



FOR PROFESSIONAL INVESTORS - 10/01/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Pull Back

JCI slightly weakened and closed at 8,044 (-17 points or -0.21%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR -1.7Tn today and rupiah slightly strengthened to IDR 16,610/USD.

Banking stocks were negative as BBTN (-1.56%), BMRI (-0.45%), BBNI (-1.22%), BBCA (-1.64%), and BBRI (-2.31%) all retreated. Consumer names were mostly negative as GGRM (-4.29%), ICBP (-1.58%), INDF (-1.73%), and KLBF (-2.65%) all corrected, except MYOR (+2.46%). Mining stocks were mixed as TINS (+18.38%) and ANTM (+1.58%) in green, while ITMG (-1.53%), ADRO (-1.18%), and INCO (-3.18%) retreated. Poultry names were positive as JPFA (+4.59%), CPIN (+0.43%), and MAIN (+2.82%) all rose. Other movers were EMTK (+24.7%), ENRG (+18.01%), AKRA (-6.2%), and AMRT (-4.15%).

The Ministry of Industry (Kemenperin) released the Industrial Confidence Index (IKI) at 53.02 in September 2025, indicating continued expansion. Compared to the IKI in August 2025, it decreased by 0.53. However, compared to September 2024, the IKI value increased by 0.54.

