

FOR PROFESSIONAL INVESTORS - 02/12/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rebound

JCI advanced and closed at 6,646 (+114 points or +1.74%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR 208Bn today and rupiah was stabilized at IDR 16,367/USD.

Banking stocks were positive as BBNI (+5.65%), BMRI (+1.23%), BBKA (+0.83%), BBRI (+0.5%), and PNBK (+2.01%) all advanced. Consumer names were mixed as KLBF (+2.8%), INDF (+1.3%), and SDO (+5.45%) closed higher, while ICBP (-0.67%) and UNVR (-3.51%) retreated. Telco stocks were positive as TLKM (+6.9%), ISAT (+7.08%), and FREN (+4.35%) all up. Material names were positive as TPIA (+11.28%) and BRPT (+1.23%) all inched higher. Other movers were PANI (+8.21%), CASA (+7.26%), FMII (-12.22%), and MLPT (-7.2%).

Consumer Confidence Index in Jan-25 is at 127.2, down -0.5 points from December's level. Economic Conditions Index recorded at 113.5 (-2.5 points MoM) while Consumer Expectations Index recorded at 140.8 (+1.3 points MoM).

BOND MARKET

Little Change

Indonesia bond market start the day with better bid with local currency strengthened despite higher UST yield. Biddish tone was heard as soon as market opened, led by 4Y FR101 // 10Y FR103 which were taken at 101.1 (6.56%) // 99.7 (6.79%) followed by short tenor. Flows are relatively mixed today. Several selling interests from onshore banks and local names met with the buyer which came from offshore real money. Significant price increase soon invited profit takers in market and erased the morning gain. Yield curve closed higher around 2 – 4 bps.

