FOR PROFESSIONAL INVESTORS - 06/13/2025

DAILY REPORT
INDONESIA MARKET WRAP

EQUITY MARKET

Slightly Lower

JCI weakened and closed at 7,166 (-38 points or -0.53%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net INflow of IDR 479Bn today and rupiah slightly weakened to IDR 16,295/USD.

Banking stocks were mostly negative as BBTN (-1.69%), BMRI (-0.48%), BBCA (-1.1%), and BBRI (-1.72%) all retreated, except PNBN (+4.89%). Consumer names were mostly negative as MYOR (-0.96%), KLBF (-0.33%), ICBP (-0.7%), and UNVR (-4%) all declined, except INDF (+1.22%). Retailer stocks were negative as ACES (-2.75%), ERAA (-3.7%), MAPA (-3.65%), and AMRT (-1.61%) all weakened. Pulp & paper names were negative as TKIM (-0.4%) and INKP (-3.46%) all declined. Other movers were BALI (+13.54%), MEDC (+9.38%), ADRO (-5.9%), and BFIN (-4.62%).

Bank Indonesia (BI) reported consumer confidence index of 117.5 in May2025, down 4.2 points from 121.7 in Apr2025

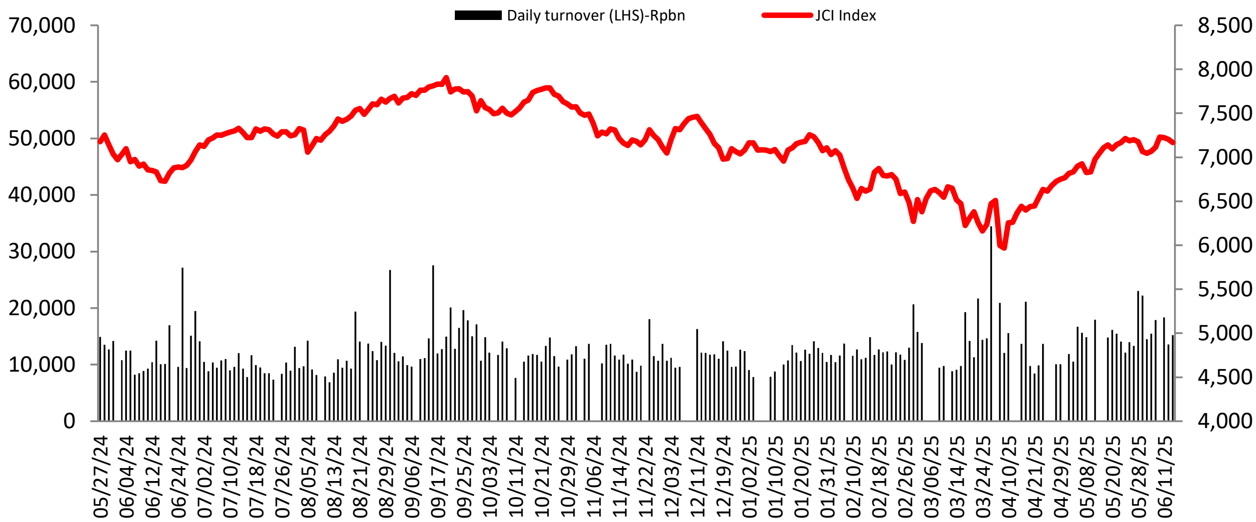
BOND MARKET

PAUSED

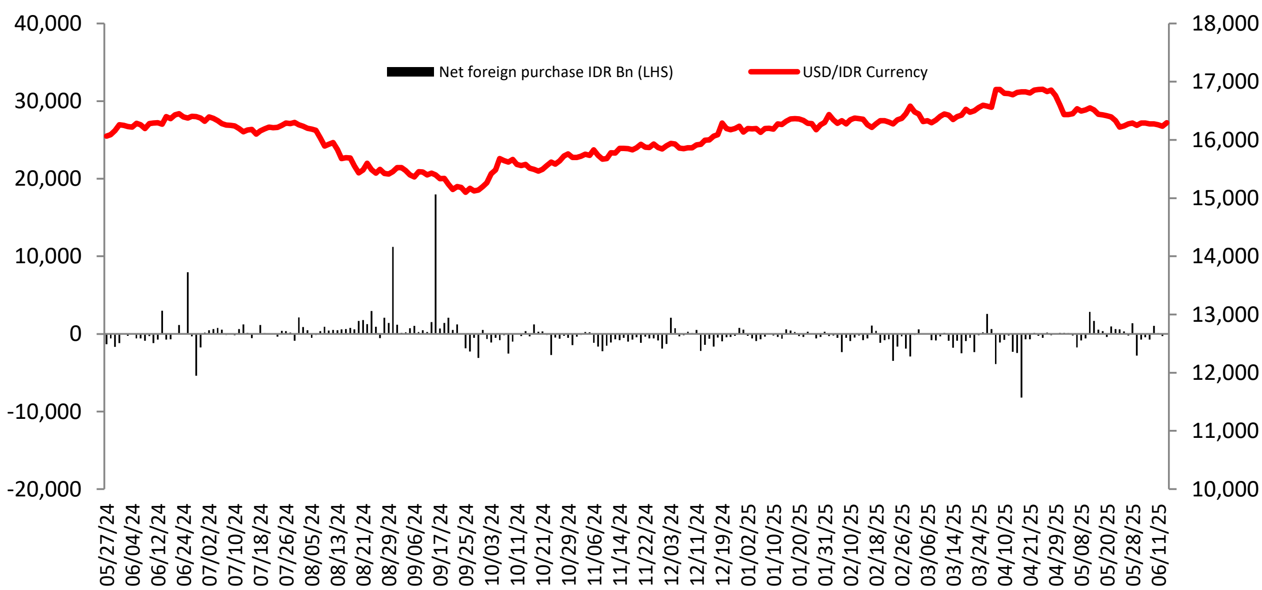
Indonesia bond market positive movement were halted today as geopolitical tension arise between Israel – Iran. Rupiah opened higher in 16270/80 range driven by recovery in USD. We noted some selling interest in the morning session, particularly in benchmark series ahead of next week auction. 10Y FR103 were traded as low as 100.10 (6.74%) before managed to climb higher to 100.3 (6.71%) towards closing time. Short end are still supported by local demands as there are fresh liquidity of IDR 142tn coming from FR81 maturity this weekend. Overall, yield curve climbed higher on 4Y tenor onwards. The benchmark series of 5Y/10Y/15Y/20Y closed at mid yield 6.31%/6.70%/6.96%/7.01%.
