



FOR PROFESSIONAL INVESTORS - 08/28/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Slightly Higher

JCI slightly strengthened and closed at 7,952 (+16 points or +0.2%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 279Bn today and rupiah was stabilized at IDR 16,345/USD.

Banking stocks were mostly positive as BBKA (+0.3%), BBRI (+0.24%), BNLI (+3.62%), and BBTN (+5.24%) all up, except BMRI (-0.63%). Consumer names were mostly negative as GGRM (-0.58%), UNVR (-0.28%), ICBP (-0.27%), and KLBF (-1.55%) all corrected, except HMSP (+0.95%). Material stocks were negative as BRPT (-1.31%) and TPIA (-2.03%) all corrected. Infra names were mixed as PGAS (+3%) and TBIG (+0.52%) inched higher, while JSMR (-0.29%) and TOWR (-0.77%) weakened. Other movers were CPRO (+28.3%), MSIN (+13%), PYFA (-9.3%), and SGRO (-5.87%).

The Ministry of Energy and Mineral Resources (ESDM) proposed an additional budget in the 2026 State Budget Draft (RAPBN) to Rp 21.67tn, higher than the budget ceiling for the 2026 fiscal year at Rp 8.11tn.

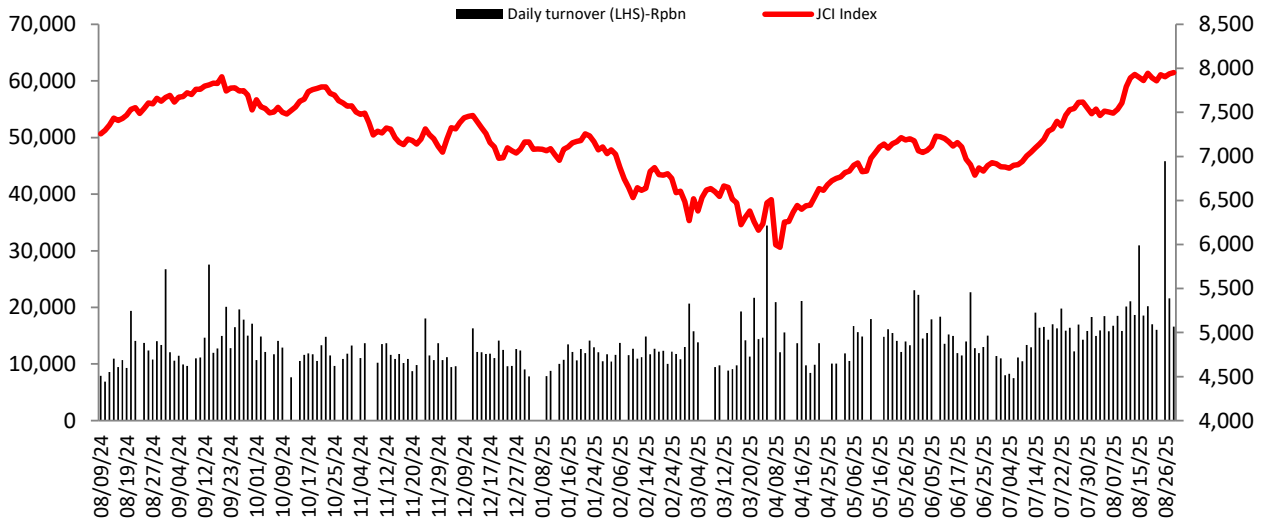
BOND MARKET

Unchanged Sentiment

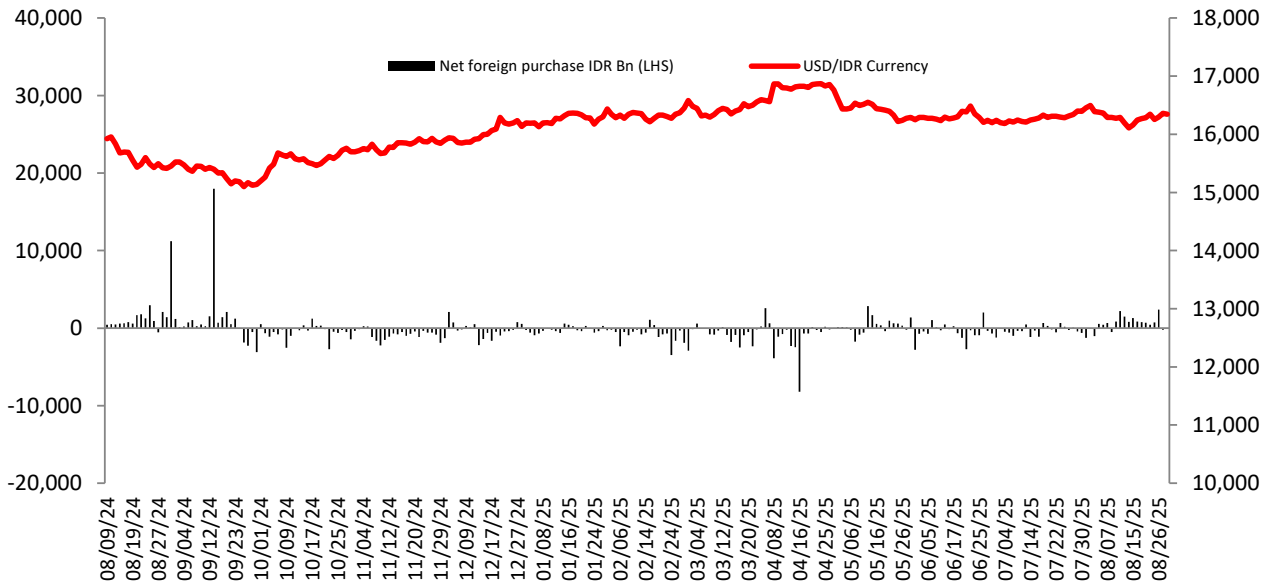
Indonesia bond market closed the day with unchanged sentiment. Market is still moving two ways in the morning session, although in the second session bond market was pretty quiet. Trading concentrated on front maturities while the other part of the yield curve was quoted within range throughout the day. IDR bond the prices ended the day unchanged from yesterday level specially for 10Y above, while <5Y lower yield around 3-7 bps. The 5Y/10Y/15Y/20Y benchmark closed the day at mid yield of 5.6%/6.29%/6.66%/6.81%

