

FOR PROFESSIONAL INVESTORS - 06/05/2026

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Accelerated Selling

JCI weakened and closed at 5,595 (-245 points or -4.2%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR -3.7Tn today and rupiah was stabilized at IDR 18,020/USD.

Banking stocks were negative as BBTN (-6.17%), BBNI (-6.14%), BMRI (-3.27%), BBRI (-2.49%), and BBKA (-6.45%) all weakened. Consumer names were negative as HMSP (-4.55%), GGRM (-6.11%), ICBP (-2.64%), KLBF (-3.47%), and INDF (-3.2%) all corrected. Telco stocks were negative as EXCL (-0.75%), ISAT (-8.74%), and TLKM (-4.83%) all corrected. Material names were negative as TPIA (-5.09%) and BRPT (-8.36%) all declined. Other movers were DWGL (+8.2%), CTBN (+6.87%), IMPC (-14.76%), and PGAS (-11.63%).

The revised P2SK Law, passed on Thursday, June 4, 2026, includes 17 major changes to the financial sector. One crucial point is providing a legal basis for Danantara to issue special debt securities such as Patriot Bonds and Merah Putih Bonds, which are expected to strengthen development financing and mobilize national capital.

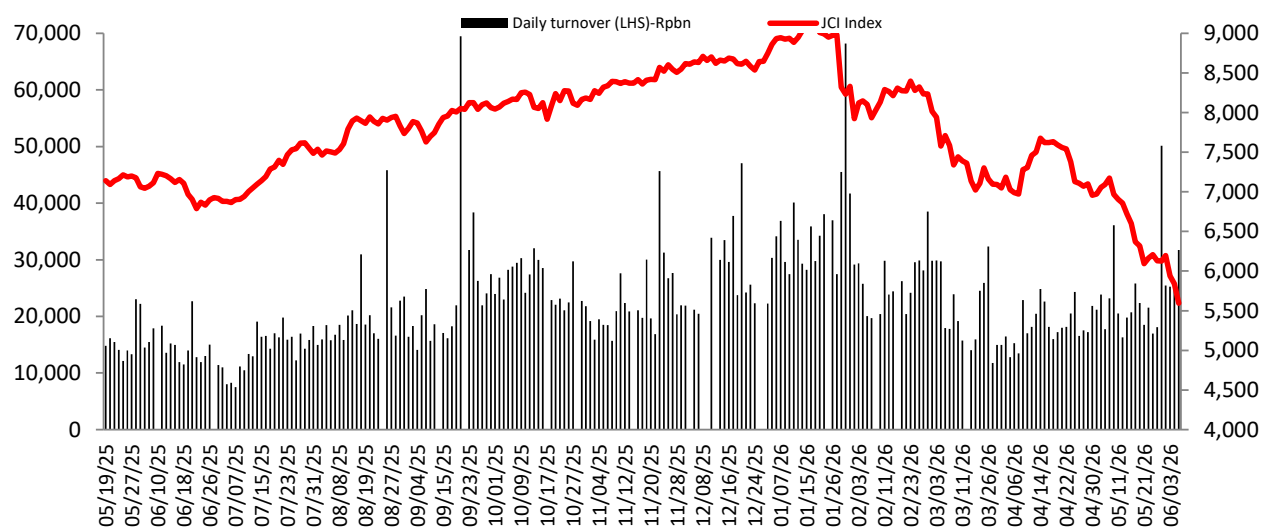
BOND MARKET

HIGHER YIELD

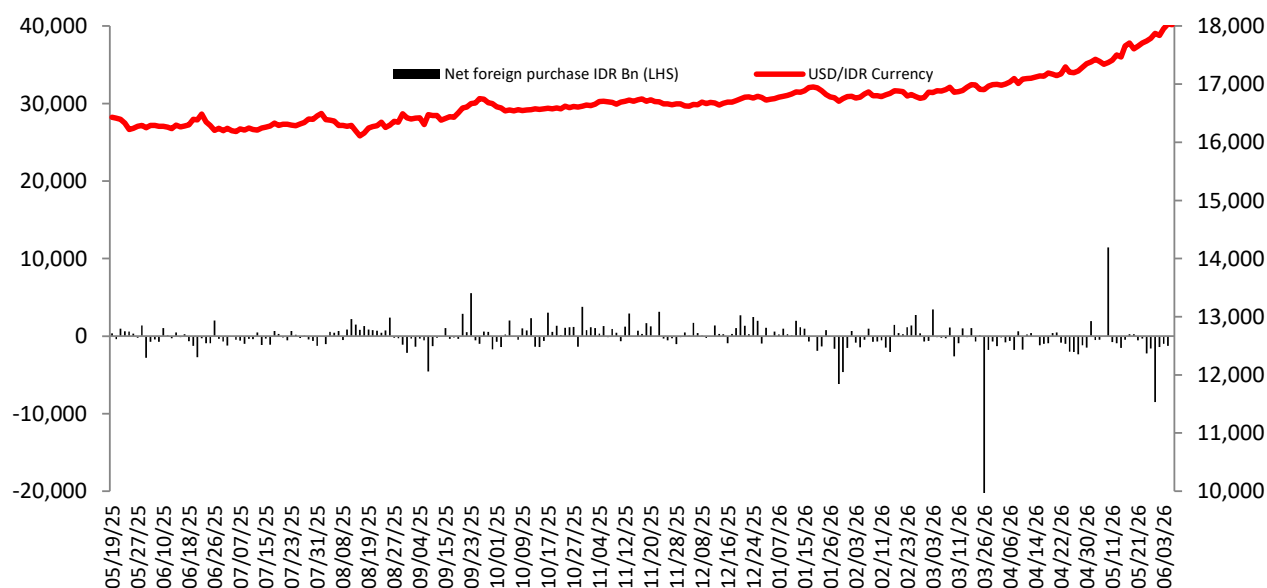
Indonesia bond market closed the day with higher yield around 8 – 11 bps followed by rupiah broke above 18,000 and UST touched at 4.48%. Selling pressure from interbank and foreign names remained thick in the air. Although we saw few bottom fishers came into the market, the buying failed to lend a support as prices went further south. The 5Y and 10Y closed both at 6.82% today with eyes focus on tomorrow SRBI auction.

