



FOR PROFESSIONAL INVESTORS - 10/09/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Higher

JCI advanced and closed at 8,251 (+85 points or +1.04%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 1Tn today and rupiah was stabilized at IDR 16,545/USD.

Banking stocks were mostly positive as BBRI (+3.76%), BBKA (+2.37%), BMRI (+3.29%), and BBNI (+4.06%) all rose, except BNLI (-2.23%). Consumer names were mixed as KLBK (+2.36%), UNVR (+3.23%), and HMSP (+1.43%) closed higher, while ICBP (-1.09%) and INDF (-1.38%) retreated. Infra stocks were positive as TOWR (+3.92%), PGAS (+1.79%), JSMR (+0.79%), and TBIG (+0.53%) all rose. Mining names were mixed as TINS (+9.92%) and PTBA (+3.08%) rose, while INDY (-3.69%), ANTM (-3.3%), and ADRO (-6.49%) down. Other movers were POLU (+19.98%), FILM (+6.21%), MLPT (-14.98%), and IMPC (-5.6%).

Bank Indonesia (BI) reported Consumer Confidence Index (CCI) in Sept 2025 at 115, lowest since April 2022 (Sep 2024: 123.5, Aug 2025: 117.2)

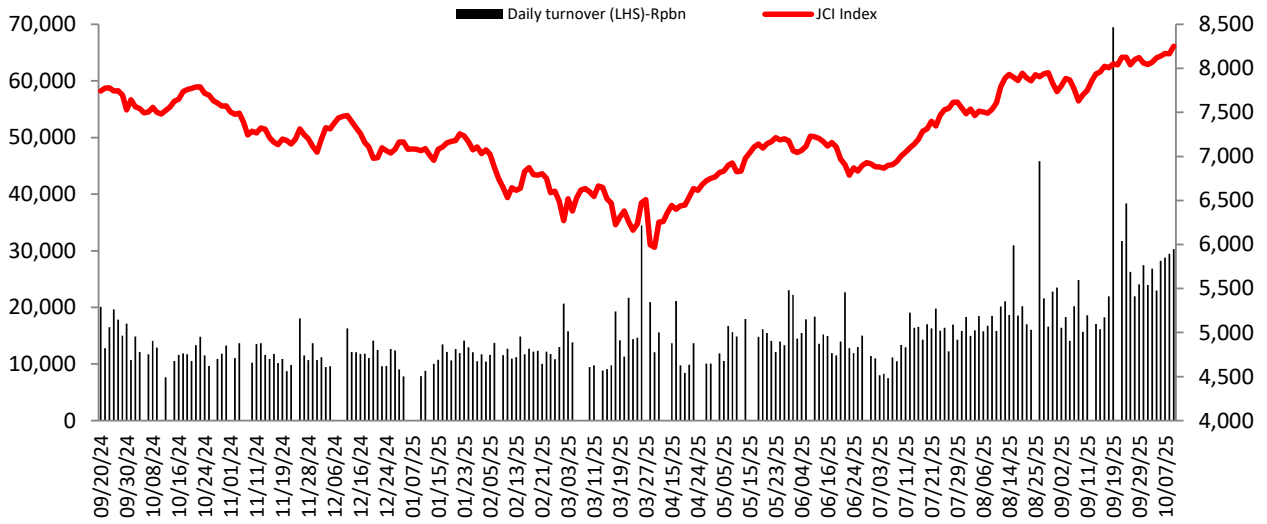
BOND MARKET

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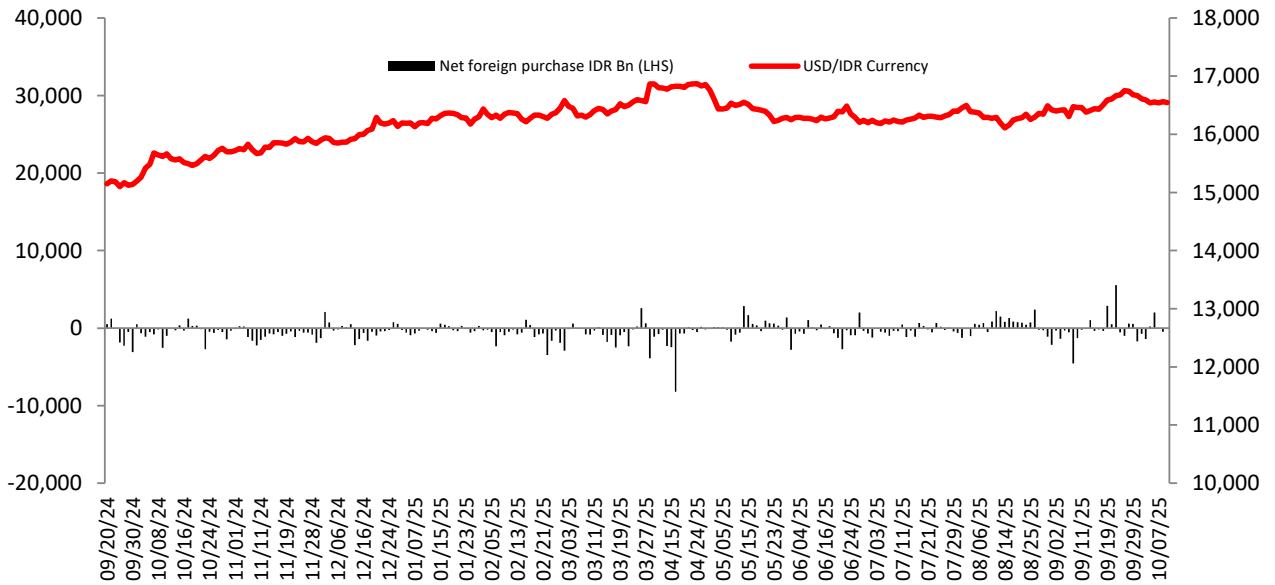
Indonesia bond market opened stronger today following UST 10Y yield plunged below 4.12% and Rupiah opened stronger at 16,520. Rally was seen as soon as market opened, led by 3Y PBS30 at 5.02%, 5Y FR104 at 5.35%, 7Y FR91 at 5.72%. The rally quickly lifted prices across the board as solid bid seen from onshore and offshore players. However nearing end of trading day, small taking profit action was seen in the market. Market closed with yields lower by 5 – 12 bps compared to yesterday closing level. Spot closed at 16,568.

