



FOR PROFESSIONAL INVESTORS - 04/16/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Lower

JCI weakened and closed at 6,400 (-42 points or -0.65%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR -348Bn today and rupiah was stabilized at IDR 16,825/USD.

Banking stocks were negative as MEGA (-4.05%), BBRI (-1.08%), BBNI (-4.21%), BBCA (-1.17%), and BMRI (-1.7%) all down. Consumer names were mixed as KLBF (+5.02%), INDF (+1.37%), and MYOR (+3.76%) advanced, while GGRM (-3.34%) and ICBP (-2.15%) closed lower. Retailer stocks were mostly negative as ACES (-1.61%), MAPA (-3.17%), and AMRT (-6.01%) all retreated, except ERAA (+6.53%). Material names were positive as TPIA (+2.04%) and BRPT (+3.55%) all closed higher. Other movers were DWGL (+34.34%), BUMI (+5.26%), INTP (-5.8%), and PTRO (-4.55%).

Bank Indonesia recorded the Consumer Confidence Index for March25 at a level of 121.1, down 5.3 points from 126.4 in February25. The decline has occurred for three consecutive months, and it marked the lowest level since November24.

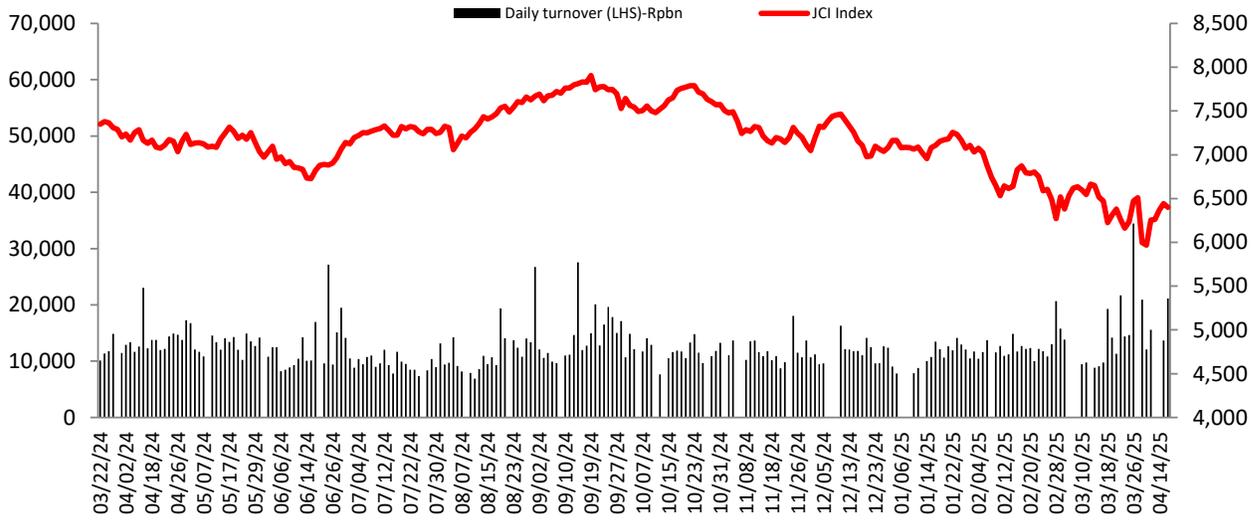
BOND MARKET

Mixed Flow

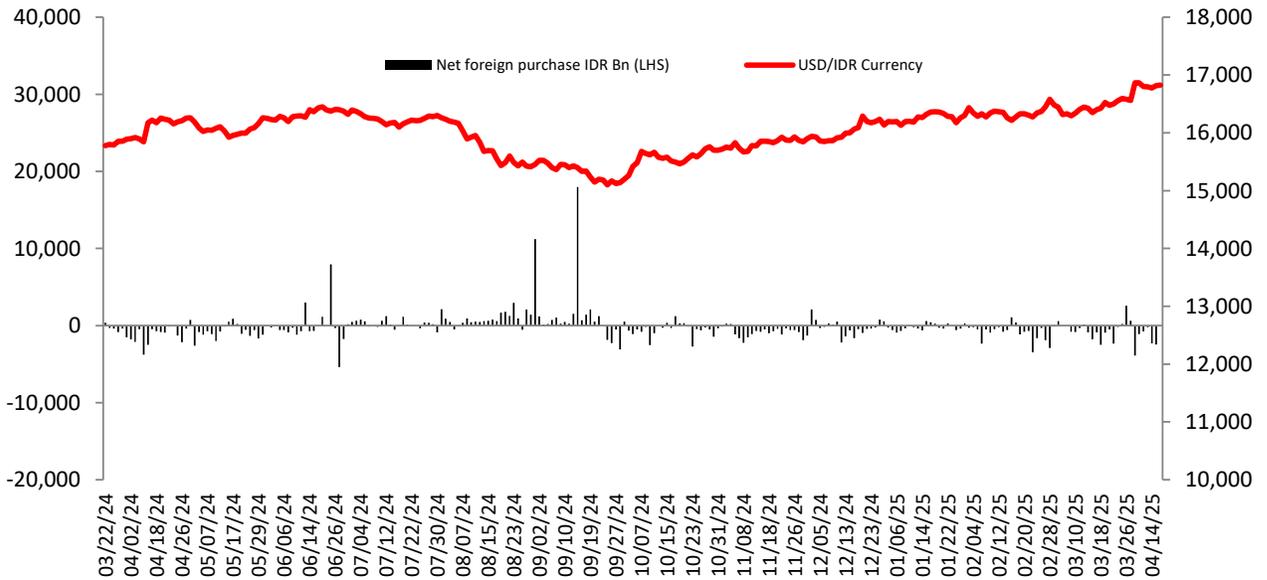
SRBI tender held today instead of Friday due to short week. In the morning session ahead of SRBI auction, we heard better bid in the front end with yield about 1 – 3 bps lower. Market saw mixed flow during the day as investor interest focused on front to belly series. Prices moved in tight range with overall biddish market tone was dominated by onshore names. The 5Y and 10Y yield lower by about 6 and 2bps compared to yesterday closing, while the rest of the curved moved ranging by 1 - 2 bps.

