

FOR PROFESSIONAL INVESTORS - 07/08/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Flat

JCI was flat and closed at 6,904 (+3 points or +0.05%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR 981Bn today and rupiah slightly strengthened to IDR 16,208/USD.

Banking stocks were mostly negative as BBNI (-0.75%), BMRI (-0.42%), BBRI (-0.81%), and BBKA (-1.45%) all corrected, except BNLI (+4.53%). Consumer names were mixed as SIDO (+0.41%) rose, MYOR (-1.4%), UNVR (-2.56%), and INDF (-0.93%) down, and HMSP unchanged. Material stocks were positive as TPIA (+4.09%) and BRPT (+1.51%) all in green. Retailer names were negative as ERAA (-0.95%), MAPI (-1.6%), MAPA (-8.39%), and AMRT (-1.25%) all closed lower. Other movers were PANI (+6.78%), PTRO (+4.04%), BFIN (-3.73%), and MLPT (-3.33%).

Bank Indonesia reported that Indo forex reserve rose +0.1% MoM (US\$0.1bn) to US\$153bn in Jun25. This amount is equivalent to financing 6.4 months of imports or 6.2 months of imports and servicing the gov't's external debt.

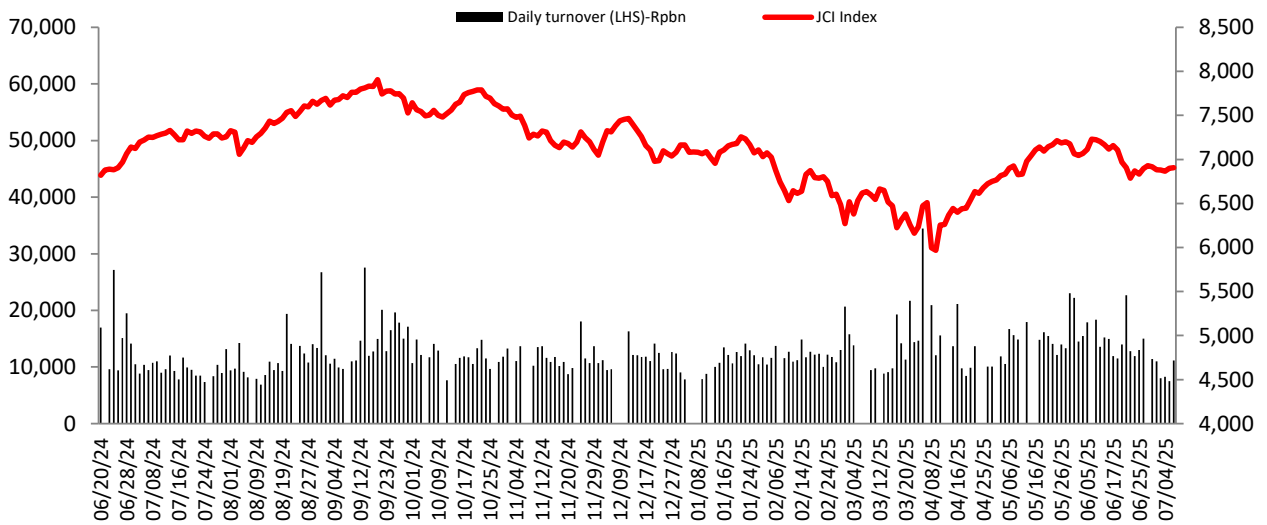
BOND MARKET

Sukuk Auction

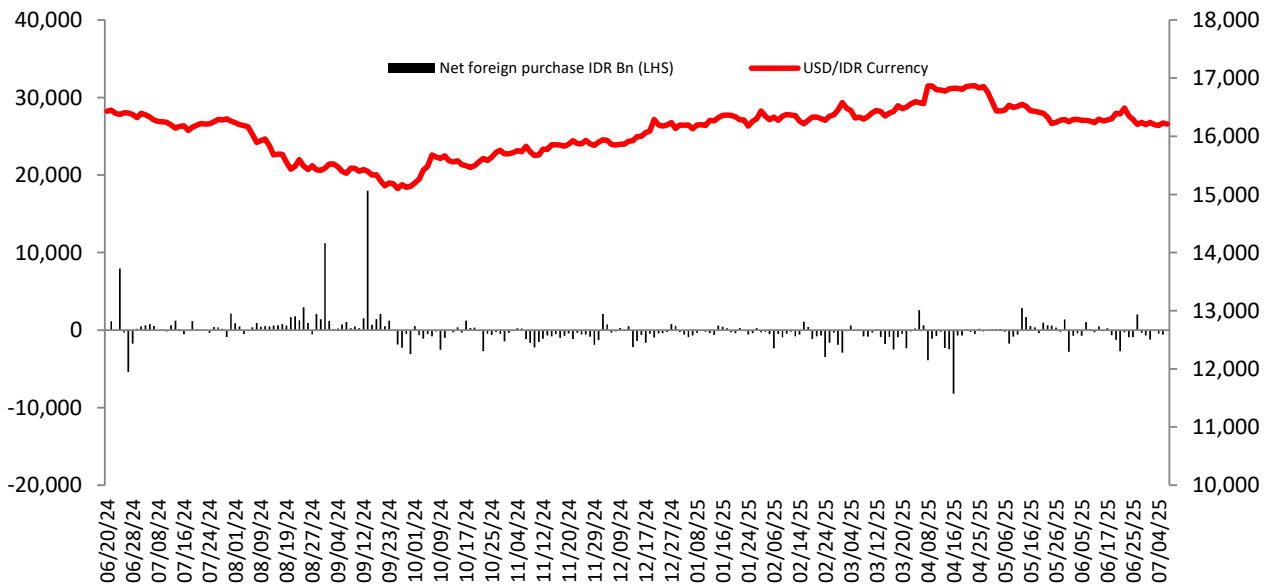
Indonesia bond market start the day with unchanged despite the 32% import tariff imposed by Trump to Indonesia. Local currency closed at 16,206 compared to yesterday closing at 16,240 and 10Y UST yield at 4.41%. After open the day unchanged, bond prices moved nowhere throughout the day as we heard hardly any trade done. Today we have sukuk auction, MoF was received demand with total of IDR 40.83Tn incoming bids out of which MoF upsized the issuance to IDR 12Tn from initial target of IDR 9Tn. The series absorbed (against incoming bids) on