FOR PROFESSIONAL INVESTORS - 06/24/2026

DAILY REPORT
INDONESIA MARKET WRAP

EQUITY MARKET

SOLD OFF

JCI weakened and closed at 5,884 (-217 points or -3.56%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR -1.2Tn today and rupiah weakened to IDR 17,943/USD.

Banking stocks were negative as MEGA (-0.97%), BBNI (-3.21%), BMRI (-3.64%), BBRI (-3.44%), and BBCA (-3.27%) all down. Consumer names were mixed as UNVR (+1.81%), MYOR (+2.2%), and KLBF (+0.66%) advanced, while ICBP (-1.52%) and GGRM (-5.25%) closed lower. Mining stocks were negative as INDY (-9.36%), ADRO (-1.75%), TINS (-5.93%), INCO (-7.46%), and ANTM (-4.18%) all retreated. Material names were negative as TPIA (-12.44%) and BRPT (-9.55%) all corrected. Other movers were LINK (+13.7%), SHIP (+9.82%), ENRG (-14.81%), and BUVA (-14.52%).

Bank Indonesia (BI) recorded M2 money supply growth of +10.8% YoY in May 2026 to reach Rp10,416tn, higher than April 2026 growth at +9.2% YoY. The growth is mainly driven by loan disbursement (+11% YoY) and net foreign assets (+5% YoY).

