



FOR PROFESSIONAL INVESTORS - 02/26/2026

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Another Correction

JCI weakened and closed at 8,235 (-87 points or -1.04%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 341Bn today and rupiah slightly strengthened to IDR 16,755/USD.

Banking stocks were mixed as BMRI (+0.47%) and MEGA (+0.41%) advanced, while BBNI (-0.89%), BBKA (-0.34%), and BBRI (-0.5%) down. Consumer names were mostly negative as UNVR (-0.86%), MYOR (-3.65%), ICBP (-1.56%), and KLBF (-3.59%) all declined, except INDF (+2.28%). Mining stocks were mostly negative as INDY (-4.86%), ADRO (-2.11%), INCO (-3.4%), and ANTM (-2.91%) all declined, except TINS (+2.53%). Retailer names were negative as ERAA (-1.39%), MAPI (-1.52%), MAPA (-4.23%), and AMRT (-0.86%) all weakened. Other movers were STAR (+24.41%), TKIM (+19.95%), BUVA (-14.76%), and IMPC (-9.01%).

Minister of Finance Purbaya Yudhi Sadewa will audit tax refunds or restitution in the 2025 State Budget, which reached Rp361tn.

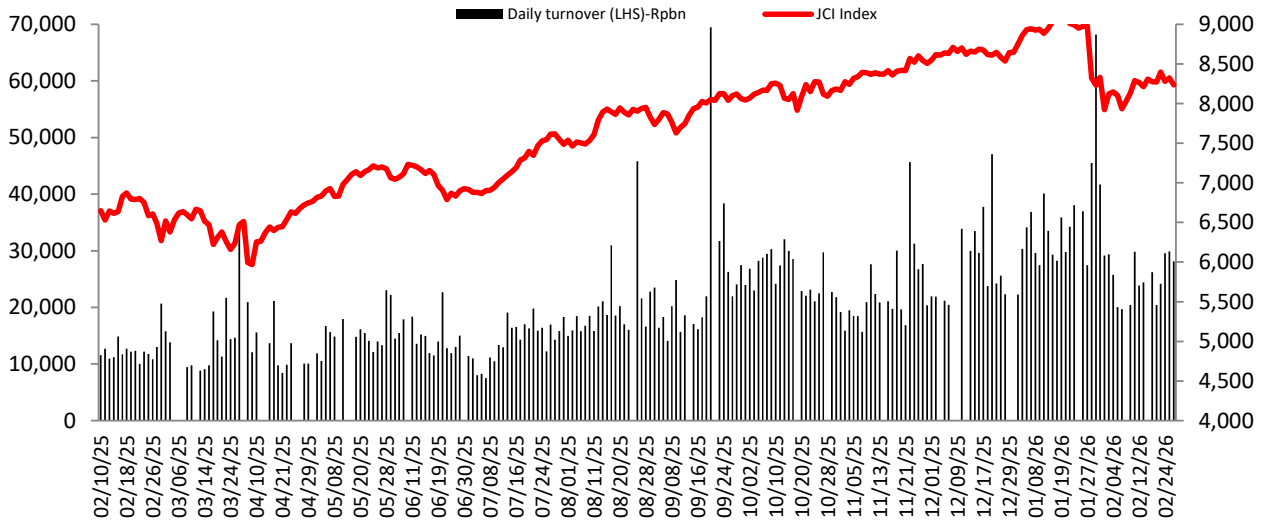
BOND MARKET

A Quiet Day

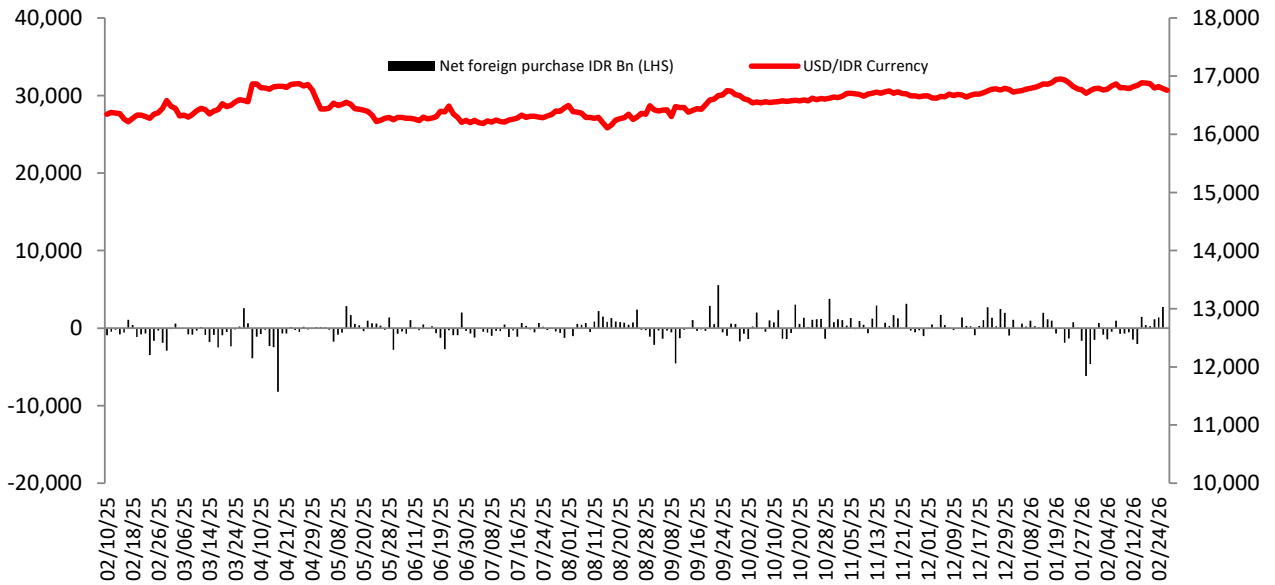
Indonesia bond market opened the day firmer in line with stronger IDR which declined past 16750 level. We saw mixed interest throughout the day but overall trading remained within range. The afternoon session were rather muted with IDR closed at 16758. Overall yield curve moved slightly in a bear-flattening manners as short tenor yield closed 1-3bps higher while the rest of the curve were unchanged. Tomorrow, BI will held another SRBI auction for tenor 6m, 9m and 12m.

