



FOR PROFESSIONAL INVESTORS - 03/26/2026

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Closed Lower

JCI weakened and closed at 7,164 (-138 points or -1.89%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net outflow of IDR 1.9Tn today and rupiah was stabilized at IDR 16,904/USD.

Banking stocks were mostly negative as BNLI (-6.62%), BBCA (-0.36%), BBRI (-1.41%), and BMRI (-2.62%) all closed lower, except MEGA (+9.64%). Consumer names were mixed as INDF (+0.83%), MYOR (+1.63%), and GGRM (+1.99%) up, while HMSP (-2.01%) and KLBF (-1.01%) closed lower. Mining stocks were negative as INCO (-2.18%), INDY (-5.93%), ADRO (-1.9%), TINS (-5.67%), and ANTM (-5.25%) all retreated. Telco names were negative as EXCL (-0.34%), ISAT (-3.18%), and TLKM (-3.94%) all closed lower. Other movers were SOTS (+24.57%), GIAA (+15.07%), FILM (-14.48%), and TCPI (-8.9%).

Finance Minister Purbaya Yudhi Sadewa stated that the National Nutrition Agency (BGN) has proposed efficiencies in the Free Nutritious Meals (MBG) program by reducing the frequency of MBG distribution, which could roughly save up to Rp40tn.

