

FOR PROFESSIONAL INVESTORS - 09/08/2025

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Closed Lower

JCI weakened and closed at 7,767 (-100 points or -1.28%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net outflow of IDR 526Bn today and rupiah advanced to IDR 16,304/USD.

Banking stocks were negative as BBTN (-9.77%), BBNI (-4.35%), BMRI (-4.06%), BBRI (-2.5%), and BBCA (-3.75%) all declined. Consumer names were mixed as HMSP (+17.76%), GGRM (+12.5%), and ICBP (+1.35%) up, while INDF (-1.33%) and KLBK (-2.54%) corrected. Telco stocks were negative as ISAT (-2.04%), EXCL (-2.19%), and TLKM (-1.9%) all retreated. Mining names were mixed as ANTM (+6.49%), TINS (+5.83%), and INDY (+5.73%) up, while ITMG (-0.34%) and ADRO (-2.27%) corrected. Other movers were POLU (+20%), BNBR (+9.68%), MSIN (-11.28%), and ARTO (-7.83%).

The Central Statistics Agency noted that national corn production in July 2025 was 1.46mn tonnes, dropped -4.58% MoM from June. The potential corn production in Aug-Oct reaches 3.62mn tonnes, or dropped -20.87% YoY. This is in line with the potential reduction in the harvested corn area.

