



FOR PROFESSIONAL INVESTORS - 08/20/2025

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Rebound

JCI advanced and closed at 7,944 (+81 points or +1.03%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 863Bn today and rupiah slightly weakened to IDR 16,270/USD.

Banking stocks were positive as BBRI (+2.72%), BMRI (+3.13%), BBNI (+2.31%), BBKA (+0.29%), and BBTN (+5.18%) all in green. Consumer names were mixed as KLBF (+2.56%) and INDF (+0.63%) closed higher, while HMSP (-1.83%), UNVR (-1.37%), and ICBP (-1.28%) retreated. Properties stocks were positive as BSDE (+8.2%), LPKR (+10%), PWON (+3.19%), and SMRA (+4.93%) all inched higher. Material names were mixed as BRPT (+5.38%) in green, while TPIA (-0.56%) weakened. Other movers were AMRT (+6.79%), BRMS (+5.73%), DKFT (-14.81%), and MAYA (-12.31%).

Ministry of Public Works (PU) signaled that new toll road development will not receive support from the budget. The budget will support projects surrounding the toll area to support the traffic volume.

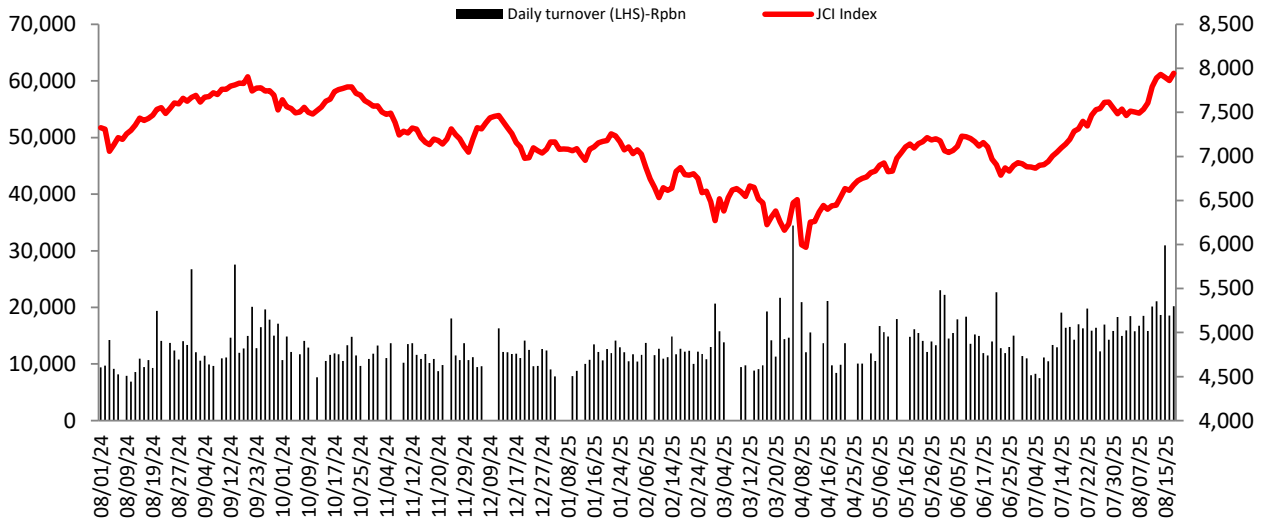
### BOND MARKET

#### BI Cuts 25bps

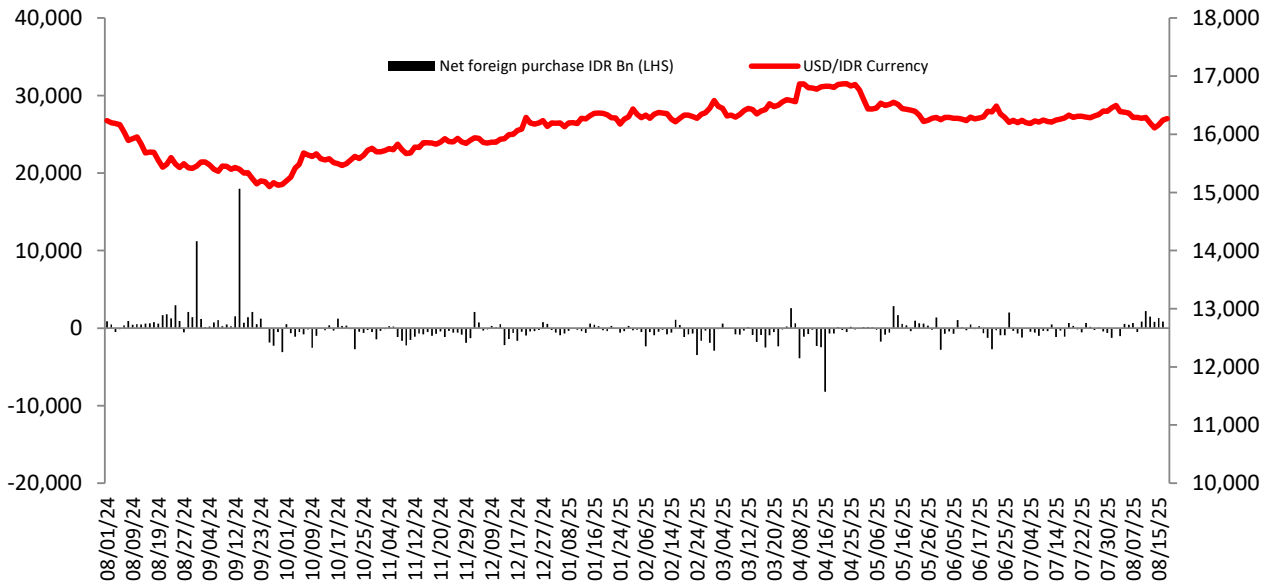
Indonesia bond market opened with wide spread as players turned defensive and stood sideline ahead of BI rate meeting today. Only few trades were seen in the morning session with light trading volume. In the afternoon session, Bank Indonesia cuts key rate by 25 bps to 5%. After the announcement, INDOGB yields dropped. The 5Y yields dropped 10 bps traded at 5.81% and 10Y closed dropped 5 bps to 6.36%. The yield managed to close the day lower around 5 to 12 bps compare to yesterday's closing level. The benchmark series of 5, 10, 15 and 20Y closed at mid yield of 5.79%, 6.35%, 6.75% and 6.8%. Spot closed at 16,272 compare today opening at 16,323.

