



FOR PROFESSIONAL INVESTORS - 07/30/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Correction

JCI weakened and closed at 7,550 (-68 points or -0.89%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 635Bn today and rupiah was stabilized at IDR 16,393/USD.

Banking stocks were mostly negative as BBNI (-0.72%), BBKA (-0.3%), BMRI (-1.91%), and BBRI (-3.57%) all weakened, except BNLN (+2.52%). Consumer names were mostly negative as KLBF (-0.34%), MYOR (-1.81%), UNVR (-1.61%), and ICBP (-0.75%) all weakened, except INDF (+0.9%). Retailer stocks were negative as LPPF (-2.52%), MAPI (-0.89%), ERAA (-3.77%), and AMRT (-4.39%) all declined. Pulp & paper names were positive as INKP (+5.17%) and TKIM (+4.49%) all rose. Other movers were SIMP (+18.1%), DSNG (+12.73%), SMMA (-12.77%), and ISAT (-4.85%).

The Ministry of Investment and Downstreaming recorded foreign direct investment in 2Q25 at Rp202.2tn, contracting by -7% YoY, 1H25 FDI still grew by 3% YoY. Meanwhile, domestic direct investment was recorded to grow by +31% YoY to Rp275.5tn (1H25 DDI grew 25% YoY).

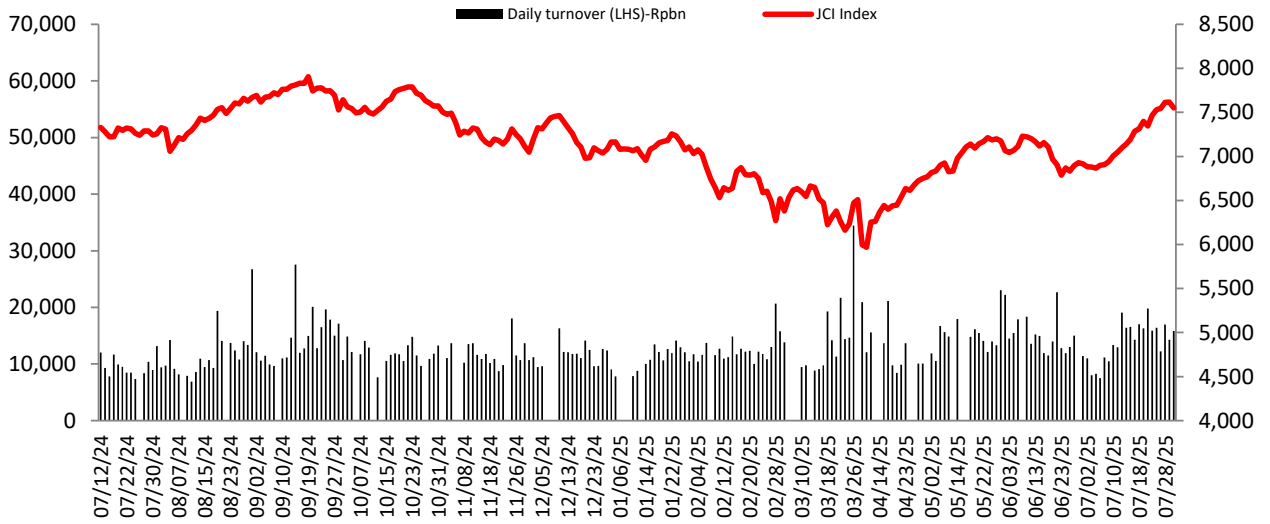
BOND MARKET

MUTED

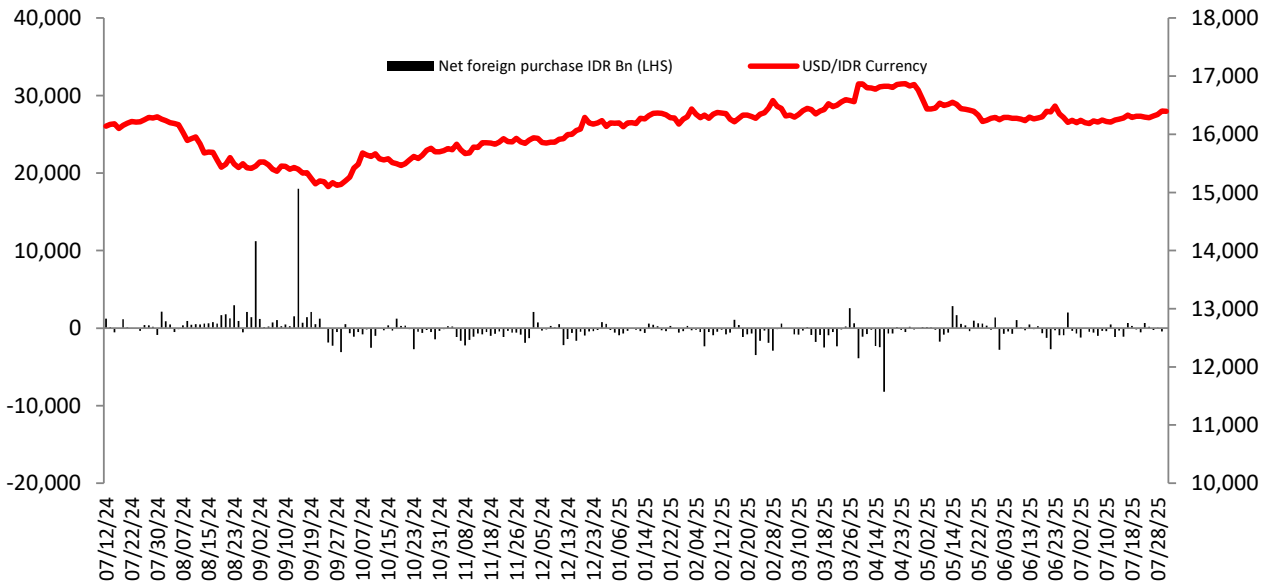
It was a quiet start of the day in Indonesia bond market although UST yield moved lower by 1-bps overnight. Some profit taking attempt are seen on the morning session, aiming to sell the newly issued benchmark series from yesterday's auction. However, there were little to no trade heard from our side. Players likely stayed at the sideline following tonight's FOMC meeting. The benchmark series of 5/10/15/20Y closed the day at mid-yield 6.10%/6.55%/6.83%/6.89% respectively.