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	97.3	0.1	1.2	5Y
FR91	FR0091 Govt	97.2	0.2	0.8	10Y
FR93	FR0093 Govt	94.3	0.4	(0.6)	15Y
FR92	FR0092 Govt	99.2	0.1	(0.9)	20Y
PBS036	INDOIS 5 ½ 08/15/25	99.8	0.0	0.6	15-8-2025
PBS003	INDOIS 6 01/15/27	99.0	0.1	0.7	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	99.8	0.0	0.2	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	96.0	0.0	(1.0)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,400.1	(0.6)	(9.6)	
Thailand	SET Index	1,137.2	0.8	(18.8)	
Korean Stock Exch.	KOSPI Index	2,447.4	(1.2)	2.0	
Straight Times	FSSTI Index	3,662.5	1.0	(3.3)	
Kuala Lumpur	KLCI Index	1,476.9	(0.6)	(10.1)	
Philippines	PCOMP Index	6,134.6	(0.8)	(6.0)	
Nikkei	NKY Index	33,920.4	(1.0)	(15.0)	
Hang Seng	HSI Index	21,057.0	(1.9)	5.0	
MSCI-Asia pacific	MXAP Index	177.9	1.2	(2.0)	
<u>Global Indices</u>					
Dow Jones	INDU Index	40,369.0	(0.4)	(5.1)	
S&P 500	SPX Index	5,396.6	(0.2)	(8.2)	
Nasdaq	CCMP Index	16,823.2	(0.0)	(12.9)	
FTSE 100	UKX Index	8,212.0	(0.4)	0.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,825.0	(0.1)	(4.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,818.4	0.3	3.5
3 month	IDSWT3M Index	16,818.2	(0.0)	(4.1)
6 month	IDSWT6M Index	16,807.7	0.3	(4.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,849.8	0.3	(4.2)
6 month	IDFWT6M Index	16,844.0	(0.3)	(3.8)

*price as of 4/15/2025

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