



FOR PROFESSIONAL INVESTORS - 11/07/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Pushing Higher

JCI advanced and closed at 8,395 (+58 points or +0.69%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 918Bn today and rupiah was stabilized at IDR 16,685/USD.

Banking stocks were mixed as BBCA (+1.46%) and BBNI (+1.35%) advanced, while PNB (-0.98%), MEGA (-0.61%), and BBRI (-0.5%) down. Consumer names were mixed as INDF (+1.42%) and KLBF (+1.2%) closed higher, while GGRM (-1.75%), HMSP (-1.72%), and UNVR (-3.44%) closed lower. Poultry stocks were negative as MAIN (-1.82%), JPFA (-4.96%), and CPIN (-2.94%) all retreated. Telco names were mixed as ISAT (+8.86%) in green, TLKM (-0.29%) down, and EXCL unchanged. Other movers were BUVA (+11.32%), SSIA (+9.97%), TCPI (-5.29%), and MAPI (-3.47%).

The Financial Services Authority (OJK) is reviewing the possibility of issuing new regulations that would divide Indonesian commercial banks into three groups. Core Capital Banks (KBMI) Group 1, with capital of Rp 3-6 trillion, will be encouraged to consolidate.

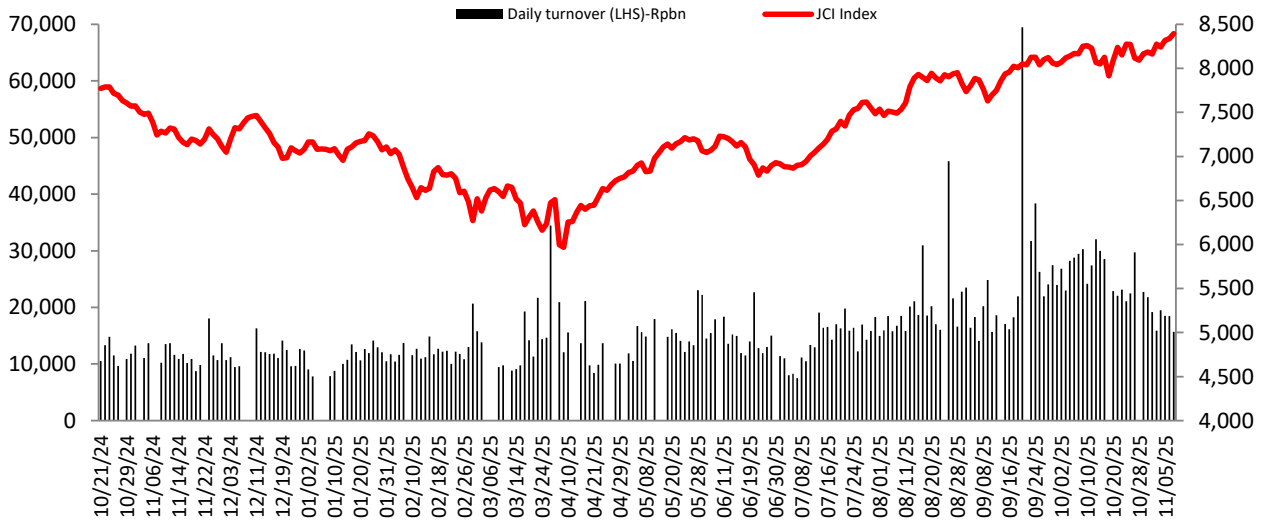
BOND MARKET

Lower Yield

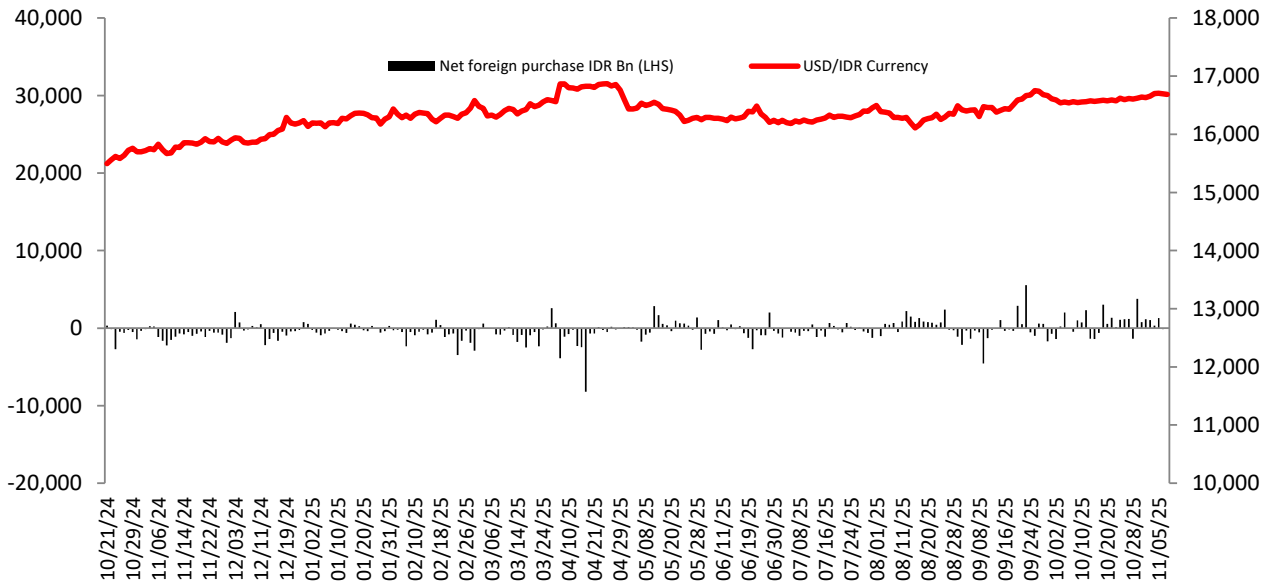
Indonesia bond market closed the day with bullish tone following lower UST yield. Buying interest remained thick in 10Y area, FR183 that traded as high as 103.1 (6.09%), while FR103 traded at 104.5 (6.12%). The 5Y FR104 yield dropped 7 bps to 5.46%, supported by local demand mostly on benchmark series. However, bond market was pretty quiet in the second session. Yield of front/mid/back are lower by 6/4/2 bps vs 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	100.5	0.0	4.5	5Y
