



FOR PROFESSIONAL INVESTORS - 12/01/2025

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Rebound

JCI slightly strengthened and closed at 8,549 (+40 points or +0.47%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR -120Bn today and rupiah was stabilized at IDR 16,659/USD.

Banking stocks were mixed as BBCA (+1.51%), BMRI (+0.62%), and BBNI (+1.17%) up, while PNBN (-4.18%) and BBRI (-0.27%) corrected. Consumer names were mixed as UNVR (+0.77%) and KLBF (+0.42%) inched higher, while MYOR (-1.38%), ICBP (-0.59%), and HMSP (-2.44%) retreated. Poultry stocks were positive as JPFA (+7.79%), CPIN (+1.73%), and MAIN (+6.12%) all inched higher. Telco names were mixed as TLKM (+3.99%) advanced, while EXCL (-1.04%) and ISAT (-2.09%) closed lower. Other movers were PADI (+34.43%), ENRG (+21.32%), RISE (-14.95%), and APIC (-14.1%).

President Prabowo Subianto requested that all national forces be deployed to deal with the flood and landslide disasters in Aceh, North Sumatra, and West Sumatra. President Prabowo Subianto headed to the areas affected by the major floods on Sumatra Island on Monday morning, December 1, 2025.

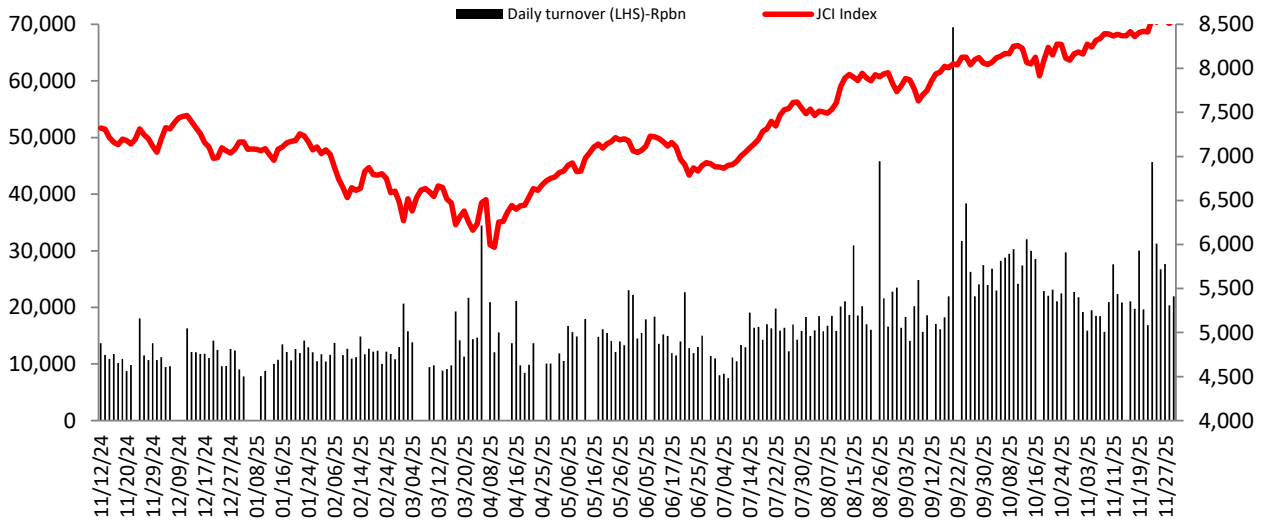
### BOND MARKET

#### Thin Support

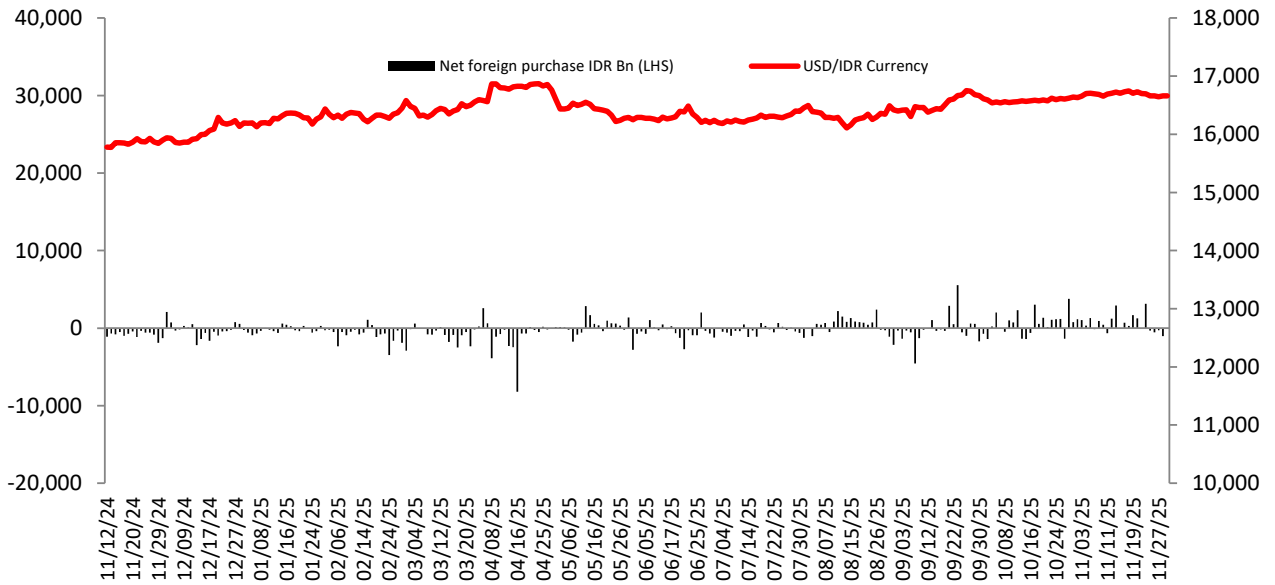
Indonesia bond market opened in wide spread today with 10Y UST post at 4.03%. Market trading was active, particularly in the afternoon session and nearing closing time with Rupiah traded stable against USD, closing at 16,663 level. Support came to secondary with 10Y benchmark series traded around 6.25% compare to last Friday's closing. At the end of the day, the yield curve was slid lower by about 2 – 5 bps ahead of tomorrow bond auction. Trading activities were mainly done in 5-10Y