



FOR PROFESSIONAL INVESTORS - 08/08/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Higher

JCI advanced and closed at 7,533 (+43 points or +0.58%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR 511Bn today and rupiah was stabilized at IDR 16,291/USD.

Banking stocks were mostly negative as MEGA (-0.61%), BMRI (-0.21%), BBRI (-0.27%), and BBNI (-1.21%) all declined, except BNL1 (+1.91%). Consumer names were negative as GGRM (-2.56%), UNVR (-0.85%), KLBF (-0.36%), INDF (-0.61%), and ICBP (-1.58%) all down. Pulp & paper stocks were positive as INKP (+8.11%) and TKIM (+11.55%) all inched higher. Mining names were mostly negative as INDY (-1.82%), INCO (-2.2%), ANTM (-1.9%), and ADRO (-4.28%) all closed lower, except ITMG (+0.97%). Other movers were DSSA (+20%), IMPC (+16.81%), ENRG (-14.17%), and MSIN (-3.69%).

FX reserve declined slightly to US\$152bn in Jul2025 from US\$152.6bn in Jun2025 – a still elevated figure YTD. The decline was largely driven by maturing FX bonds. IDR has stayed relatively stable during Jul2025. Import and debt payment coverage stays at 6.2 months (6.3 months if just for imports).