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	100.4	0.0	4.4	5Y
FR91	FR0091 Govt	103.6	0.3	7.5	10Y
FR93	FR0093 Govt	100.1	0.2	5.6	15Y
FR92	FR0092 Govt	103.6	0.0	3.4	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.4	0.0	3.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	103.5	(0.1)		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	8,250.9	1.0	16.5	
Thailand	SET Index	1,314.0	0.7	(6.2)	
Korean Stock Exch.	KOSPI Index	3,549.2	2.7	47.9	
Straight Times	FSSTI Index	4,440.5	(0.4)	17.2	
Kuala Lumpur	KLCI Index	1,629.7	0.1	(0.8)	
Philippines	PCOMP Index	6,057.4	(0.7)	(7.2)	
Nikkei	NKY Index	48,580.4	1.8	21.8	
Hang Seng	HSI Index	26,752.6	(0.3)	33.4	
MSCI-Asia pacific	MXAP Index	224.1	(0.5)	23.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,601.8	(0.0)	9.5	
S&P 500	SPX Index	6,753.7	0.6	14.8	
Nasdaq	CCMP Index	23,043.4	1.1	19.3	
FTSE 100	UKX Index	9,512.0	(0.4)	16.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,545.0	0.1	(2.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,609.1	0.3	2.2
3 month	IDSWT3M Index	16,595.0	0.3	(2.7)
6 month	IDSWT6M Index	16,604.5	0.3	(2.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,616.7	0.2	(2.8)
6 month	IDFWT6M Index	16,616.5	0.2	(2.4)

*price as of 10/8/2025

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