

GLOBAL MARKET REVIEW

Indeks-indeks *Wall Street* bergerak terbatas di Kamis (6/6). *Wall Street* dibayangi sikap *wait and see* jelang rilis data *Non Farm Payrolls* dan *Unemployment Rate* untuk bulan Mei 2024. Kedua data ini termasuk dalam data-data utama yang diperhatikan the Fed dalam memutuskan kebijakan moneterinya. Tidak ada perubahan pada peluang pemangkasan *the Fed Rate* di September 2024, tetap di atas 55% berdasarkan jajak pendapat terbaru oleh *CME FedWatch Tools*.

Sebaliknya, indeks-indeks di Eropa menguat signifikan di Kamis (6/6). Penguatan tersebut dipicu oleh pemangkasan sukubunga acuan ECB sebesar 25 bps ke 4.25% (6/6). Ini menjadi pemangkasan sukubunga acuan pertama oleh ECB sejak September 2019. Pemangkasan ini dinilai memberikan tekanan tambahan bagi the Fed untuk mempertimbangkan langkah serupa pada FOMC September 2024 mendatang.

U.S. Treasury Yield relatif *sideways* di kisaran 4.3% di perdagangan Kamis (6/6), turun dari rentang 4.5% di pekan lalu. Tren penurunan *yield* diperkirakan berlanjut seiring sentimen-sentimen di atas.

Harga minyak *brent* menguat 3.67% ke US\$79.87/barel di Kamis (6/6) menyusul keputusan pemangkasan sukubunga acuan ECB (6/6).

Global Indices as of 06-06-2024

| | Last | Chg | % Chg |
|---------|-----------|--------|--------|
| KLCI | 1,614.73 | 6.20 | 0.39% |
| STI | 3,330.81 | 0.80 | 0.02% |
| SSEC | 3,048.79 | -16.61 | -0.54% |
| HSI | 18,476.80 | 51.84 | 0.28% |
| Nikkei | 38,703.51 | 213.34 | 0.55% |
| CAC 40 | 8,040.12 | 33.55 | 0.42% |
| DAX | 18,652.67 | 76.73 | 0.41% |
| FTSE | 8,285.34 | 38.39 | 0.47% |
| DJIA | 38,886.17 | 78.84 | 0.20% |
| S&P 500 | 5,352.96 | -1.07 | -0.02% |
| Nasdaq | 17,173.12 | -14.78 | -0.09% |

Source : Bloomberg | CNBC

Commodities - current price

| | Last | Chg | % Chg |
|-----------|-----------|---------|--------|
| Oil Crude | 75.71 | 1.64 | 2.21% |
| Oil Brent | 80.03 | 1.62 | 2.07% |
| Nat. Gas | 2.83 | 0.08 | 2.81% |
| Gold | 2,376.77 | 21.75 | 0.92% |
| Silver | 31.32 | 1.31 | 4.35% |
| Coal | 137.00 | -2.80 | -2.00% |
| Tin | 31,321.00 | -611.00 | -1.91% |
| Nickel | 18,620.00 | 332.00 | 1.82% |
| CPO KLCE | 3,961.00 | 54.00 | 1.38% |

Source : CNBC | tradingeconomics.com

Currencies - current level

| | Last | Chg | % Chg |
|--------|-----------|--------|--------|
| USDIDR | 16,228.00 | -94.00 | -0.58% |
| EURUSD | 1.09 | 0.00 | 0.17% |
| USDJPY | 155.64 | -0.27 | -0.17% |

Source : Bloomberg | CNBC

Global Upcoming Released

| | Date |
|------------------|--------------|
| European Council | 2024 |
| OPEC | 2024 |
| G-20 | 18-19 Nov 24 |
| G-7 | 13-15 Jun 24 |
| IMF | 2024 |

Source : investing.com | profitf.com

Table 1. GLOBAL ECONOMIC RELEASED as of 06-06-2024

| Released Data | Actual | Forecast | Previous |
|--------------------------------------------------|-------------|----------|-----------|
| Japan Foreign Bond Investment (Jun/01) | ¥1323.40 Bn | - | ¥297.9 Bn |
| Japan BoJ Nakamura Speech | - | - | - |
| Euro Area ECB Interest Rate Decision | 4.25% | 4.25% | 4.50% |
| Euro Area Deposit Facility Rate | 3.75% | 3.75% | 4.00% |
| Euro Area Marginal Lending Rate | 4.50% | - | 4.75% |
| Euro Area ECB Press Conference | - | - | - |
| Euro Area Retail Sales YoY (Apr) | 0.00% | - | 0.70% |
| United Kingdom S&P Global Construction PMI (May) | 54.70 | 52.30 | 53.00 |

