



FOR PROFESSIONAL INVESTORS - 10/03/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Higher

JCI advanced and closed at 8,118 (+47 points or +0.59%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 200Bn today and rupiah slightly strengthened to IDR 16,540/USD.

Banking stocks were mixed as BBKA (+0.33%) and BNL (+2.14%) inched higher, while MEGA (-2.06%), BBRI (-0.54%), and BMRI (-1.15%) down. Consumer names were mostly positive as INDF (+1.78%), UNVR (+2.51%), HMSP (+2.5%), and ICBP (+0.53%) all rose, except KLBF (-1.82%). Telco stocks were mixed as EXCL (+4.78%) rose, TLKM (-1.92%) weakened, and FREN unchanged. Mining names were mostly positive as TINS (+18.02%), ANTM (+2.89%), INDY (+2.54%), and INCO (+0.46%) all up, except ADRO (-0.6%). Other movers were BUVA (+25%), RAJA (+24.85%), PYFA (-9.52%), and TOWR (-7.08%).

The house of representatives (DPR) is accelerating the formation on regulation on zero over-dimension over-loading (ODOL) policy and this is set to be released soon.

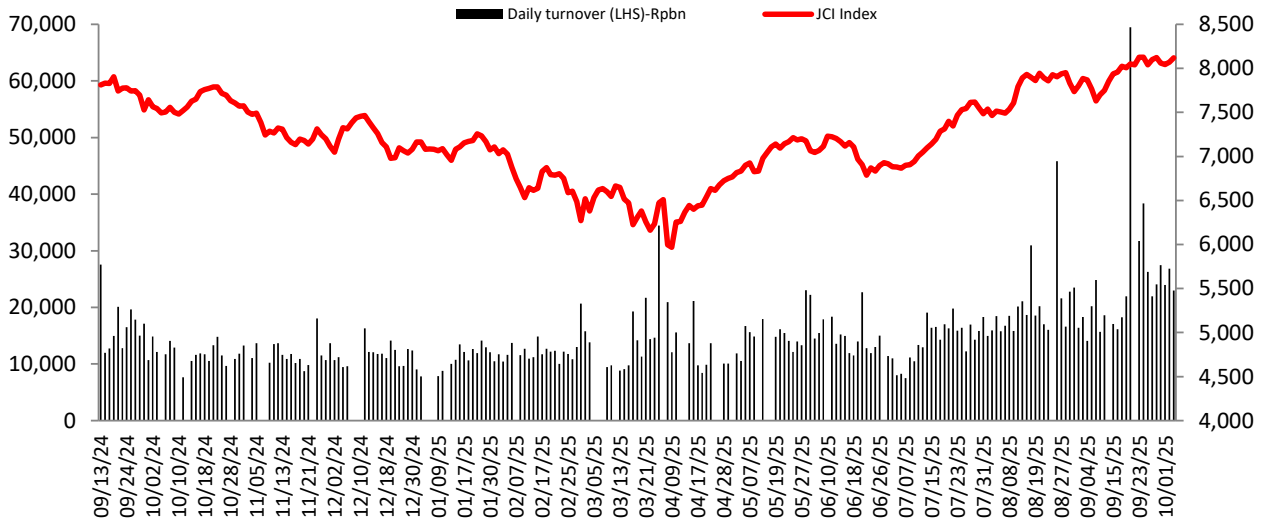
BOND MARKET

Late Buying

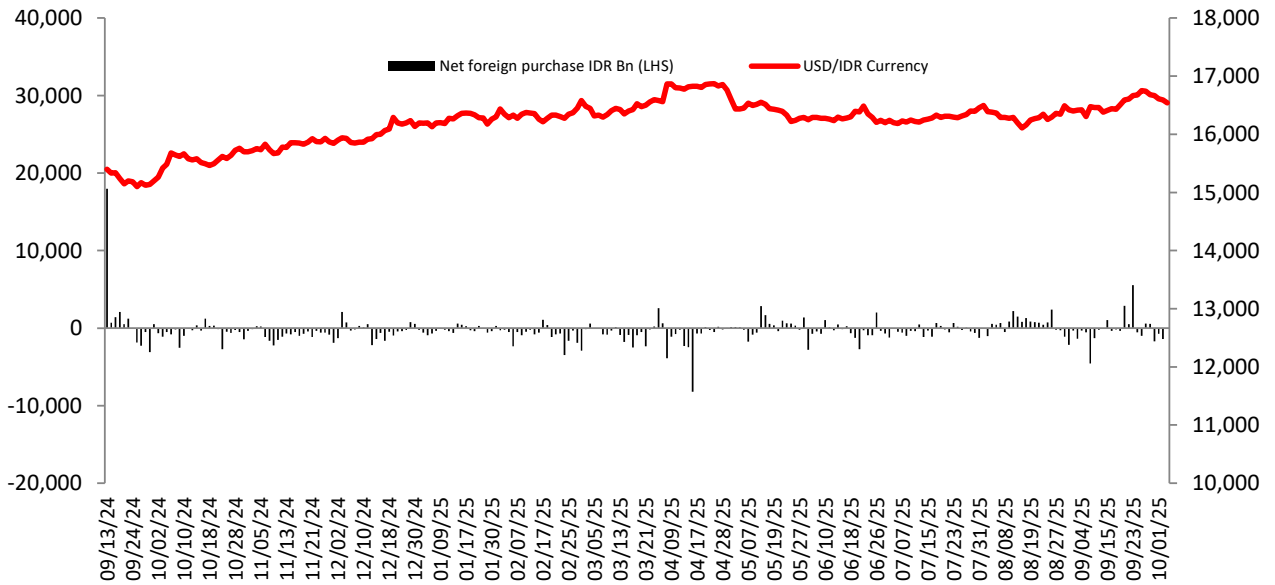
Indonesia bond market start the day with wider and softer tone. In the morning session, nothing much happened in the bond market. As soon as London market opened, Rupiah broke below 16,600 level. Several buying activities were seen, especially on 10Y above until the trading session end. MoF reduced its auction issuance from 27Tn to 23Tn next week where its marking the first Q4 2025 auction calendar Overall, IDR bonds yield went down 3 – 6 bps compared to yesterday closing.

