

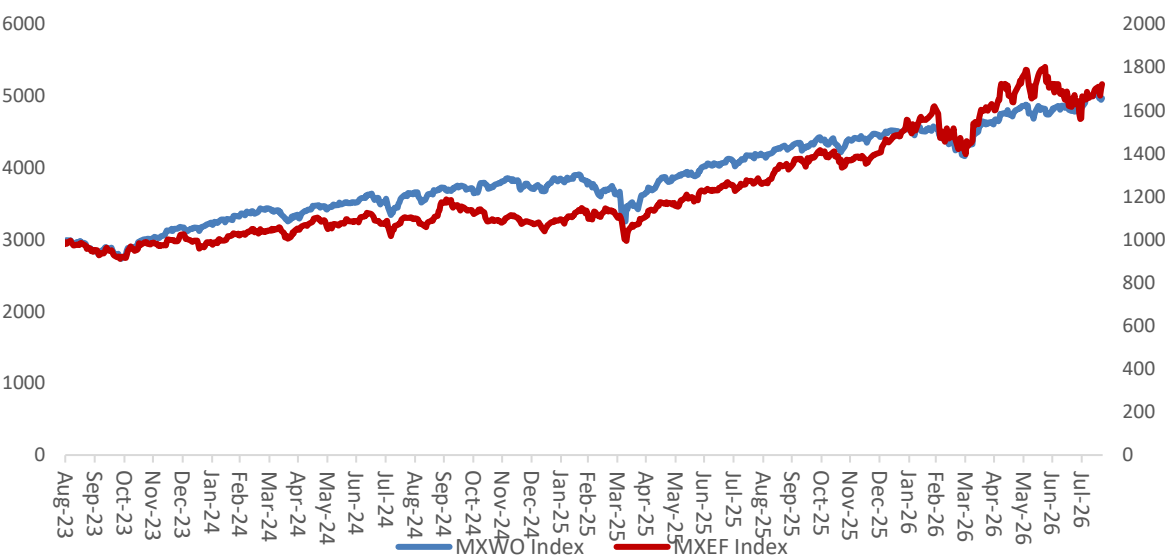


Global Markets Under Pressure as Rising Yields, Middle East Tensions, and Oil Prices Drive Risk-Off Sentiment