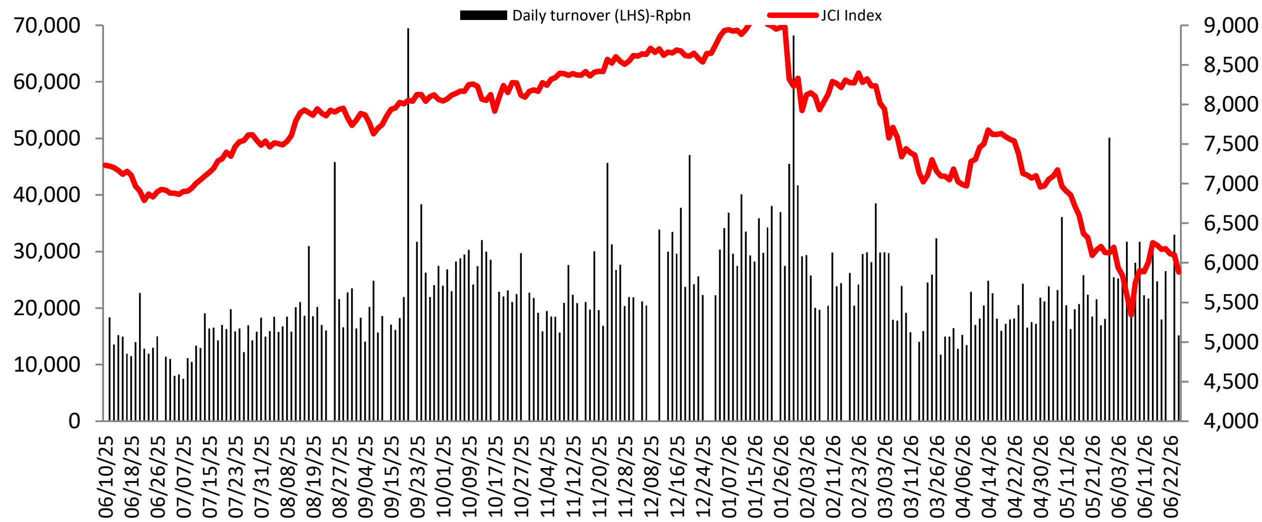
BOND MARKET

Selective Demand

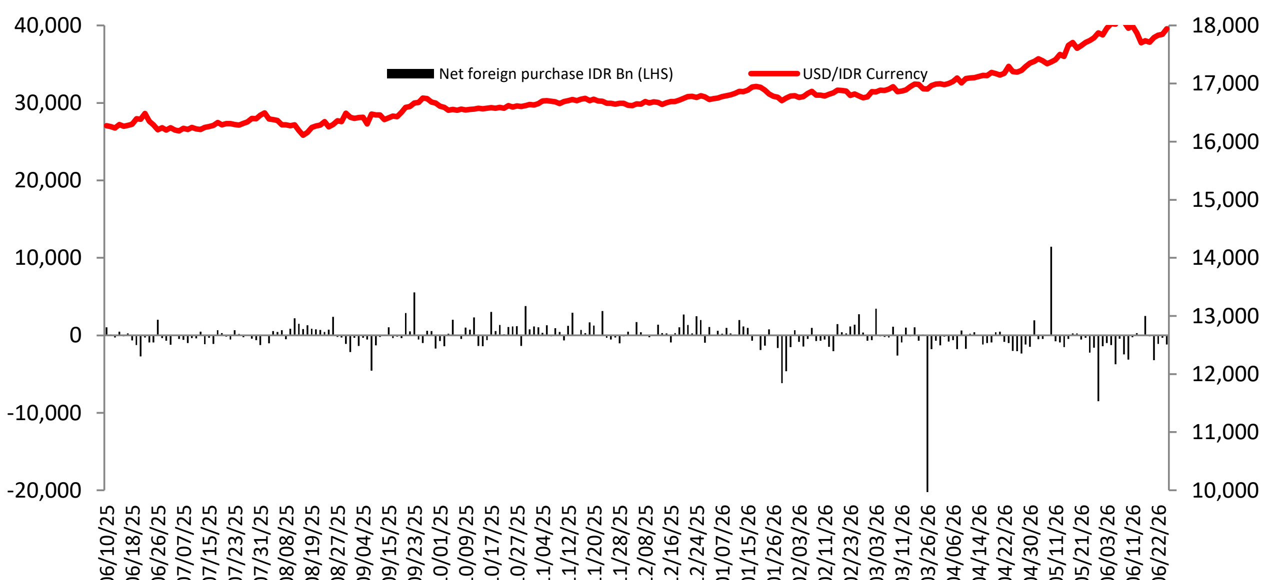
Indonesia bond market opened on a cautious noted ahead of the SRBI auction despite firmer UST overnight. The auction result came in constructive with lower cut-offs and better demand, particularly in the belly tenor. However, gains were partly trimmed into the close as quarter-end flows and continued pressure on IDR encouraged some profit-taking. Overall, Indonesia bond market closed mixed with 5Y remaining relatively better supported. In today SRBI auction, total incoming bids reached IDR 46.92Tn (compared to IDR 42.79Tn in the previous auction). BI again set the the 12mo cut-off at 7.74% with the issuance absorbed at IDR 18Tn from previously at IDR 5Tn. At the end of the day, 5Y/10Y/15Y/20Y INDOGB yield curve closed by -2bps/0bps/0bps/-3bps.

GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
Bonds					
FR90	FR0090 Govt	98.5	(0.0)	(1.8)	5Y
FR91	FR0091 Govt	96.1	(0.2)	(6.3)	10Y
FR93	FR0093 Govt	93.3	(0.1)	(8.0)	15Y
FR92	FR0092 Govt	98.4	(0.7)	(7.5)	20Y
PBS036	INDOIS 5 ⅜ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	99.4	#VALUE!	(1.7)	15-01-2027
PBS037	INDOIS 6 ⅞ 03/15/36	100.4	(0.0)	(4.7)	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.0	(0.2)	(3.8)	15-06-2047
Asia Pacific					
Jakarta Composite	JCI Index	5,883.9	(3.6)	(32.0)	
Thailand	SET Index	1,548.2	0.5	22.9	
Korean Stock Exch.	KOSPI Index	8,471.0	3.3	101.0	
Straight Times	FSSTI Index	5,216.0	0.2	12.3	
Kuala Lumpur	KLCI Index	1,682.1	0.1	0.1	
Philipines	PCOMP Index	5,991.4	(2.2)	(1.0)	
Nikkei	NKY Index	69,175.0	(0.9)	37.4	
Hang Seng	HSI Index	23,412.2	0.3	(8.7)	
MSCI-Asia pacific	MXAP Index	275.5	(3.6)	21.0	
Global Indices					
Dow Jones	INDU Index	51,666.8	(0.1)	7.5	
S&P 500	SPX Index	7,365.5	(1.4)	7.6	
Nasdaq	CCMP Index	25,587.0	(2.2)	10.1	
FTSE 100	UKX Index	10,437.0	0.1	5.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	17,943.0	(0.5)	(7.0)
Swap-IDR				
1 month	IDSWT1M Index	17,875.0	0.2	6.9
3 month	IDSWT3M Index	17,870.2	0.2	(7.0)
6 month	IDSWT6M Index	17,868.0	0.2	(6.9)
Forward-IDR				
3 month	IDFWT3M Index	17,928.6	0.4	(7.2)
6 month	IDFWT6M Index	17,930.2	(0.4)	(6.9)

*price as of 6/23/2026

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