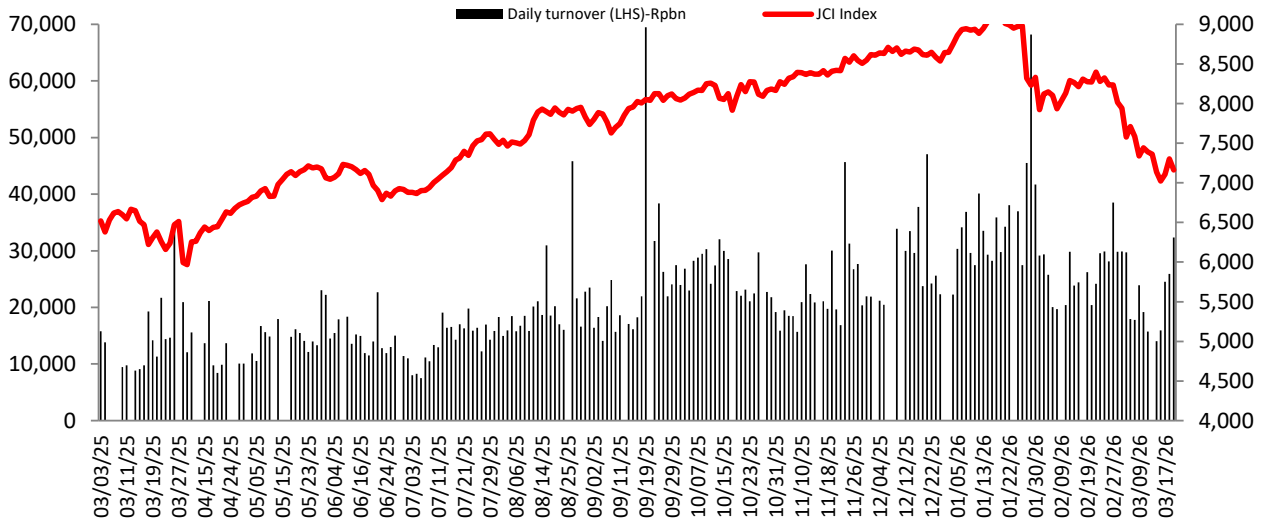
BOND MARKET

Policy-Driven Rebound

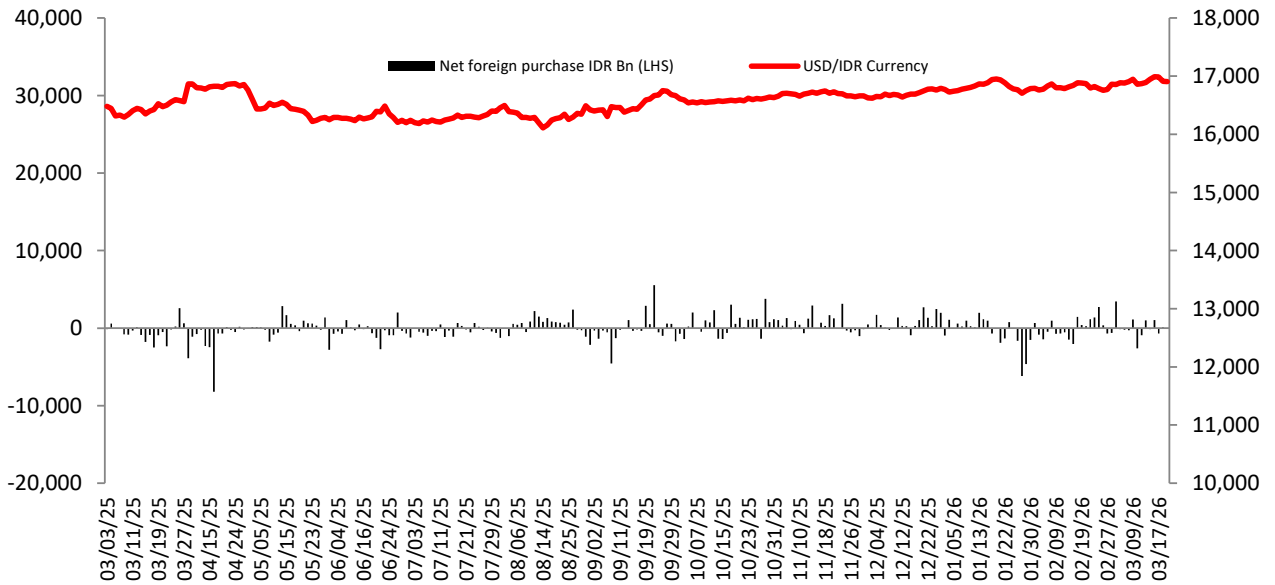
Indonesia bond market rebounded today, with yield moving lower by 7 – 13 bps. The recovery was mainly driven by liquidity injection from the Ministry of Finance, IDR 100Tn into state-owned banks (Himbara) and a regional bank (Bank DKI), which improved banking system liquidity and supported demand for SBN. In the morning session, the activity lead by the 5Y areas, FR109 got traded at 97 (6.59%). Trading picked up in the afternoon session as the London market opened. However, overall sentiment remains cautious amid persistent global uncertainties and elevated UST yields, 10Y at 4.37%. Total foreign ownership in SBN declined to IDR 857.99Tn as of Mar 6th, 2026 from previously IDR 875.36 on Feb 27th, 2026.

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	99.3	0.1	(1.0)	5Y
FR91	FR0091 Govt	97.9	0.3	(4.5)	10Y
FR93	FR0093 Govt	95.8	0.1	(5.5)	15Y
FR92	FR0092 Govt	101.5	0.1	(4.5)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.5	#VALUE!	(0.7)	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.9	(0.4)	(3.3)	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.9	#VALUE!	(1.9)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,164.1	(1.9)	(17.1)	
Thailand	SET Index	1,442.2	(1.1)	14.5	
Korean Stock Exch.	KOSPI Index	5,460.5	(3.2)	29.6	
Straight Times	FSSTI Index	4,887.8	(0.3)	5.2	
Kuala Lumpur	KLCI Index	1,710.9	(0.3)	1.8	
Philippines	PCOMP Index	5,984.2	(1.0)	(1.1)	
Nikkei	NKY Index	53,603.7	(0.3)	6.5	
Hang Seng	HSI Index	24,856.4	(1.9)	(3.0)	
MSCI-Asia pacific	MXAP Index	238.6	2.0	4.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,429.5	0.7	(3.4)	
S&P 500	SPX Index	6,591.9	0.5	(3.7)	
Nasdaq	CCMP Index	21,929.8	0.8	(5.6)	
FTSE 100	UKX Index	10,014.6	(0.9)	0.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,904.0	0.0	(1.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,989.1	0.5	1.6
3 month	IDSWT3M Index	16,986.6	(0.0)	(1.7)
6 month	IDSWT6M Index	16,990.0	0.2	(1.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	17,005.5	0.0	(1.7)
6 month	IDFWT6M Index	17,037.2	(0.0)	(1.6)

*price as of 3/25/2026

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