On today's SRBI auction, BI saw increase of demand at IDR 41.9tn higher than last week IDR 24tn. BI issued SRBI at IDR 22.5tn, with 6mo, 9mo and 12mo weighted average yield at 6.22%, 6.26% and 6.27% respectively.

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	98.2	(0.0)	2.1	5Y
FR91	FR0091 Govt	99.3	(0.2)	3.1	10Y
FR93	FR0093 Govt	96.1	(0.3)	1.4	15Y
FR92	FR0092 Govt	101.1	(0.1)	0.9	20Y
PBS036	INDOIS 5 ⅜ 08/15/25	100.0	0.0	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	99.7	(0.0)	1.4	15-01-2027
PBS037	INDOIS 6 ⅞ 03/15/36	99.9	(0.1)	0.3	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.4	(0.2)	1.5	15-06-2047
Asia Pacific					
Jakarta Composite	JCI Index	7,166.1	(0.5)	1.2	
Thailand	SET Index	1,123.7	(0.4)	(19.7)	
Korean Stock Exch.	KOSPI Index	2,894.6	(0.9)	20.6	
Straight Times	FSSTI Index	3,911.4	(0.3)	3.3	
Kuala Lumpur	KLCI Index	1,518.1	(0.6)	(7.6)	
Philipines	PCOMP Index	6,395.6	0.2	(2.0)	
Nikkei	NKY Index	37,834.3	(0.9)	(5.2)	
Hang Seng	HSI Index	23,892.6	(0.6)	19.1	
MSCI-Asia pacific	MXAP Index	200.2	(0.2)	10.2	
Global Indices					
Dow Jones	INDU Index	42,967.6	0.2	1.0	
S&P 500	SPX Index	6,045.3	0.4	2.8	
Nasdaq	CCMP Index	19,662.5	0.2	1.8	
FTSE 100	UKX Index	8,839.7	(0.5)	8.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	16,295.0	(0.4)	(1.2)
Swap-IDR				
1 month	IDSWT1M Index	16,240.5	(0.2)	(0.1)
3 month	IDSWT3M Index	16,238.7	(0.2)	(0.5)
6 month	IDSWT6M Index	16,248.0	(0.1)	(0.6)
Forward-IDR				
3 month	IDFWT3M Index	16,247.7	(0.3)	(0.5)
6 month	IDFWT6M Index	16,357.0	0.2	(0.8)

*price as of 6/12/2025

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