



FOR PROFESSIONAL INVESTORS - 04/13/2026

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

STILL UP

JCI advanced and closed at 7,500 (+42 points or +0.56%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 397Bn today and rupiah was stabilized at IDR 17,103/USD.

Banking stocks were negative as MEGA (-1.69%), BBNI (-1.34%), BBRI (-0.59%), BMRI (-1.5%), and BBCA (-1.87%) all weakened. Consumer names were mostly negative as UNVR (-0.52%), KLBF (-0.51%), GGRM (-2.74%), and ICBP (-2.03%) all corrected, except INDF (+0.75%). Material stocks were positive as BRPT (+14.36%) and TPIA (+6.58%) all up. Telco names were negative as ISAT (-0.93%), EXCL (-1.58%), and TLKM (-0.62%) all weakened. Other movers were FILM (+19.6%), PTRO (+11.63%), APIC (-14.7%), and SMMA (-6.12%).

Gaikindo recorded a decline in wholesale car sales in March 2026, reaching 61.3k units (-13.8% YoY, -24.6% MoM). Meanwhile, retail sales reached 66.6k units (-13.2% YoY, -14.8% MoM). The decline in car sales was due to the large number of Eid al-Fitr holidays, which impacted dealer operations.

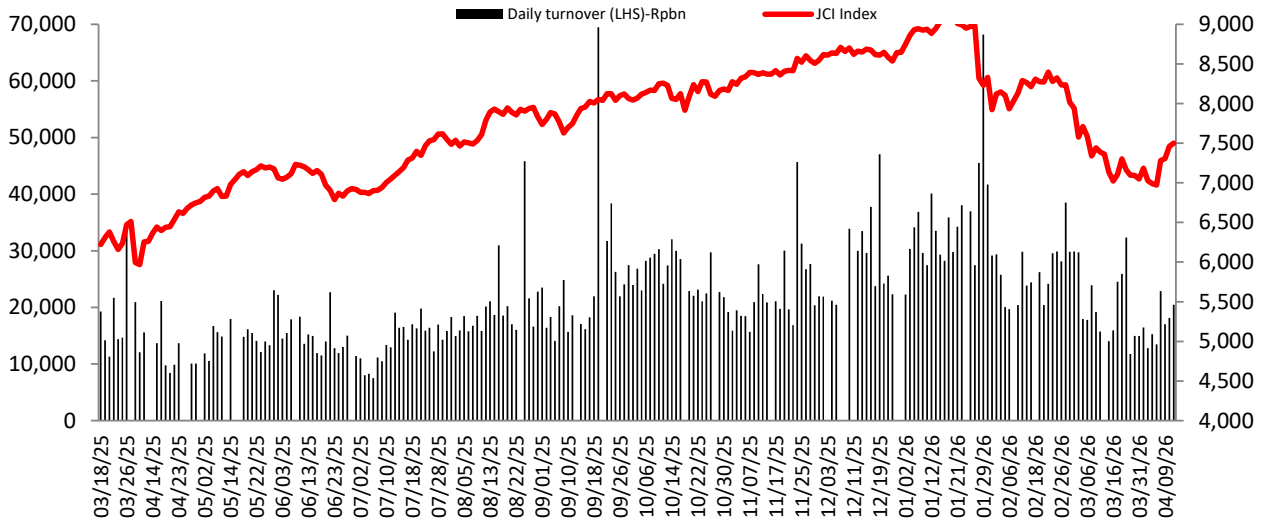
BOND MARKET

Supply Ahead

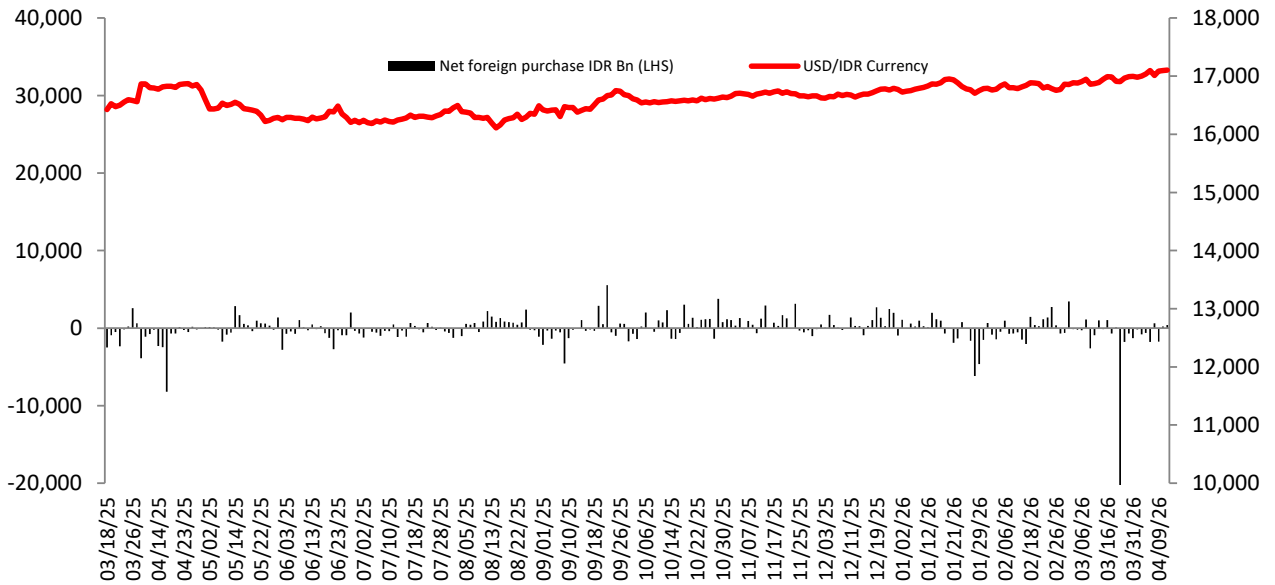
Indonesia bond market started the week with higher yield around 3 – 5bps after the outcome of peace talks over the weekend. Rupiah opened the day at above 17,130 level and closed at 17,104. Limited activities remained focus on front to belly area while the other part of the yield curve was quoted within range throughout the day. Overall market was relatively quiet with small trades due to pre-auction selling ahead of tomorrow supply. By the end of day yield curve closed slightly higher by 2 – 5 bps. There will be fresh supply tomorrow as Indonesia