

FOR PROFESSIONAL INVESTORS - 05/08/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Pullback

JCI weakened and closed at 6,828 (-98 points or -1.42%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 842Bn today and rupiah slightly strengthened to IDR 16,495/USD.

Banking stocks were mostly negative as BBNI (-0.96%), BBKA (-1.1%), BMRI (-3.23%), and BBRI (-3.07%) all weakened, except BBTN (+9.95%). Consumer names were mixed as ICBP (+2.93%), KLBF (+2.49%), and INDF (+0.32%) closed higher, while MYOR (-0.88%) and UNVR (-1.66%) down. Mining stocks were negative as INDY (-5.19%), PTBA (-1.45%), TINS (-6.17%), INCO (-3.16%), and ANTM (-5.09%) all closed lower. Telco names were negative as EXCL (-2.29%), ISAT (-4.36%), and TLKM (-1.91%) all down. Other movers were BBKP (+4.62%), INPC (+4.44%), BRIS (-5.86%), and PANI (-4.14%).

Ministry of public works focus to allocated addition budget of Rp23.3tn for six priority infrastructure activities, one of which includes road preservation. With this addition, total budget of the ministry increased to Rp73.8tn.

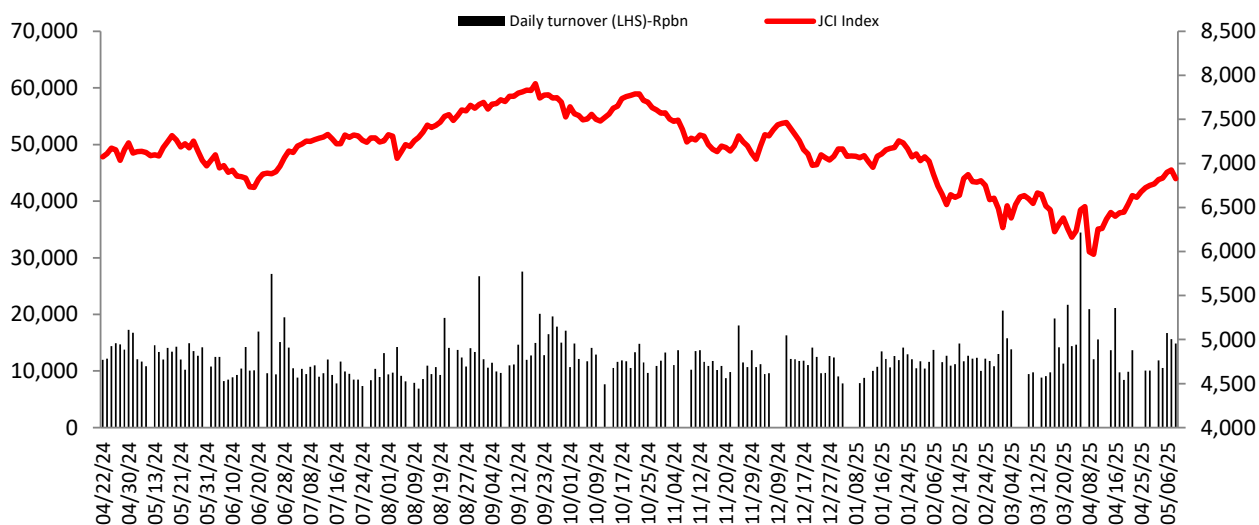
BOND MARKET

TWO WAYS

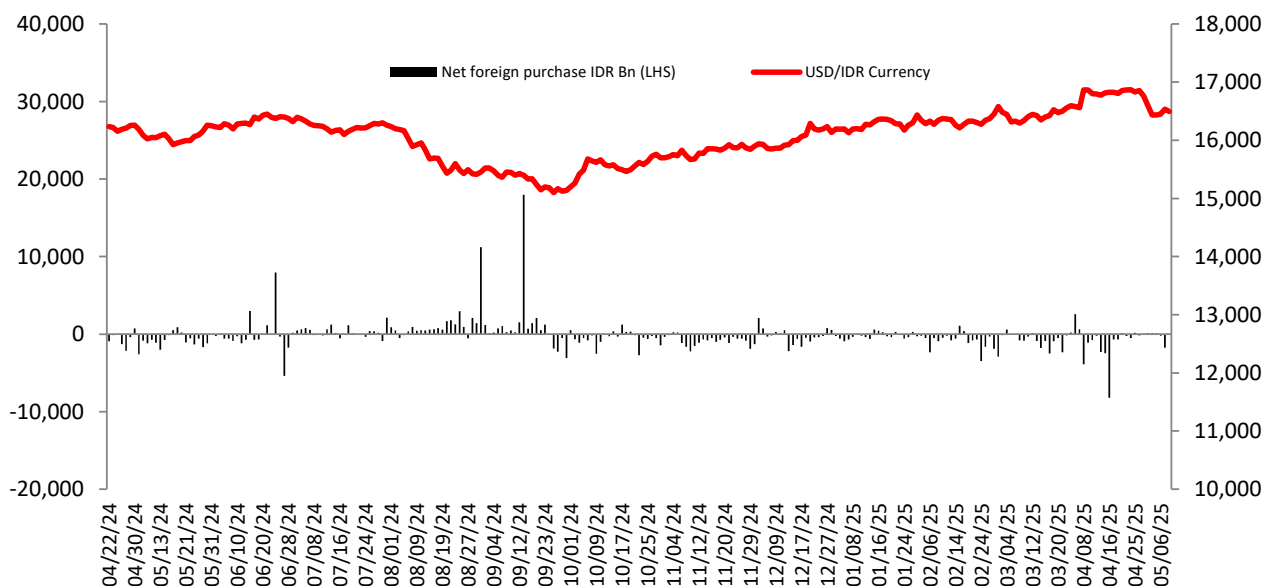
The bond market saw no improvement in risk sentiment today although we witnessed two ways trading in the market. Morning session saw buying interest started by local players. While we still witnessed mixed names showed their selling interest particularly after London opened although trading volume remained thin. Thin trading volume during the day pushed bidders to be more defensive. Yields were higher by around 1 – 2 bps across the curve.