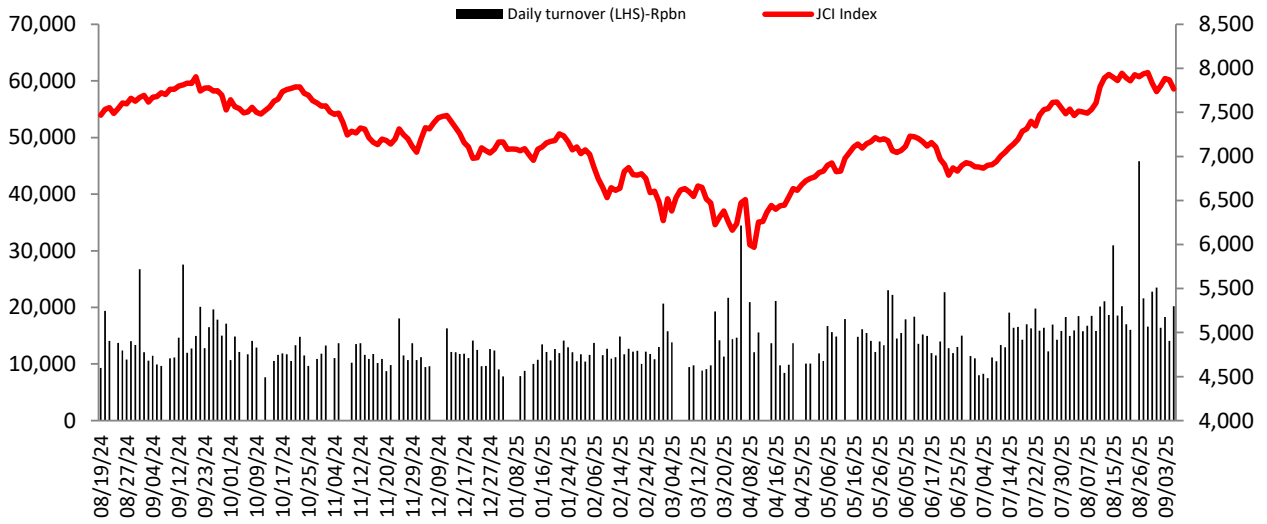
### BOND MARKET

#### A ROLLERCOASTER RIDE

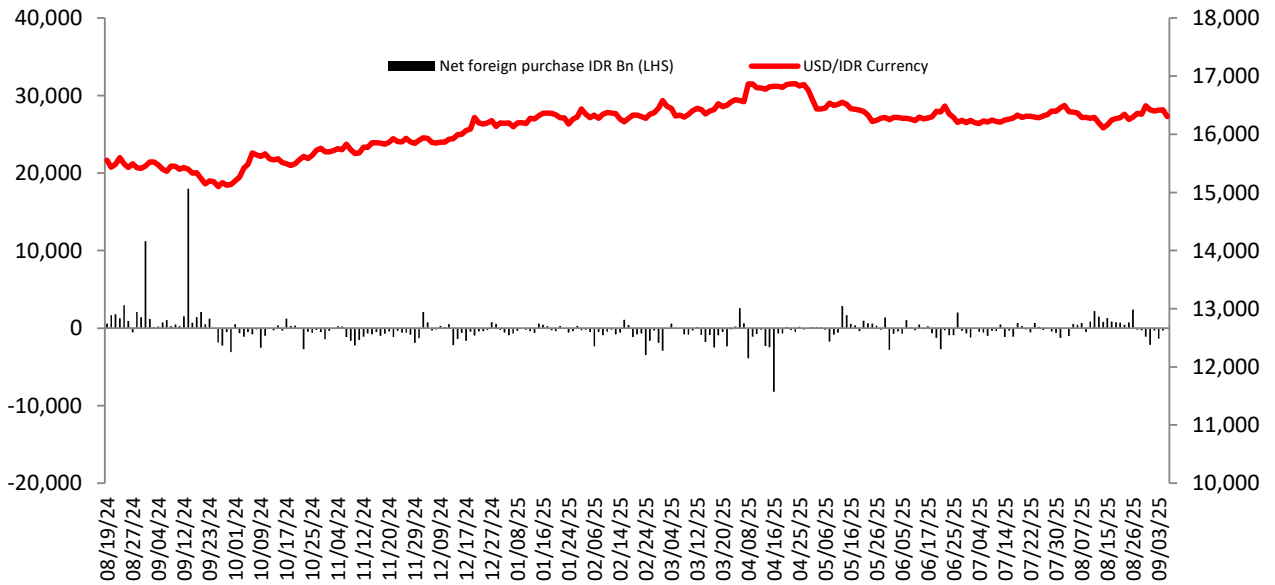
Indonesia bond market returned from long weekend with positive tone post US NFP data last Friday. INDOGB start the day with wide spread with 2 – 6 bps lower and Rupiah opened at 16,380 level. Buying interest was seen from foreign names and onshore banks on front to belly ahead of regular bond auction tomorrow. Nearing market closing time, President Prabowo announced cabinet reshuffle, including Minister of Finance position to Purbaya Yudhi Sadewa. Post reshuffle on Sri Mulyani, Indonesia market turned bearish. INDOGB reacted negatively and no more bidders was seen. Sentiment was offerish until closing time and at the end of the day, bonds yield closed 7 – 10 bps higher, specially on 10Y below and 2 – 3 bps higher on 15Y and 20Y. The benchmark series 5Y/10Y/15Y/20Y closed at mid-yield of 5.8%/6.44%/6.75%/6.89% respectively. Rupiah closed at 16,310.

# 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	(0.0)	3.7	5Y
FR91	FR0091 Govt	101.7	0.0	5.5	10Y
FR93	FR0093 Govt	99.1	0.0	4.6	15Y
FR92	FR0092 Govt	102.8	(0.0)	2.7	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.9	0.0	3.0	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.8	0.0		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.6	(0.1)		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,766.8	(1.3)	9.7	
Thailand	SET Index	1,266.2	0.1	(9.6)	
Korean Stock Exch.	KOSPI Index	3,219.6	0.5	34.2	
Straight Times	FSSTI Index	4,308.5	0.0	13.8	
Kuala Lumpur	KLCI Index	1,585.6	0.5	(3.5)	
Philippines	PCOMP Index	6,101.9	(0.8)	(6.5)	
Nikkei	NKY Index	43,643.8	1.5	9.4	
Hang Seng	HSI Index	25,633.9	0.8	27.8	
MSCI-Asia pacific	MXAP Index	213.5	1.4	17.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	45,400.9	(0.5)	6.7	
S&P 500	SPX Index	6,481.5	(0.3)	10.2	
Nasdaq	CCMP Index	21,700.4	(0.0)	12.4	
FTSE 100	UKX Index	9,218.6	0.1	12.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,304.0	0.7	(1.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,431.5	0.1	1.1
3 month	IDSWT3M Index	16,437.5	0.1	(1.8)
6 month	IDSWT6M Index	16,434.0	0.0	(1.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,456.7	0.1	(1.8)
6 month	IDFWT6M Index	16,466.5	0.0	(1.5)

\*price as of 9/5/2025

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