

## DAILY UPDATE June 22, 2026

### MACROECONOMIC NEWS

**Oil Price** - Crude oil prices rebounded on Monday, with Brent rising 1.4% to USD 81.69/bbl and WTI gaining 3.0% to USD 78.93/bbl, as renewed geopolitical tensions overshadowed recent U.S.-Iran diplomatic progress. Market sentiment deteriorated after Iran reportedly reclosed the Strait of Hormuz and President Trump threatened stronger military action if Iran-backed Hezbollah continued attacks on Israel, prompting traders to rebuild geopolitical risk premiums into oil prices. The move partially reversed last week's nearly 10% decline, which had been driven by optimism surrounding a fragile 60-day U.S.-Iran interim peace agreement and expectations of improved oil supply and shipping conditions. Investors are now closely monitoring whether ongoing negotiations can sustain the ceasefire and prevent further disruptions to global energy markets.

**U.S. - Iran Situations** - U.S.-Iran negotiations in Switzerland remained ongoing despite reports that Iran had suspended participation following President Trump's threat of renewed military strikes over Hezbollah's actions in Lebanon. The talks, aimed at establishing a framework for future discussions on Iran's nuclear program, ceasefire implementation, and regional security, highlight the fragility of the recently agreed 60-day diplomatic window. Adding to market uncertainty, Iran reportedly renewed restrictions on transit through the Strait of Hormuz, although shipping activity has so far remained largely uninterrupted. Investors continue to monitor whether negotiations can preserve the ceasefire framework and prevent further escalation across the region.

**E.U. Economy** - Bank of America expects the ECB to maintain a hawkish bias as policymakers remain focused on upside inflation risks despite sluggish Eurozone growth. Current projections support the possibility of one additional rate hike this year, although lower oil prices may delay action until September or prompt a temporary pause. Beyond interest rates, investors are increasingly monitoring the ECB's ongoing balance-sheet reduction, which has shrunk from €8.3 trillion in 2022 to around €6.3 trillion by end-2025 and could play a growing role in shaping future monetary policy and liquidity conditions

### Equity Markets

	Closing	% Change
Dow Jones	51,565	0.14
NASDAQ	26,518	1.91
S&P 500	7,501	1.08
MSCI excl. Jap	1,187	-0.11
Nikkei	71,250	0.28
Shanghai Comp	4,091	-0.43
Hang Seng	23,925	-1.59
STI	5,193	-0.39
JCI	6,177	0.08
Indo ETF (IDX)	11	0.73
Indo ETF (EIDO)	12	-0.40

### Currency

	Closing	Last Trade
US\$ - IDR	17,804	17,804
US\$ - Yen	161.3	161.45
Euro - US\$	1.1471	1.1463
US\$ - SG\$	1.291	1.293

### Commodities

	Last	Price Chg	%Chg
Oil NYMEX	78.9	2.8	3.7
Oil Brent	81.7	2.24	2.8
Coal Newcastle	144.0		
Nickel	17580	-262	-1.5
Tin	53293	-360	-0.7
Gold	4148	-38.4	-0.9
CPO Rott	1295		
CPO Malay	4646	75	1.6

### Indo Gov. Bond Yields

	Last	Yield Chg	%Chg
1 year	7.133	-0.08	-1.14
3 year	7.107	-0.03	-0.38
5 year	6.987	0.06	0.82
10 year	7.076	0.03	0.36
15 year	7.188	-0.25	-3.41
30 year	7.388	0.14	1.99

## CORPORATE NEWS

**DOSS** - PT Global Sukses Digital approved a cash dividend of IDR 3/share, totaling IDR 5 billion and representing 14% of FY2025 net profit of IDR 34 billion. The company also allocated IDR 640 million to its statutory reserve, while the remaining earnings were retained to support future operations and growth initiatives. The cum-dividend date is 25 June 2026, with dividend payment scheduled for 17 July 2026.

**DVLA** - PT Darya-Varia Laboratoria approved a final dividend of IDR 64/share from FY2025 earnings, bringing the total FY2025 dividend to IDR 105/share, including the interim dividend of IDR 41/share paid in November 2025. The total dividend distribution amounts to IDR 117 billion, representing a payout ratio of 71% of FY2025 net profit, while the remaining earnings will be retained to support working capital and future investments. Shareholders on record as of 1 July 2026 will be eligible for the final dividend, with payment scheduled for 22 July 2026.

**PNBN** - PT Bank Pan Indonesia approved a cash dividend of IDR 42/share, totaling IDR 1 trillion and representing a 37% payout ratio of FY2025 net profit of IDR 2.6 trillion. The remaining IDR 1.6 trillion will be retained to strengthen core capital and support future business growth. The cum-dividend date is 25 June 2026, with dividend payment scheduled for 17 July 2026.

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