



FOR PROFESSIONAL INVESTORS - 09/15/2025

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### HOLDING UP

JCI advanced and closed at 7,937 (+83 points or +1.06%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 1Tn today and rupiah slightly weakened to IDR 16,410/USD.

Banking stocks were mixed as BBCA (+1.26%), BMRI (+0.22%), and BNL ( +2.68%) advanced, while BBNI (-2.43%) and BBRI (-0.96%) closed lower. Consumer names were mixed as INDF (+1.32%), GGRM (+5.08%), and HMSP (+2.78%) inched higher, while KLBF (-0.42%) and MYOR (-2.4%) closed lower. Properties stocks were positive as CTRA (+3.7%), BSDE (+3.2%), PWON (+2.19%), and SMRA (+2.65%) all rose. Material names were positive as BRPT (+3.54%) and TPIA (+0.63%) all closed higher. Other movers were BULL (+34.57%), MLPT (+13.71%), ESSA (-2.94%), and INKP (-2.89%).

The government continues the rice food aid program, which will run for four months from September to December 2025. The aid scheme remains the same, namely 10kg of rice per month to 18.2mn beneficiaries, with a budget of Rp13.9tn.

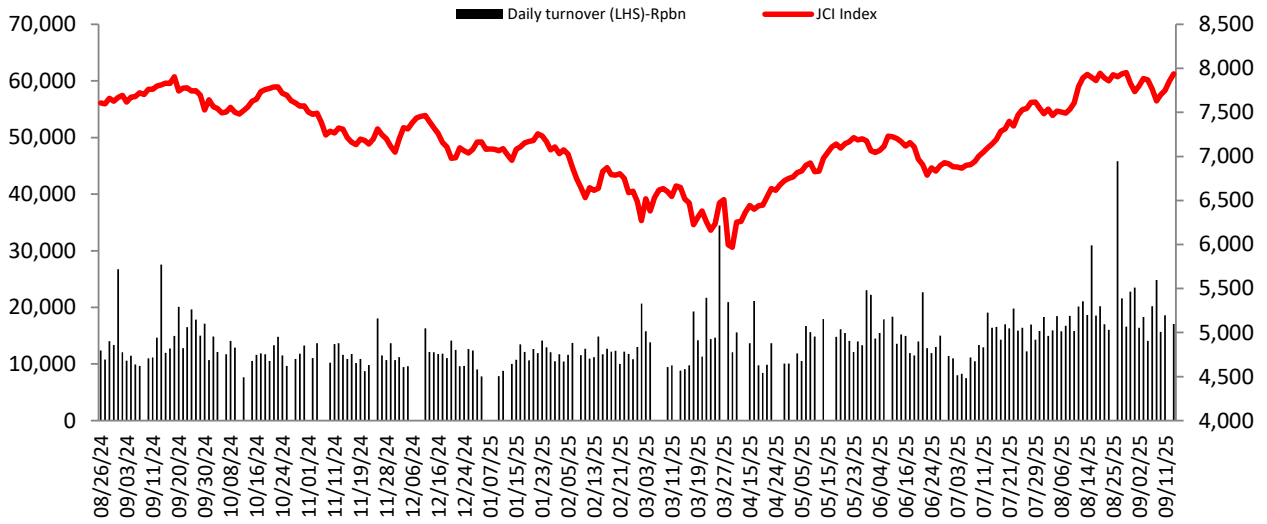
### BOND MARKET

#### FLATTISH

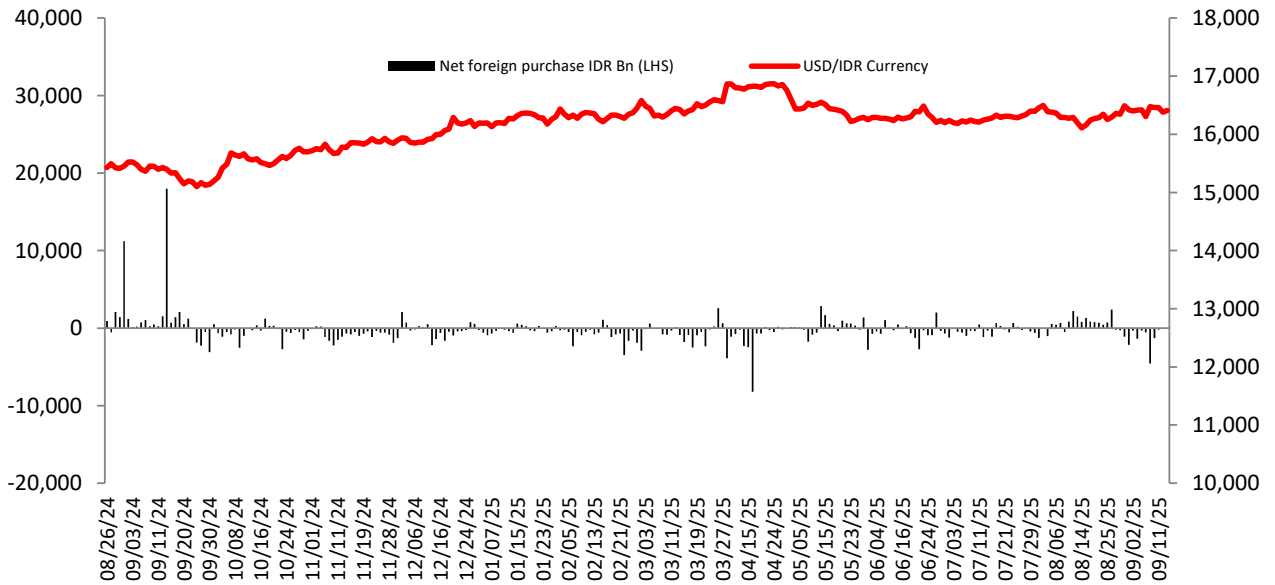
The bond market saw no improvement in risk sentiment today although we witnessed two ways trading in the market. Morning session saw buying interest started by onshore players. While on the afternoon session as we witnessed mixed names showed their selling interest particularly after London opened although trading volume remained thin. Thin trading volume during the day pushed bidders to be more defensive. Price movement went back to range bound possibly in preparation for the back-to-back BI and FOMC meetings on Wednesday. Overall tone remains cautious and the yield closed the day higher by around 1 – 2 bps.

