



FOR PROFESSIONAL INVESTORS - 09/11/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Higher

JCI advanced and closed at 7,748 (+49 points or +0.64%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR - 192Bn today and rupiah was stabilized at IDR 16,462/USD.

Banking stocks were positive as BBRI (+5.15%), BBNI (+7.8%), BMRI (+1.82%), BBCA (+0.64%), and BBTN (+6.27%) all inched higher. Consumer names were mostly positive as KLBF (+3.45%), INDF (+0.67%), ICBP (+0.81%), and UNVR (+1.18%) all advanced, except MYOR (-3.3%). Poultry stocks were positive as CPIN (+4.23%), JPFA (+6.5%), and MAIN (+2.17%) all closed higher. Mining names were mostly negative as TINS (-1.38%), ADRO (-0.3%), INCO (-3.36%), and ANTM (-3.42%) all retreated, except ITMG (+0.56%). Other movers were ESSA (+12.3%), PTRO (+6.9%), DSSA (-6.55%), and MDKA (-3.85%).

The Minister of Finance plans to transfer Rp200tn state funds stored in Bank Indonesia to the banking system. This is done to encourage credit flow and support Indonesia's economic growth.

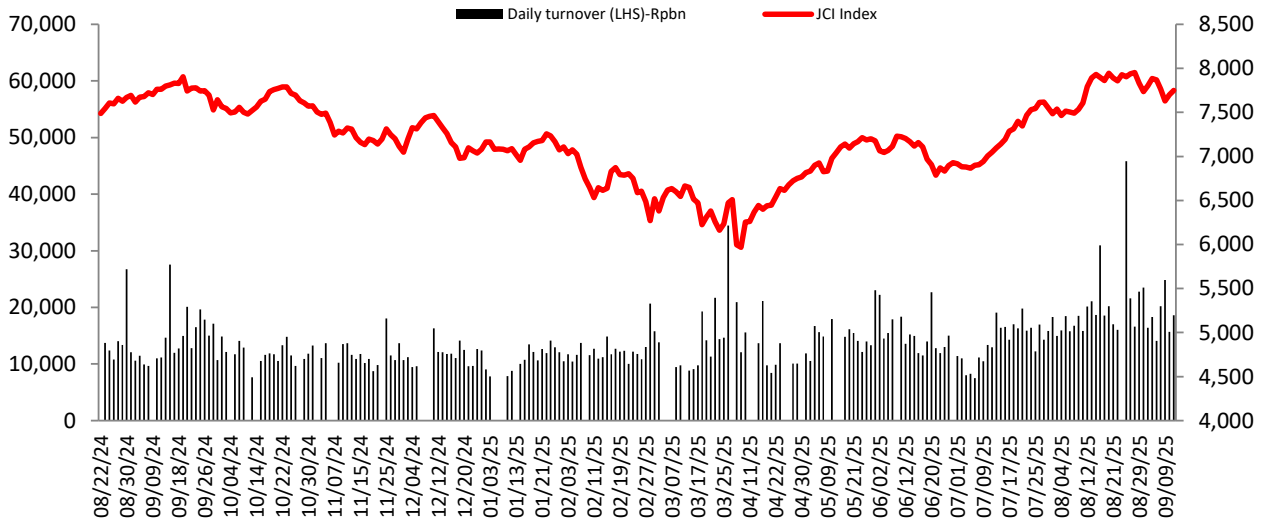
BOND MARKET

Better Sentiment

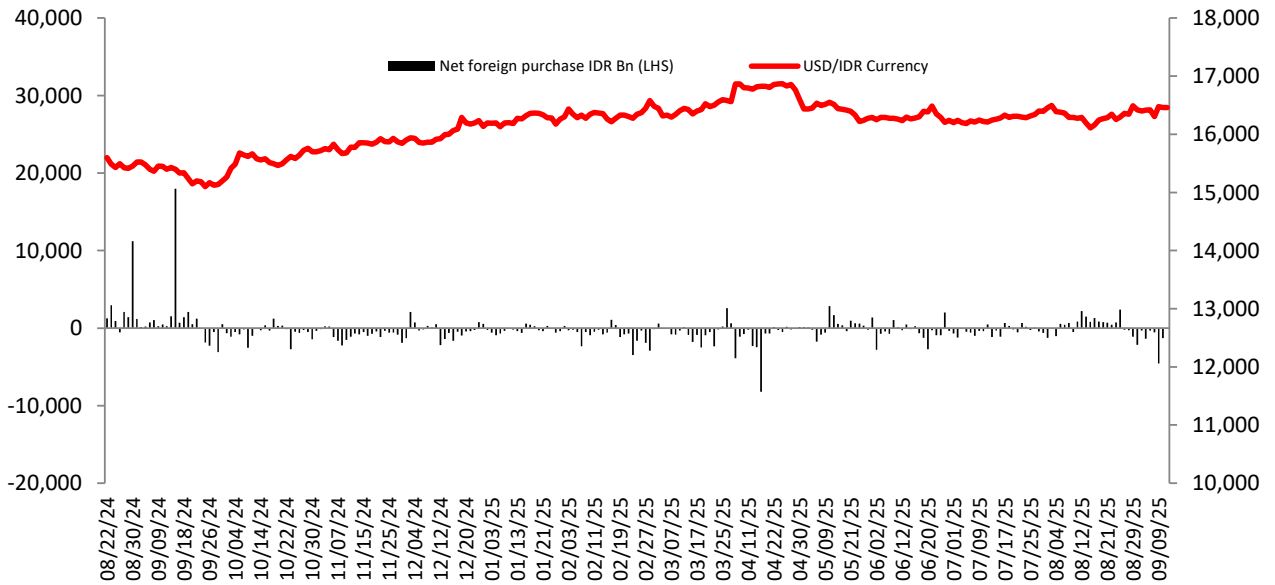
Indonesia bond market rebounded following yesterday's FinMin stated that MoF will inject IDR 200tn to Himbara banks. We heard onshore and offshore names looking to collect across the curve. Some names has start to replace the soon to be mature bond, FR40 on Sept 15. Short end yield were lower by 3-8 bps while belly area moved slightly lower by 2-4 bps. Overall, benchmark series of 5/10/15/20Y closed at mid yield 5.82%/ 6.49%/6.78%/6.88%. Tomorrow, BI will held SRBI auction, offering 6mo, 9mo and 12mo SRBI.