Weekly Summary 17 – 21 Agustus 2026

Global Stock Market Closed Mixed

Grafik 2. MSCI Index

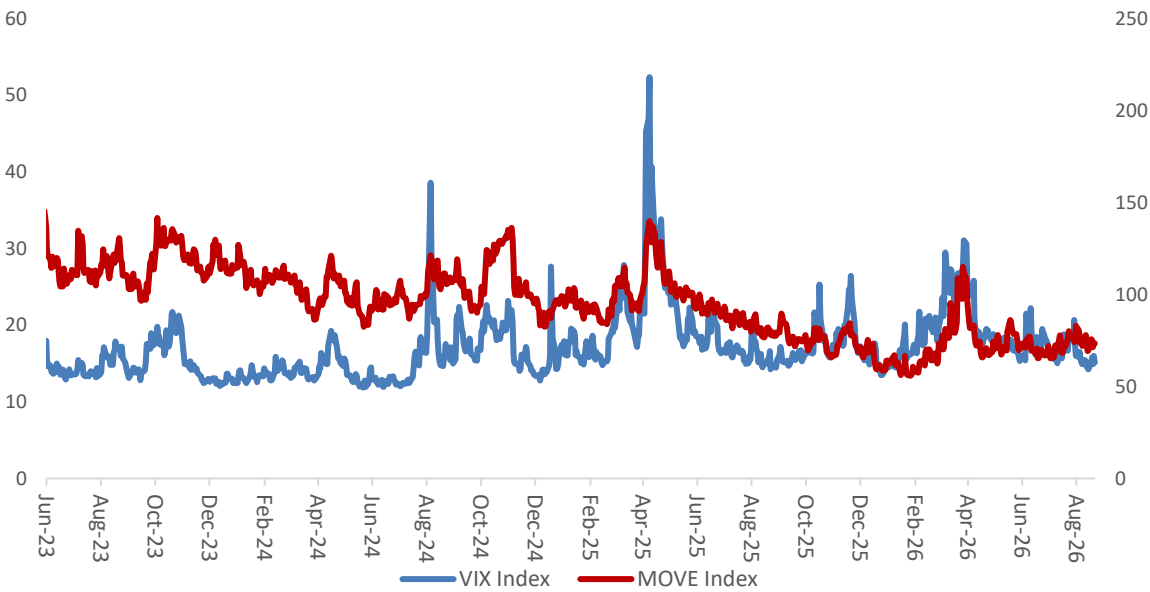


Tabel 2. MSCI Data

Index	Close Price	Return (WoW)	Return (Ytd)
MXWO	4.969,82	-1,19%	12,18%
MXEF	1.721,89	1,22%	22,61%

