



FOR PROFESSIONAL INVESTORS - 11/11/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Slightly Lower

JCI slightly weakened and closed at 8,367 (-25 points or -0.29%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 649Bn today and rupiah slightly weakened to IDR 16,689/USD.

Banking stocks were mostly negative as BBTN (-1.64%), BMRI (-1.06%), BBRI (-1.02%), and BBKA (-2.04%) all down, except BNL (+0.48%). Consumer names were mostly negative as INDF (-0.7%), HMSP (-2.92%), UNVR (-1.58%), and ICBP (-1.16%) all retreated, except KLBF (+1.18%). Retailer stocks were mostly negative as MAPA (-1.91%), AMRT (-1.59%), and MAPI (-4.93%) all closed lower, except ERAA (+4.67%). Telco names were mixed as TLKM (+2.33%) and ISAT (+7.25%) closed higher, while EXCL unchanged. Other movers were BUMI (+32%), DEWA (+12.06%), TCPI (-5.33%), and ARTO (-5%).

Bank Indonesia's October 2025 Consumer Survey showed stronger consumer confidence, with the Consumer Confidence Index rising to 121.2 from 115.0 in September, remaining in optimistic territory (>100).

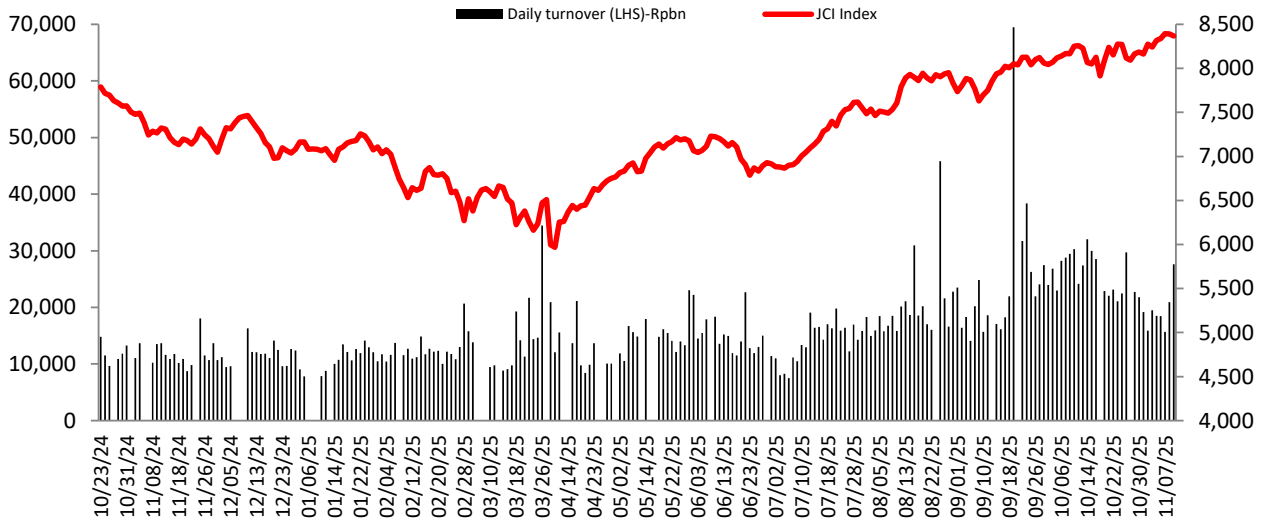
BOND MARKET

SUKUK AUCTION

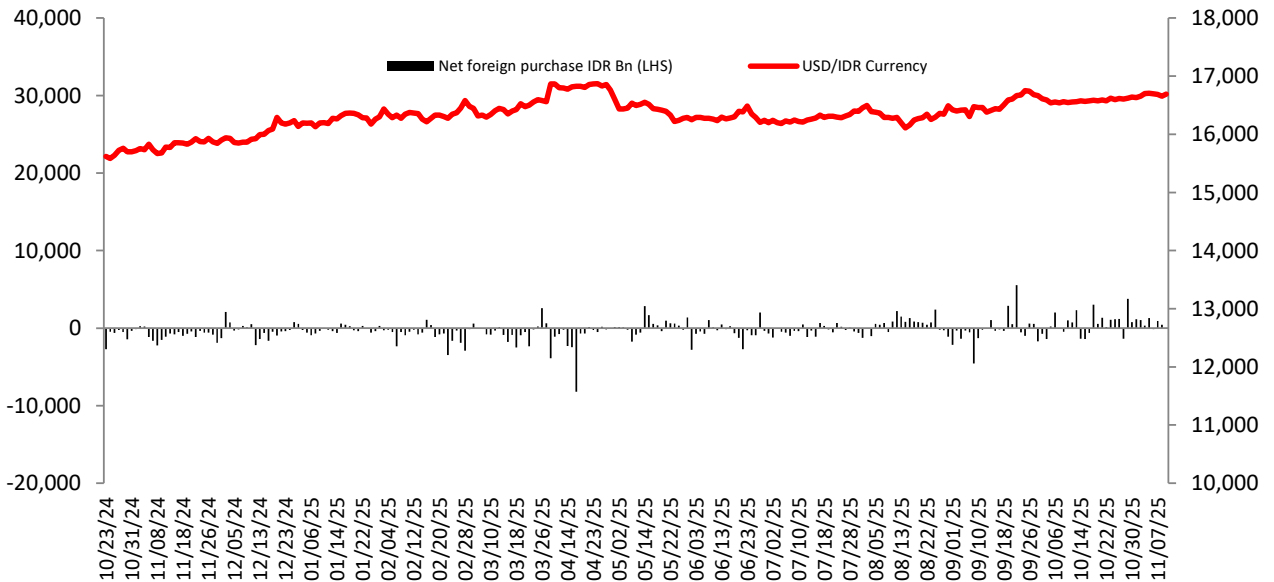
Bond market opened with wide price as Rupiah retraced back to above 16700 level following US headlines. Selling interest seen from offshore players but support came from local banks buying dips in 7-10Y tenor bucket. Yield curve closed the day relatively unchanged from yesterday. On today's sharia auction, MoF received demand of IDR 43tn and upsized issuance to IDR 10tn from initial target at IDR 7tn. The series absorbed (against incoming bids) on the auction were IDR 1tn (IDR 6.0tn) 1mo SPN-S, IDR 1tn (IDR 1.4tn) 