

Daily Report Indonesia Market Wrap



FOR PROFESSIONAL
INVESTORS -
09/15/2026

EQUITY MARKET

Another Correction

JCI weakened and closed at 6,461 (-74 points or -1.13%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net outflow of IDR 349Bn today and rupiah slightly weakened to IDR 17,691/USD.

Banking stocks were negative as BBTN (-2.47%), BBNI (-3.1%), BMRI (-2.25%), BBKA (-1.54%), and BBRI (-2.35%) all declined. Consumer names were mixed as KLBF (+4.76%) and INDF (+0.34%) advanced, while GGRM (-5.92%), HMSP (-8.33%), and ICBP (-3.16%) retreated. Properties stocks were negative as BSDE (-1.54%), LPKR (-3.28%), CTRA (-1.63%), and SMRA (-13.25%) all declined. Material names were negative as TPIA (-1.61%) and BRPT (-2.11%) all declined. Other movers were ELTY (+9.09%), APIC (+6.76%), BYAN (-8.11%), and IMPC (-5.8%).

The venture capital industry's net non-performing financing (NPF) stood at 2.02% in July 2026, up from 1.7% in July 2025. Meanwhile, the OJK recorded a 0.46% YoY contraction in the value of venture capital financing to Rp16.3tn during 7M26.

BOND MARKET

Auction Day

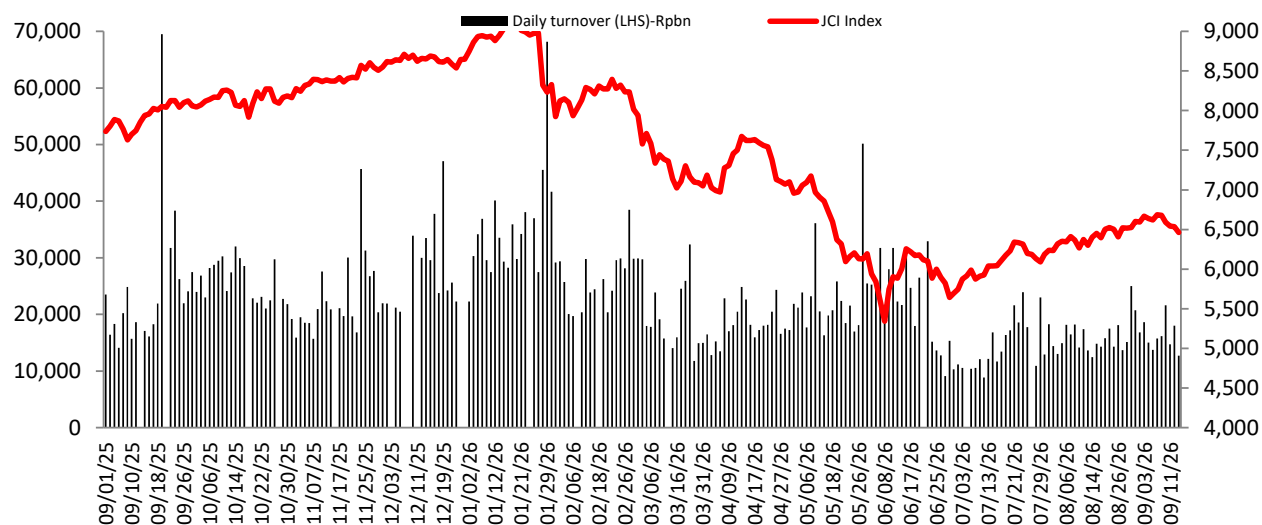
Indonesia bond market closed the day weaker. We witnessed several sporadic activity although the volume was very limited following UST yield that surged to 5.02%. The yield curve was higher around 4 – 8 bps despite two ways trading today. Some bidders turned defensive and stood sideline ahead of Feds meeting on Thursday. In the afternoon session, MOF announced the incoming bids in today auction which was recorded at IDR 60.9675Tn, lower demand compared to previous auction at IDR 65.9651Tn. The MoF managed to upsize the issuance to IDR 34Tn from initial target IDR 32Tn. The series absorbed (against incoming bids) on the auction were IDR 1Tn (IDR 1.697Tn) 1M SPN, IDR 1Tn (IDR 3.263Tn) 3M SPN, IDR 6.4Tn (IDR 7.776Tn) 12M SPN, IDR 12.8Tn (IDR 23.609Tn) 5Y FR110, IDR 4.95Tn (IDR 9.385Tn) 10Y FR111, IDR 1.6Tn (IDR 5.1275Tn) 15Y FR106, IDR 3.8Tn (IDR 5.1275Tn) 20Y FR107, IDR 1.35Tn (IDR 2.746Tn) 30Y FR102 and IDR 1.1Tn (IDR 1.946Tn) 40Y FR105 at weighted average yields of 6.59%, 6.69%, 6.89%, 7.05%, 7.21%, 7.25%, 7.25%, 7.26% and 7.26% respectively. Rupiah closed at 17,694.



