



FOR PROFESSIONAL INVESTORS - 09/26/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rebound

JCI advanced and closed at 8,099 (+59 points or +0.73%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 583Bn today and rupiah was stabilized at IDR 16,741/USD.

Banking stocks were mixed as BMRI (+1.38%) and BNL (+2.42%) inched higher, while BBNI (-0.24%), BBRI (-0.74%), and BBCA (-0.97%) retreated. Consumer names were mostly positive as UNVR (+5.48%), ICBP (+2.04%), HMSP (+5.42%), and KLBF (+1.75%) all up, except INDF (-1.29%). Material stocks were mixed as BRPT (+5.13%) advanced, while TPIA (-0.97%) corrected. Pulp & paper names were negative as TKIM (-2.81%) and INKP (-3.86%) all corrected. Other movers were SHIP (+20%), ENRG (+12.16%), ISAT (-5.26%), and BSDE (-4.15%).

Ministry of finance to subsidise margin for mortgages (KPR) starting from 5.5% up to 10% per year depending on the loan ceiling that is being proposed, in order to support the three million housing program.

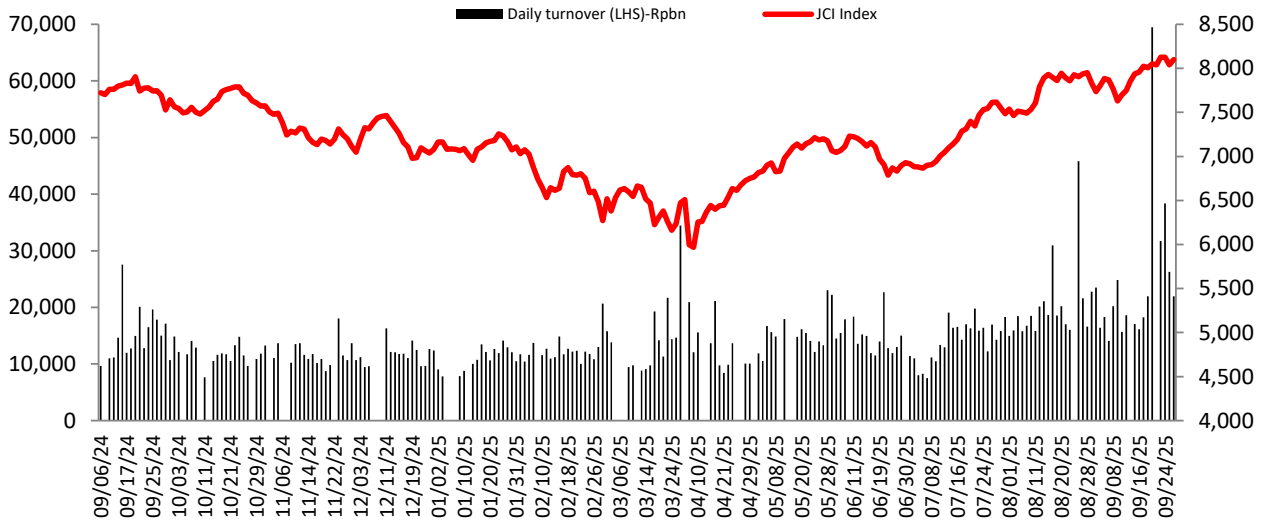
BOND MARKET

CALM DAY

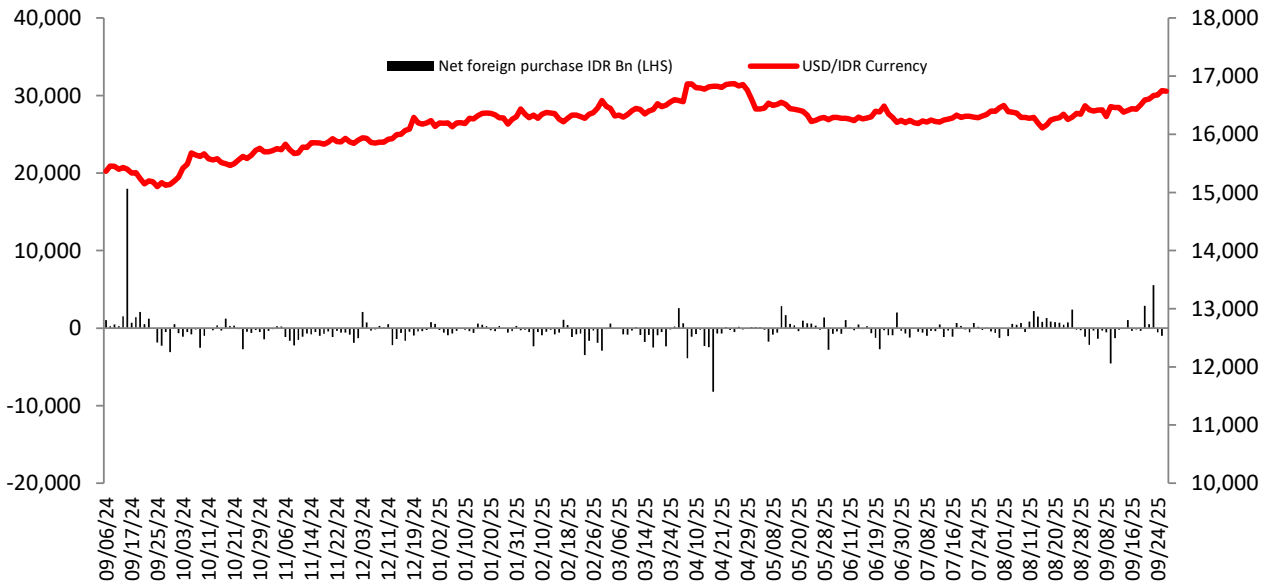
Indonesia bond market was calm today. Only few trades were seen throughout the day with light trading volume. Although the overall market tone was mixed, no significant price action took place. We heard heavy intervention on IDR spot market from BI. BI also bidding FR103, FR108 on secondary market at morning session. IDR bond the prices ended the day unchanged from yesterday level. The yield of 5Y/10Y/15Y/20Y benchmark closed the day at mid-yield of 5.55%/6.39%/6.77%/6.85% respectively. Spot closed at 16,738.

