



FOR PROFESSIONAL INVESTORS - 03/20/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Higher

JCI advanced and closed at 6,382 (+70 points or +1.11%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 499Bn today and rupiah slightly strengthened to IDR 16,475/USD.

Banking stocks were mostly negative as MEGA (-3.33%), BBNI (-2.16%), BMRI (-1.28%), and BBRI (-1.35%) all weakened, except BBKA (+0.6%). Consumer names were mixed as KLBF (+5.83%) and SIDO (+4.59%) in green, while ICBP (-1.17%), UNVR (-4.04%), and INDF (-2.43%) closed lower. Material stocks were positive as TPIA (+15.1%) and BRPT (+0.75%) all inched higher. Retailer names were negative as MAPA (-3.6%), MAPI (-3.38%), ACES (-15.13%), and AMRT (-1.84%) all weakened. Other movers were JSPT (+20%), MSIN (+11.38%), BRIS (-9.92%), and HEAL (-6.25%).

The Financial Services Authority (OJK) has issued a policy permitting companies to conduct share buybacks without requiring approval from a general meeting of shareholders (GMS).

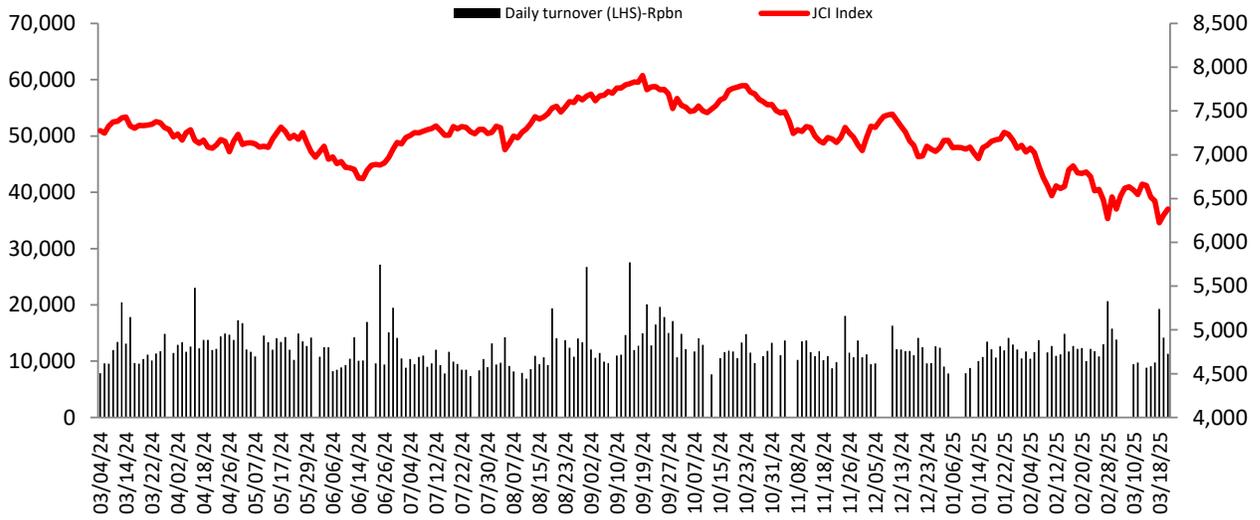
BOND MARKET

MIXED SENTIMENT

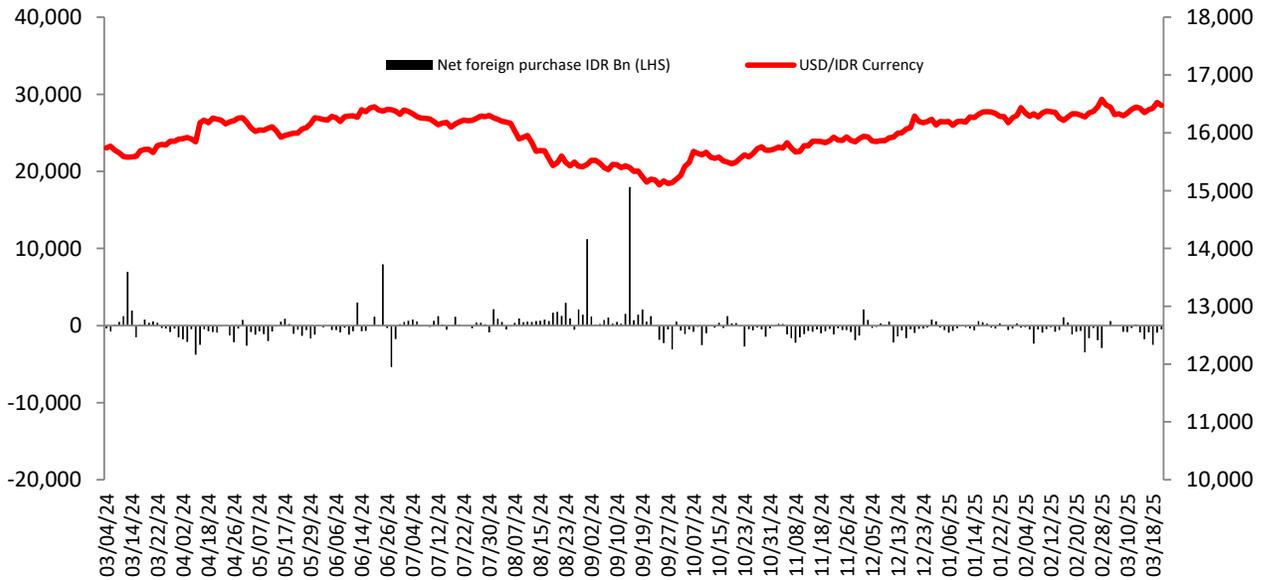
Indonesia bond market start the day with biddish tone following lower 10Y UST yield. Mixed players was seen buying not only the benchmark series, but also non benchmark series. Significant price increase soon invited profit takers in market. Market closed with yields lower by 4 – 5 bps compared to yesterday closing level. The benchmark series of 5, 10, 15 and 20Y closed at mid yield of 6.78%, 7.09%, 7.11% and 7.11%.