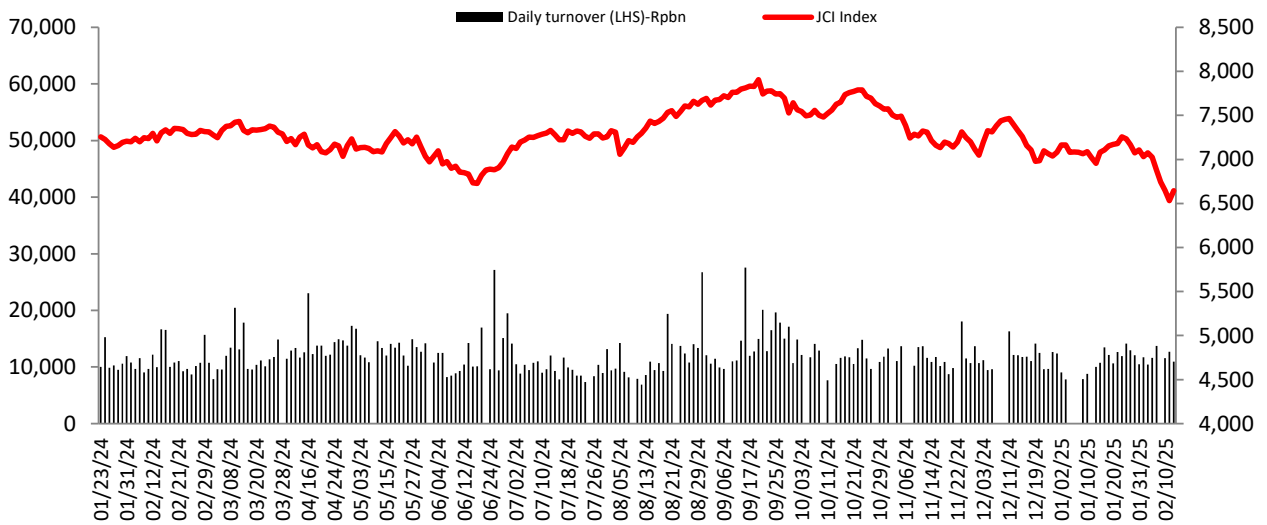


BNP PARIBAS
ASSET MANAGEMENT

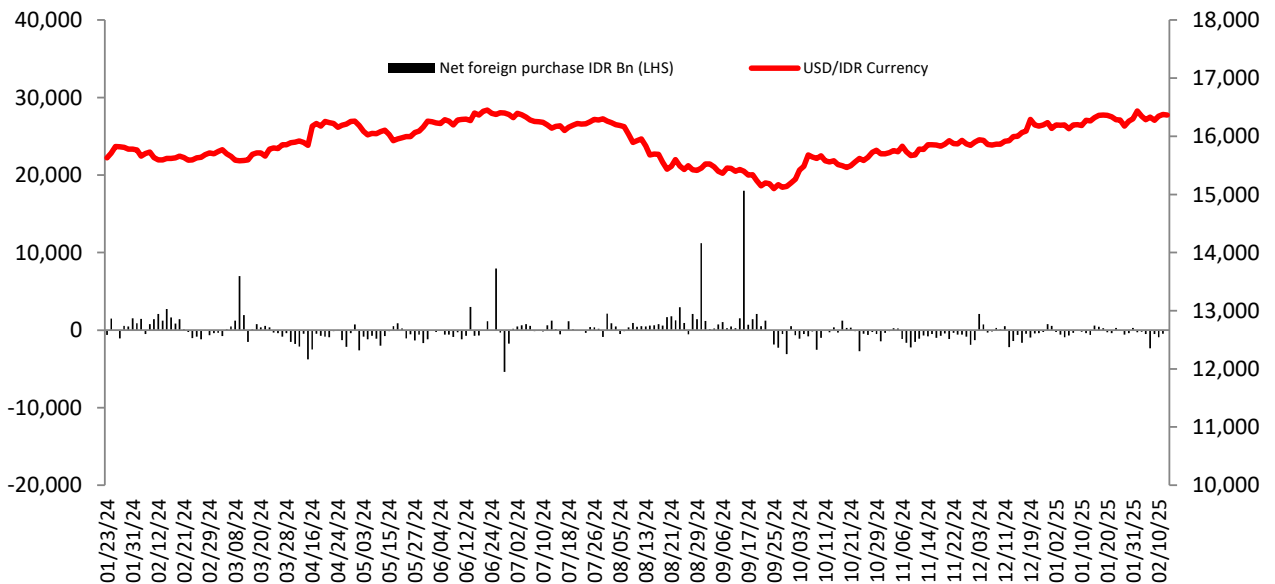
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GRAPHS & TABLES

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	97.2	0.0	1.0	5Y
FR91	FR0091 Govt	97.8	(0.1)	1.4	10Y
FR93	FR0093 Govt	95.4	0.1	0.6	15Y
FR92	FR0092 Govt	100.8	(0.1)	0.6	20Y
PBS036	INDOIS 5 ¾ 08/15/25	99.7	0.0	0.6	15-8-2025
PBS003	INDOIS 6 01/15/27	99.1	(0.0)	0.8	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	95.5	0.0	(1.5)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,645.8	1.7	(6.1)	
Thailand	SET Index	1,284.0	1.1	(8.3)	
Korean Stock Exch.	KOSPI Index	2,548.4	0.4	6.2	
Straight Times	FSSTI Index	3,874.6	0.4	2.3	
Kuala Lumpur	KLCI Index	1,603.1	0.8	(2.4)	
Philippines	PCOMP Index	6,044.1	0.9	(7.4)	
Nikkei	NKY Index	38,963.7	0.4	(2.3)	
Hang Seng	HSI Index	21,857.9	2.6	9.0	
MSCI-Asia pacific	MXAP Index	184.5	(0.5)	1.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,593.7	0.3	4.8	
S&P 500	SPX Index	6,068.5	0.0	3.2	
Nasdaq	CCMP Index	19,643.9	(0.4)	1.7	
FTSE 100	UKX Index	8,782.5	0.1	7.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,367.0	0.0	(1.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,381.4	0.2	0.8
3 month	IDSWT3M Index	16,379.6	0.2	(1.4)
6 month	IDSWT6M Index	16,370.0	0.1	(1.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,443.0	0.2	(1.7)
6 month	IDFWT6M Index	16,442.0	0.1	(1.4)

*price as of 2/12/2025



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