



FOR PROFESSIONAL INVESTORS - 03/12/2026

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Slightly Lower

JCI slightly weakened and closed at 7,362 (-27 points or -0.37%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 1Tn today and rupiah slightly weakened to IDR 16,893/USD.

Banking stocks were mixed as BBKA (+1.1%) and BMRI (+1.64%) rose, while BBTN (-1.55%), BBNI (-0.23%), and BBRI (-0.28%) declined. Consumer names were mixed as ICBP (+4.48%) and INDF (+0.41%) in green, while GGRM (-2.47%), HMSP (-3.77%), and UNVR (-5.5%) retreated. Telco stocks were positive as TLKM (+0.67%), ISAT (+5.42%), and EXCL (+1.44%) all in green. Infra names were mixed as PGAS (+4.35%) and TBIG (+1.67%) up, while JSMR (-0.63%) and TOWR (-0.86%) corrected. Other movers were MSIN (+8.02%), ADRO (+6.38%), FILM (-8.1%), and BIPI (-7.69%).

The State Budget (APBN) recorded a deficit of Rp135.7tn as of the end of February 2026. Finance Minister Purbaya Yudhi Sadewa stated that the APBN deficit was equivalent to 0.53% of gross domestic product (GDP).

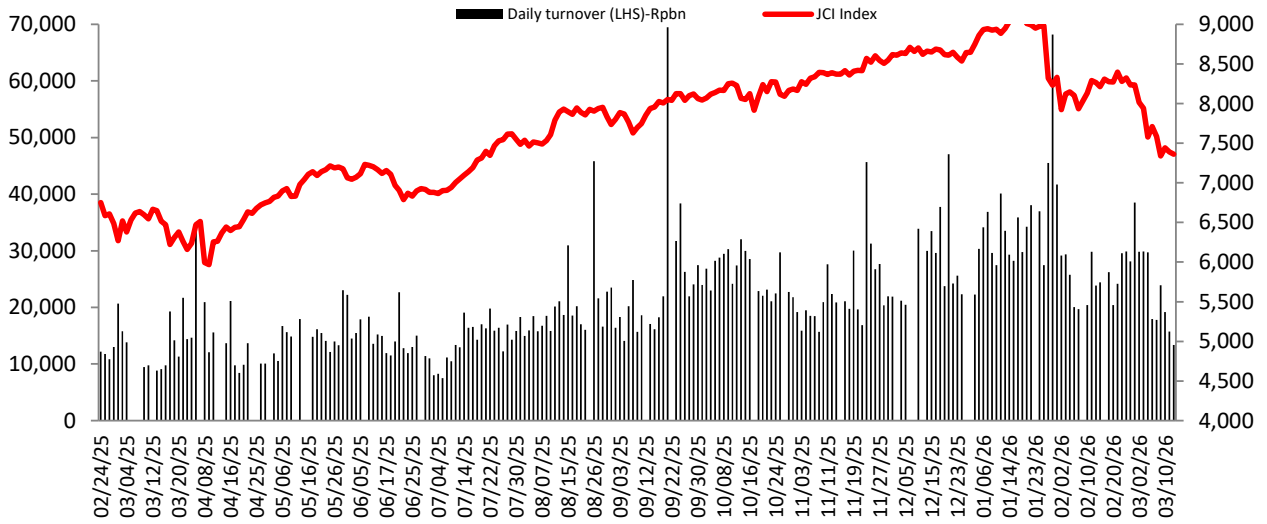
### BOND MARKET

#### Better Sentiment (Slightly)

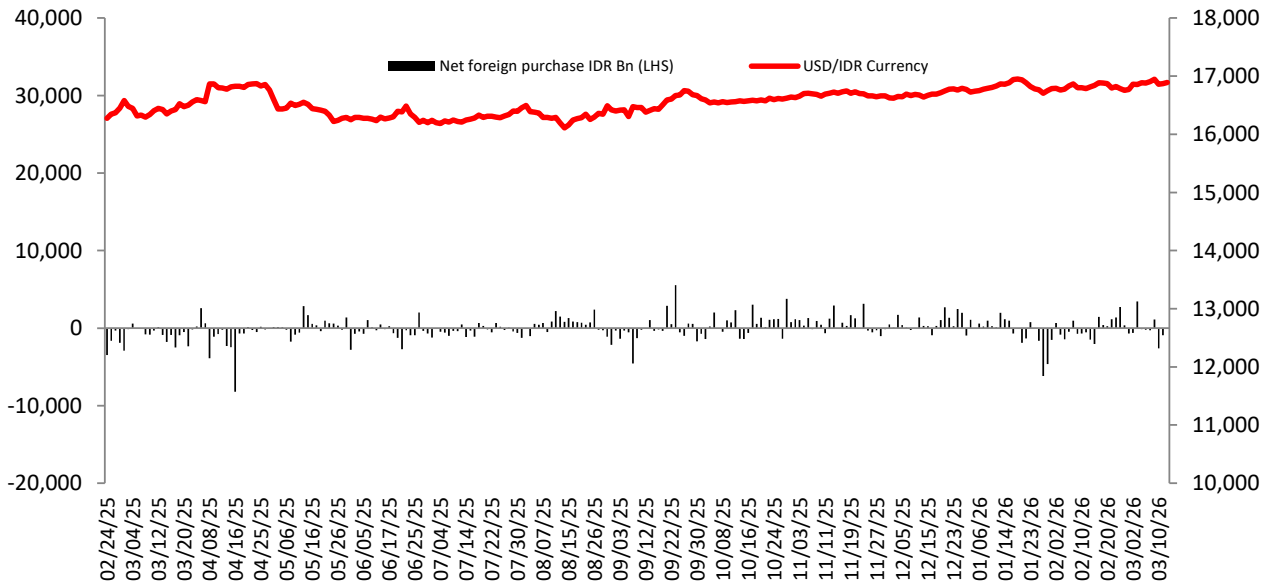
Indonesia bond market closed the day relatively weaker compared to yesterday closing. In the morning session, bond market opened wider and weaker. Nothing traded was heard at least from our side, bonds price remained defensive. In the afternoon session, bond market turned more lively. Buying interest was heard from state banks on 5Y – 10Y area. However, front end still feel pressured as yield went higher by 3-25bps. Overall, yield curve moved flatter throughout the day with benchmark series of 5/10/15/20Y closed at mid yield 6.19%/6.71%/6.85%/6.78%.

