



FOR PROFESSIONAL INVESTORS - 10/10/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Flat

JCI was flat and closed at 8,258 (+7 points or +0.08%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 729Bn today and rupiah was stabilized at IDR 16,553/USD.

Banking stocks were mostly negative as BBNI (-3.17%), BMRI (-3.19%), BBCA (-1.99%), and BBRI (-3.37%) all corrected, except BNLN (+3.2%). Consumer names were mixed as INDF (+0.7%) and SIDO (+0.96%) up, while UNVR (-0.78%), MYOR (-1.83%), and ICBP (-2.75%) weakened. Material stocks were positive as BRPT (+3.88%) and TPIA (+4.85%) all up. Pulp & paper names were positive as INKP (+5.02%) and TKIM (+3.24%) all inched higher. Other movers were BKSL (+13.74%), RAJA (+8.61%), POLU (-14.65%), and FILM (-4.04%).

Bank Indonesia estimates that the Retail Sales Index (RSI) for September 2025 will grow by 5.8% (yoy), higher than the growth in the previous month which stood at 3.5% (yoy).

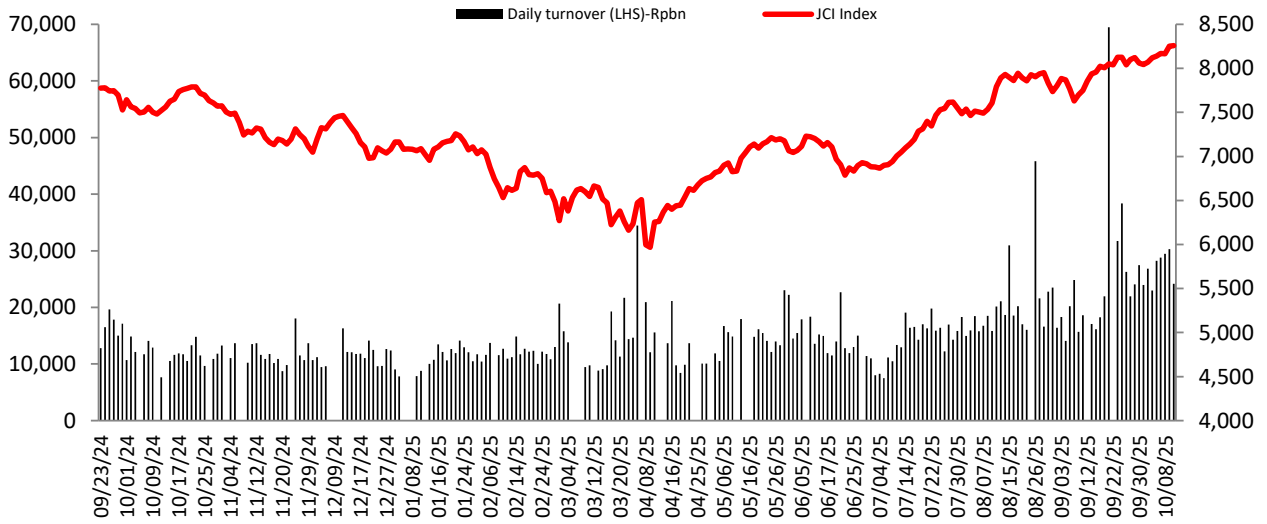
BOND MARKET

CALM DAY

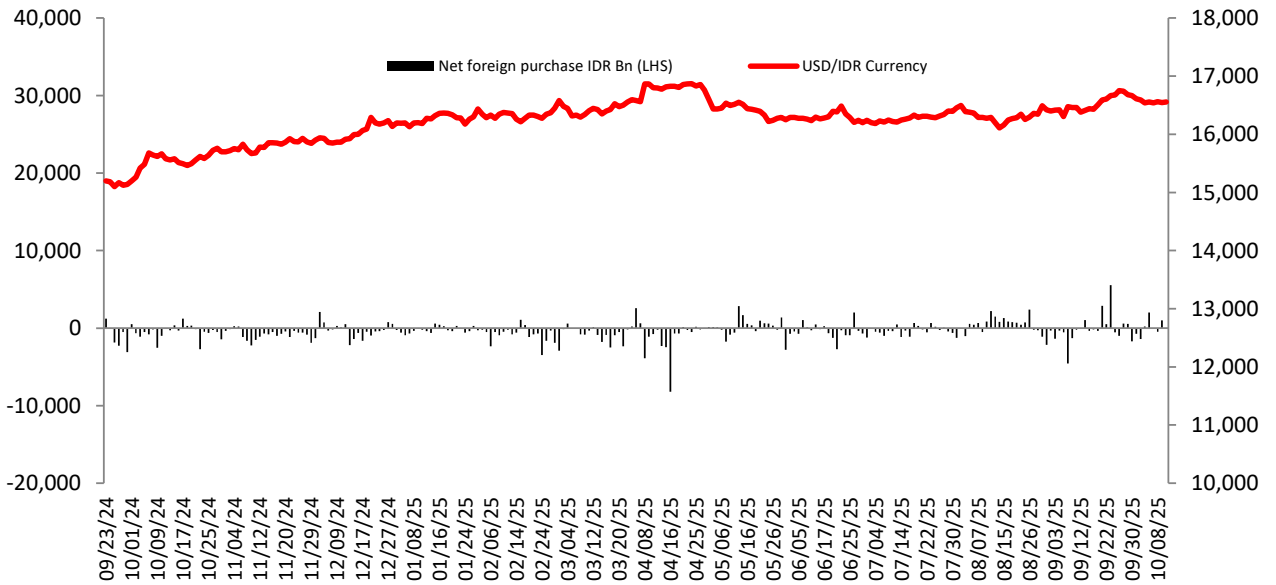
Indonesia bond market was calm today. Only few trades were seen throughout the day with light trading volume. Although the overall market tone was mixed and we noted some profit taking actions, no significant price action took place. IDR bond the prices ended the day unchanged from yesterday level. The yield of 5Y/10Y/15Y/20Y benchmark closed the day at mid-yield of 5.36%/6.08%/6.57%/6.70% respectively.

