



FOR PROFESSIONAL INVESTORS - 08/07/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Flat

JCI slightly weakened and closed at 7,490 (-14 points or -0.18%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 666Bn today and rupiah slightly strengthened to IDR 16,290/USD.

Banking stocks were mostly negative as BBTN (-1.33%), MEGA (-0.61%), BNL1 (-1.26%), and BMRI (-0.43%) all declined, except BBNI (+0.49%). Consumer names were mostly negative as MYOR (-0.45%), HMSP (-0.95%), ICBP (-0.52%), and KLBF (-1.08%) all down, except UNVR (+1.73%). Material stocks were mixed as TPIA (+0.28%) rose, while BRPT (-4.42%) weakened. Mining names were mostly positive as ANTM (+2.27%), INCO (+5.4%), ADRO (+0.54%), and INDY (+1.48%) all closed higher, except PTBA (-0.83%). Other movers were PYFA (+13.15%), MSIN (+6.4%), BKSL (-6.55%), and PTRO (-4.18%).

The government decided to increase the ceiling for People's Business Credit (KUR) in the housing sector for the 3 million housing program to Rp20bn, which was previously set at Rp5bn.

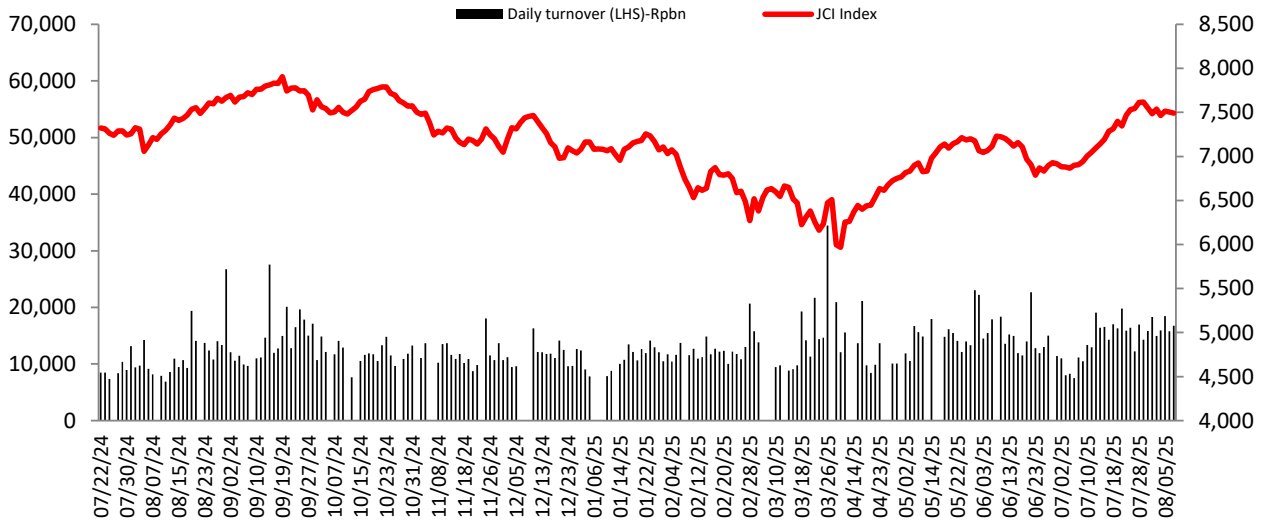
BOND MARKET

Biddish Tone

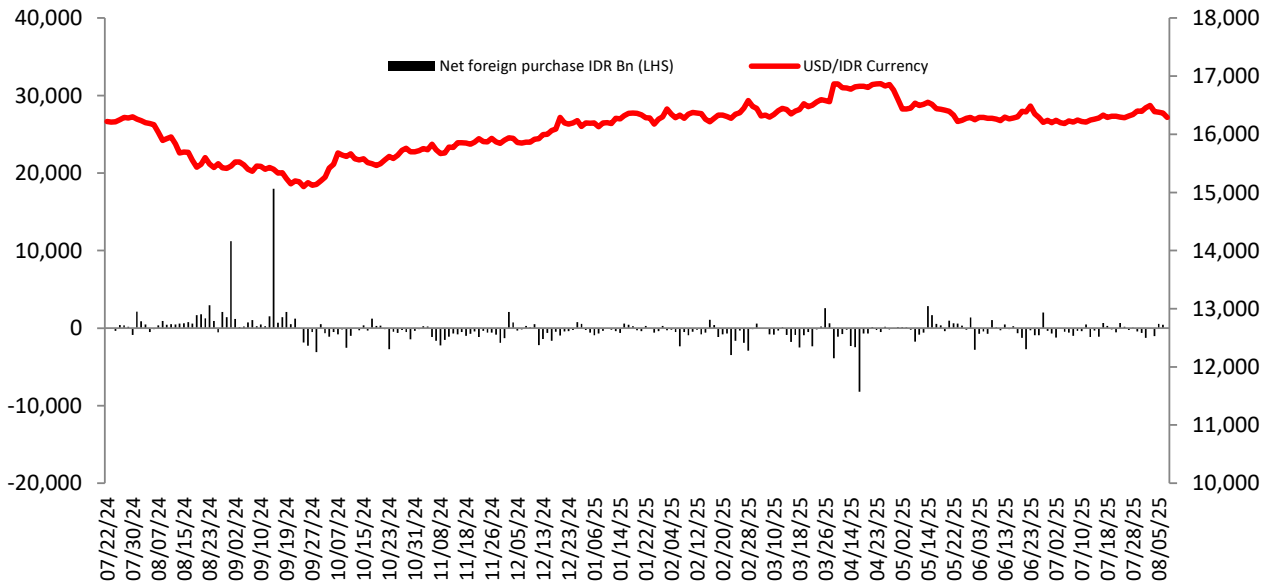
Indonesia bond market opened stronger today following UST 10Y yield plunged below 4.25% and Rupiah opened below 16,325. Rally was seen as soon as market opened, led by 5Y FR104 and FR82 taken at 102.2 (5.97%) and 102 (6.07%). The rally quickly lifted prices across the board as solid bid seen from onshore and offshore players. However nearing end of trading day, small taking profit action was seen in the market. Market closed with yields lower by 3 – 10 bps compared to yesterday closing level. The 5Y/10Y/15Y/20Y benchmark closed the day at mid-yield of 5.94%/6.44%/6.78%/6.84%.

