



FOR PROFESSIONAL INVESTORS - 08/14/2025

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### All time high!

JCI slightly strengthened and closed at 7,931 (+38 points or +0.49%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 827Bn today and rupiah advanced to IDR 16,110/USD.

Banking stocks were mixed as BBNI (+0.46%) and BBTN (+1.12%) in green, while BMRI (-0.41%), BBRI (-0.49%), and BBCA (-1.68%) declined. Consumer names were positive as KLBF (+2.5%), ICBP (+2.64%), INDF (+1.56%), UNVR (+2.52%), and MYOR (+1.36%) all rose. Pulp & paper stocks were negative as TKIM (-0.7%) and INKP (-2.5%) all closed lower. Telco names were mixed as TLKM (+1.79%) and EXCL (+1.72%) up, while ISAT (-1.77%) declined. Other movers were LIFE (+20%), SGRO (+16.22%), SMMA (-5.32%), and MEDC (-2.78%).

Minister of Finance Sri Mulyani stated that the implementation of Free Nutritious Meals could cost up to Rp300tn in 2026. This is because the program is targeted to reach 82mn beneficiaries. Note that this year's budget is Rp71tn with an additional reserve of Rp100tn, as recently reiterated by the MoF.

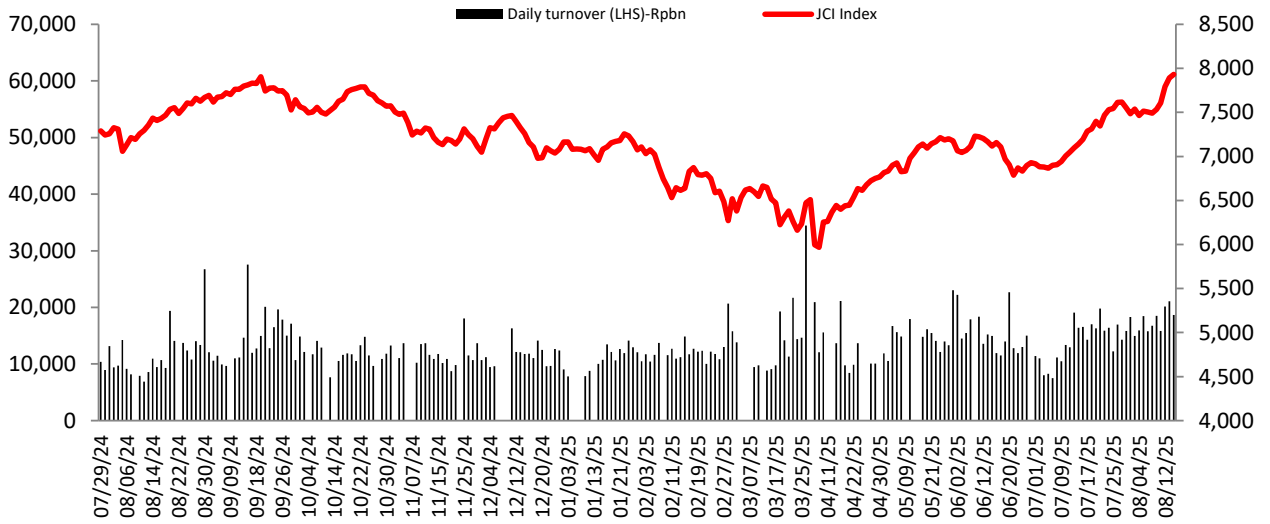
### BOND MARKET

#### FLATTISH

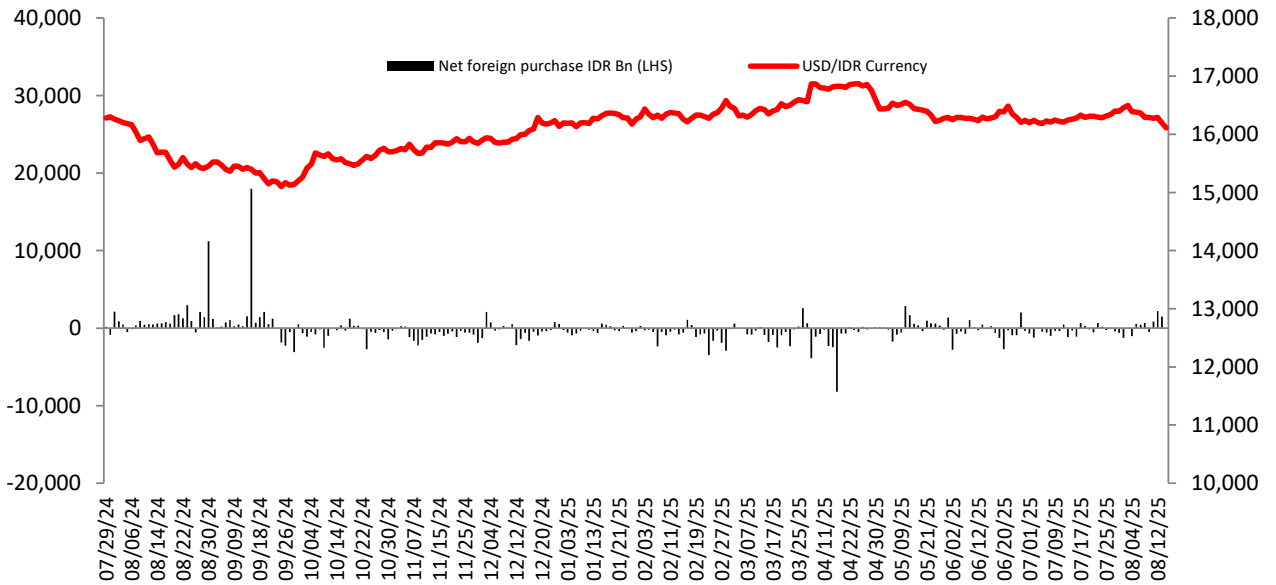
The bond market saw no improvement in risk sentiment today although we witnessed two ways trading in the market. Morning session saw buying interest started by offshore players following Rupiah opened at 16,095. While on the afternoon session as we witnessed mixed names showed their selling interest particularly after London opened although trading volume remained thin. Thin trading volume during the day pushed bidders to be more defensive. The benchmark of 5Y, 10Y, 15Y and 20Y closed at mid yields of 5.85%, 6.38%, 6.75% and 6.81% respectively. Spot closed at 16,115 level.

