



FOR PROFESSIONAL INVESTORS - 07/03/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Another Correction

JCI slightly weakened and closed at 6,881 (-34 points or -0.49%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 32Bn today and rupiah slightly weakened to IDR 16,242/USD.

Banking stocks were mixed as BMRI (+0.42%) and BBNI (+0.25%) closed higher, while BNLI (-2.19%), BBCA (-0.29%), and BBRI (-0.54%) down. Consumer names were mixed as HMSP (+1.68%) and MYOR (+0.46%) in green, while KLBF (-0.66%), ICBP (-1.18%), and INDF (-2.74%) closed lower. Mining stocks were mostly negative as PTBA (-0.81%), INCO (-2%), ADRO (-3.01%), and ANTM (-2.61%) all down, except ITMG (+0.91%). Telco names were mixed as ISAT (+0.95%) advanced, while EXCL (-1.3%) and TLKM (-1.07%) retreated. Other movers were TOWR (+11.34%), LSIP (+5.88%), MLPT (-5.76%), and ARTO (-5.25%).

The government plans to resume the subsidies for purchase of electric 2W in August 2025. The incentive amount disbursed by the government is likely to remain the same as the previous year, which is Rp7mn/unit.

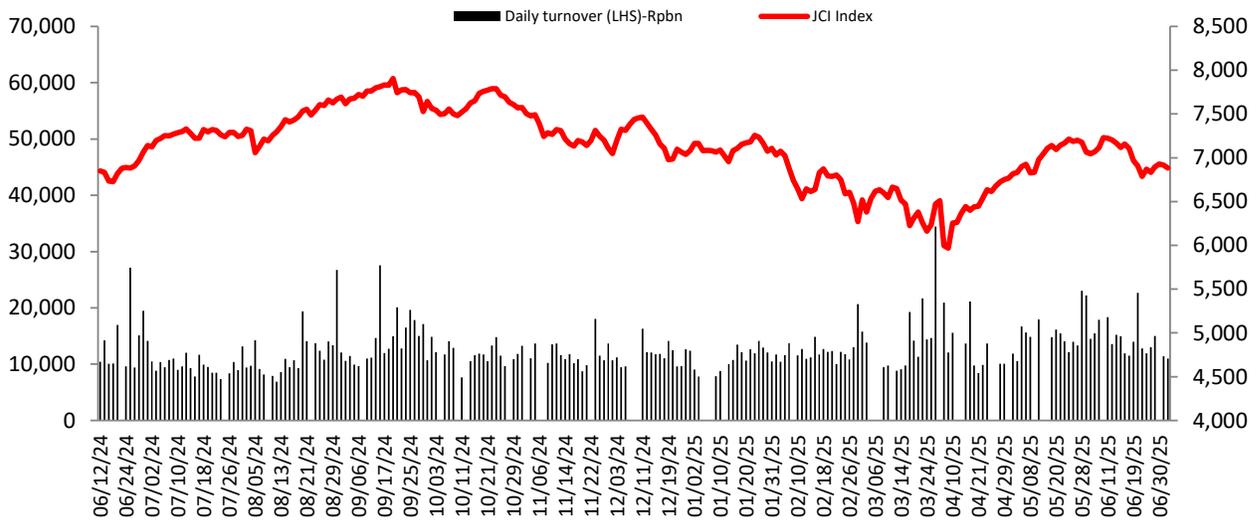
BOND MARKET

Unchanged

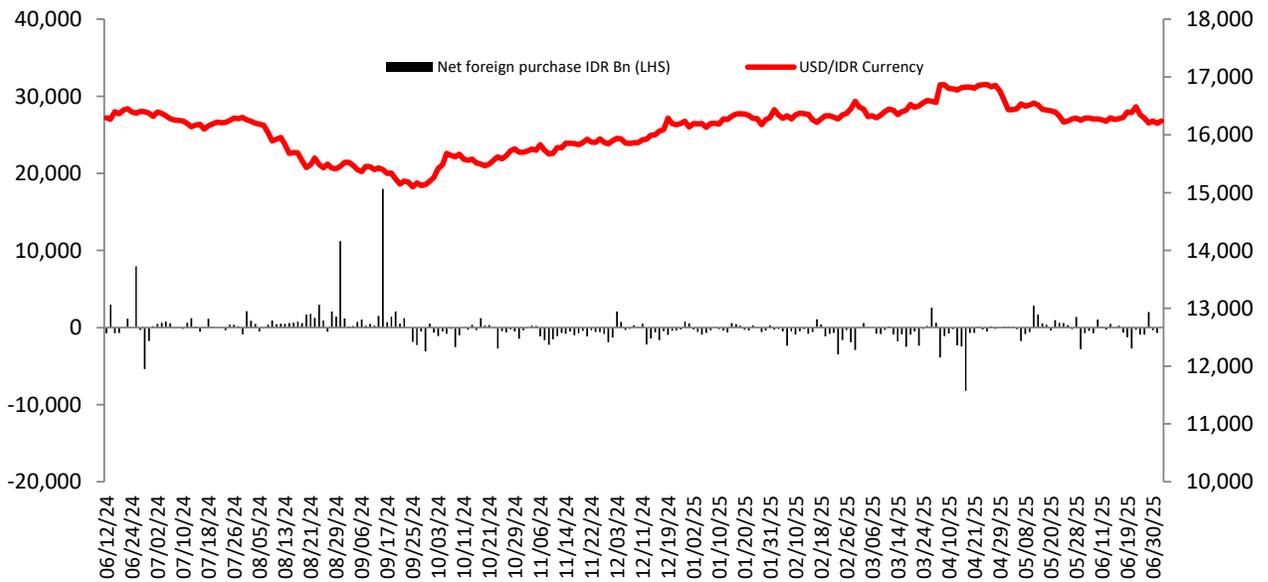
Indonesia bond market closed the day with unchanged ahead of US NFP data tonight. Market is still moving two ways in the morning session, although in the second session bond market was pretty quiet. Trading concentrated on middle to longer maturities while the other part of the yield curve was quoted within range throughout the day. IDR bond the prices ended the day unchanged from yesterday level. The 5Y/10Y/15Y/20Y benchmark closed the week at mid yield of 6.22%/6.58%/6.91%/6.98%.

