



FOR PROFESSIONAL INVESTORS - 09/01/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Another Correction

JCI weakened and closed at 7,736 (-94 points or -1.21%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR - 2.2Tn today and rupiah slightly strengthened to IDR 16,421/USD.

Banking stocks were negative as MEGA (-1.19%), BBNI (-1.37%), BBCA (-0.93%), BMRI (-2.75%), and BBRI (-1.73%) all corrected. Consumer names were mostly negative as SIDO (-0.96%), GGRM (-2.64%), INDF (-0.67%), and KLBF (-3.29%) all retreated, except ICBP (+2.51%). Retailer stocks were negative as ACES (-2.63%), MAPI (-1.24%), MAPA (-3.17%), and AMRT (-1.82%) all declined. Properties names were negative as LPKR (-2.88%), BSDE (-3.69%), CTRA (-2.96%), and PWON (-4.84%) all closed lower. Other movers were MPRO (+14.07%), IMPC (+9.62%), HEAL (-3.32%), and BRPT (-2.74%).

The leadership of the House of Representatives (DPR) agreed to revoke several policies, including the amount of allowances for DPR members. Additionally, they are committed to imposing a moratorium on overseas visits.

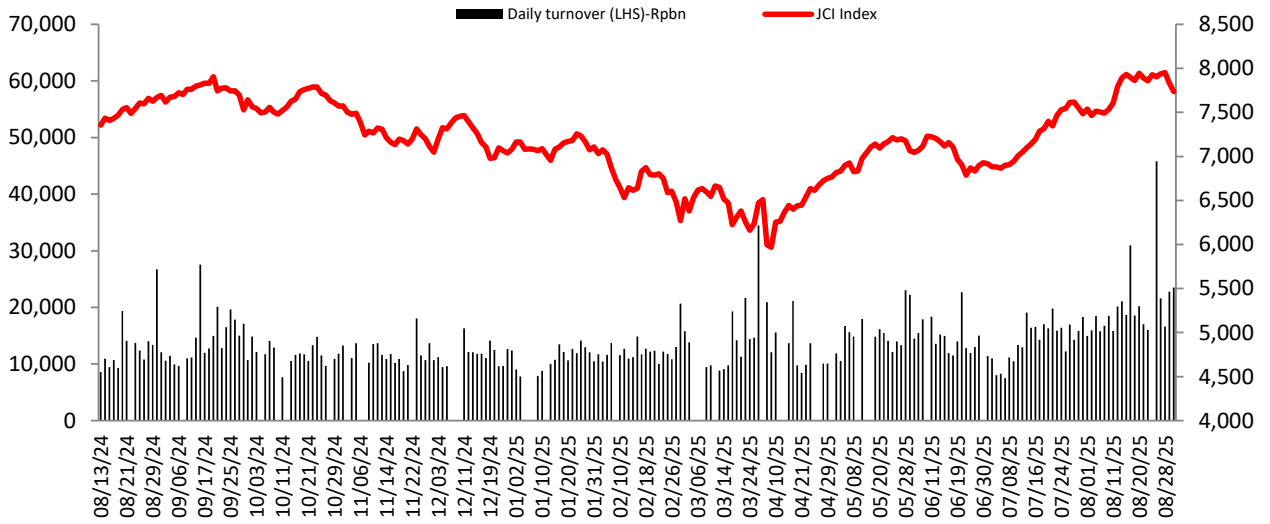
BOND MARKET

Steady

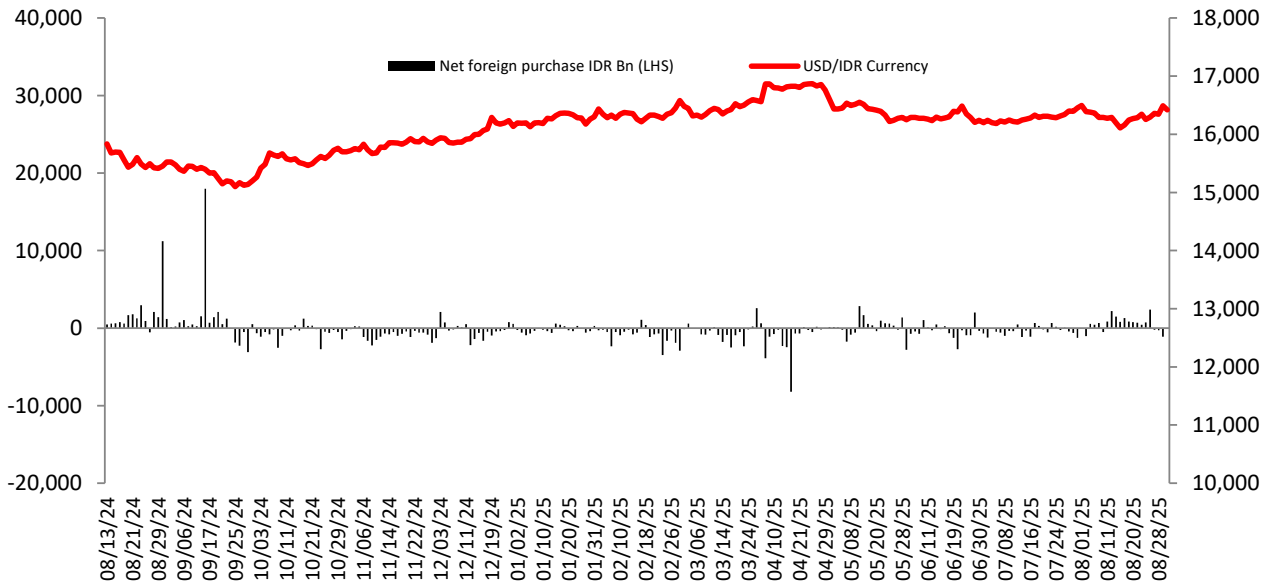
Today, we have US Labour Day and all eyes are still focused on domestic political situation. Indonesia bond market opened with higher yield around 3 – 6 bps. As soon as market opened, we heard selling actions from local banks and onshore foreign banks. Surprisingly, the selling action doesn't last long as we saw some dip buyer come to secondary market to collect at better price. We also heard state bank gave support on 3Y, 5Y and 10Y, hence capping the price action. The 5Y/10Y/15Y/20Y benchmark closed the day at mid yield of 5.76%/6.41%/6.74%/6.86%. Rupiah closed at 16,418.

