

FOR PROFESSIONAL INVESTORS - 05/28/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Mixed

JCI slightly weakened and closed at 7,176 (-23 points or -0.32%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 1.4Tn today and rupiah slightly weakened to IDR 16,290/USD.

Banking stocks were mostly negative as BBTN (-1.57%), BBNI (-0.88%), BBKA (-0.53%), and BMRI (-1.85%) all closed lower, except BBRI (+1.83%). Consumer names were negative as UNVR (-0.57%), GGRM (-1.96%), SIDO (-2.83%), ICBP (-2.02%), and KLBF (-3.5%) all declined. Retailer stocks were negative as ACES (-2.54%), MAPA (-4.73%), MAPI (-3.7%), and AMRT (-4.71%) all corrected. Material names were negative as BRPT (-6.67%) and TPIA (-4.85%) all declined. Other movers were HEAL (+8.07%), CLEO (+6.12%), JPFA (-4.18%), and ADRO (-3.93%).

BI reported Indonesia consumer confidence index at 52.11 in May2025 (up 0.21ppt from Apr2025 but down 0.39 ppt YoY)

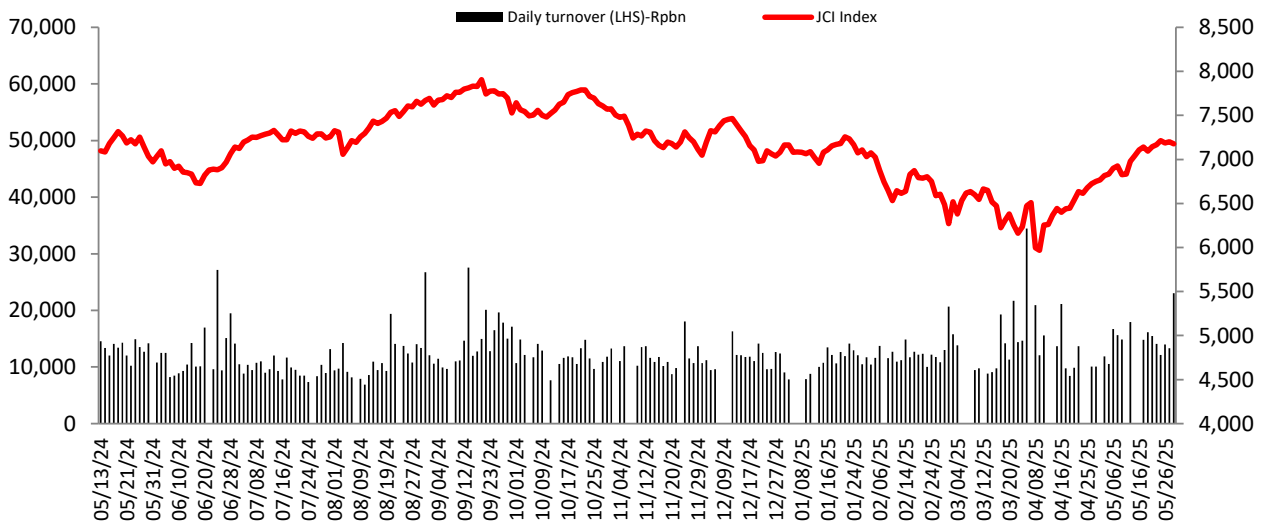
BOND MARKET

UNEVENTFUL

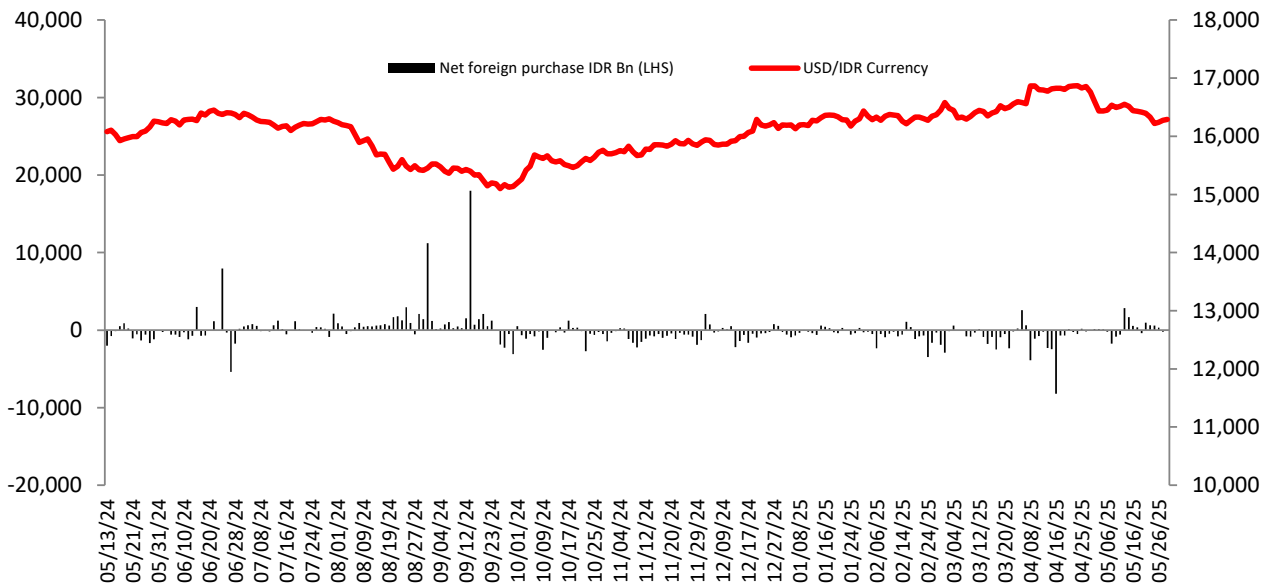
It's a rather quiet day for a month-end with trading mostly in 5Y and 10Y benchmark and yield remained range-bound. SRBI auction also saw some slow demand at IDR 19tn compared to last week at IDR 29tn. BI issued SRBI at IDR 12tn, with 6mo, 9mo and 12mo weighted average yield at 6.21%, 6.25% and 6.26% respectively. Overall, yield curve closed relatively unchanged with 5, 10, 15 and 20Y benchmark series closed at yield 6.42%, 6.82%, 7.0% and 7.02%.

