



FOR PROFESSIONAL INVESTORS - 08/06/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Mixed

JCI slightly weakened and closed at 7,504 (-11 points or -0.15%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 433Bn today and rupiah slightly strengthened to IDR 16,363/USD.

Banking stocks were negative as MEGA (-0.61%), BBNI (-2.84%), BMRI (-1.05%), BBRI (-0.8%), and BBCA (-1.48%) all retreated. Consumer names were mostly negative as MYOR (-1.77%), UNVR (-3.61%), KLBF (-1.41%), and INDF (-1.5%) all corrected, except SIDO (+1.81%). Mining stocks were mostly positive as ANTM (+4.76%), INCO (+5.42%), PTBA (+0.83%), and TINS (+1.01%) all in green, except ADRO (-0.27%). Retailer names were mostly positive as MAPI (+3.04%), ERAA (+2.74%), and LPPF (+0.63%) all rose, except AMRT (-4.13%). Other movers were FILM (+19.73%), CARS (+16.85%), KPIG (-5.45%), and ASII (-2.49%).

The Ministry of Finance has realized a budget of Rp18.8tn in 1H25 for the Housing Financing Liquidity Facility (FLPP) program. The budget is intended to finance around 115k subsidized housing units. Currently, the 2025 target is 350k subsidized housing units, with a total budget of Rp35.2tn.

