



FOR PROFESSIONAL INVESTORS - 11/05/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rally

JCI advanced and closed at 8,319 (+77 points or +0.93%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 1.3Tn today and rupiah was stabilized at IDR 16,705/USD.

Banking stocks were mostly positive as BBKA (+0.58%), BMRI (+0.85%), BBRI (+0.25%), and BBNI (+0.22%) all up, except MEGA (-0.9%). Consumer names were mixed as KLBF (+7.76%), ICBP (+2.65%), and INDF (+0.71%) inched higher, while GGRM (-3.12%) and HMSP (-3.85%) closed lower. Retailer stocks were positive as MAPI (+6.82%), AMRT (+1.84%), MAPA (+3.92%), and RALS (+3.7%) all rose. Material names were positive as BRPT (+1.71%) and TPIA (+0.36%) all closed higher. Other movers were TINS (+19.67%), BRMS (+9.68%), HEAL (-5.94%), and GIAA (-5.22%).

The government, through the Ministry of Agriculture will develop a chicken farming ecosystem to strengthen the domestic supply of eggs and chicken. This is in response to the need for the Free Nutritious Meals (MBG) program. The need for eggs to support MBG reached 700k tons to almost 1mn tons, while the need for broiler chickens reached 1.1mn tons.

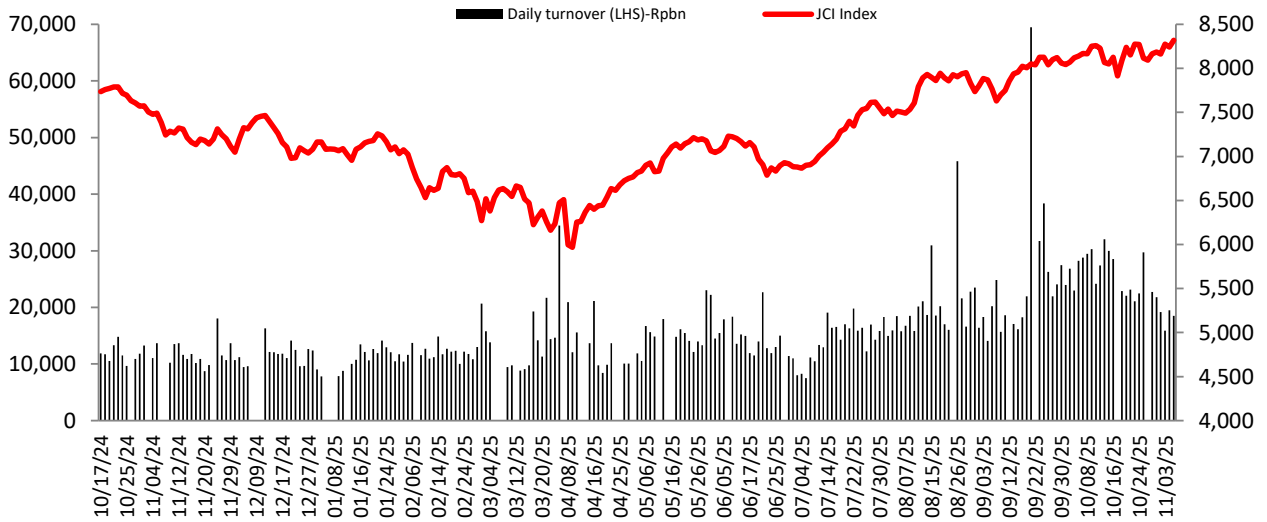
BOND MARKET

Little Change

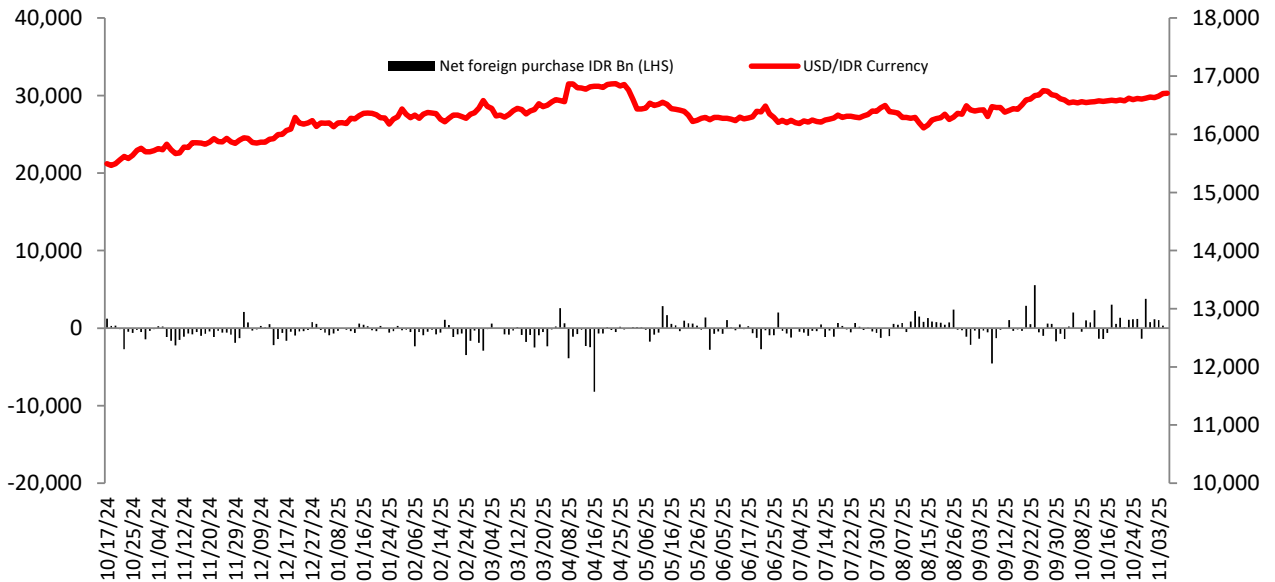
Indonesia bond market start the day with offerish tone. Several selling interest from mixed players was seen mostly in morning session. The 5Y and 10Y benchmarks series remained as market's favorite. However, some standby buyers was seen especially on 10Y benchmark series. Meanwhile from our end, we saw no trades in the afternoon session after The Govt announced their GDP data Q3 that came better than expectation at 5.04% (vs 5.00% cons. Yield curved closed with higher 2 – 3bps.