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	99.7	0.1	3.7	5Y
FR91	FR0091 Govt	101.9	0.2	5.7	10Y
FR93	FR0093 Govt	99.2	0.1	4.6	15Y
FR92	FR0092 Govt	103.3	0.1	3.1	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	101.0	0.1	3.1	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.6	0.5		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.7	0.1		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,952.1	0.2	12.3	
Thailand	SET Index	1,252.3	0.3	(10.6)	
Korean Stock Exch.	KOSPI Index	3,196.3	0.3	33.2	
Straight Times	FSSTI Index	4,254.4	0.2	12.3	
Kuala Lumpur	KLCI Index	1,587.1	(0.1)	(3.4)	
Philippines	PCOMP Index	6,190.2	(1.3)	(5.2)	
Nikkei	NKY Index	42,828.8	0.7	7.4	
Hang Seng	HSI Index	24,998.8	(0.8)	24.6	
MSCI-Asia pacific	MXAP Index	211.8	(0.4)	16.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	45,565.2	0.3	7.1	
S&P 500	SPX Index	6,481.4	0.2	10.2	
Nasdaq	CCMP Index	21,590.1	0.2	11.8	
FTSE 100	UKX Index	9,226.0	(0.3)	12.9	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,345.0	0.1	(1.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,260.0	0.0	0.0
3 month	IDSWT3M Index	16,287.8	0.2	(0.8)
6 month	IDSWT6M Index	16,270.0	0.1	(0.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,303.0	0.3	(0.8)
6 month	IDFWT6M Index	16,318.0	(0.2)	(0.6)

*price as of 8/27/2025

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