# 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	101.2	0.2	5.1	10Y
FR93	FR0093 Govt	98.7	0.1	4.1	15Y
FR92	FR0092 Govt	103.1	0.2	2.9	20Y
PBS036	INDOIS 5 ¾ 08/15/25	100.0	0.0	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	100.8	0.0	2.6	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.4	0.2	1.8	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.4	(0.3)	2.5	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,931.3	0.5	12.0	
Thailand	SET Index	1,266.7	(0.8)	(9.5)	
Korean Stock Exch.	KOSPI Index	3,225.7	0.0	34.4	
Straight Times	FSSTI Index	4,256.5	(0.4)	12.4	
Kuala Lumpur	KLCI Index	1,581.1	(0.3)	(3.7)	
Philippines	PCOMP Index	6,291.9	(0.5)	(3.6)	
Nikkei	NKY Index	42,649.3	(1.4)	6.9	
Hang Seng	HSI Index	25,519.3	(0.4)	27.2	
MSCI-Asia pacific	MXAP Index	213.6	1.6	17.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,922.3	1.0	5.6	
S&P 500	SPX Index	6,466.6	0.3	9.9	
Nasdaq	CCMP Index	21,713.1	0.1	12.4	
FTSE 100	UKX Index	9,159.0	(0.1)	12.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,110.0	0.5	(0.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,296.3	0.2	0.3
3 month	IDSWT3M Index	16,301.4	0.3	(0.9)
6 month	IDSWT6M Index	16,287.6	0.2	(0.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,309.6	0.2	(0.9)
6 month	IDFWT6M Index	16,325.4	0.3	(0.6)

\*price as of 8/13/2025

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