Source: Bloomberg

Grafik 3. Volatility Index



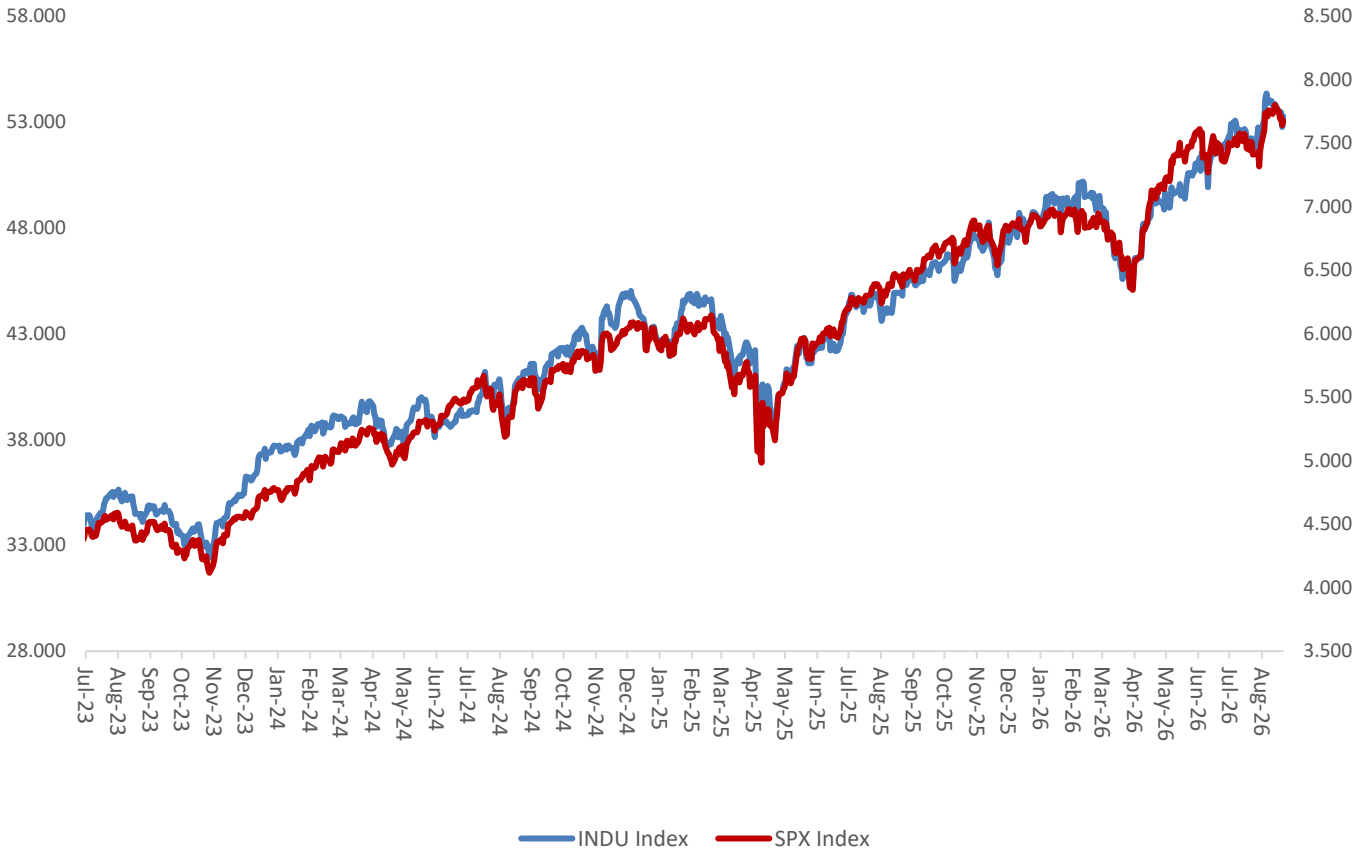
Tabel 3. Volatility Data

Index	Close Price	Return (WoW)	Weekly Range	Average 5 Year
VIX	15,13	6,18%	14,89-16,01	18,50
MOVE	73,40	5,49%	71,26-75,63	103,24

Source: Bloomberg

Wall Street Index Closed Fall

Grafik 4. DJIA & S&P 500 Index



Source: Bloomberg

Tabel 4. Wall Street's Data

Index	Close Price	Return (WoW)	Return (Ytd)
DJIA	53.277,01	-0,85%	10,85%
S&P	7.674,37	-1,43%	12,11%
Nasdaq	26.180,46	-2,05%	12,64%
DXY	98,80	-0,87%	0,49%

Source: Bloomberg

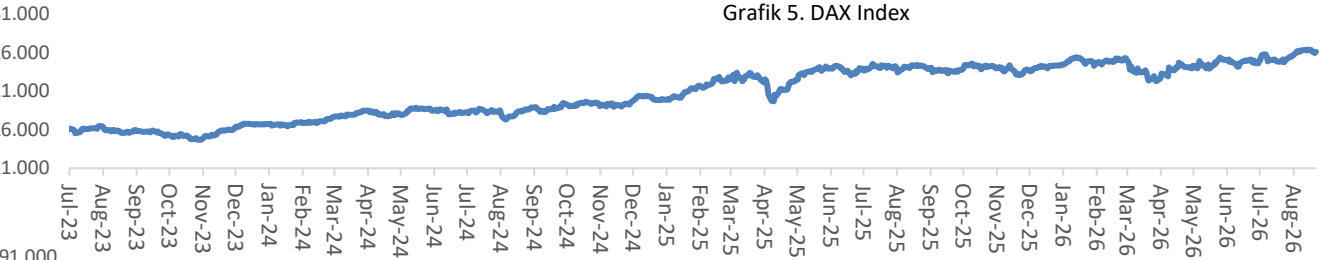
Tabel 5. US 's Economic Data

Event	Period	Survei	Actual	Prior
Industrial Production MoM	Jul	0.3%	0.1%	0.1”%
Initial Jobless Claims	Aug 15	210k	206k	209k
S&P Global US Manufacturing PMI	Aug P	53.9	53.2	53.9

