

FOR PROFESSIONAL INVESTORS - 06/10/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rally

JCI advanced and closed at 7,231 (+117 points or +1.65%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 1Tn today and rupiah was stabilized at IDR 16,273/USD.

Banking stocks were positive as BMRI (+3.45%), BBKA (+1.96%), BBRI (+1.22%), BBNI (+2.26%), and BBTN (+3.93%) all inched higher. Consumer names were mixed as INDF (+0.61%) and HMSP (+0.76%) in green, while MYOR (-1.4%), ICBP (-0.47%), and KLBF (-1.25%) corrected. Mining stocks were mixed as PTBA (+3.14%) and ITMG (+1.13%) up, while ADRO (-0.47%), INCO (-5.66%), and ANTM (-5.51%) corrected. Hospital names were negative as SILO (-4.02%), MIKA (-2.8%), and HEAL (-4.42%) all declined. Other movers were MLPT (+19.95%), TPIA (+9.92%), KPIG (-3.25%), and MAPA (-2.86%).

Indonesia cement sales volume posted a decline of 7.4% YoY in 1Q25, due to slower economic activities and infrastructure development in the country. Kalimantan posted the slowest growth of -21.8% YoY, partly attributed to the slower development of the Nusantara capital city (IKN).

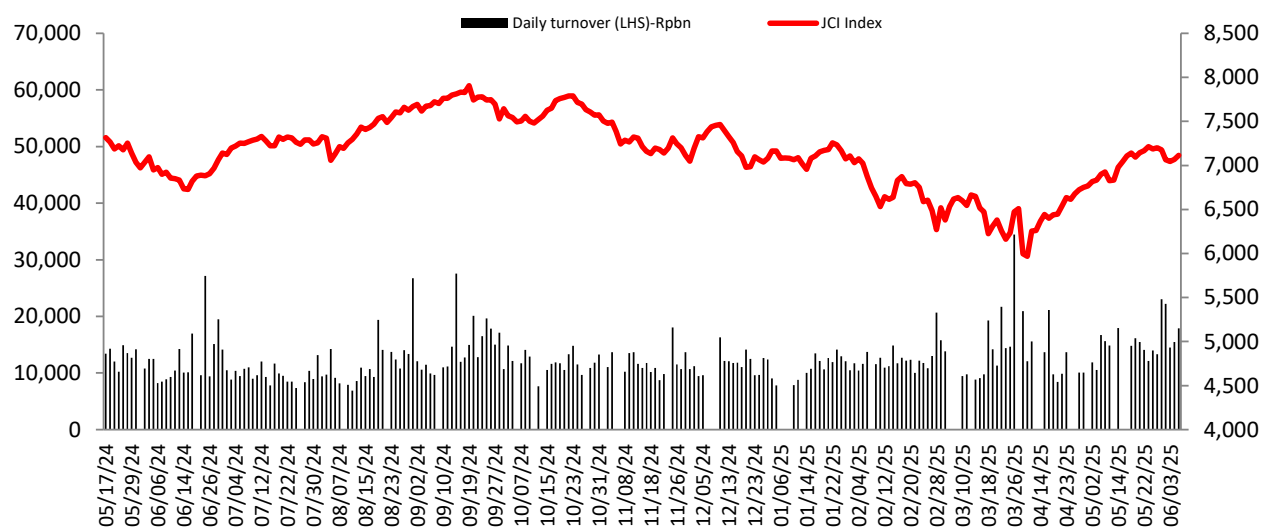
BOND MARKET

Sukuk Auction

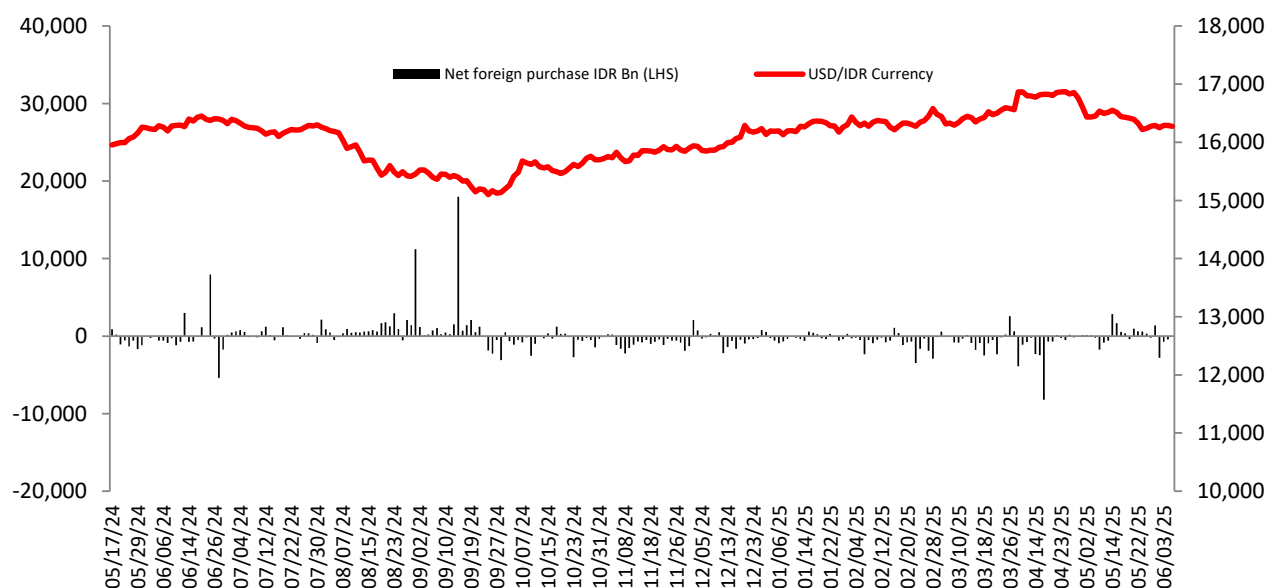
Indonesia bond market start the week softer. Back from holiday, onshore players start to collect the bonds to position for more BI rate cut. Unfortunately, the flow didn't last long as the yield increase invited the profit takers to the market and capped the morning gain. In today sukuk auction, MoF was received demand with total of IDR 36.89Tn incoming bids out of which MoF issued as per initial target of IDR 10Tn. The series absorbed (against incoming bids) on the auction were IDR 