



FOR PROFESSIONAL INVESTORS - 11/10/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Closed Flat

JCI was flat and closed at 8,391 (-3 points or -0.04%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 416Bn today and rupiah slightly strengthened to IDR 16,654/USD.

Banking stocks were negative as BNLI (-0.47%), BMRI (-0.42%), BBNI (-1.78%), BBRI (-1.26%), and BBCA (-1.15%) all corrected. Consumer names were mixed as ICBP (+0.58%), KLBF (+0.4%), and KAEF (+2.59%) up, while INDF (-0.35%) and GGRM (-2.97%) weakened. Mining stocks were mostly positive as TINS (+6.85%), INDY (+5.73%), ADRO (+0.77%), and ANTM (+0.34%) all up, except INCO (-0.22%). Telco names were mixed as EXCL (+0.36%) up, while ISAT (-3.72%) and TLKM (-0.86%) retreated. Other movers were RISE (+15.79%), DEWA (+14.37%), DSSA (-12%), and MIKA (-5.3%).

Ministry of social stated to increase the budget allocation for social aids in 2025 to be more than Rp110tn, following the addition of temporary cash social aid (BLTD) and additional regular social aid that has been disbursed in June-July 2025 period.

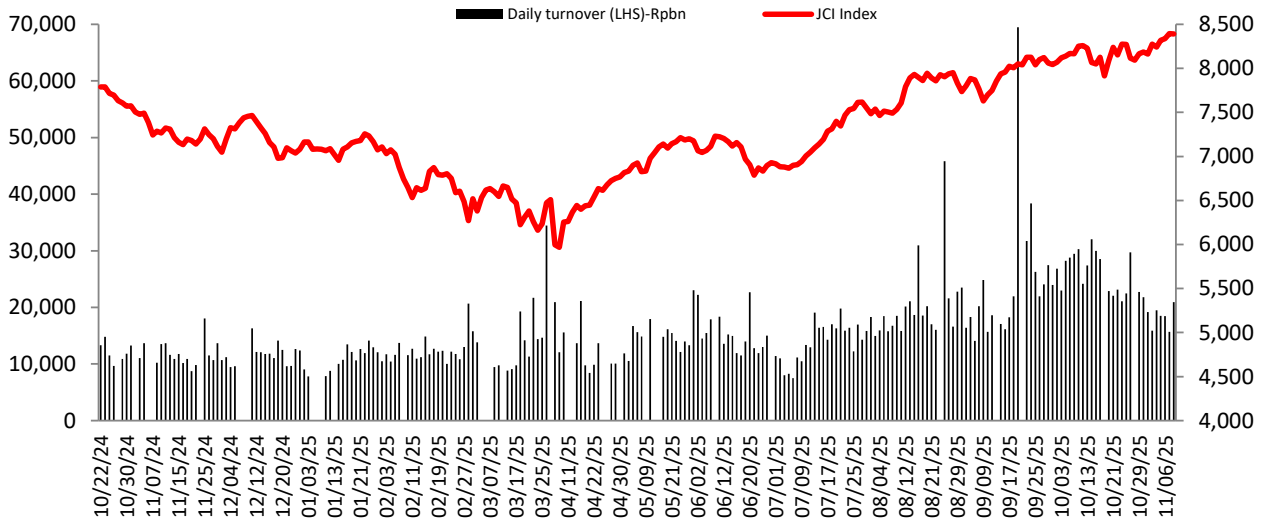
BOND MARKET

Lackluster trading

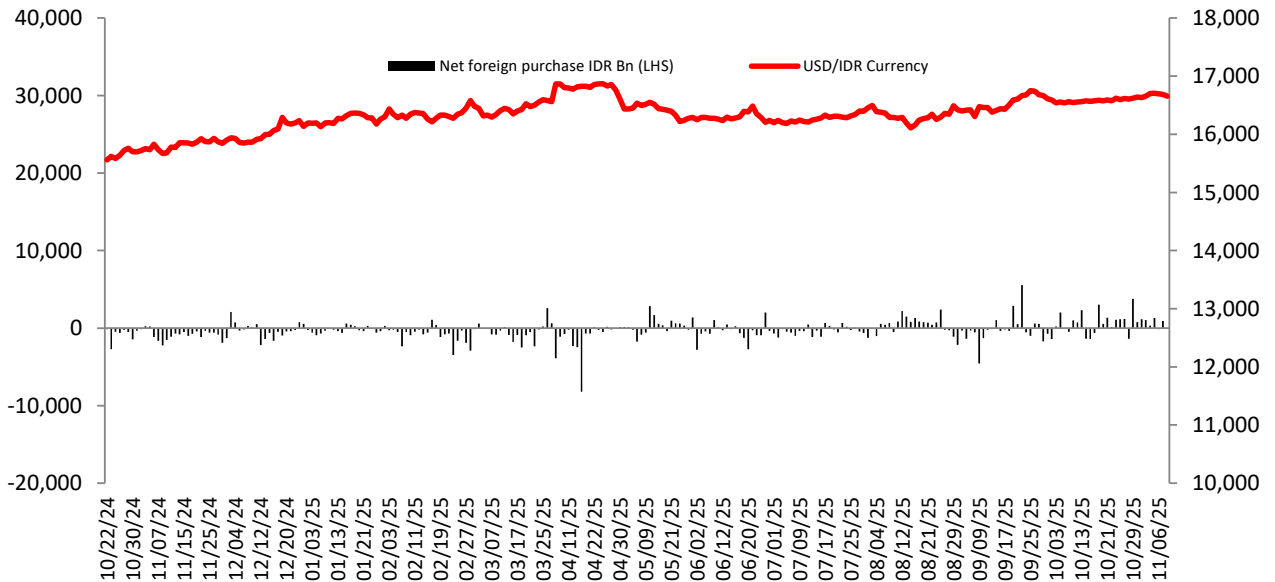
Indonesia bond market started the week on cautious note with wide prices and Rupiah level below 16700. Trading volume were light today with mixed interest seen in belly area. The bond market was quiet for most part of the trading day. Yield curve closed relatively unchanged with benchmark series of 5/10/15/20Y closed at mid yield 5.61%/6.18%/6.45%/6.59%. Tomorrow, MoF will hold its regular sukuk auction. Series to be auctioned tomorrow are 1mo, 3mo and 12mo SPNS, 3Y PBS30, 5Y PBS40, 14Y PBS34, 16Y PBS39 and 24Y PBS38 with indicative issuance target size of IDR 7tn.