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	99.7	0.1	3.7	5Y
FR91	FR0091 Govt	101.5	(0.2)	5.4	10Y
FR93	FR0093 Govt	98.9	(0.2)	4.3	15Y
FR92	FR0092 Govt	102.7	(0.4)	2.5	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.8	(0.2)	2.9	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.8	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	7,736.1	(1.2)	9.3	
Thailand	SET Index	1,244.5	0.6	(11.1)	
Korean Stock Exch.	KOSPI Index	3,142.9	(1.4)	31.0	
Straight Times	FSSTI Index	4,276.1	0.1	12.9	
Kuala Lumpur	KLCI Index	1,575.1	(0.8)	(4.1)	
Philippines	PCOMP Index	6,140.4	(0.2)	(5.9)	
Nikkei	NKY Index	42,188.8	(1.2)	5.8	
Hang Seng	HSI Index	25,617.4	2.2	27.7	
MSCI-Asia pacific	MXAP Index	211.5	(0.2)	16.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	45,544.9	(0.2)	7.1	
S&P 500	SPX Index	6,460.3	(0.6)	9.8	
Nasdaq	CCMP Index	21,455.6	(1.2)	11.1	
FTSE 100	UKX Index	9,208.7	0.2	12.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,421.0	0.4	(1.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,487.7	0.8	1.4
3 month	IDSWT3M Index	16,463.3	0.8	(1.9)
6 month	IDSWT6M Index	16,465.0	0.7	(2.0)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,473.7	0.6	(1.9)
6 month	IDFWT6M Index	16,511.0	0.7	(1.8)

*price as of 8/29/2025

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