Source : dailyfx.com | tradingeconomics.com

Table 2. GLOBAL MACROECONOMICS as of 07-06-2024

| Released Data | Date | Forecast | Previous |
|--------------------------------------------|----------|-----------|-------------|
| Indonesia Foreign Exchanges Reserves (May) | 7-Jun-24 | - | \$136.20 Bn |
| China Balance of Trade (May) | 7-Jun-24 | \$73.00 | \$72.35 Bn |
| Germany Balance of Trade (May) | 7-Jun-24 | €22.60 Bn | €22.30 Bn |
| Euro Area ECB Nagel Speech | 7-Jun-24 | - | - |
| Euro Area GDP Growth Rate QoQ 3rd Est (Q1) | 7-Jun-24 | 0.30% | -0.10% |
| Euro Area GDP Growth Rate YoY 3rd Est (Q1) | 7-Jun-24 | 0.40% | 0.10% |
| U.S Non Farm Payrolls (May) | 7-Jun-24 | 185K | 175K |
| U.S Unemployment Rate (May) | 7-Jun-24 | 3.90% | 3.90% |

Source : dailyfx.com | tradingeconomics.com

JAKARTA COMPOSITE INDEX - Daily Chart

ATPS2023II dipublikasikan pada TradingView.com, Jun 06, 2024 18:06 UTC+7



TV TradingView

DOMESTIC MARKET REVIEW

[Resistance : 7075] [Pivot : 7000] [Support : 6900]

IHSG berpeluang lanjutkan penguatan ke atas level psikologis 7000 di Jumat (7/6). Penguatan ditopang oleh arahan positif dari mayoritas indeks global dan potensi penguatan nilai tukar Rupiah.

Penguatan saham-saham bank di Kamis (6/6) sejalan dengan penguatan nilai tukar Rupiah ke Rp16,255/USD (-0.15%). Pemangkasan sukubunga ECB sebesar 25 bps dan perubahan pandangan terhadap arah kebijakan the Fed berpotensi mendorong berlanjutnya kecenderungan tersebut. Berdasarkan jajak pendapat *CME FedWatch Tools*, peluang pemangkasan the Fed Rate di September 2024 berada di 56% (6/6).

Berdasarkan sentimen di atas, nilai tukar Rupiah berpeluang lanjutkan penguatan di Jumat (7/6). Dengan demikian, saham bank, terutama bank-bank berkaputalisasi besar (BBCA, BBNI, BBRI dan BMRI) dapat kembali diperhatikan di Jumat (7/6). Saham-saham ini diperkirakan kembali menopang IHSG di Jumat (7/6).

Disamping saham-saham bank, pasar dapat memperhatikan peluang rebound lanjutan pada UL TJ, INTP dan NCKL di Jumat (7/6)

POINTS OF INTEREST

- Indeks-indeks *Wall Street* bergerak terbatas di Kamis (6/6).
- *Wall Street* dibayangi sikap *wait and see* jelang rilis data Non Farm Payrolls dan Unemployment Rate untuk bulan Mei 2024.
- Indeks-indeks di Eropa menguat signifikan di Kamis (6/6).
- ECB memangkas sukubunga acuan sebesar 25 bps ke 4.25% (6/6).
- *U.S. Treasury Yield* relatif *sideways* di kisaran 4.3% di perdagangan Kamis (6/6).
- Sentimen di atas berpotensi menjaga tren penurunan *yield* untuk beberapa waktu kedepan.
- Tidak ada perubahan pada peluang pemangkasan *the Fed Rate* di September 2024, tetap di atas 55% berdasarkan jajak pendapat terbaru oleh *CME FedWatch Tools*.
- Nilai tukar Rupiah berpeluang lanjutkan penguatan di Jumat (7/6).
- IHSG berpeluang lanjutkan penguatan ke atas level psikologis 7000 di Jumat (7/6).
- *Top picks* (7/6) : UL TJ, INTP, NCKL, BBCA, BBNI, BBRI dan BMRI.