0.4Tn (IDR 1.11Tn) 6mo SPN-S, IDR 1.4Tn (IDR 4.468Tn) 9mo SPN-S, IDR 1.65Tn (IDR 8.675Tn) 2Y PBS3, IDR 3.05Tn (IDR 13.72Tn) 3Y PBS30, IDR 2.35Tn (IDR 2.43Tn) 4Y PBSG1, IDR 0.6Tn (IDR 3.2015Tn) 16Y PBS34, and IDR 0.55Tn (IDR 3.286Tn) 24Y PBS38 at cut off yields of 5.8%, 6%, 6.3%, 6.38%, 6.5%, 6.9% and 7% 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	98.3	0.0	2.1	5Y
FR91	FR0091 Govt	98.9	0.1	2.7	10Y
FR93	FR0093 Govt	96.1	(0.2)	1.3	15Y
FR92	FR0092 Govt	101.1	(0.1)	0.9	20Y
PBS036	INDOIS 5 ¾ 08/15/25	99.9	(0.0)	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	99.7	0.0	1.4	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.0	0.2	0.4	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.4	0.4	1.5	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,230.7	1.6	2.1	
Thailand	SET Index	1,139.7	0.4	(18.6)	
Korean Stock Exch.	KOSPI Index	2,871.9	0.6	19.7	
Straight Times	FSSTI Index	3,933.8	(0.1)	3.9	
Kuala Lumpur	KLCI Index	1,517.0	(0.2)	(7.6)	
Philippines	PCOMP Index	6,347.7	(0.9)	(2.8)	
Nikkei	NKY Index	38,211.5	0.3	(4.2)	
Hang Seng	HSI Index	24,162.9	(0.1)	20.5	
MSCI-Asia pacific	MXAP Index	199.1	1.0	9.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	42,761.8	(0.0)	0.5	
S&P 500	SPX Index	6,005.9	0.1	2.1	
Nasdaq	CCMP Index	19,591.2	0.3	1.5	
FTSE 100	UKX Index	8,867.9	0.4	8.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,273.0	0.0	(1.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,279.1	(0.1)	0.2
3 month	IDSWT3M Index	16,274.4	(0.2)	(0.8)
6 month	IDSWT6M Index	16,274.1	(0.2)	(0.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,298.7	(0.1)	(0.8)
6 month	IDFWT6M Index	16,331.4	(0.2)	(0.7)

*price as of 6/9/2025



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