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	98.6	0.0	2.5	5Y
FR91	FR0091 Govt	99.5	0.0	3.2	10Y
FR93	FR0093 Govt	96.8	(0.1)	2.1	15Y
FR92	FR0092 Govt	101.6	0.0	1.5	20Y
PBS036	INDOIS 5 ¼ 08/15/25	100.1	0.0	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	99.9	0.0	1.6	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.6	0.2	1.0	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.0	(0.0)	1.1	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,881.2	(0.5)	(2.8)	
Thailand	SET Index	1,113.1	0.3	(20.5)	
Korean Stock Exch.	KOSPI Index	3,075.1	(0.5)	28.2	
Straight Times	FSSTI Index	4,005.3	0.4	5.7	
Kuala Lumpur	KLCI Index	1,550.2	0.6	(5.6)	
Philippines	PCOMP Index	6,419.1	(0.1)	(1.7)	
Nikkei	NKY Index	39,762.5	(0.6)	(0.3)	
Hang Seng	HSI Index	24,221.4	0.6	20.7	
MSCI-Asia pacific	MXAP Index	203.8	0.2	12.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,494.9	0.9	4.6	
S&P 500	SPX Index	6,198.0	(0.1)	5.4	
Nasdaq	CCMP Index	20,202.9	(0.8)	4.6	
FTSE 100	UKX Index	8,802.3	0.2	7.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,242.0	(0.3)	(0.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,180.3	(0.2)	(0.5)
3 month	IDSWT3M Index	16,201.0	(0.2)	(0.3)
6 month	IDSWT6M Index	16,201.2	(0.2)	(0.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,215.4	(0.2)	(0.3)
6 month	IDFWT6M Index	16,235.5	(0.4)	(0.1)

*price as of 7/1/2025

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