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	100.3	0.0	4.2	5Y
FR91	FR0091 Govt	102.9	0.1	6.8	10Y
FR93	FR0093 Govt	99.6	0.1	5.0	15Y
FR92	FR0092 Govt	103.2	0.1	3.1	20Y
PBS036	INDOIS 5 ¾ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.4	0.1	3.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	102.4	(0.0)		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.7	(0.0)		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,118.3	0.6	14.7	
Thailand	SET Index	1,293.6	0.4	(7.6)	
Korean Stock Exch.	KOSPI Index	3,549.2	2.7	47.9	
Straight Times	FSSTI Index	4,412.0	0.4	16.5	
Kuala Lumpur	KLCI Index	1,635.1	(0.2)	(0.4)	
Philippines	PCOMP Index	6,108.9	1.1	(6.4)	
Nikkei	NKY Index	45,769.5	1.9	14.7	
Hang Seng	HSI Index	27,140.9	(0.5)	35.3	
MSCI-Asia pacific	MXAP Index	222.6	0.8	22.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,519.7	0.2	9.3	
S&P 500	SPX Index	6,715.4	0.1	14.2	
Nasdaq	CCMP Index	22,844.1	0.4	18.3	
FTSE 100	UKX Index	9,487.7	0.6	16.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,540.0	0.3	(2.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,600.0	(0.4)	2.1
3 month	IDSWT3M Index	16,611.7	(0.3)	(2.8)
6 month	IDSWT6M Index	16,616.5	(0.4)	(2.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,622.2	(0.5)	(2.8)
6 month	IDFWT6M Index	16,640.6	(0.5)	(2.6)

*price as of 10/2/2025

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* PT BNP Paribas Asset Management (address: Sequis Tower, Lantai 29, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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