



FOR PROFESSIONAL INVESTORS - 10/27/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Correction

JCI weakened and closed at 8,117 (-155 points or -1.87%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net inflow of IDR 1.2Tn today and rupiah slightly weakened to IDR 16,615/USD.

Banking stocks were mixed as BBKA (+0.91%), BBRI (+0.26%), and MEGA (+0.31%) closed higher, while BNLI (-7.63%) and BMRI (-1.76%) weakened. Consumer names were positive as UNVR (+7.11%), KLBF (+4.08%), INDF (+2.05%), GGRM (+12.07%), and HMSP (+6.37%) all rose. Material stocks were mixed as TPIA (+1.72%) in green, while BRPT (-9.34%) retreated. Telco names were mixed as TLKM (+1.22%) and ISAT (+1.83%) advanced, while EXCL (-5.41%) corrected. Other movers were POLU (+15.44%), MAPA (+5.56%), IMPC (-15%), and RISE (-14.88%).

Government has completed the concept and pre-feasibility study on the coal gasification project to dimethyl ether and the results have been given to Danantara investment agency. Government is also weighing investment options offered by companies from China and Europe to develop the project.

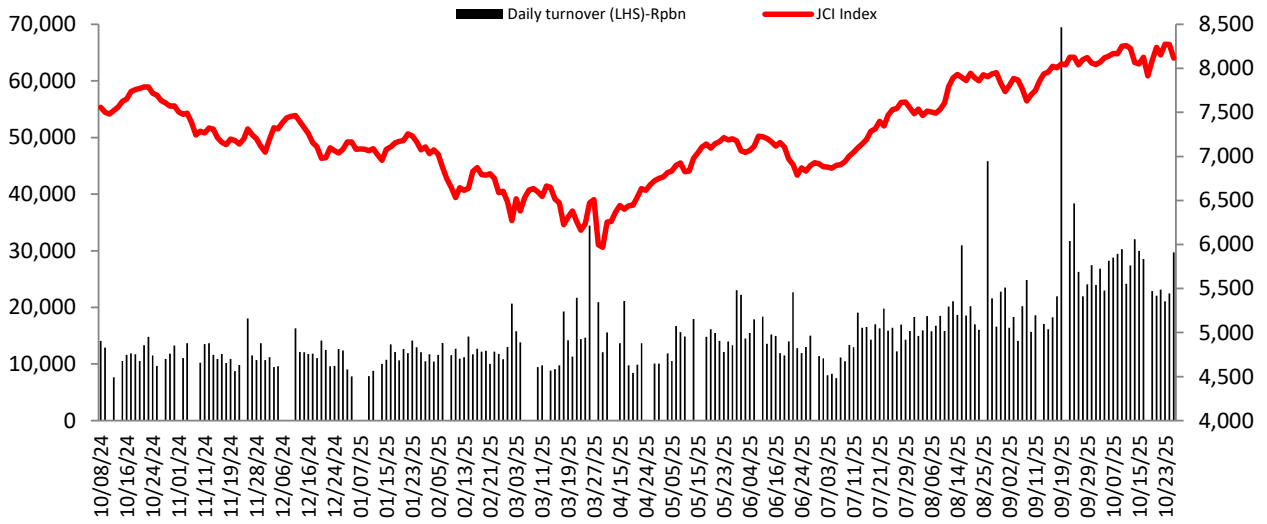
BOND MARKET

LITTLE CHANGE

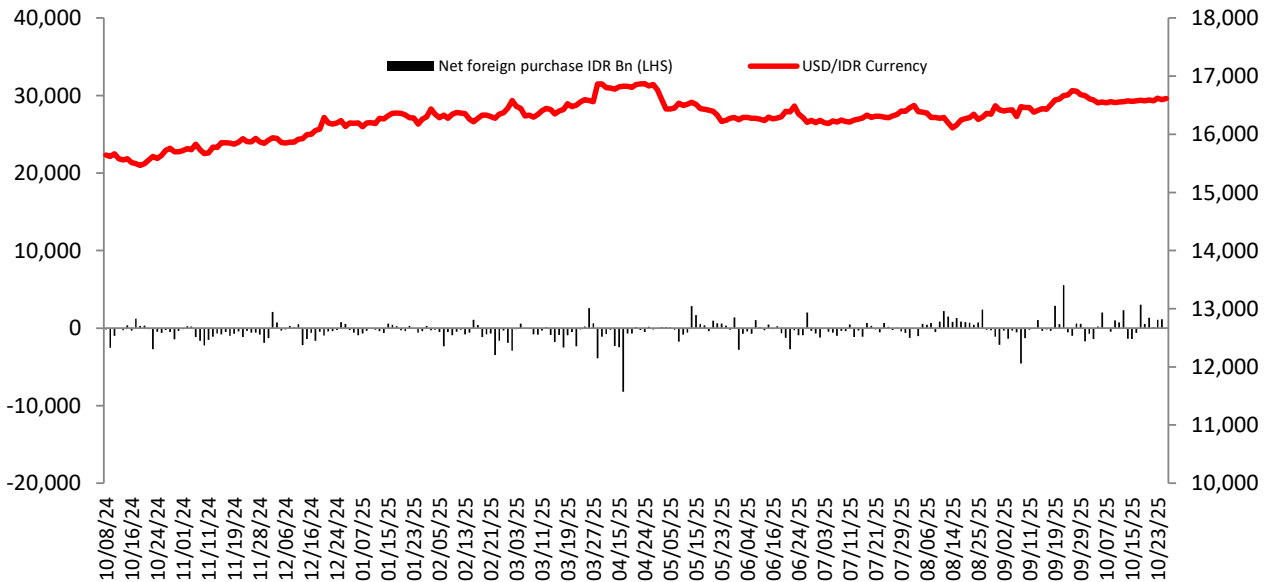
Indonesia bond market start the week with wide spread and softer tone. Limited activities remained focus on 5Y and 10Y area while the other part of the yield curve was quoted within range throughout the day. There is not much activity both from local and foreign as most players prepared for tomorrow auction. By the end of day yield curve closed slightly lower by 1-3bps. Tomorrow, Indonesia Debt Management Office ("DMO") will hold its regular sukuk bond auction with IDR 9Tn target of issuance comprising of 1M SPNS, 6M SPNS, 9M SPNS, 3Y PBS-030, 5Y PBS-040 (New Issuance), 8Y PBSG-002 (New Issuance), 14Y PBS-034 and 25Y PBS-038.