# 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	(0.0)	(0.6)	5Y
FR91	FR0091 Govt	99.4	(0.6)	(3.0)	10Y
FR93	FR0093 Govt	98.7	0.2	(2.7)	15Y
FR92	FR0092 Govt	103.0	(0.1)	(3.1)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.6	(0.0)	(0.6)	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	103.1	(0.2)	(2.0)	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	100.7	0.0	(1.1)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,362.1	(0.4)	(14.9)	
Thailand	SET Index	1,422.3	1.1	12.9	
Korean Stock Exch.	KOSPI Index	5,583.3	(0.5)	32.5	
Straight Times	FSSTI Index	4,855.3	(0.2)	4.5	
Kuala Lumpur	KLCI Index	1,711.0	0.1	1.8	
Philippines	PCOMP Index	6,113.6	(0.7)	1.0	
Nikkei	NKY Index	54,453.0	(1.0)	8.2	
Hang Seng	HSI Index	25,716.8	(0.7)	0.3	
MSCI-Asia pacific	MXAP Index	245.3	0.8	7.7	
<u>Global Indices</u>					
Dow Jones	INDU Index	47,417.3	(0.6)	(1.3)	
S&P 500	SPX Index	6,775.8	(0.1)	(1.0)	
Nasdaq	CCMP Index	22,716.1	0.1	(2.3)	
FTSE 100	UKX Index	10,286.2	(0.7)	3.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,893.0	(0.1)	(1.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,971.1	0.3	1.5
3 month	IDSWT3M Index	16,968.4	0.3	(1.6)
6 month	IDSWT6M Index	16,976.4	0.4	(1.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,993.3	0.2	(1.6)
6 month	IDFWT6M Index	17,033.0	0.3	(1.6)

\*price as of 3/11/2026

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