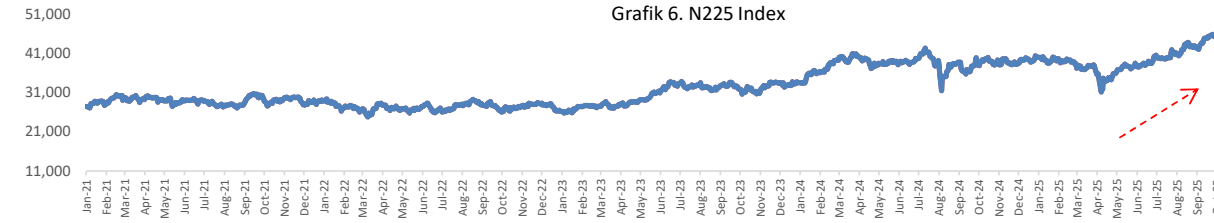
Source: Bloomberg

Europe & Asia’s Capital Market Mostly Closed Mixed

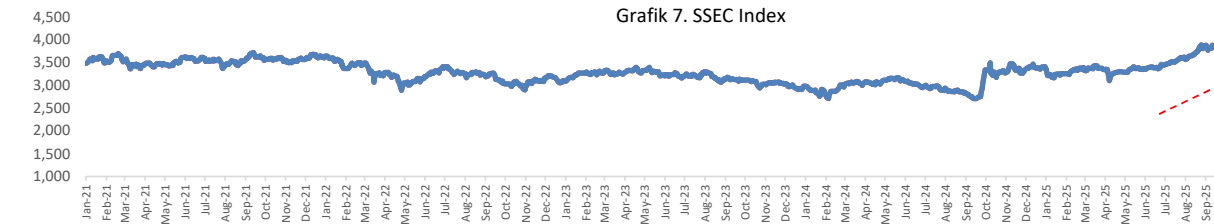
Grafik 5. DAX Index



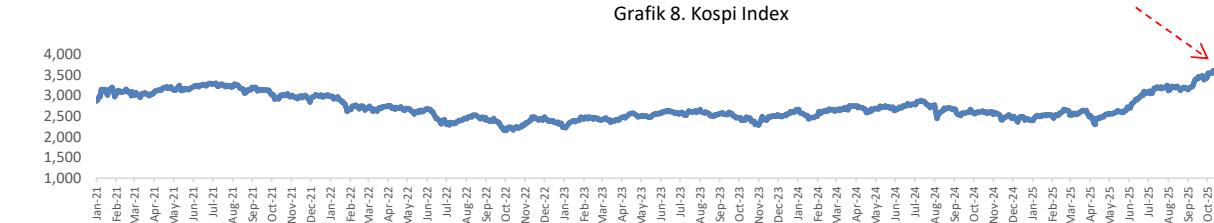
Grafik 6. N225 Index



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

Prices of Essential Commodities Closed Fall

Grafik 9. BCOM Index



Source: Bloomberg

Tabel 8. Bloomberg Commodity Index Data

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

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

JCI Closed Strong

Grafik 10. JCI Index



Source: Bloomberg

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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 triliun | 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                     | Support  | 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

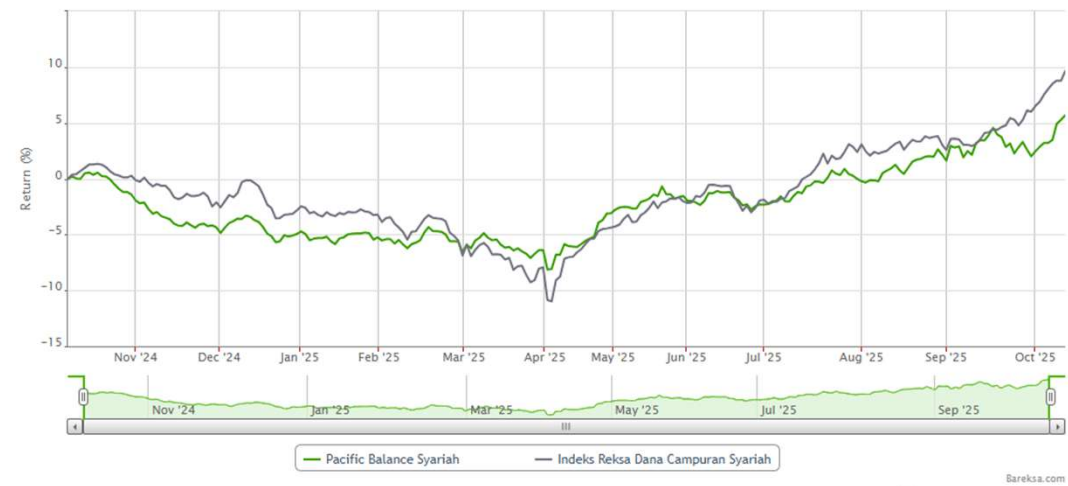
## PCI's Mutual Funds Performance vs Benchmark

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

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