



FOR PROFESSIONAL INVESTORS - 10/08/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Flat

JCI was flat and closed at 8,166 (-3 points or -0.04%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR 455Bn today and rupiah slightly weakened to IDR 16,560/USD.

Banking stocks were mostly negative as BNLI (-1.75%), BBNI (-1.25%), BMRI (-0.93%), and BBKA (-2.64%) all weakened, except BBRI (+0.27%). Consumer names were mixed as MYOR (+3.29%), UNVR (+1.37%), and INDF (+0.35%) in green, while GGRM (-5.04%) and HMSP (-5.41%) corrected. Mining stocks were mixed as ADRO (+12.12%), ANTM (+6.05%), and INCO (+4.94%) advanced, while ITMG (-1.23%) and TINS (-3.32%) retreated. Infra names were mixed as PGAS (+3.08%) rose, JSMR (-0.26%) and TOWR (-0.97%) down, and TBIG unchanged. Other movers were POLU (+19.96%), IMPC (+13.08%), SHIP (-10.16%), and SSIA (-9.17%).

Bank Indonesia reported that Indo forex reserve declined - 1.3% MoM (US\$2bn) to US\$148.7bn in Sep25. This amount is equivalent to financing 6.2 months of imports or 6.0 months of imports and servicing the gov't's external debt.

