FOR PROFESSIONAL INVESTORS - 06/17/2025

DAILY REPORT
INDONESIA MARKET WRAP

EQUITY MARKET

Rebound

JCI advanced and closed at 7,156 (+38 points or +0.54%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 143Bn today and rupiah was stabilized at IDR 16,280/USD.

Banking stocks were mixed as BBCA (+1.68%) and BBTN (+4.35%) inched higher, while BBNI (-0.91%), BMRI (-0.97%), and BBRI (-0.75%) weakened. Consumer names were mixed as KLBF (+4.25%) and ICBP (+0.47%) up, while MYOR (-0.96%), INDF (-0.3%), and UNVR (-1.33%) corrected. Material stocks were mixed as TPIA (+3.28%) inched higher, while BRPT (-2.24%) retreated. Properties names were positive as CTRA (+3.13%), PWON (+2.11%), BSDE (+1.72%), and SMRA (+1%) all closed higher. Other movers were KPIG (+15.28%), MLPT (+10.6%), ENRG (-4.32%), and MIKA (-3.85%).

The Ministry of Maritime Affairs and Fisheries has allocated a budget of Rp2.2 trillion for the development of 100 Red and White Fisherman Villages in 2025. This program is prepared to boost the productivity of fishing communities.

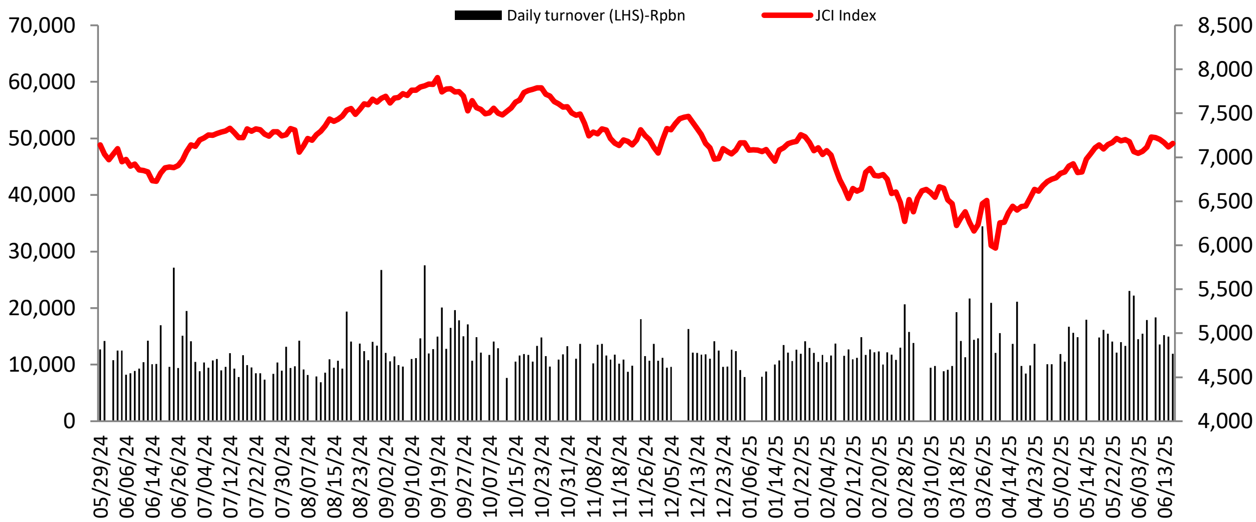
BOND MARKET

Auction Day

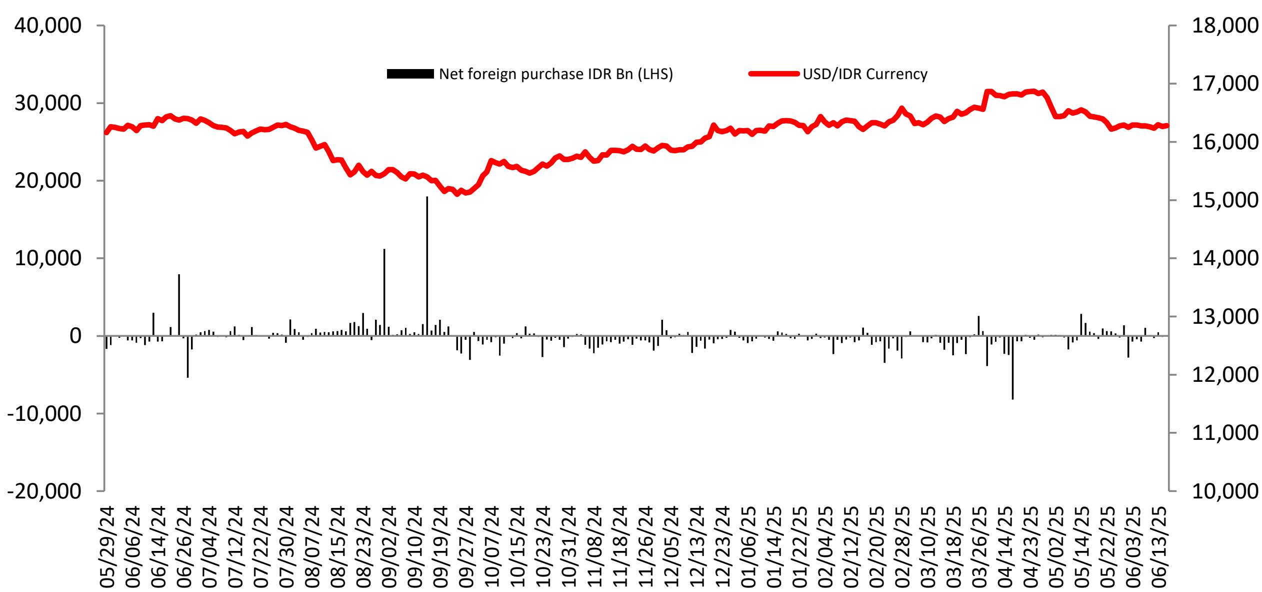
Indonesia bond market opened biddish today ahead of tomorrow's BI meeting. In the afternoon session, MOF announced the incoming bids was recorded IDR 81.0341 Tn (vs last IDR 77.179 Tn). Right after the announcement, we heard 1Y PBS32 / 3Y PBS30 got traded at 98.85 (5.99%)/98.95 (6.25%). MoF managed to upsized the issuance to IDR 30Tn (initial target: IDR 26Tn). The series absorbed (against incoming bids) on the auction were IDR 2Tn (IDR 4.843Tn) 12mo SPN, IDR 6.1Tn (IDR 20.228Tn) 5Y FR104, IDR 8.75Tn (IDR 