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	98.2	(0.0)	2.0	5Y
FR91	FR0091 Govt	98.5	(0.0)	2.3	10Y
FR93	FR0093 Govt	96.0	0.1	1.3	15Y
FR92	FR0092 Govt	101.0	0.0	0.8	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.9	0.0	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	99.7	0.0	1.4	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	99.8	(0.0)	0.2	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	97.9	0.0	1.0	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,175.8	(0.3)	1.4	
Thailand	SET Index	1,160.7	(0.2)	(17.1)	
Korean Stock Exch.	KOSPI Index	2,670.2	1.2	11.3	
Straight Times	FSSTI Index	3,911.9	0.4	3.3	
Kuala Lumpur	KLCI Index	1,523.5	(0.2)	(7.2)	
Philippines	PCOMP Index	6,425.8	0.6	(1.6)	
Nikkei	NKY Index	37,722.4	(0.0)	(5.4)	
Hang Seng	HSI Index	23,258.3	(0.5)	15.9	
MSCI-Asia pacific	MXAP Index	195.0	(0.5)	7.3	
<u>Global Indices</u>					
Dow Jones	INDU Index	42,343.7	1.8	(0.5)	
S&P 500	SPX Index	5,921.5	2.0	0.7	
Nasdaq	CCMP Index	19,199.2	2.5	(0.6)	
FTSE 100	UKX Index	8,764.8	(0.2)	7.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,290.0	(0.1)	(1.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,256.5	0.5	0.0
3 month	IDSWT3M Index	16,243.2	0.4	(0.6)
6 month	IDSWT6M Index	16,187.8	(0.6)	(0.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,272.5	0.3	(0.6)
6 month	IDFWT6M Index	16,302.7	0.2	(0.5)

*price as of 5/27/2025

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