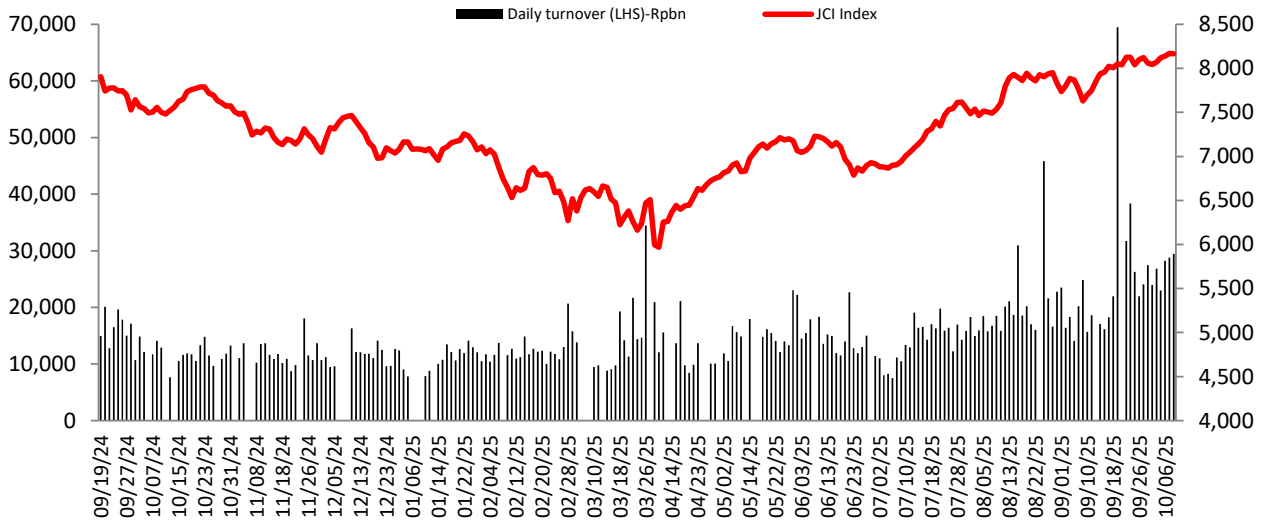
BOND MARKET

Slightly Higher

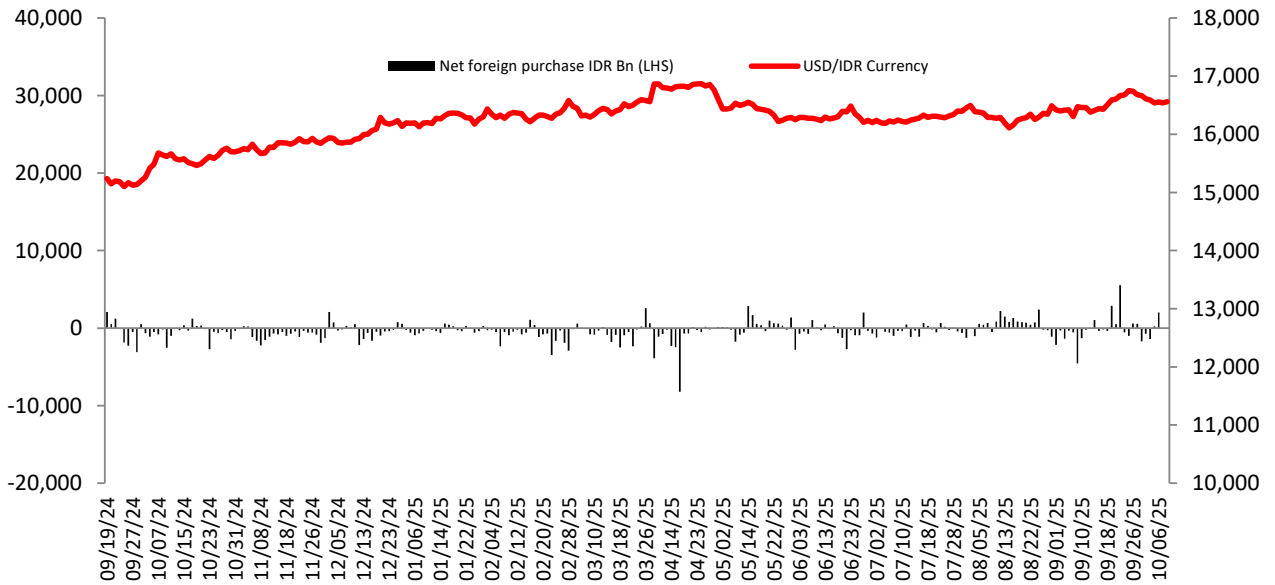
Indonesia bond market opened unchanged despite Rupiah weakening against USD and 10Y UST yield posted lower below 4.13%. Local currency start the day with higher level, opened at above 15,610 compare yesterday closing at 16,561. Most of the morning session was muted with bidders turned very defensive. While on the afternoon session as we witnessed mixed names showed their buying interest particularly after London opened although trading volume remained thin. Overall tone remains cautious and the yield closed the day lower by around 3 – 9 bps.

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	100.4	0.0	4.3	5Y
FR91	FR0091 Govt	103.3	0.1	7.2	10Y
FR93	FR0093 Govt	99.9	0.2	5.4	15Y
FR92	FR0092 Govt	103.6	0.2	3.4	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	103.7	0.1		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.8	0.1		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,166.0	(0.0)	15.3	
Thailand	SET Index	1,304.9	(0.0)	(6.8)	
Korean Stock Exch.	KOSPI Index	3,549.2	2.7	47.9	
Straight Times	FSSTI Index	4,456.3	(0.4)	17.7	
Kuala Lumpur	KLCI Index	1,627.5	(0.2)	(0.9)	
Philippines	PCOMP Index	6,098.7	0.2	(6.6)	
Nikkei	NKY Index	47,735.0	(0.5)	19.7	
Hang Seng	HSI Index	26,829.5	(0.5)	33.7	
MSCI-Asia pacific	MXAP Index	225.2	(0.1)	24.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,603.0	(0.2)	9.5	
S&P 500	SPX Index	6,714.6	(0.4)	14.2	
Nasdaq	CCMP Index	22,788.4	(0.7)	18.0	
FTSE 100	UKX Index	9,534.2	0.5	16.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,560.0	(0.1)	(2.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,552.5	(0.3)	1.8
3 month	IDSWT3M Index	16,551.0	(0.3)	(2.5)
6 month	IDSWT6M Index	16,555.6	(0.2)	(2.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,588.5	(0.2)	(2.6)
6 month	IDFWT6M Index	16,583.1	(0.4)	(2.2)

*price as of 10/7/2025

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