Panin Asset Management
Subsidiary of PT Panin Sekuritas Tbk.

DAILY UPDATE **August 5, 2026**

Morning News

MACROECONOMIC NEWS

U.S. Economy - U.S. job openings eased to 7.36 million in June, below expectations, while the prior month's figure was revised lower. Despite softer demand for workers, hiring, quits, and layoffs remained broadly unchanged, pointing to a resilient but gradually cooling labor market. The data supports the Federal Reserve's increased focus on inflation ahead of Friday's July payrolls report, with economists expecting around 75,000 new jobs and unemployment to edge up to 4.3%.

U.S. Market - Wall Street closed at record highs on Tuesday as the AI trade rebounded sharply, supported by strong earnings from major technology companies, lower oil prices, and easing Treasury yields. The S&P 500 rose 1.8%, the Dow gained 1.7%, and the NASDAQ advanced 2.6%, while Palantir and Caterpillar posted notable gains on solid results. Investor attention now turns to earnings from SpaceX and AMD, which will test whether the renewed enthusiasm for AI and semiconductor stocks can be sustained despite lingering concerns over elevated valuations and heavy capital spending.

Oil Price - Oil prices fell sharply for a second consecutive session as renewed hopes for a diplomatic breakthrough in the Iran conflict eased concerns over supply disruptions. Brent crude dropped 5.6% to US$79.11 per barrel, while WTI declined 5.9% to US$75.58, after U.S. officials suggested an agreement with Tehran could be reached soon to reopen the Strait of Hormuz and support broader de-escalation efforts.

CORPORATE NEWS

TAPG - PT Triputra Agro Persada will distribute a 2026 interim dividend of IDR 60/share, implying a yield of around 3.3% as of 3 August. The cum-dividend date for the regular market is 11 August 2026, with payment scheduled for 31 August 2026.

JSMR - PT Jasa Marga (Persero), through subsidiary PT Jasamarga Bali Tol, secured a sustainability-linked financing facility of up to ~IDR 1.6 trillion from PT Bank Syariah Indonesia (BRIS) to finance the Nusa Dua–Ngurah Rai–Benoa toll road asset. The proceeds will be used to partially repay principal and/or interest on shareholder loans with JSMR, the toll road concession holder.

Equity Markets

	Closing	% Change
Dow Jones	54,086	1.71
NASDAQ	26,585	2.59
S&P 500	7,737	1.79
MSCI excl. Jap	1,089	-0.19
Nikkei	65,467	2.36
Shanghai Comp	3,822	0.33
Hang Seng	25,853	-0.60
STI	5,612	0.00
JCI	6,320	1.37
Indo ETF (IDX)	11	2.10
Indo ETF (EIDO)	13	2.00

Currency

	Closing	Last Trade
US$ - IDR	18,027	18,027
US$ - Yen	157.75	157.59
Euro - US$	1.1531	1.1535
US$ - SG$	1.282	1.282

Commodities

	Last	Price Chg	%Chg
Oil NYMEX	75.2	-5.0	-6.2
Oil Brent	78.8	-4.95	-5.9
Coal Newcastle	130.9	-1.65	-1.2
Nickel	17193	133	0.8
Tin	55989	543	1.0
Gold	4077	23.6	0.6
CPO Rott	1295		
CPO Malay	4679	35	0.8

Indo Gov. Bond Yields

	Last	Yield Chg	%Chg
1 year	7.006	-0.01	-0.09
3 year	7.198	0.01	0.17
5 year	7.330	0.00	0.01
10 year	7.328	-0.01	-0.12
15 year	7.352	0.01	0.07
30 year	7.344	0.00	0.00

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CORPORATE NEWS

SRTG - PT Saratoga Investama Sedaya plans to sell approximately 4.9 million treasury shares from its 2020 buyback through the stock exchange starting August 18, 2026.

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