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)	1.1	5Y
FR91	FR0091 Govt	97.2	(0.1)	0.8	10Y
FR93	FR0093 Govt	95.7	(0.3)	0.9	15Y
FR92	FR0092 Govt	99.7	(0.1)	(0.5)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.8	0.0	0.6	15-8-2025
PBS003	INDOIS 6 01/15/27	99.1	(0.0)	0.8	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	99.9	(0.0)	0.3	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	97.1	0.0	0.1	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,381.7	1.1	(9.9)	
Thailand	SET Index	1,181.7	(0.7)	(15.6)	
Korean Stock Exch.	KOSPI Index	2,637.1	0.3	9.9	
Straight Times	FSSTI Index	3,930.5	0.6	3.8	
Kuala Lumpur	KLCI Index	1,504.2	(0.9)	(8.4)	
Philippines	PCOMP Index	6,323.1	0.2	(3.2)	
Nikkei	NKY Index	37,751.9	(0.2)	(5.4)	
Hang Seng	HSI Index	24,220.0	(2.2)	20.7	
MSCI-Asia pacific	MXAP Index	189.6	(0.1)	4.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	41,964.6	0.9	(1.4)	
S&P 500	SPX Index	5,675.3	1.1	(3.5)	
Nasdaq	CCMP Index	17,750.8	1.4	(8.1)	
FTSE 100	UKX Index	8,696.7	(0.1)	6.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,475.0	0.3	(2.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,521.7	0.5	1.7
3 month	IDSWT3M Index	16,528.9	0.5	(2.3)
6 month	IDSWT6M Index	16,530.3	0.5	(2.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,550.1	0.6	(2.4)
6 month	IDFWT6M Index	16,597.4	0.8	(2.3)

*price as of 3/19/2025

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

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