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	100.5	#VALUE!	4.5	5Y
FR91	FR0091 Govt	102.6	0.0	6.4	10Y
FR93	FR0093 Govt	101.0	#VALUE!	6.5	15Y
FR92	FR0092 Govt	106.4	#VALUE!	6.2	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.3	(0.0)	3.4	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	105.4	0.7		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	102.0	(0.0)		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,391.2	(0.0)	18.5	
Thailand	SET Index	1,306.3	0.3	(6.7)	
Korean Stock Exch.	KOSPI Index	4,073.2	3.0	69.8	
Straight Times	FSSTI Index	4,488.1	(0.1)	18.5	
Kuala Lumpur	KLCI Index	1,627.4	0.5	(0.9)	
Philippines	PCOMP Index	5,702.6	(1.0)	(12.7)	
Nikkei	NKY Index	50,911.8	1.3	27.6	
Hang Seng	HSI Index	26,649.1	1.6	32.8	
MSCI-Asia pacific	MXAP Index	225.6	(0.8)	24.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,987.1	0.2	10.4	
S&P 500	SPX Index	6,728.8	0.1	14.4	
Nasdaq	CCMP Index	23,004.5	(0.2)	19.1	
FTSE 100	UKX Index	9,758.3	0.8	19.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,654.0	0.2	(3.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,697.9	(0.1)	2.7
3 month	IDSWT3M Index	16,696.3	(0.1)	(3.4)
6 month	IDSWT6M Index	16,715.0	0.0	(3.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,704.0	0.0	(3.3)
6 month	IDFWT6M Index	16,715.0	(0.1)	(3.0)

*price as of 11/7/2025

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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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