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	99.8	0.1	3.8	5Y
FR91	FR0091 Govt	101.7	0.6	5.6	10Y
FR93	FR0093 Govt	98.7	(0.0)	4.1	15Y
FR92	FR0092 Govt	102.5	(0.0)	2.3	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.9	0.1	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	0.0		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,747.9	0.6	9.4	
Thailand	SET Index	1,288.5	0.8	(8.0)	
Korean Stock Exch.	KOSPI Index	3,344.2	0.9	39.4	
Straight Times	FSSTI Index	4,349.5	0.1	14.8	
Kuala Lumpur	KLCI Index	1,582.9	(0.5)	(3.6)	
Philippines	PCOMP Index	6,126.9	0.1	(6.2)	
Nikkei	NKY Index	44,372.5	1.2	11.2	
Hang Seng	HSI Index	26,086.3	(0.4)	30.0	
MSCI-Asia pacific	MXAP Index	218.0	0.9	20.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	45,490.9	(0.5)	6.9	
S&P 500	SPX Index	6,532.0	0.3	11.1	
Nasdaq	CCMP Index	21,886.1	0.0	13.3	
FTSE 100	UKX Index	9,263.2	0.4	13.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,462.0	(0.0)	(2.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,465.0	0.8	1.3
3 month	IDSWT3M Index	16,458.3	(0.0)	(1.9)
6 month	IDSWT6M Index	16,463.7	0.0	(2.0)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,470.8	(0.1)	(1.9)
6 month	IDFWT6M Index	16,509.7	0.1	(1.8)

*price as of 9/10/2025

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