Debt Management Office (“DMO”) will hold conventional bond auction with IDR 36Tn with maximum IDR 54Tn issuance target. The series that will be issued are 1M SPN, 3M SPN, 1Y SPN, 5Y FR109, 10Y FR108, 15Y FR106, 20Y FR107, 30Y FR102 and 40Y FR105. In the previous conventional auction, incoming bids reached IDR 58.22Tn and DMO issued IDR 40Tn.

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	99.4	0.0	(0.9)	5Y
FR91	FR0091 Govt	99.6	0.0	(2.9)	10Y
FR93	FR0093 Govt	97.8	(0.2)	(3.6)	15Y
FR92	FR0092 Govt	103.7	0.1	(2.5)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.3	#VALUE!	(0.9)	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	102.4	(0.4)	(2.9)	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	100.4	(0.1)	(1.4)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,500.2	0.6	(13.3)	
Thailand	SET Index	1,506.8	1.2	19.6	
Korean Stock Exch.	KOSPI Index	5,808.6	(0.9)	37.8	
Straight Times	FSSTI Index	4,984.2	(0.1)	7.3	
Kuala Lumpur	KLCI Index	1,680.5	(0.6)	0.0	
Philippines	PCOMP Index	6,054.1	(0.7)	0.0	
Nikkei	NKY Index	56,502.8	(0.7)	12.2	
Hang Seng	HSI Index	25,660.9	(0.9)	0.1	
MSCI-Asia pacific	MXAP Index	248.5	0.8	9.1	
<u>Global Indices</u>					
Dow Jones	INDU Index	47,916.6	(0.6)	(0.3)	
S&P 500	SPX Index	6,816.9	(0.1)	(0.4)	
Nasdaq	CCMP Index	22,902.9	0.4	(1.5)	
FTSE 100	UKX Index	10,548.9	(0.5)	6.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	17,103.0	(0.0)	(2.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	17,085.5	0.4	2.2
3 month	IDSWT3M Index	17,083.1	0.4	(2.3)
6 month	IDSWT6M Index	17,084.4	0.2	(2.2)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	17,095.2	0.5	(2.2)
6 month	IDFWT6M Index	17,205.9	0.2	(2.6)

*price as of 4/10/2026

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