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	100.2	(0.0)	4.2	5Y
FR91	FR0091 Govt	102.9	(0.0)	6.7	10Y
FR93	FR0093 Govt	99.2	(0.1)	4.6	15Y
FR92	FR0092 Govt	102.7	(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	101.3	0.0	3.4	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	102.3	(0.0)		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.4	(0.6)		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,099.3	0.7	14.4	
Thailand	SET Index	1,280.4	(0.6)	(8.6)	
Korean Stock Exch.	KOSPI Index	3,386.1	(2.5)	41.1	
Straight Times	FSSTI Index	4,272.7	(0.0)	12.8	
Kuala Lumpur	KLCI Index	1,609.1	0.7	(2.0)	
Philippines	PCOMP Index	6,027.1	(0.3)	(7.7)	
Nikkei	NKY Index	45,355.0	(0.9)	13.7	
Hang Seng	HSI Index	26,128.2	(1.3)	30.3	
MSCI-Asia pacific	MXAP Index	220.4	(0.4)	21.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	45,947.3	(0.4)	8.0	
S&P 500	SPX Index	6,604.7	(0.5)	12.3	
Nasdaq	CCMP Index	22,384.7	(0.5)	15.9	
FTSE 100	UKX Index	9,256.3	0.5	13.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,741.0	0.1	(3.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,670.0	0.2	2.6
3 month	IDSWT3M Index	16,668.0	0.1	(3.2)
6 month	IDSWT6M Index	16,674.4	0.1	(3.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,710.2	0.2	(3.3)
6 month	IDFWT6M Index	16,684.4	(0.1)	(2.8)

*price as of 9/25/2025

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* PT BNP Paribas Asset Management (address: Sequis Tower, Lantai 29, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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