# 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	99.5	0.1	3.4	5Y
FR91	FR0091 Govt	101.3	0.2	5.1	10Y
FR93	FR0093 Govt	98.8	0.3	4.2	15Y
FR92	FR0092 Govt	103.0	0.1	2.8	20Y
PBS036	INDOIS 5 ¾ 08/15/25	#N/A N/A	#VALUE!	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	100.7	#VALUE!	2.8	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.5	0.0		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.6	0.2	1.7	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,943.8	1.0	12.2	
Thailand	SET Index	1,248.2	1.0	(10.9)	
Korean Stock Exch.	KOSPI Index	3,130.1	(0.7)	30.4	
Straight Times	FSSTI Index	4,219.5	0.1	11.4	
Kuala Lumpur	KLCI Index	1,588.2	(0.1)	(3.3)	
Philippines	PCOMP Index	6,277.9	0.0	(3.8)	
Nikkei	NKY Index	42,888.6	(1.5)	7.5	
Hang Seng	HSI Index	25,165.9	0.2	25.5	
MSCI-Asia pacific	MXAP Index	213.2	(0.2)	17.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,922.3	0.0	5.6	
S&P 500	SPX Index	6,411.4	(0.6)	9.0	
Nasdaq	CCMP Index	21,315.0	(1.5)	10.4	
FTSE 100	UKX Index	9,196.4	0.1	12.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,270.0	(0.2)	(1.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,247.0	0.5	(0.0)
3 month	IDSWT3M Index	16,236.9	0.5	(0.5)
6 month	IDSWT6M Index	16,245.0	0.5	(0.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,244.4	0.5	(0.5)
6 month	IDFWT6M Index	16,313.9	0.7	(0.6)

\*price as of 8/19/2025

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