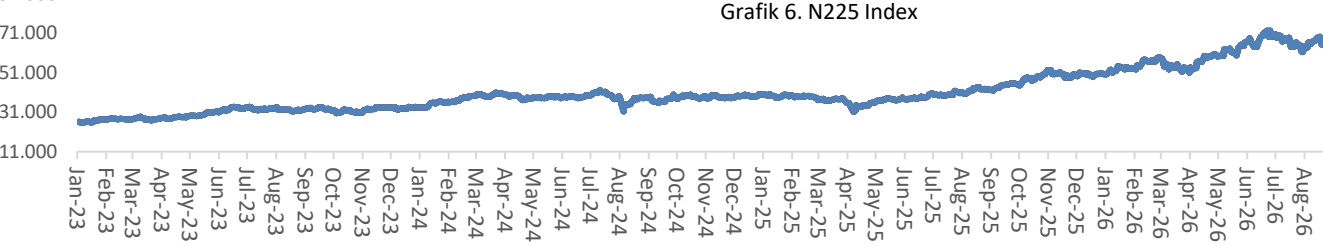
Source: Bloomberg

Europe & Asia’s Stock Market Closed Mixed

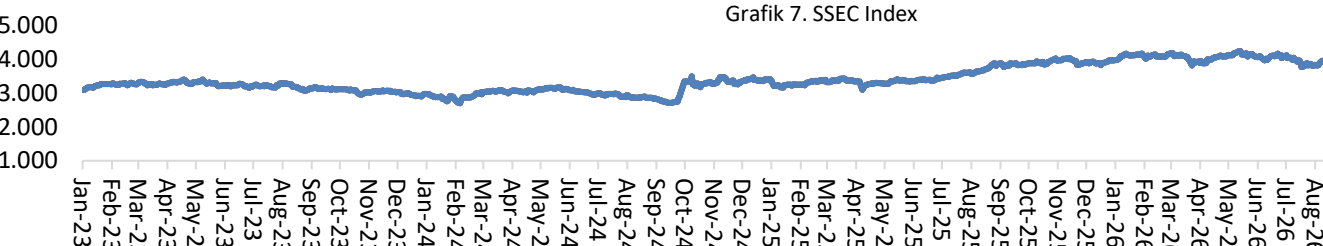
Grafik 5. DAX Index



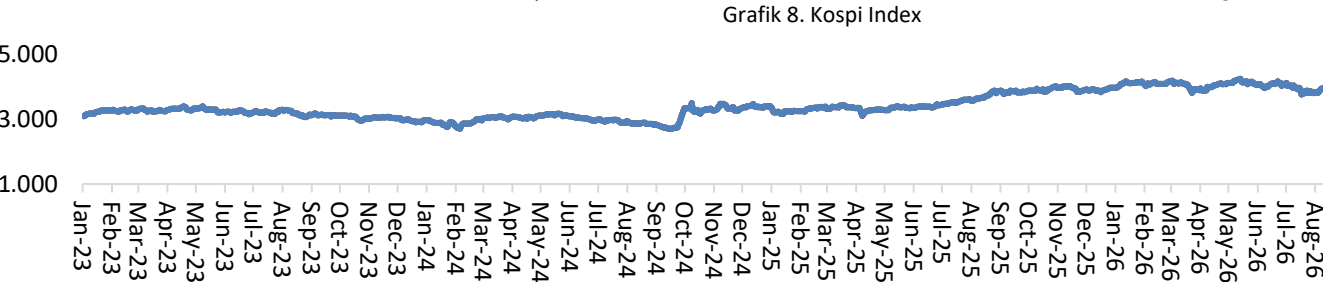
Grafik 6. N225 Index



Grafik 7. SSEC Index



Grafik 8. Kospi Index



Tabel 6. Europe & Asia’s Stock Market Data

Index	Close Price	Return (WoW)	Return (Ytd)
German DAX	26.136,56	-1,15%	6,72%
Japan N225	66.016,36	-3,93%	31,14%
China SSEC	3.905,20	-0,56%	-1,60%
Korea Kospi	6.912,95	-0,93%	64,04%
USDEUR	0,86	-0,93%	0,58%
USDJPY	158,95	-0,23%	1,43%
USDCNY	6,72	-0,32%	-3,82%
USDKRW	1.386,65	-2,12%	-3,69%