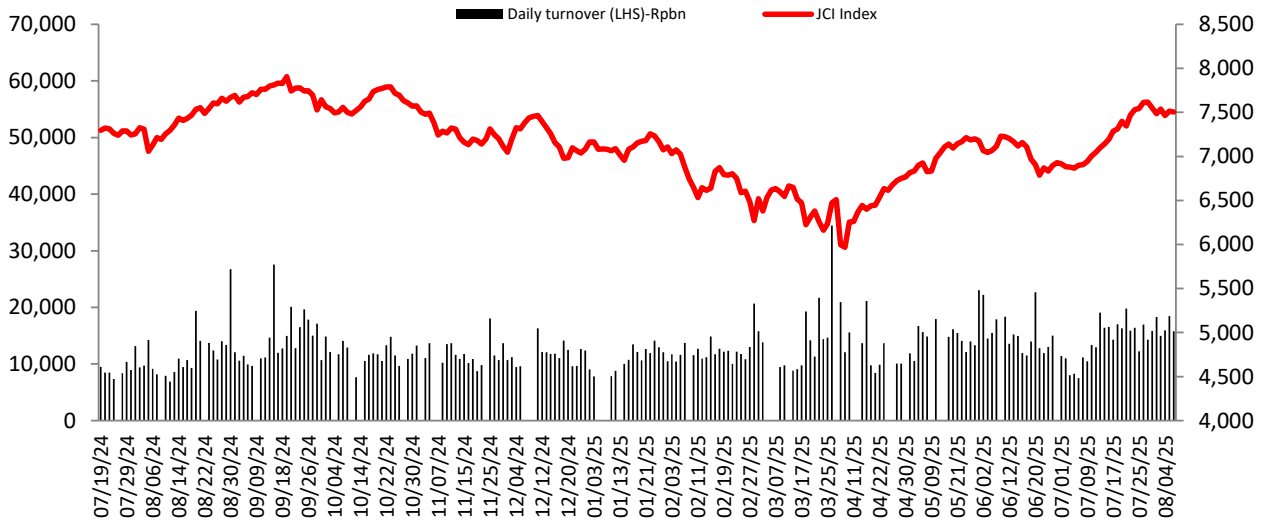
BOND MARKET

TWO WAYS

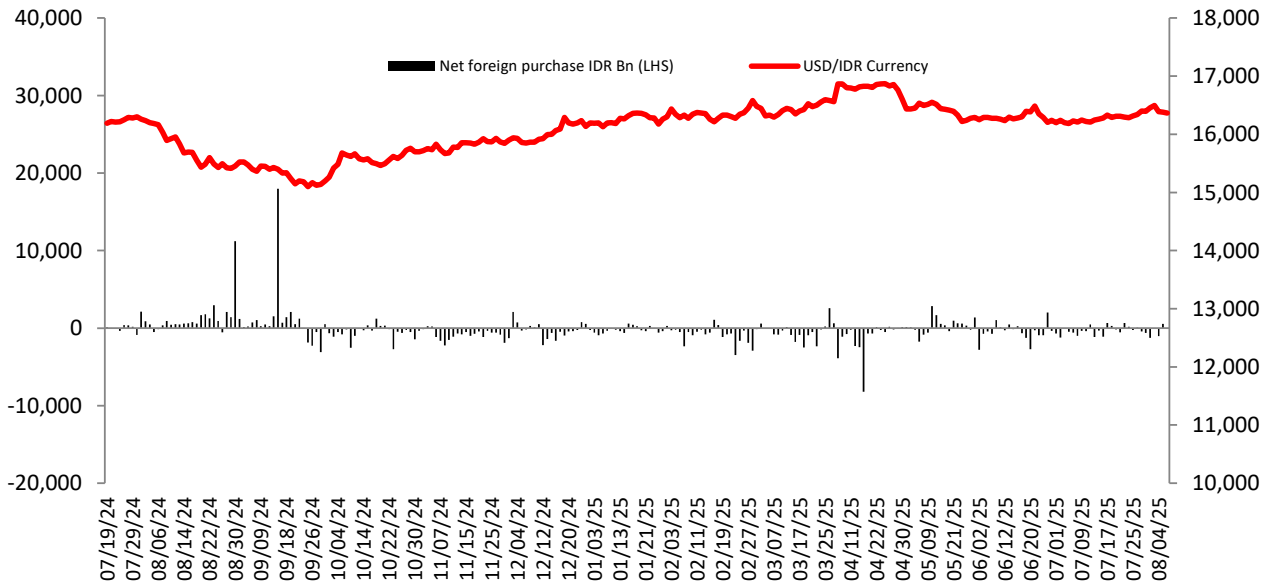
Indonesia bond market closed the day with lower yield around 3 – 6 bps for 5Y and 10Y benchmark series, while the 15Y and 20Y benchmark series remained unchanged. In the morning session, bond market was pretty quiet. We only heard some foreign banks show better seller with small clip. Meanwhile in the afternoon session, mixed names show better bid on <10Y series. Trading concentrated on front maturities while the other part of the yield curve was quoted within range throughout the day. The 5Y/10Y/15Y/20Y benchmark closed the day at mid yield of 6.02%/6.46%/6.82%/6.87%.

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	99.1	0.0	3.1	5Y
FR91	FR0091 Govt	100.3	0.1	4.1	10Y
FR93	FR0093 Govt	98.0	0.1	3.4	15Y
FR92	FR0092 Govt	102.2	(0.0)	2.0	20Y
PBS036	INDOIS 5 ¾ 08/15/25	99.9	0.0	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	100.6	0.0	2.3	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.0	0.0	1.4	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.8	0.8	1.9	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,503.8	(0.2)	6.0	
Thailand	SET Index	1,264.1	1.4	(9.7)	
Korean Stock Exch.	KOSPI Index	3,198.1	0.0	33.3	
Straight Times	FSSTI Index	4,221.2	0.3	11.4	
Kuala Lumpur	KLCI Index	1,541.5	0.2	(6.1)	
Philippines	PCOMP Index	6,370.7	0.3	(2.4)	
Nikkei	NKY Index	40,794.9	0.6	2.3	
Hang Seng	HSI Index	24,910.6	0.0	24.2	
MSCI-Asia pacific	MXAP Index	206.3	0.7	13.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,111.7	(0.1)	3.7	
S&P 500	SPX Index	6,299.2	(0.5)	7.1	
Nasdaq	CCMP Index	20,916.6	(0.7)	8.3	
FTSE 100	UKX Index	9,159.9	0.2	12.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,363.0	0.1	(1.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,385.9	(0.6)	0.8
3 month	IDSWT3M Index	16,393.6	(0.6)	(1.5)
6 month	IDSWT6M Index	16,390.7	(0.6)	(1.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,393.4	(0.7)	(1.4)
6 month	IDFWT6M Index	16,431.3	(0.7)	(1.3)

*price as of 8/5/2025

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