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	100.2	(0.0)	(0.1)	5Y
FR91	FR0091 Govt	101.9	0.0	(0.6)	10Y
FR93	FR0093 Govt	100.1	(0.0)	(1.3)	15Y
FR92	FR0092 Govt	105.0	0.0	(1.3)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.1	0.0	(0.1)	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	103.9	(0.0)	(1.2)	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	101.8	0.0	(0.0)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,235.3	(1.0)	(4.8)	
Thailand	SET Index	1,533.4	1.1	21.7	
Korean Stock Exch.	KOSPI Index	6,307.3	3.7	49.7	
Straight Times	FSSTI Index	4,964.4	(0.9)	6.8	
Kuala Lumpur	KLCI Index	1,740.9	(0.4)	3.6	
Philippines	PCOMP Index	6,625.5	0.1	9.5	
Nikkei	NKY Index	58,753.4	0.3	16.7	
Hang Seng	HSI Index	26,381.0	(1.4)	2.9	
MSCI-Asia pacific	MXAP Index	259.1	1.2	13.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	49,482.2	0.6	3.0	
S&P 500	SPX Index	6,946.1	0.8	1.5	
Nasdaq	CCMP Index	23,152.1	1.3	(0.4)	
FTSE 100	UKX Index	10,818.2	0.1	8.9	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,755.0	0.2	(0.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,816.0	(0.1)	0.5
3 month	IDSWT3M Index	16,820.4	(0.1)	(0.7)
6 month	IDSWT6M Index	16,801.2	(0.2)	(0.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,833.1	0.0	(0.6)
6 month	IDFWT6M Index	16,872.9	0.1	(0.6)

*price as of 2/25/2026

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