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	97.9	0.0	1.8	5Y
FR91	FR0091 Govt	98.5	0.1	2.2	10Y
FR93	FR0093 Govt	96.0	0.3	1.3	15Y
FR92	FR0092 Govt	100.7	(0.0)	0.6	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.9	0.0	0.7	15-8-2025
PBS003	INDOIS 6 01/15/27	99.5	0.0	1.2	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	96.5	0.0	(0.5)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,827.8	(1.4)	(3.6)	
Thailand	SET Index	1,206.6	(1.1)	(13.8)	
Korean Stock Exch.	KOSPI Index	2,579.5	0.2	7.5	
Straight Times	FSSTI Index	3,848.2	(0.4)	1.6	
Kuala Lumpur	KLCI Index	1,542.7	(0.5)	(6.1)	
Philippines	PCOMP Index	6,389.5	(1.2)	(2.1)	
Nikkei	NKY Index	36,928.6	0.4	(7.4)	
Hang Seng	HSI Index	22,775.9	0.4	13.5	
MSCI-Asia pacific	MXAP Index	190.7	0.0	5.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	41,114.0	0.7	(3.4)	
S&P 500	SPX Index	5,631.3	0.4	(4.3)	
Nasdaq	CCMP Index	17,738.2	0.3	(8.1)	
FTSE 100	UKX Index	8,585.4	0.3	5.0	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,495.0	0.2	(2.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,523.5	0.3	1.7
3 month	IDSWT3M Index	16,533.0	0.5	(2.4)
6 month	IDSWT6M Index	16,544.2	0.5	(2.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,555.4	0.4	(2.4)
6 month	IDFWT6M Index	16,573.0	0.3	(2.2)

*price as of 5/7/2025



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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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