



FOR PROFESSIONAL INVESTORS - 08/13/2025

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Extended Rally

JCI advanced and closed at 7,893 (+101 points or +1.3%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net inflow of IDR 1.5Tn today and rupiah advanced to IDR 16,195/USD.

Banking stocks were mixed as BBCA (+0.85%), BBRI (+0.74%), and BBTN (+5.95%) inched higher, while BNLI (-1.58%) and BMRI (-0.81%) closed lower. Consumer names were mostly negative as HMSP (-0.91%), MYOR (-1.35%), INDF (-0.31%), and ICBP (-0.79%) all down, except KLBF (+1.45%). Properties stocks were positive as CTRA (+7%), SMRA (+3.15%), PWON (+1.56%), and BSDE (+1.7%) all in green. Pulp & paper names were negative as TKIM (-2.72%) and INKP (-4.48%) all declined. Other movers were MLPT (+7.84%), DSSA (+5.86%), RAJA (-3.57%), and ISAT (-2.16%).

Ministry of energy and mineral resources (ESDM) reported investment realisation in the energy and mineral resources sector reached US\$13.9bn or Rp226tn in 1H25, which grew by +24% YoY and is the highest achievement in the past five years.

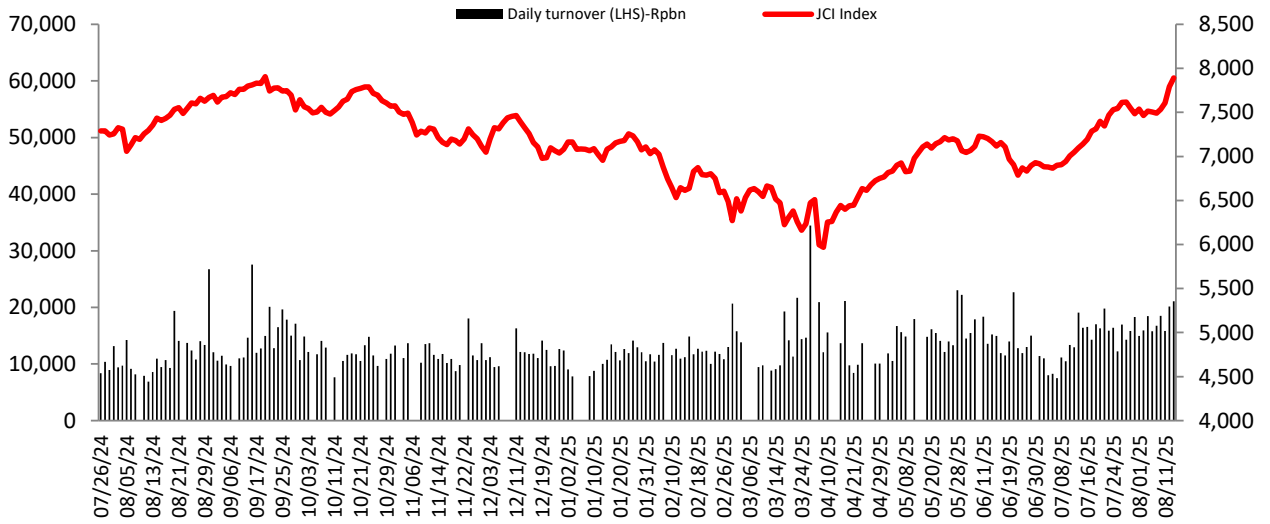
### BOND MARKET

#### EXTENDED BUYING

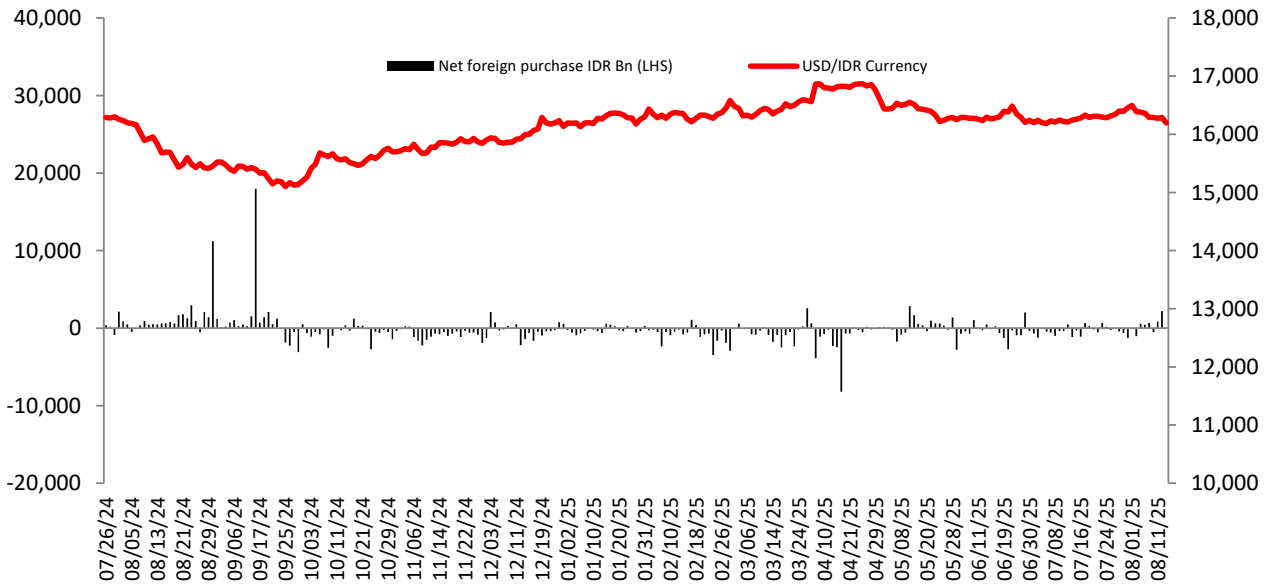
The bond market advanced further today on the back of solid interest from both local and foreign banks players. Both players who do not win from auction bought a lot on secondary market today. Buying boosted prices level across the board. Overall sentiment was bullish mainly on front to belly. However, bond prices movement was quickly capped by profit takers. Overall, bonds yield shifted lower by 4 – 8 bps. Offer level in the market for benchmark series of 5Y/10Y/15Y/20Y was at 5.85%/6.35%/6.7%/6.8%.

