



FOR PROFESSIONAL INVESTORS - 10/06/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Mixed

JCI slightly strengthened and closed at 8,140 (+22 points or +0.27%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 2Tn today and rupiah was stabilized at IDR 16,554/USD.

Banking stocks were negative as BBNI (-0.99%), BBKA (-0.33%), BNLI (-5.02%), BMRI (-1.16%), and BBRI (-0.81%) all corrected. Consumer names were mostly negative as KLBF (-0.93%), GGRM (-4.9%), INDF (-0.7%), and HMSP (-7.93%) all down, except UNVR (+1.36%). Material stocks were positive as BRPT (+3.9%) and TPIA (+3.63%) all advanced. Poultry names were negative as MAIN (-0.69%), JPFA (-0.95%), and CPIN (-1.65%) all weakened. Other movers were TRIM (+24.49%), POLU (+20%), FILM (-14.75%), and SHIP (-7.88%).

Government is expanding investment opportunities for the Giant Sea Wall national strategic project located in the northern side of the Java island which could take up to US\$80bn of funding.

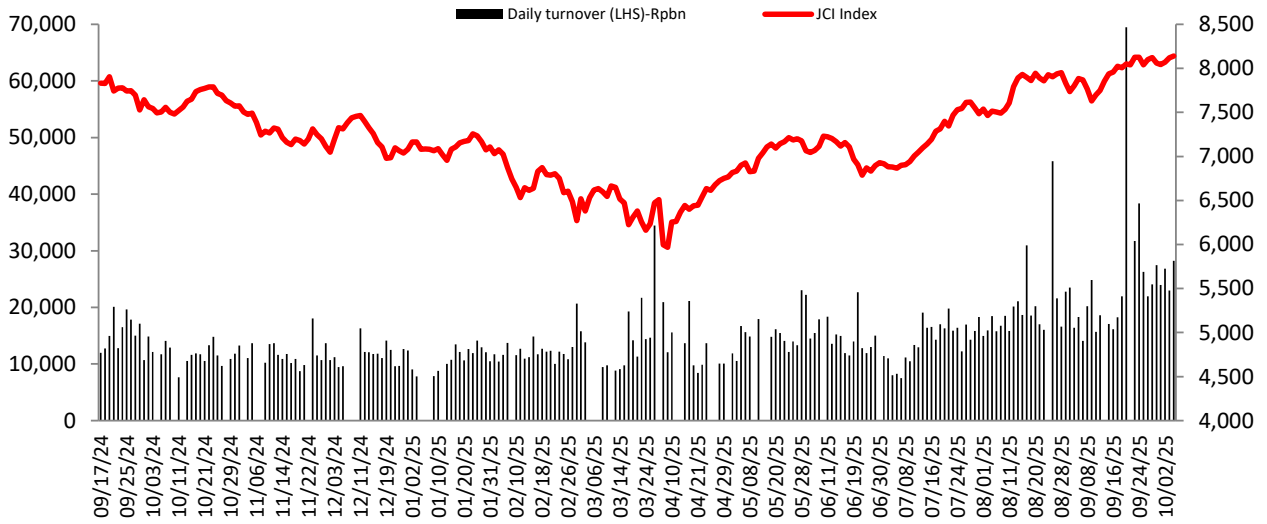
BOND MARKET

Slow Day

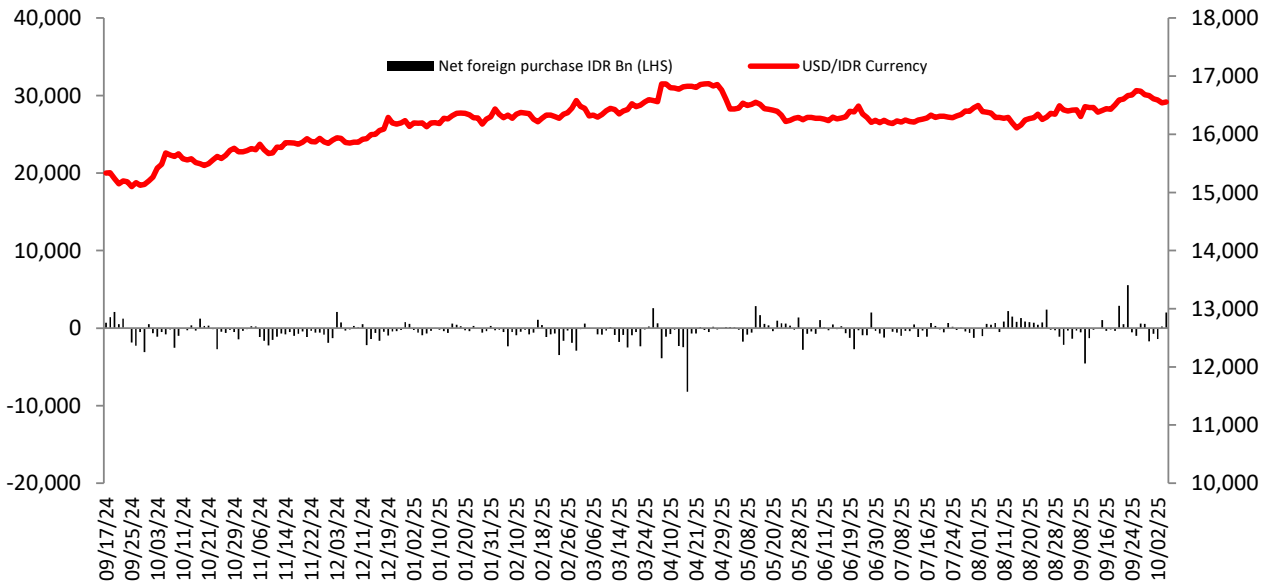
The bond market closed the day unchanged amid thin trading volume. Despite narrow bid and ask spread quoted throughout the day, no significant trade was heard at least from our side. Potential of additional supply tomorrow hindered bidders from putting aggressive bid. Bond prices were so stable. The trading volume was relatively light with the front end to belly tenor remained as market's favorite. In tomorrow's bonds auction, MoF is planning to issue IDR 23Tn, lower from previous auction target of IDR 27Tn. This is due to lower 4Q 2025 target issuance of IDR 180Tn compared to IDR 280.35Tn in 3Q (and same as 4Q24). The benchmark series 5Y/10Y/15Y/20Y closed at mid-yield of 5.44%/6.26%/6.67%/6.79% respectively.