JCI Statistics as of 06-06-2024

6974.897 +0.39%
 +27.227
 Value

| | |
|----------|--------|
| %Weekly | -1.19% |
| %Monthly | -2.44% |
| %YTD | -4.10% |

| | |
|------------------|-----------|
| T. Vol (Shares) | 14.84 B |
| T. Val (Rp) | 8.21 T |
| F. Net (Rp) | -592.03 B |
| 2024 F. Net (Rp) | -7.70 T |
| Market Cap. (Rp) | 11,669 T |

| | |
|-------------|-----------------------|
| 2024 Lo/Hi | 6,970.736 / 7,454.448 |
| Resistance | 7075 |
| Pivot Point | 7000 |
| Support | 6900 |

Source : IDX | Research Team

ISSI Statistics as of 05-06-2024

212.521 +0.41%
 +0.862

Source : IDX | Research Team

Domestic Macroeconomics

| | Value |
|-------------------------------|--------|
| GDP (Q1-2024) (YoY) | 5.11% |
| Export Growth (YoY) - Apr '24 | 1.72% |
| Import Growth (YoY) - Apr'24 | 4.62% |
| BI Rate - May'24 | 6.25% |
| Inflation Rate - May'24 (MoM) | -0.03% |
| Inflation Rate - May'24 (YoY) | 2.84% |
| LPS - Bank Umum (Rp) | 4.25% |
| LPS - Bank Umum (USD) | 2.25% |
| LPS - BPR | 6.75% |

Source : BI | BPS | IDX

Domestic Upcoming Released

| | Date |
|------------------|-----------|
| GDP | 8-Aug-24 |
| Export Import | 19-Jun-24 |
| Inflation | 1-Jul-24 |
| Interest Rate | 20-Jun-24 |
| Foreign Reserved | 7-Jun-24 |
| Trade Balance | 19-Jun-24 |

Source : BI | BPS

MARKET NEWS

MIKA PT Mitra Keluarga Tbk

PT Mitra Keluarga Tbk (MIKA) telah melaksanakan RUPST pada 4 Juni 2024 dan menyetujui pembagian dividen tunai sebesar Rp450 miliar. Alokasi tersebut setara dengan 49% dari torehan laba bersih tahun buku 2023 sebesar Rp916.13 miliar sehingga para investor akan mendapat dividen senilai Rp34 per lembar saham. Selanjutnya, sekitar Rp9.16 miliar dialokasikan dan dibukukan sebagai dana cadangan. Sementara sisa laba bersih sekitar Rp456.97 miliar dibukukan sebagai laba ditahan untuk menambah modal kerja perseroan.

MDKA PT Merdeka Copper Gold Tbk

PT Merdeka Copper Gold Tbk (MDKA) akan menggelar private placement maksimal 2,447,298,377 lembar. Pengeluaran saham baru tersebut setara dengan 10% dari total modal belanja modal, pembelian saham, pembelian aset, penyertaan saham, atau metode transaksi lainnya sesuai dengan industri grup perseroan. Penerbitan saham baru tersebut akan mendongkrak jumlah saham beredar perseroan sehingga diharapkan dapat meningkatkan likuiditas perdagangan saham perseroan. Selain itu, private placement akan memberi tambahan dana untuk mendukung pengembangan usaha perseroan dan memperkuat struktur permodalan.

MEDC PT Medco Energi Internasional Tbk

PT Medco Energi Internasional Tbk (MEDC) menyampaikan bahwa perusahaan telah menyelesaikan tender atas buyback surat utang jatuh tempo. Corporate Secretary MEDC, Siendy K. Wisandana mengungkapkan bahwa MEDC telah merampungkan tender atas pembelian kembali jumlah terutang atas 7.375 surat utang senior jatuh tempo 2026 yang diterbitkan oleh Medco Oak Tree Pte. Ltd. (Surat Utang 2026) dan 6.375% surat utang senior jatuh tempo 2027 yang diterbitkan oleh Medco Bell Pte. Ltd. (Surat Utang 2027).

TBIG PT Tower Bersama Group Tbk

PT Tower Bersama Group Tbk (TOWR) mengalokasikan dana taktis senilai Rp800.80 miliar. Dana tersebut disiapkan untuk buyback saham maksimal 396,500,000 lembar. Saham yang akan di buyback tersebut dibalut dengan nilai nominal Rp20. Buyback tersebut setara dengan 1.75% dari seluruh modal ditempatkan dan disetor penuh perseroan. Aksi tersebut akan dilakukan dalam tempo 12 bulan dan rencana tersebut telah memperoleh persetujuan dari para pemegang saham atau mendapat dukungan suara sekitar 99,557% dari 20.90 miliar pemilik suara. Buyback tersebut didasari oleh kinerja apik TBIG yang telah menghasilkan arus kas melebihi dari jumlah yang diperlukan dalam mempertahankan peningkatan dan pertumbuhan.

PTRO PT Petrosea Tbk

PT Petrosea Tbk (PTRO) mengumumkan bahwa pada 5 Juni 2024, perusahaan telah menandatangani term sheet perjanjian penambangan dengan PT Global Bara Mandiri senilai sekitar USD230 juta dan durasi selama 8 tahun yang dapat diperpanjang menjadi kontrak life of mine. Ruang lingkup pekerjaannya meliputi penggalian lapisan penutup, pengupasan batubara dan pemuatan batubara di tambang yang berlokasi di Kecamatan Kapuas Tengah, Kabupaten Kapuas, Provinsi Kalimantan Tengah. Penandatanganan perjanjian tersebut merupakan salah satu wujud nyata dari ekspansi bisnis PTRO ke Kalimantan Tengah dan memperkuat keberlanjutan perusahaan dimasa mendatang.

