



FOR PROFESSIONAL INVESTORS - 09/02/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rebound

JCI advanced and closed at 7,802 (+66 points or +0.85%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR -332Bn today and rupiah slightly strengthened to IDR 16,400/USD.

Banking stocks were mostly negative as BBTN (-0.39%), BBNI (-0.23%), BMRI (-0.65%), and BBRI (-0.5%) all retreated, except MEGA (+0.3%). Consumer names were mostly positive as INDF (+1.35%), SIDO (+1.94%), GGRM (+2.11%), and MYOR (+0.48%) all rose, except KLBF (-1.28%). Mining stocks were positive as ANTM (+8.44%), TINS (+3.5%), PTBA (+0.83%), ITMG (+0.68%), and INDY (+2.7%) all in green. Properties names were positive as BSDE (+11.96%), PWON (+3.95%), CTRA (+2.54%), and SMRA (+2.7%) all advanced. Other movers were BRMS (+10.29%), TKIM (+8.87%), ELTY (-9.09%), and AMRT (-2.31%).

Central Bureau of Statistics (BPS) recorded deflation of 0.08% MoM in Aug2025. On YoY basis, inflation reached 2.31% in Aug2025 bringing YTD inflation to 1.6%. MoM was mainly caused by decrease in food prices.

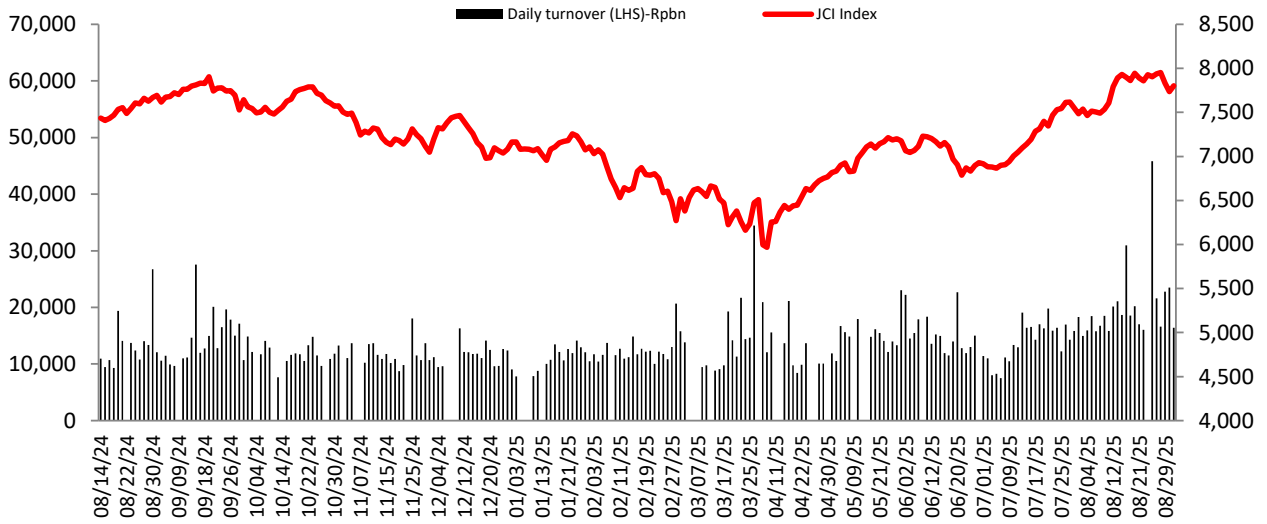
BOND MARKET

Sukuk Auction

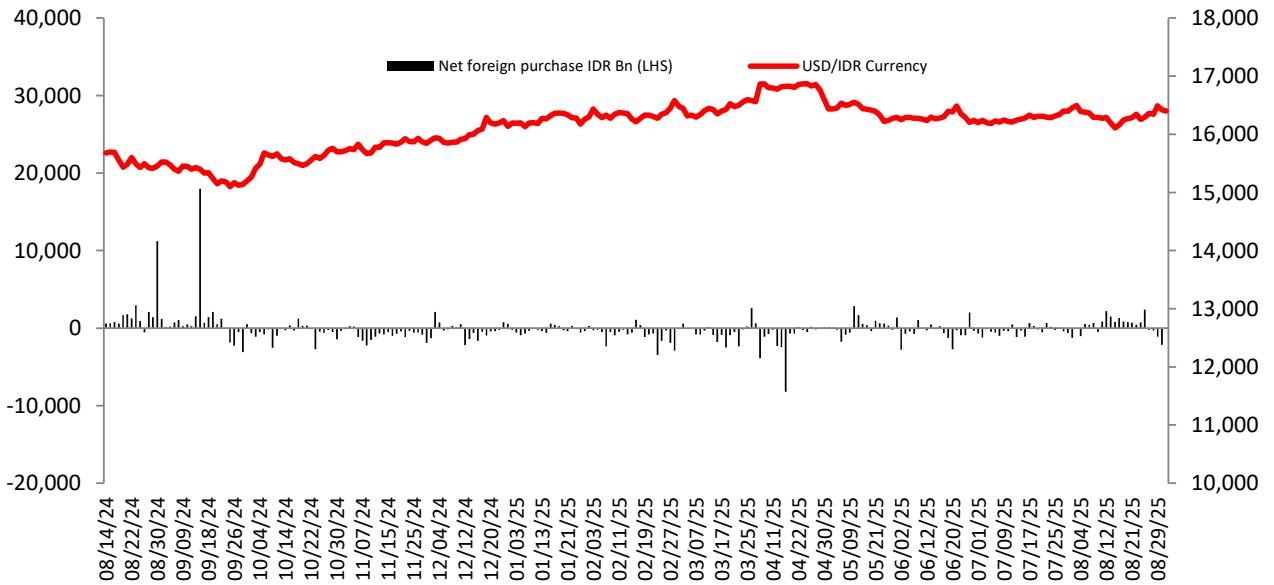
Indonesia bond market closed the day with better sentiment following local situation are getting conducive. As soon as market opened, we seen buying interest jump in to secondary, led by 10Y FR103 got taken at 6.39% and followed with 15Y FR106 and 20Y FR107 taken at 6.7% and 6.86%. Overall tone was biddish and the yield closed the day lower by around 3 – 5 bps. In today sukuk auction, government received incoming bids totaling at IDR 41.856Tn. MoF decided to upsize the issuance from target IDR 9Tn to IDR 9.9Tn. The series absorbed (against incoming bids) on the auction were, IDR 1.45Tn (IDR 5.72Tn) 9mo SPN-S, IDR 0.55Tn (IDR 4.547Tn) 2Y PBS3, IDR 0.85Tn (IDR 9.556Tn) 4Y PBS30, IDR 1.25Tn (IDR 3.582Tn) 4Y PBSG1, IDR 2.35Tn (IDR 9.7556Tn) 14Y PBS34 and IDR 3.45Tn (IDR 8.173Tn) 24Y PBS38 at cut off yields of 5.13%, 5.32%, 5.48%, 5.85%, 6.62%, and 6.86% respectively. No winner on 6mo SPNS.

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	99.8	0.0	3.7	5Y
FR91	FR0091 Govt	101.8	0.3	5.6	10Y
FR93	FR0093 Govt	99.1	0.1	4.5	15Y
FR92	FR0092 Govt	103.0	0.3	2.8	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.8	0.0	2.9	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.4	#VALUE!		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.8	0.1		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,801.6	0.8	10.2	
Thailand	SET Index	1,248.3	0.3	(10.8)	
Korean Stock Exch.	KOSPI Index	3,172.4	0.9	32.2	
Straight Times	FSSTI Index	4,298.5	0.5	13.5	
Kuala Lumpur	KLCI Index	1,576.7	0.1	(4.0)	
Philippines	PCOMP Index	6,128.9	(0.2)	(6.1)	
Nikkei	NKY Index	42,310.5	0.3	6.1	
Hang Seng	HSI Index	25,496.6	(0.5)	27.1	
MSCI-Asia pacific	MXAP Index	211.8	0.1	16.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	45,544.9	(0.2)	7.1	
S&P 500	SPX Index	6,460.3	(0.6)	9.8	
Nasdaq	CCMP Index	21,455.6	(1.2)	11.1	
FTSE 100	UKX Index	9,157.7	(0.4)	12.0	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,400.0	0.1	(1.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,442.5	(0.3)	1.2
3 month	IDSWT3M Index	16,430.0	(0.2)	(1.7)
6 month	IDSWT6M Index	16,490.0	0.2	(2.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,490.3	0.1	(2.0)
6 month	IDFWT6M Index	16,511.0	0.7	(1.8)

*price as of 9/1/2025

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