the auction were IDR 2Tn (IDR 4.903Tn) 9mo SPN-S, IDR 1.6Tn (IDR 8.581Tn) 2Y PBS3, IDR 3.95Tn (IDR 13.346Tn) 3Y PBS30, IDR 1.6Tn (IDR 3.146Tn) 4Y PBSG1, IDR 0.7Tn (IDR 2.049Tn) 14Y PBS34, and IDR 2.15Tn (IDR 7.765Tn) 24Y PBS38 at cut off yields of 5.85%, 5.99%, 6.12%, 6.30%, 6.85%, and 6.98% respectively. No winner on 6mo SPNS.

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	98.6	0.1	2.5	5Y
FR91	FR0091 Govt	99.7	0.0	3.5	10Y
FR93	FR0093 Govt	97.2	(0.0)	2.5	15Y
FR92	FR0092 Govt	101.8	(0.0)	1.6	20Y
PBS036	INDOIS 5 ¾ 08/15/25	100.1	(0.0)	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	100.0	(0.0)	1.7	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.5	0.1	0.9	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	6,904.4	0.1	(2.5)	
Thailand	SET Index	1,115.7	(0.7)	(20.3)	
Korean Stock Exch.	KOSPI Index	3,115.0	1.8	29.8	
Straight Times	FSSTI Index	4,047.9	0.4	6.9	
Kuala Lumpur	KLCI Index	1,530.1	(0.5)	(6.8)	
Philippines	PCOMP Index	6,433.6	0.1	(1.5)	
Nikkei	NKY Index	39,688.8	0.3	(0.5)	
Hang Seng	HSI Index	24,148.1	1.1	20.4	
MSCI-Asia pacific	MXAP Index	201.7	(0.8)	11.1	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,406.4	(0.9)	4.4	
S&P 500	SPX Index	6,230.0	(0.8)	5.9	
Nasdaq	CCMP Index	20,412.5	(0.9)	5.7	
FTSE 100	UKX Index	8,811.8	0.1	7.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,208.0	0.1	(0.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,200.0	(0.2)	(0.3)
3 month	IDSWT3M Index	16,236.8	0.3	(0.5)
6 month	IDSWT6M Index	16,210.0	0.1	(0.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,256.8	0.2	(0.5)
6 month	IDFWT6M Index	16,225.0	(0.5)	(0.0)

*price as of 7/7/2025

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