

FOR PROFESSIONAL INVESTORS - 05/26/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Pullback

JCI slightly weakened and closed at 7,188 (-26 points or -0.36%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 320Bn today and rupiah slightly weakened to IDR 16,240/USD.

Banking stocks were mixed as BMRI (+0.92%) and BNL (+2.62%) up, while PNB (-5.6%), BBCA (-0.52%), and BBRI (-0.69%) down. Consumer names were mixed as KLBF (+4.11%) and ICBP (+1.85%) in green, while HMSP (-0.76%), GGRM (-2.91%), and UNVR (-1.12%) closed lower. Properties stocks were negative as BSDE (-0.56%), LPKR (-3.23%), SMRA (-3.69%), and PWON (-5.21%) all retreated. Material names were mixed as BRPT (+5.63%) in green, while TPIA (-7.58%) weakened. Other movers were BRMS (+9.38%), GIAA (+9.09%), ARTO (-6.93%), and GEMS (-4.66%).

The government plans to issue the latest electricity tariff discounts on June 5, 2025 up to July 2025. The 50% electricity discount will only target 79.3mn households with electricity capacity below 1,300 volt amperes (VA).

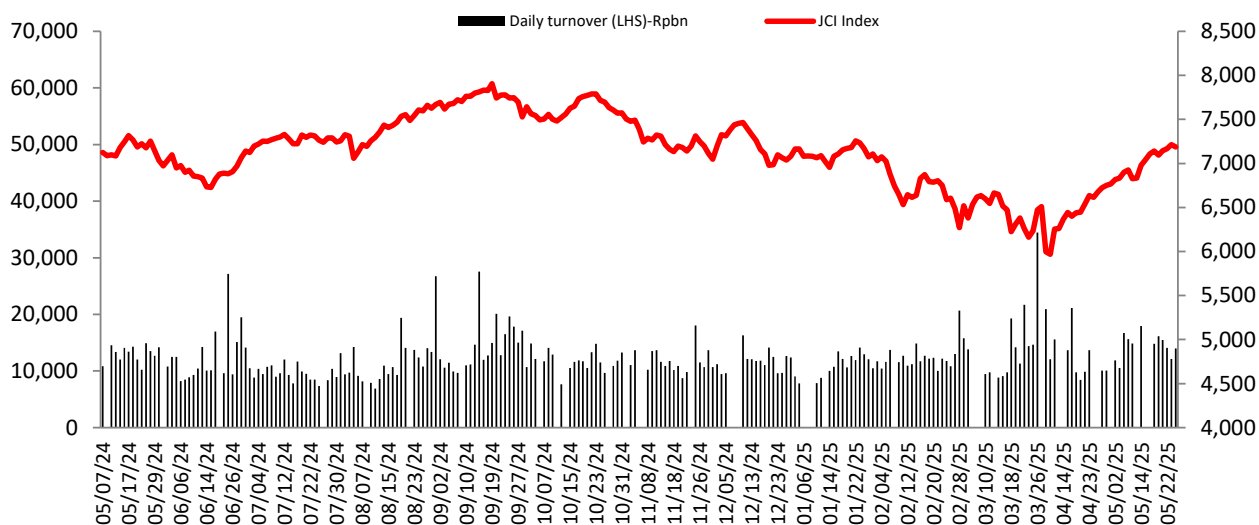
BOND MARKET

Steady

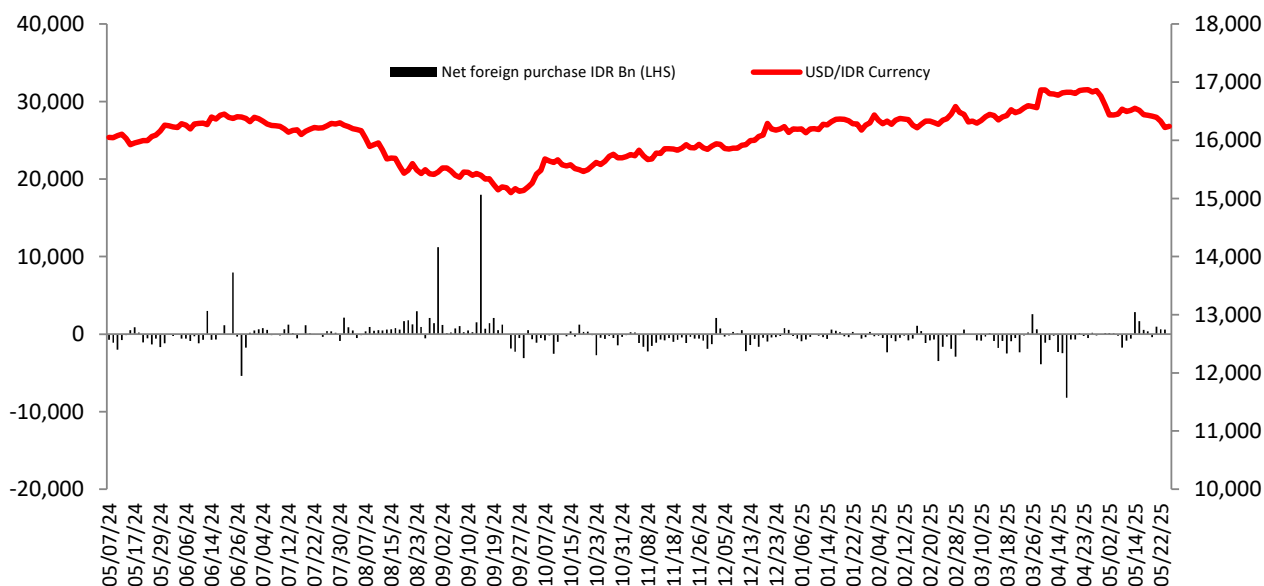
Indonesia bond market start the week with better performance on local currency. However, Indonesia bond market was calm today. Only few trades were seen throughout the day with light trading volume. Although the overall market tone was mixed, no significant price action took place. IDR bond the prices ended the day unchanged from last Friday level. Today is US holiday, no movement on UST. The yield of 5/10/15/20Y benchmark closed the day at mid-yield of 6.4%/6.8%/6.99%/7.01% respectively. Spot opened at 16,153 and closed at 16,249.