area. There will be fresh supply tomorrow as Indonesia Debt Management Office ("DMO") will hold conventional bond auction with IDR 23Tn issuance target. The series that will be issued are 1M SPN, 3M SPN, 12M SPN, 5Y FR109, 10Y FR108, 15Y FR106, 20Y FR107, 30Y FR102 and 40Y FR105. In the previous conventional auction, incoming bids reached IDR 78.89Tn and DMO issued IDR 28Tn.

# 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	100.2	0.0	4.2	5Y
FR91	FR0091 Govt	102.1	0.1	6.0	10Y
FR93	FR0093 Govt	100.7	(0.3)	6.2	15Y
FR92	FR0092 Govt	105.7	(0.2)	5.5	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.0	(0.1)	3.1	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	105.0	0.1		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	101.9	0.0		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,548.8	0.5	20.7	
Thailand	SET Index	1,276.6	1.6	(8.8)	
Korean Stock Exch.	KOSPI Index	3,920.4	(0.2)	63.4	
Straight Times	FSSTI Index	4,526.2	0.0	19.5	
Kuala Lumpur	KLCI Index	1,624.6	1.3	(1.1)	
Philippines	PCOMP Index	5,989.3	(0.5)	(8.3)	
Nikkei	NKY Index	49,303.3	(1.9)	23.6	
Hang Seng	HSI Index	26,033.3	0.7	29.8	
MSCI-Asia pacific	MXAP Index	223.2	(0.1)	22.9	
<u>Global Indices</u>					
Dow Jones	INDU Index	47,716.4	0.6	12.2	
S&P 500	SPX Index	6,849.1	0.5	16.4	
Nasdaq	CCMP Index	23,365.7	0.7	21.0	
FTSE 100	UKX Index	9,712.8	(0.1)	18.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,659.0	0.0	(3.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,670.0	0.1	2.6
3 month	IDSWT3M Index	16,663.7	0.1	(3.2)
6 month	IDSWT6M Index	16,640.0	(0.2)	(3.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,660.7	0.0	(3.0)
6 month	IDFWT6M Index	16,680.0	(0.2)	(2.8)

\*price as of 11/28/2025

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