Source: Bloomberg

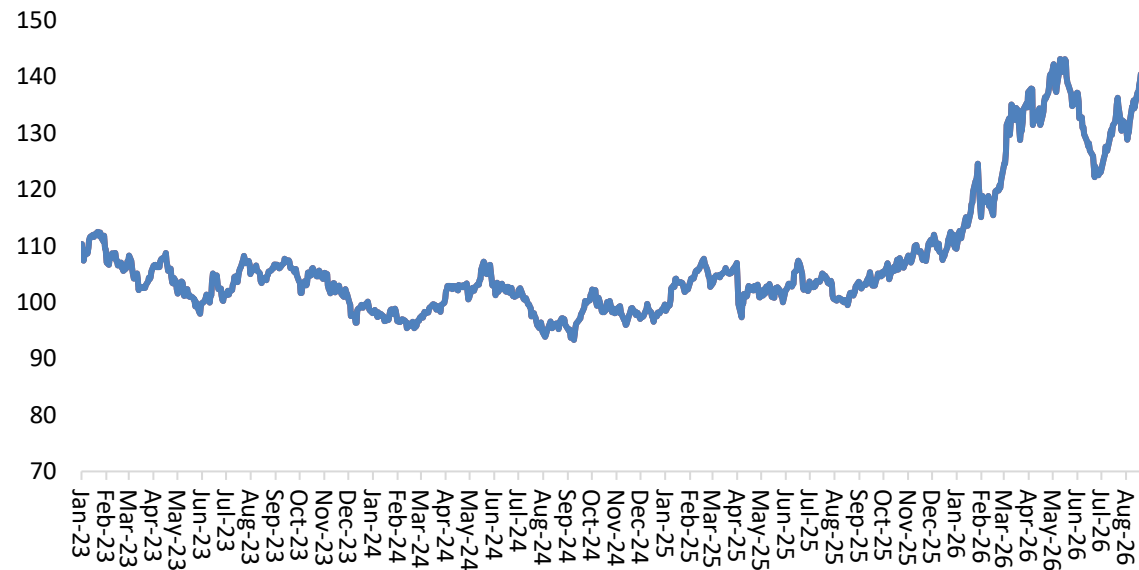
Tabel 7. Europe & Asia’s Economic Data

Event	Period	Survei	Actual	Pri
Natl CPI YoY (Japan)	Jul	1.9%	1.9%	1.6
Retail Sales YoY (China)	Jul	1.5%	0.6%	1.0
PPI YoY (South Korea)	Jul		7,7%	8.6

Source: Bloomberg

Prices of Essential Commodities Closed Strong

Grafik 9. BCOM Index



Tabel 8. Bloomberg Commodity Index Data

Index	Close Price	Return (WoW)	Return (Ytd)
Bloomberg Cmdty Index	140,49	6,65%	28,08%