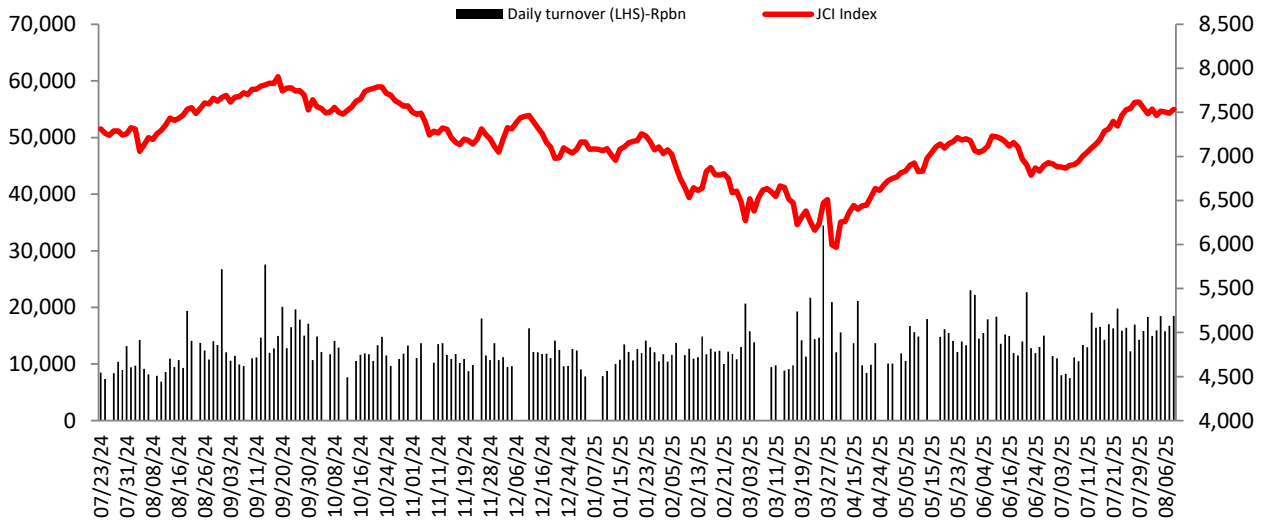
BOND MARKET

MIXED TRADING DAY

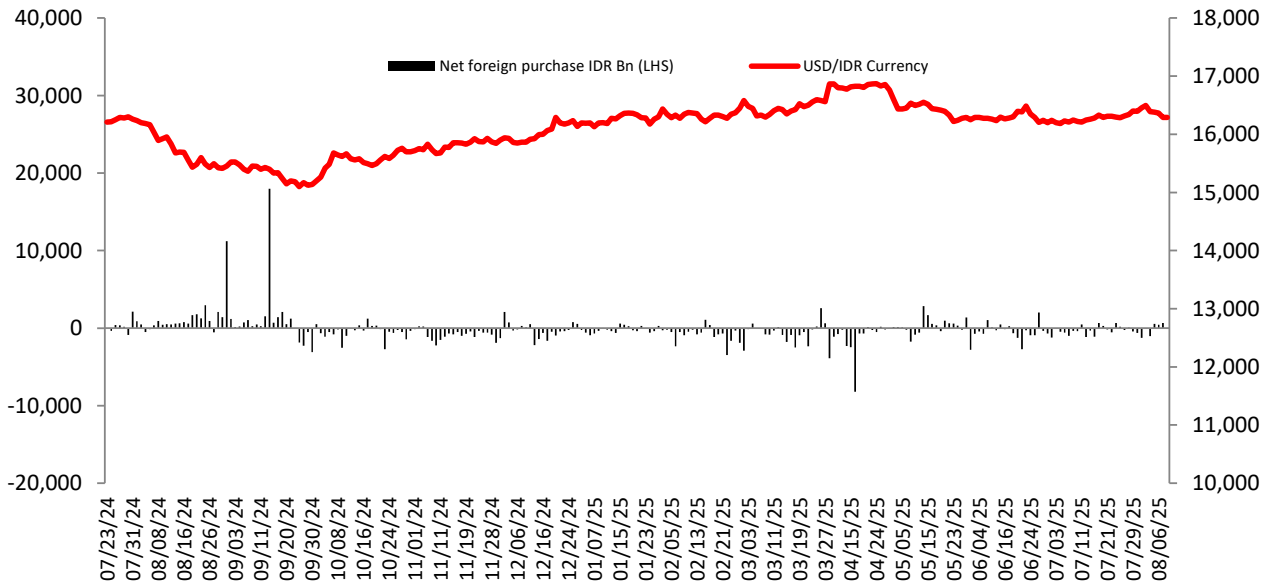
Indonesia bond market started the day with biddish tone. As soon as market opened, high interest was seen in front area and 10Y areas. Both offshore players and onshore banks were seen hunting for bonds hence triggered rally across the board. Buying not only the benchmark series, but also non benchmark series. In today SRBI auction, SRBI demand bounced back to IDR 52.97Tn compare from last week auction at IDR 23Tn. BI only absorbed IDR 10Tn (out of IDR 12Tn maturity this week), secondary market rallied further. Significant price increase soon invited profit takers in market and erased the gain. The benchmark series of 5, 10, 15 and 20Y closed the week at mid yield of 5.93%, 6.39%, 6.77% and 6.82% respectively. Next week, MoF would be having conventional bond auction with IDR 27Tn on Tuesday, and there will be new 5Y FR109.

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	99.3	0.1	3.2	5Y
FR91	FR0091 Govt	100.5	0.1	4.3	10Y
FR93	FR0093 Govt	98.2	(0.1)	3.6	15Y
FR92	FR0092 Govt	102.6	0.1	2.4	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.9	0.0	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	100.9	0.1	2.6	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.0	(0.1)	1.4	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.3	0.0	2.4	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,533.4	0.6	6.4	
Thailand	SET Index	1,258.6	(0.5)	(10.1)	
Korean Stock Exch.	KOSPI Index	3,210.0	(0.5)	33.8	
Straight Times	FSSTI Index	4,237.1	(0.5)	11.9	
Kuala Lumpur	KLCI Index	1,557.0	0.5	(5.2)	
Philippines	PCOMP Index	6,339.4	(0.4)	(2.9)	
Nikkei	NKY Index	41,820.5	1.9	4.8	
Hang Seng	HSI Index	24,858.8	(0.9)	23.9	
MSCI-Asia pacific	MXAP Index	208.9	1.0	15.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	43,968.6	(0.5)	3.3	
S&P 500	SPX Index	6,340.0	(0.1)	7.8	
Nasdaq	CCMP Index	21,242.7	0.3	10.0	
FTSE 100	UKX Index	9,092.7	(0.1)	11.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,291.0	(0.0)	(1.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,316.6	(0.4)	0.4
3 month	IDSWT3M Index	16,306.5	(0.4)	(1.0)
6 month	IDSWT6M Index	16,302.4	(0.4)	(1.0)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,305.2	(0.4)	(0.8)
6 month	IDFWT6M Index	16,328.4	(0.4)	(0.7)

*price as of 8/7/2025

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