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	98.5	(0.0)	(1.8)	5Y
FR91	FR0091 Govt	97.6	(0.3)	(4.8)	10Y
FR93	FR0093 Govt	96.3	(0.3)	(5.0)	15Y
FR92	FR0092 Govt	101.7	(0.4)	(4.4)	20Y
PBS036	INDOIS 5 ½ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	99.6	(0.0)	(1.6)	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.5	0.0	(3.6)	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	100.3	(0.0)	(1.5)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	5,594.8	(4.2)	(35.3)	
Thailand	SET Index	1,583.4	(0.7)	25.7	
Korean Stock Exch.	KOSPI Index	8,160.6	(5.5)	93.6	
Straight Times	FSSTI Index	5,050.0	(0.3)	8.7	
Kuala Lumpur	KLCI Index	1,693.4	0.6	0.8	
Philippines	PCOMP Index	5,938.4	0.4	(1.9)	
Nikkei	NKY Index	66,588.1	(1.3)	32.3	
Hang Seng	HSI Index	24,962.0	(1.2)	(2.6)	
MSCI-Asia pacific	MXAP Index	278.7	(1.6)	22.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	51,561.9	1.7	7.3	
S&P 500	SPX Index	7,584.3	0.4	10.8	
Nasdaq	CCMP Index	26,831.0	(0.1)	15.4	
FTSE 100	UKX Index	10,397.0	0.4	4.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	18,020.0	0.1	(7.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	18,043.9	0.5	7.9
3 month	IDSWT3M Index	18,048.2	0.5	(8.0)
6 month	IDSWT6M Index	18,045.4	0.6	(8.0)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	18,094.7	0.6	(8.2)
6 month	IDFWT6M Index	18,162.8	0.0	(8.3)

*price as of 6/4/2026

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