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	4.3	5Y
FR91	FR0091 Govt	103.0	0.1	6.9	10Y
FR93	FR0093 Govt	99.6	(0.0)	5.0	15Y
FR92	FR0092 Govt	103.3	0.0	3.1	20Y
PBS036	INDOIS 5 ¾ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.3	(0.1)	3.4	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	102.4	0.0		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.6	0.0		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,139.9	0.3	15.0	
Thailand	SET Index	1,285.6	(0.6)	(8.2)	
Korean Stock Exch.	KOSPI Index	3,549.2	2.7	47.9	
Straight Times	FSSTI Index	4,421.7	0.2	16.7	
Kuala Lumpur	KLCI Index	1,638.1	0.2	(0.3)	
Philippines	PCOMP Index	6,000.3	(1.8)	(8.1)	
Nikkei	NKY Index	47,944.8	4.8	20.2	
Hang Seng	HSI Index	26,957.8	(0.7)	34.4	
MSCI-Asia pacific	MXAP Index	224.2	0.7	23.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,758.3	0.5	9.9	
S&P 500	SPX Index	6,715.8	0.0	14.2	
Nasdaq	CCMP Index	22,780.5	(0.3)	18.0	
FTSE 100	UKX Index	9,505.0	0.1	16.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,554.0	(0.1)	(2.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,600.0	(0.4)	2.1
3 month	IDSWT3M Index	16,608.8	(0.0)	(2.8)
6 month	IDSWT6M Index	16,586.0	(0.2)	(2.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,620.4	(0.0)	(2.8)
6 month	IDFWT6M Index	16,636.2	(0.0)	(2.5)

*price as of 10/3/2025

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