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	100.5	(0.0)	4.5	5Y
FR91	FR0091 Govt	102.4	(0.2)	6.2	10Y
FR93	FR0093 Govt	101.0	(0.2)	6.5	15Y
FR92	FR0092 Govt	106.7	(0.1)	6.5	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.4	0.0	3.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	105.2	(0.1)		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	101.7	(0.4)		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,318.5	0.9	17.5	
Thailand	SET Index	1,294.2	(0.3)	(7.6)	
Korean Stock Exch.	KOSPI Index	4,004.4	(2.8)	66.9	
Straight Times	FSSTI Index	4,417.1	(0.1)	16.6	
Kuala Lumpur	KLCI Index	1,621.6	(0.1)	(1.3)	
Philippines	PCOMP Index	5,818.1	(0.8)	(10.9)	
Nikkei	NKY Index	50,212.3	(2.5)	25.9	
Hang Seng	HSI Index	25,935.4	(0.1)	29.3	
MSCI-Asia pacific	MXAP Index	227.5	(1.0)	25.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	47,085.2	(0.5)	10.7	
S&P 500	SPX Index	6,771.6	(1.2)	15.1	
Nasdaq	CCMP Index	23,348.6	(2.0)	20.9	
FTSE 100	UKX Index	9,701.6	(0.1)	18.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,705.0	(0.0)	(3.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,666.2	0.2	2.5
3 month	IDSWT3M Index	16,671.2	0.2	(3.2)
6 month	IDSWT6M Index	16,667.3	0.2	(3.2)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,735.5	0.4	(3.5)
6 month	IDFWT6M Index	16,734.9	0.4	(3.2)

*price as of 11/4/2025

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