# 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	99.4	(0.0)	3.3	5Y
FR91	FR0091 Govt	100.9	0.3	4.7	10Y
FR93	FR0093 Govt	98.6	0.3	4.0	15Y
FR92	FR0092 Govt	102.9	0.3	2.7	20Y
PBS036	INDOIS 5 ¾ 08/15/25	100.0	0.0	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	100.8	0.0	2.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.1	0.1	1.5	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.7	(0.0)	2.8	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,892.9	1.3	11.5	
Thailand	SET Index	1,277.2	1.4	(8.8)	
Korean Stock Exch.	KOSPI Index	3,224.4	1.1	34.4	
Straight Times	FSSTI Index	4,268.0	1.1	12.7	
Kuala Lumpur	KLCI Index	1,586.6	1.2	(3.4)	
Philippines	PCOMP Index	6,325.1	0.6	(3.1)	
Nikkei	NKY Index	43,274.7	1.3	8.5	
Hang Seng	HSI Index	25,613.7	2.6	27.7	
MSCI-Asia pacific	MXAP Index	210.3	0.6	15.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,458.6	1.1	4.5	
S&P 500	SPX Index	6,445.8	1.1	9.6	
Nasdaq	CCMP Index	21,681.9	1.4	12.3	
FTSE 100	UKX Index	9,162.1	0.2	12.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,195.0	0.6	(0.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,296.3	0.2	0.3
3 month	IDSWT3M Index	16,301.4	0.3	(0.9)
6 month	IDSWT6M Index	16,287.6	0.2	(0.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,309.6	0.2	(0.9)
6 month	IDFWT6M Index	16,325.4	0.3	(0.6)

\*price as of 8/12/2025

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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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