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CA Reminder

| Tender Offer | Price | Start Offering | End Offering | Payment Date |
|---------------|----------|----------------|--------------|--------------|
| CASS | Rp883 | 5-Jun-24 | 4-Jul-24 | 16-Jul-24 |
| META | Rp250 | 20-May-24 | 14-Jun-24 | 25-Jun-24 |
| Cash Dividend | Dividend | Cum Date | Ex Date | Payment Date |
| ANTM | Rp128 | 20-May-24 | 21-May-24 | 7-Jun-24 |
| BMHS | Rp1 | 7-Jun-24 | 10-Jun-24 | 3-Jul-24 |
| BOLT | Rp35 | 6-Jun-24 | 7-Jun-24 | 2-Jul-24 |
| BREN | Rp2 | 6-Jun-24 | 7-Jun-24 | 28-Jun-24 |
| CGAS | Rp1 | 6-Jun-24 | 7-Jun-24 | 28-Jun-24 |
| CLEO | Rp5 | 7-Jun-24 | 10-Jun-24 | 28-Jun-24 |
| CSRA | Rp15 | 6-Jun-24 | 7-Jun-24 | 28-Jun-24 |
| GEMS | US\$0 | 28-May-24 | 29-May-24 | 7-Jun-24 |
| GRPM | Rp2 | 7-Jun-24 | 10-Jun-24 | 3-Jul-24 |
| IDEA | Rp1 | 7-Jun-24 | 10-Jun-24 | 3-Jul-24 |
| JSMR | Rp38 | 20-May-24 | 21-May-24 | 7-Jun-24 |
| MEDC | US\$0 | 7-Jun-24 | 10-Jun-24 | 28-Jun-24 |
| MERK | Rp320 | 6-Jun-24 | 7-Jun-24 | 26-Jun-24 |
| MOLI | Rp4 | 6-Jun-24 | 7-Jun-24 | 26-Jun-24 |
| MPMX | Rp115 | 6-Jun-24 | 7-Jun-24 | 28-Jun-24 |
| NAYZ | Rp0 | 7-Jun-24 | 10-Jun-24 | 3-Jul-24 |
| NICL | Rp4 | 6-Jun-24 | 7-Jun-24 | 19-Jun-24 |
| PGAS | Rp148 | 7-Jun-24 | 10-Jun-24 | 28-Jun-24 |
| POWR | Rp44 | 6-Jun-27 | 7-Jun-24 | 25-Jun-24 |
| PSGO | Rp8 | 7-Jun-24 | 10-Jun-24 | 28-Jun-24 |
| PTBA | Rp398 | 20-May-24 | 21-May-24 | 7-Jun-24 |
| RAJA | Rp38 | 6-Jun-24 | 7-Jun-24 | 28-Jun-24 |
| SILO | Rp20 | 7-Jun-24 | 10-Jun-24 | 28-Jun-24 |
| SMBR | Rp2 | 6-Jun-24 | 7-Jun-24 | 28-Jun-24 |
| STAA | Rp27 | 7-Jun-24 | 10-Jun-24 | 24-Jun-24 |
| TBIG | Rp30 | 7-Jun-24 | 10-Jun-24 | 3-Jul-24 |
| TGKA | Rp312 | 27-May-24 | 28-May-24 | 7-Jun-24 |
| RUPST | | | | Date |
| ACES | | | | 7-Jun-24 |
| CRAB | | | | 7-Jun-24 |
| GMTD | | | | 7-Jun-24 |
| HRUM | | | | 7-Jun-24 |
| IFII | | | | 7-Jun-24 |
| KBLI | | | | 7-Jun-24 |
| KEEN | | | | 7-Jun-24 |
| KING | | | | 7-Jun-24 |
| LPPS | | | | 7-Jun-24 |
| MCOR | | | | 7-Jun-24 |
| MGRO | | | | 7-Jun-24 |
| NETV | | | | 7-Jun-24 |
| OILS | | | | 7-Jun-24 |
| OMED | | | | 7-Jun-24 |
| PLAN | | | | 7-Jun-24 |
| PNGO | | | | 7-Jun-24 |
| PTSP | | | | 7-Jun-24 |
| RODA | | | | 7-Jun-24 |
| SEMA | | | | 7-Jun-24 |
| WIRG | | | | 7-Jun-24 |

Source : ksei

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