FR91	FR0091 Govt	102.6	0.1	6.5	10Y
FR93	FR0093 Govt	101.0	0.0	6.5	15Y
FR92	FR0092 Govt	106.4	0.0	6.2	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.3	(0.0)	3.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	104.7	(0.4)		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	102.0	0.0		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,394.6	0.7	18.6	
Thailand	SET Index	1,304.3	(0.7)	(6.9)	
Korean Stock Exch.	KOSPI Index	3,953.8	(1.8)	64.8	
Straight Times	FSSTI Index	4,492.2	0.2	18.6	
Kuala Lumpur	KLCI Index	1,619.1	0.0	(1.4)	
Philippines	PCOMP Index	5,759.4	(1.3)	(11.8)	
Nikkei	NKY Index	50,276.4	(1.2)	26.0	
Hang Seng	HSI Index	26,241.8	(0.9)	30.8	
MSCI-Asia pacific	MXAP Index	227.5	1.2	25.3	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,912.3	(0.8)	10.3	
S&P 500	SPX Index	6,720.3	(1.1)	14.3	
Nasdaq	CCMP Index	23,054.0	(1.9)	19.4	
FTSE 100	UKX Index	9,704.5	(0.3)	18.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,685.0	0.1	(3.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,710.0	(0.1)	2.8
3 month	IDSWT3M Index	16,713.2	(0.1)	(3.5)
6 month	IDSWT6M Index	16,708.0	(0.1)	(3.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,708.5	(0.2)	(3.3)
6 month	IDFWT6M Index	16,723.9	(0.2)	(3.1)

*price as of 11/6/2025

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