32.071Tn) 10Y FR103, IDR 7.6Tn (IDR 13.639Tn) 15Y FR106, IDR 3.7Tn (IDR 6.321Tn) 20Y FR107, IDR 0.65Tn (IDR 1.363Tn) 30Y FR102 and IDR 1.2Tn (IDR 1.568Tn) 40Y FR105 at weighted average yields of 5.94%, 6.33%, 6.72%, 6.99%, 7.04%, 7.02% and 7.1% respectively. No winner 3mo SPN.

GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
Bonds					
FR90	FR0090 Govt	98.3	0.1	2.2	5Y
FR91	FR0091 Govt	99.2	(0.1)	2.9	10Y
FR93	FR0093 Govt	96.3	0.1	1.6	15Y
FR92	FR0092 Govt	101.0	0.0	0.9	20Y
PBS036	INDOIS 5 ⅜ 08/15/25	100.0	(0.0)	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	99.8	0.0	1.5	15-01-2027
PBS037	INDOIS 6 ⅞ 03/15/36	99.8	0.0	0.1	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.3	(0.0)	1.4	15-06-2047
Asia Pacific					
Jakarta Composite	JCI Index	7,155.9	0.5	1.1	
Thailand	SET Index	1,115.0	0.0	(20.4)	
Korean Stock Exch.	KOSPI Index	2,950.3	0.1	23.0	
Straight Times	FSSTI Index	3,930.6	0.6	3.8	
Kuala Lumpur	KLCI Index	1,511.6	(0.5)	(8.0)	
Philipines	PCOMP Index	6,369.2	0.2	(2.4)	
Nikkei	NKY Index	38,536.7	0.6	(3.4)	
Hang Seng	HSI Index	23,980.3	(0.3)	19.5	
MSCI-Asia pacific	MXAP Index	199.6	0.7	9.9	
Global Indices					
Dow Jones	INDU Index	42,515.1	0.8	(0.1)	
S&P 500	SPX Index	6,033.1	0.9	2.6	
Nasdaq	CCMP Index	19,701.2	1.5	2.0	
FTSE 100	UKX Index	8,829.9	(0.5)	8.0	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	16,280.0	(0.1)	(1.1)
Swap-IDR				
1 month	IDSWT1M Index	16,286.6	(0.0)	0.2
3 month	IDSWT3M Index	16,310.0	0.1	(1.0)
6 month	IDSWT6M Index	16,274.0	(0.2)	(0.8)
Forward-IDR				
3 month	IDFWT3M Index	16,318.9	0.0	(0.9)
6 month	IDFWT6M Index	16,342.0	(0.1)	(0.7)

*price as of 6/16/2025

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