Source: Bloomberg

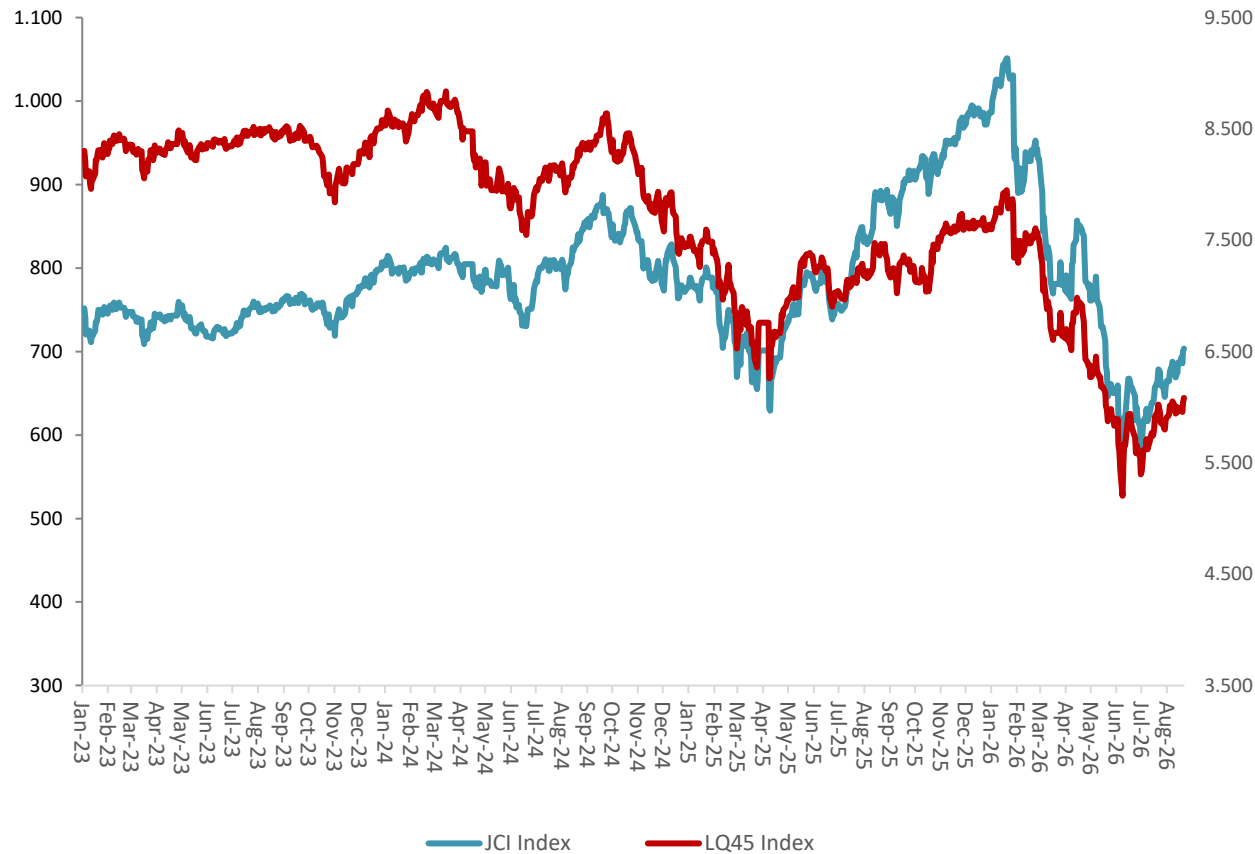
Tabel 9. Commodity Data

Index	Close Price	Return (WoW)	Return (Ytd)
Oil - WTI (USD/Bbl)	87,06	5,66%	51,62%
Oil - Brent (USD/Bbl)	94,39	6,63%	55,12%
Gold (USD/t.oz)	4.603,07	5,18%	6,57%
Nickel (USD/T)	17.058,00	1,45%	2,48%
Tin (USD/T)	55.891,00	-0,54%	37,81%
CPO (MYR/T)	4.791,00	5,81%	19,83%
Copper (USD/Lbs)	14.215,50	0,39%	14,43%
Coal (USD/T)	131,50	1,74%	22,33%

Source: Bloomberg

Jakarta Composite Index Closed Strong

Grafik 10. JCI Index



Source: Bloomberg

Tabel 10. JCI's Data

	Close Price	Return (WoW)	Return (Ytd)
JCI	6.525,69	1,93%	-24,53%
LQ45	644,59	1,95%	-23,86%
Foreign Net Buy (Equity)		Rp 2.23 triliun	Rp -71.58 triliun
Foreign Net Buy (Bond)		Rp 12.15 triliun	Rp 30.39 triliun
USDIDR	17.693,00	-0,74%	6,01%

Source: Bloomberg

Tabel 11. JCI's Sector Data

	Close Price	Return (WoW)	Return (Ytd)
Basic Material	1.807,89	3,67%	-12,1%
Energy	3.232,16	2,94%	-27,4%
Infrastructure	1.918,43	2,73%	-28,1%
Properties & Real Estate	838,82	2,65%	-28,4%
Consumer Non-Cyclicals	714,41	2,28%	-10,6%
JCI	6.525,69	1,93%	-24,5%
Industry	1.583,95	1,75%	-26,5%
Transportation & Logistic	1.803,63	1,38%	-8,2%
Consumer Cyclicals	953,83	1,24%	-22,2%
Financial	1.370,04	1,00%	-11,6%
Technology	6.983,97	0,75%	-26,7%
Healthcare	1.527,79	-0,55%	-25,9%

Source: Bloomberg

Economic Data & What to Expect one Week Ahead

Tabel 13. JCI's Forecast

JCI Forecast	Suppport	Resistance
Pivot (25-28 Agustus 2026)	6.504,76	6.549,29
	6.483,83	6.572,89
Statistical (25-28 Agustus 2026)	6.524,98	6.600,61