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	100.6	0.0	4.5	5Y
FR91	FR0091 Govt	103.4	(0.0)	7.3	10Y
FR93	FR0093 Govt	101.7	(0.1)	7.3	15Y
FR92	FR0092 Govt	107.1	0.1	6.9	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.5	(0.0)	3.6	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	105.3	#VALUE!		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	102.1	0.0		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,117.2	(1.9)	14.7	
Thailand	SET Index	1,324.7	0.8	(5.4)	
Korean Stock Exch.	KOSPI Index	4,042.8	2.6	68.5	
Straight Times	FSSTI Index	4,440.3	0.4	17.2	
Kuala Lumpur	KLCI Index	1,618.4	0.3	(1.5)	
Philippines	PCOMP Index	5,933.8	(0.9)	(9.1)	
Nikkei	NKY Index	50,512.3	2.5	26.6	
Hang Seng	HSI Index	26,433.7	1.0	31.8	
MSCI-Asia pacific	MXAP Index	226.1	0.5	24.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	47,207.1	1.0	11.0	
S&P 500	SPX Index	6,791.7	0.8	15.5	
Nasdaq	CCMP Index	23,204.9	1.1	20.2	
FTSE 100	UKX Index	9,638.4	(0.1)	17.9	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,615.0	(0.1)	(3.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,647.6	0.3	2.4
3 month	IDSWT3M Index	16,632.3	0.1	(3.0)
6 month	IDSWT6M Index	16,634.7	(0.1)	(3.0)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,630.3	(0.2)	(2.8)
6 month	IDFWT6M Index	16,662.0	0.0	(2.7)

*price as of 10/24/2025

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