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	100.4	0.0	4.4	5Y
FR91	FR0091 Govt	103.6	0.0	7.5	10Y
FR93	FR0093 Govt	100.2	0.0	5.7	15Y
FR92	FR0092 Govt	103.9	0.3	3.7	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.4	0.0	3.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	103.8	0.2		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	100.0	0.4		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,257.9	0.1	16.6	
Thailand	SET Index	1,288.2	(2.0)	(8.0)	
Korean Stock Exch.	KOSPI Index	3,610.6	1.7	50.5	
Straight Times	FSSTI Index	4,431.6	(0.2)	17.0	
Kuala Lumpur	KLCI Index	1,622.3	(0.5)	(1.2)	
Philippines	PCOMP Index	6,037.8	(0.3)	(7.5)	
Nikkei	NKY Index	48,088.8	(1.0)	20.5	
Hang Seng	HSI Index	26,290.3	(1.7)	31.1	
MSCI-Asia pacific	MXAP Index	224.9	0.4	23.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,358.4	(0.5)	9.0	
S&P 500	SPX Index	6,735.1	(0.3)	14.5	
Nasdaq	CCMP Index	23,024.6	(0.1)	19.2	
FTSE 100	UKX Index	9,496.6	(0.1)	16.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,553.0	(0.0)	(2.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,551.4	(0.4)	1.8
3 month	IDSWT3M Index	16,545.0	(0.3)	(2.4)
6 month	IDSWT6M Index	16,531.2	(0.4)	(2.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,558.7	(0.4)	(2.4)
6 month	IDFWT6M Index	16,540.1	(0.5)	(2.0)

*price as of 10/9/2025

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