6mo SPN-S, IDR 1tn (IDR 7.5tn) 9mo SPN-S, IDR 0.6tn (IDR 5.1tn) 3Y PBS30, IDR 2.05tn (IDR 5.8tn) 5Y PBS40, IDR 2.25tn (IDR 8.5tn) 14Y PBS34, IDR 1.45tn (IDR 4.1tn) 16Y PBS39 and IDR 0.65tn (IDR 4.8tn) 24Y PBS38 at weighted average yields of 4.53, 4.59%, 4.60%, 5.05%, 5.41%, 6.33%, 6.45% and 6.67%.

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	100.5	(0.0)	4.4	5Y
FR91	FR0091 Govt	102.5	(0.0)	6.4	10Y
FR93	FR0093 Govt	101.1	#VALUE!	6.6	15Y
FR92	FR0092 Govt	106.3	#VALUE!	6.1	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.3	(0.0)	3.4	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	105.4	0.0		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	101.9	(0.0)		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,366.5	(0.3)	18.2	
Thailand	SET Index	1,303.4	(0.2)	(6.9)	
Korean Stock Exch.	KOSPI Index	4,106.4	0.8	71.1	
Straight Times	FSSTI Index	4,542.2	1.2	19.9	
Kuala Lumpur	KLCI Index	1,634.8	0.5	(0.5)	
Philippines	PCOMP Index	5,629.1	(1.3)	(13.8)	
Nikkei	NKY Index	50,842.9	(0.1)	27.4	
Hang Seng	HSI Index	26,696.4	0.2	33.1	
MSCI-Asia pacific	MXAP Index	227.7	0.9	25.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	47,368.6	0.8	11.3	
S&P 500	SPX Index	6,832.4	1.5	16.2	
Nasdaq	CCMP Index	23,527.2	2.3	21.8	
FTSE 100	UKX Index	9,878.2	0.9	20.9	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,689.0	(0.2)	(3.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,697.9	(0.1)	2.7
3 month	IDSWT3M Index	16,696.3	(0.1)	(3.4)
6 month	IDSWT6M Index	16,715.0	0.0	(3.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,704.0	0.0	(3.3)
6 month	IDFWT6M Index	16,715.0	(0.1)	(3.0)

*price as of 11/10/2025

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