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	98.2	0.0	2.1	5Y
FR91	FR0091 Govt	98.6	0.1	2.3	10Y
FR93	FR0093 Govt	95.9	0.1	1.2	15Y
FR92	FR0092 Govt	101.0	0.0	0.9	20Y
PBS036	INDOIS 5 ½ 08/15/25	99.9	0.1	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	99.6	(0.0)	1.3	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	99.9	0.0	0.3	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	97.8	0.0	0.9	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,188.4	(0.4)	1.5	
Thailand	SET Index	1,175.5	(0.1)	(16.1)	
Korean Stock Exch.	KOSPI Index	2,644.4	2.0	10.2	
Straight Times	FSSTI Index	3,879.3	(0.1)	2.4	
Kuala Lumpur	KLCI Index	1,534.3	(0.1)	(6.6)	
Philippines	PCOMP Index	6,389.9	(0.4)	(2.1)	
Nikkei	NKY Index	37,531.5	1.0	(5.9)	
Hang Seng	HSI Index	23,282.3	(1.4)	16.1	
MSCI-Asia pacific	MXAP Index	195.7	0.9	7.7	
<u>Global Indices</u>					
Dow Jones	INDU Index	41,603.1	(0.6)	(2.2)	
S&P 500	SPX Index	5,802.8	(0.7)	(1.3)	
Nasdaq	CCMP Index	18,737.2	(1.0)	(3.0)	
FTSE 100	UKX Index	8,718.0	(0.2)	6.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,240.0	(0.1)	(0.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,304.6	0.1	0.3
3 month	IDSWT3M Index	16,289.5	(0.2)	(0.8)
6 month	IDSWT6M Index	16,278.0	(0.2)	(0.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,317.5	(0.1)	(0.9)
6 month	IDFWT6M Index	16,362.8	(0.3)	(0.9)

*price as of 5/23/2025

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