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	99.1	0.0	3.0	5Y
FR91	FR0091 Govt	100.2	(0.0)	3.9	10Y
FR93	FR0093 Govt	97.7	(0.1)	3.0	15Y
FR92	FR0092 Govt	102.2	(0.0)	2.0	20Y
PBS036	INDOIS 5 ¾ 08/15/25	100.0	0.0	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	100.6	(0.0)	2.3	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.1	(0.0)	1.5	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.2	0.1	1.2	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,549.9	(0.9)	6.6	
Thailand	SET Index	1,243.3	0.8	(11.2)	
Korean Stock Exch.	KOSPI Index	3,254.5	0.7	35.6	
Straight Times	FSSTI Index	4,220.6	(0.2)	11.4	
Kuala Lumpur	KLCI Index	1,524.5	0.0	(7.2)	
Philippines	PCOMP Index	6,318.2	(0.1)	(3.2)	
Nikkei	NKY Index	40,654.7	(0.0)	1.9	
Hang Seng	HSI Index	25,176.9	(1.4)	25.5	
MSCI-Asia pacific	MXAP Index	206.7	(0.5)	13.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,633.0	(0.5)	4.9	
S&P 500	SPX Index	6,370.9	(0.3)	8.3	
Nasdaq	CCMP Index	21,098.3	(0.4)	9.3	
FTSE 100	UKX Index	9,119.7	(0.2)	11.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,393.0	0.0	(1.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,398.5	0.4	0.9
3 month	IDSWT3M Index	16,403.1	0.2	(1.5)
6 month	IDSWT6M Index	16,405.1	0.4	(1.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,427.2	0.4	(1.6)
6 month	IDFWT6M Index	16,461.9	0.6	(1.5)

*price as of 7/29/2025

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