# GRAPHS & TABLES

## JCI & DAILY TURNOVER



## IDR & NET FOREIGN PURCHASES



## EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR90	FR0090 Govt	100.0	0.1	4.0	5Y
FR91	FR0091 Govt	102.3	0.2	6.1	10Y
FR93	FR0093 Govt	99.0	0.1	4.4	15Y
FR92	FR0092 Govt	102.5	(0.2)	2.4	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.0	0.1	3.1	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.8	0.6	2.2	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.5	(0.0)	2.6	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,937.1	1.1	12.1	
Thailand	SET Index	1,298.3	0.4	(7.3)	
Korean Stock Exch.	KOSPI Index	3,407.3	0.3	42.0	
Straight Times	FSSTI Index	4,338.4	(0.1)	14.5	
Kuala Lumpur	KLCI Index	1,600.1	1.1	(2.6)	
Philippines	PCOMP Index	6,057.4	(0.8)	(7.2)	
Nikkei	NKY Index	44,768.1	0.9	12.2	
Hang Seng	HSI Index	26,446.6	0.2	31.8	
MSCI-Asia pacific	MXAP Index	220.3	0.9	21.3	
<u>Global Indices</u>					
Dow Jones	INDU Index	45,834.2	(0.6)	7.7	
S&P 500	SPX Index	6,584.3	(0.0)	11.9	
Nasdaq	CCMP Index	22,141.1	0.4	14.7	
FTSE 100	UKX Index	9,273.1	(0.1)	13.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,410.0	(0.2)	(1.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,387.7	(0.5)	0.8
3 month	IDSWT3M Index	16,390.1	(0.5)	(1.5)
6 month	IDSWT6M Index	16,386.2	(0.5)	(1.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,405.9	(0.5)	(1.5)
6 month	IDFWT6M Index	16,412.8	(0.5)	(1.2)

\*price as of 9/12/2025

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\* PT BNP Paribas Asset Management (address: Sequis Tower, Lantai 29, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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