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	99.2	0.1	3.2	5Y
FR91	FR0091 Govt	100.5	0.1	4.2	10Y
FR93	FR0093 Govt	98.2	0.1	3.6	15Y
FR92	FR0092 Govt	102.5	0.3	2.3	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.9	(0.0)	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	100.7	0.1	2.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.2	0.2	1.6	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.3	0.5	2.4	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,490.2	(0.2)	5.8	
Thailand	SET Index	1,265.2	0.1	(9.6)	
Korean Stock Exch.	KOSPI Index	3,227.7	0.9	34.5	
Straight Times	FSSTI Index	4,258.2	0.7	12.4	
Kuala Lumpur	KLCI Index	1,549.1	0.5	(5.7)	
Philippines	PCOMP Index	6,364.7	(0.1)	(2.5)	
Nikkei	NKY Index	41,059.2	0.6	2.9	
Hang Seng	HSI Index	25,081.6	0.7	25.0	
MSCI-Asia pacific	MXAP Index	206.8	0.3	13.9	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,193.1	0.2	3.9	
S&P 500	SPX Index	6,345.1	0.7	7.9	
Nasdaq	CCMP Index	21,169.4	1.2	9.6	
FTSE 100	UKX Index	9,138.4	(0.3)	11.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,290.0	0.4	(1.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,385.9	(0.6)	0.8
3 month	IDSWT3M Index	16,374.0	(0.1)	(1.4)
6 month	IDSWT6M Index	16,372.3	(0.1)	(1.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,377.7	(0.1)	(1.3)
6 month	IDFWT6M Index	16,398.1	(0.1)	(1.1)

*price as of 8/6/2025

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