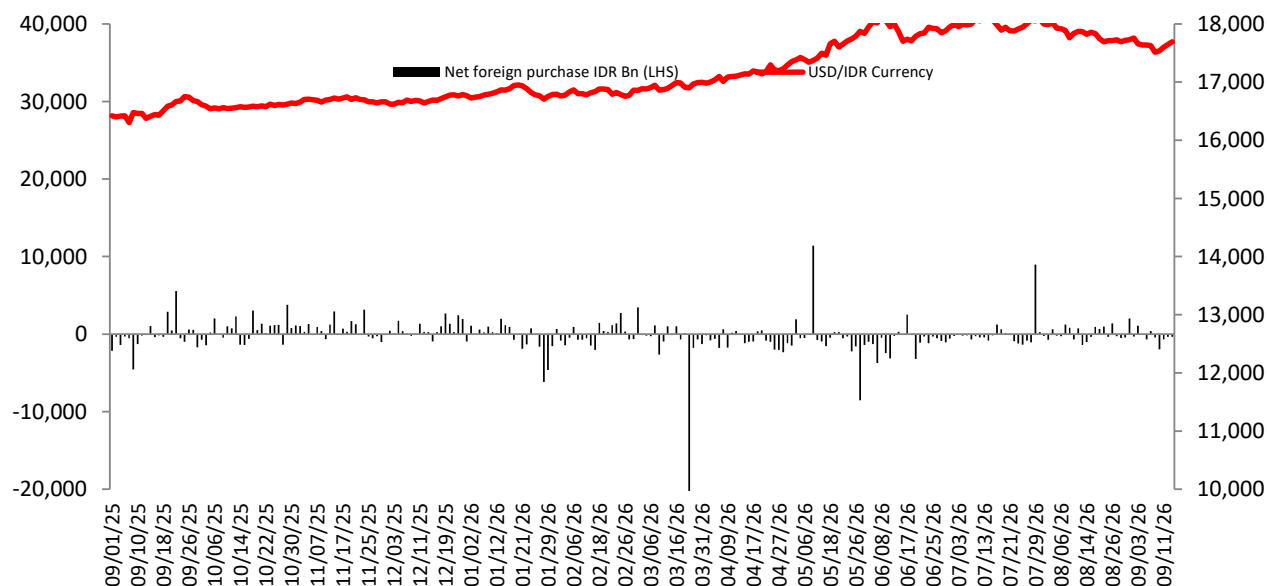
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GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR109	FR0109 Govt	95.6	(0.2)	(6.1)	5Y
FR108	FR0108 Govt	95.4	(0.1)	(7.3)	10Y
FR106	FR0106 Govt	99.3	(0.1)	(7.4)	15Y
FR107	FR0107 Govt	99.1	(0.4)	(7.3)	20Y
PBS030	INDOIS 5 ½ 07/15/28	98.5	(0.1)	(3.2)	15-7-2028
PBS040	INDOIS 5 11/15/30	92.8	(0.1)	(4.9)	15-11-2030
PBSG002	INDOIS 5 ½ 10/15/33	92.8	0.0	(5.2)	15-10-2033
PBS034	INDOIS 6 ½ 06/15/39	94.9	0.0	(6.4)	15-06-2039
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,461.2	(1.1)	(25.3)	
Thailand	SET Index	1,578.7	(0.8)	25.3	
Korean Stock Exch.	KOSPI Index	6,627.3	(0.9)	57.3	
Straight Times	FSSTI Index	5,638.6	(1.4)	21.4	
Kuala Lumpur	KLCI Index	1,679.2	(1.1)	(0.1)	
Philippines	PCOMP Index	6,007.8	(1.1)	(0.7)	
Nikkei	NKY Index	63,484.1	(0.0)	26.1	
Hang Seng	HSI Index	24,667.2	(1.0)	(3.8)	
MSCI-Asia pacific	MXAP Index	275.2	(0.9)	20.9	
<u>Global Indices</u>					
Dow Jones	INDU Index	52,421.2	(0.3)	9.1	
S&P 500	SPX Index	7,620.0	(0.5)	11.3	
Nasdaq	CCMP Index	26,186.4	(0.6)	12.7	
FTSE 100	UKX Index	10,651.4	(0.4)	7.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	17,691.0	(0.2)	(5.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	17,655.6	0.3	5.6
3 month	IDSWT3M Index	17,651.1	0.2	(5.7)
6 month	IDSWT6M Index	17,658.9	0.3	(5.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	17,676.7	0.2	(5.7)
6 month	IDFWT6M Index	17,750.0	(0.2)	(5.8)

*price as of 9/14/2026

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