Source: PCI

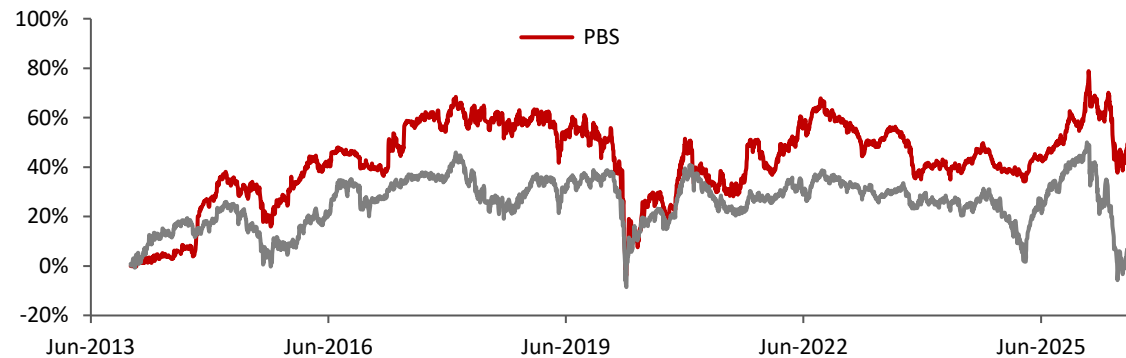
Tabel 14. Indonesia Economic Data

Event	Period	Survei	Actual	Prior
BI Rate	Aug	5,75%	5,75%	5,75%

Source: Bloomberg

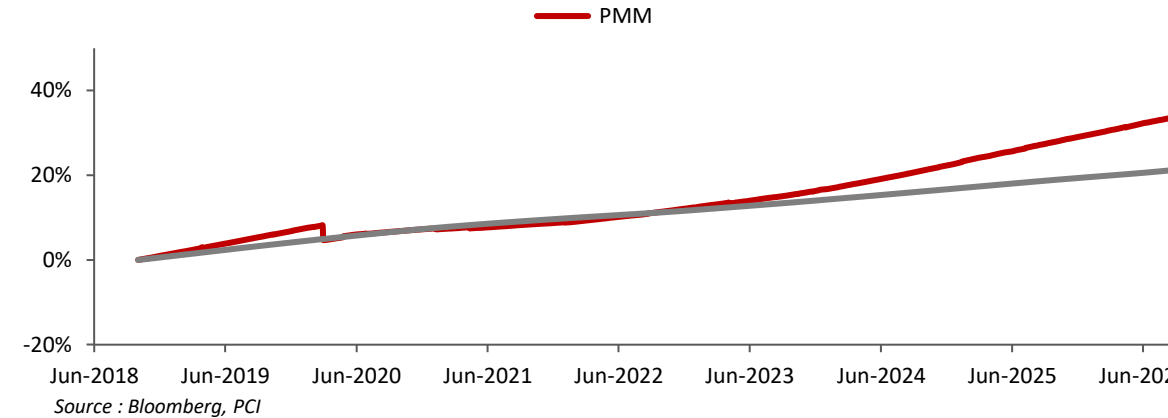
PCI's Mutual Funds Performance vs Benchmark

Grafik 11. PBS Performance



Source: Bloomberg, PCI

Grafik 12. PMM Performance



Source : Bloomberg, PCI

Tabel 14. PCI Mutual Funds performance vs Benchmark

Index	1 Week	1 Month	3 Month	6 Month	Ytd	1 Year
PBS	0,85%	2,90%	6,31%	-9,43%	-2,45%	2,21%
*Benchmark	2,08%	0,48%	0,47%	-23,38%	-25,32%	-20,29%
PMM	0,10%	0,39%	1,22%	2,46%	3,31%	5,04%
*Benchmark	0,04%	0,21%	0,57%	1,08%	1,44%	2,16%
PFI	0,59%	1,28%	-0,22%	-1,83%	-1,44%	0,56%
*Benchmark	-1,25%	1,04%	-1,11%	-5,51%	-5,77%	-5,23%

Source: Bloomberg, PCI

*Keterangan Benchmark

- Benchmark PBS : 80% JII + 20% IBPA Govt Bonds nett +1%
- Benchmark PMM : IDRE1MO Nett (Average of time deposit 1 Month)
- Benchmark PFI : 80% BINDO +20% IDRE1MO Nett (Average of time deposit 1 Month)

Thank You

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