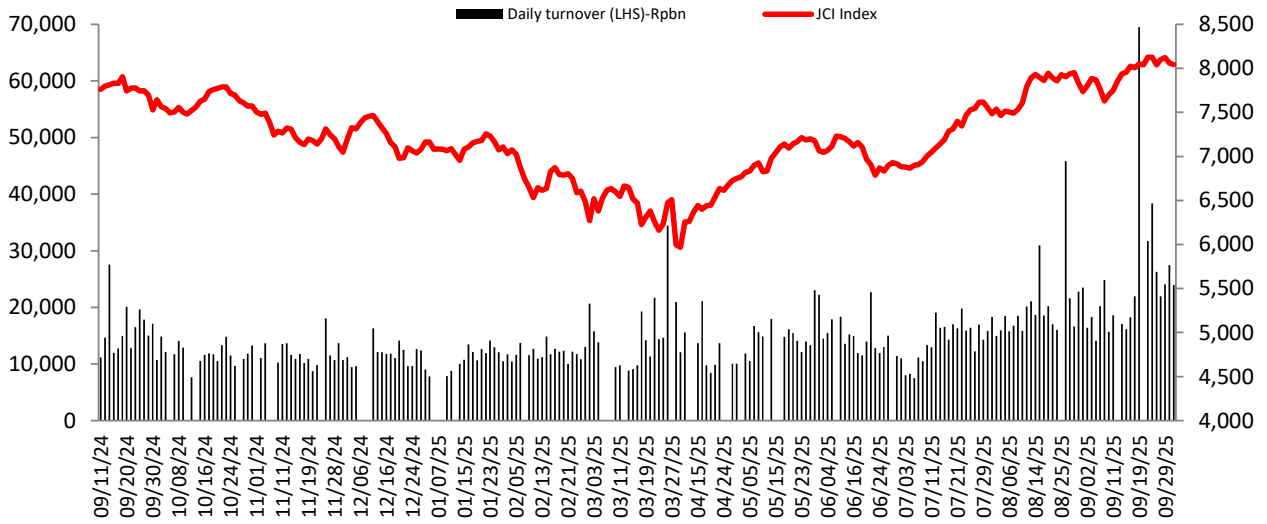
BOND MARKET

Within Range

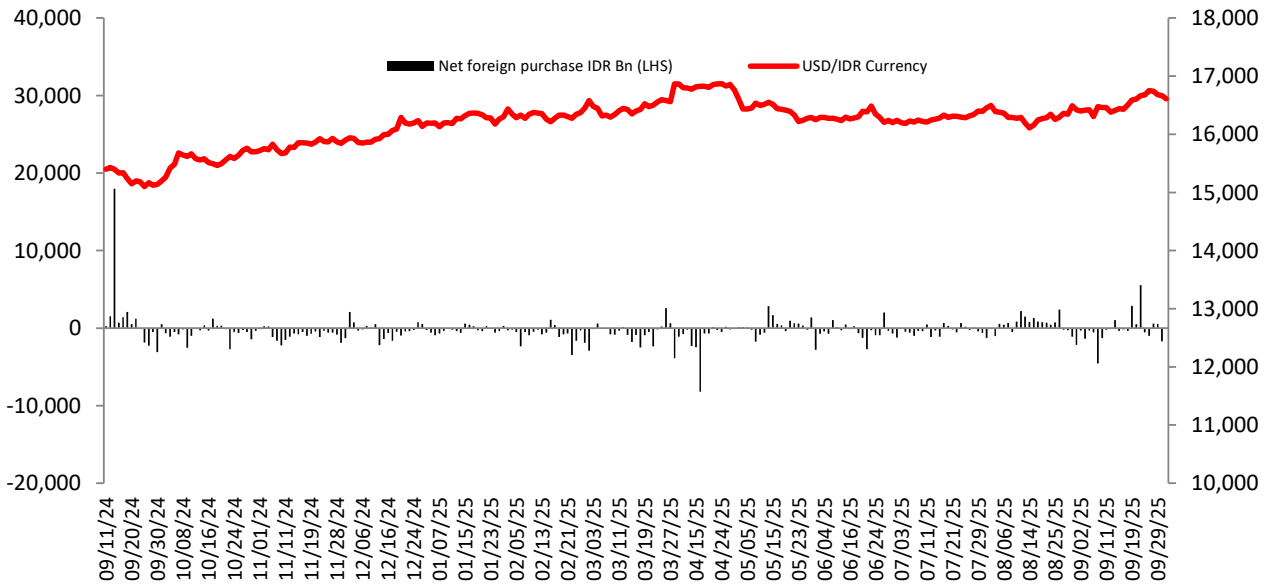
Indonesia bond market start the month with positive tone. In the morning session, IDR bond market opened the day with prices quoted unchanged although Rupiah opened higher touched above 16,700, no significant trade was heard at least from our side. While in the afternoon session, better buying was seen almost across the curve following local currency posted below 16,660. We heard buying actions came from offshore real money names buying into the belly to long-end of the curve, while some interbank players now back chasing the short-end area. The price increase soon invited profit takers in market and capped the gain. The 5Y/10Y/15Y/20Y benchmark closed the day at mid-yield of 5.44%/6.29%/6.73%/6.79%.

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	100.2	0.0	4.1	5Y
FR91	FR0091 Govt	102.8	0.0	6.6	10Y
FR93	FR0093 Govt	99.4	(0.0)	4.8	15Y
FR92	FR0092 Govt	103.1	0.1	2.9	20Y
PBS036	INDOIS 5 ¾ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.3	0.0	3.4	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	102.4	0.1		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.7	(0.3)		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,043.8	(0.2)	13.6	
Thailand	SET Index	1,275.0	0.1	(8.9)	
Korean Stock Exch.	KOSPI Index	3,455.8	0.9	44.0	
Straight Times	FSSTI Index	4,323.1	0.5	14.1	
Kuala Lumpur	KLCI Index	1,620.9	0.6	(1.3)	
Philippines	PCOMP Index	6,026.0	1.2	(7.7)	
Nikkei	NKY Index	44,550.9	(0.8)	11.7	
Hang Seng	HSI Index	26,855.6	0.9	33.9	
MSCI-Asia pacific	MXAP Index	220.6	0.6	21.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,397.9	0.2	9.1	
S&P 500	SPX Index	6,688.5	0.4	13.7	
Nasdaq	CCMP Index	22,660.0	0.3	17.3	
FTSE 100	UKX Index	9,415.7	0.7	15.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,610.0	0.3	(3.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,700.0	0.1	2.8
3 month	IDSWT3M Index	16,697.0	0.2	(3.4)
6 month	IDSWT6M Index	16,679.2	0.1	(3.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,702.8	0.0	(3.3)
6 month	IDFWT6M Index	16,732.0	(0.2)	(3.1)

*price as of 9/30/2025

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