



FOR PROFESSIONAL INVESTORS - 08/12/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rally!

JCI advanced and closed at 7,792 (+186 points or +2.44%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 2.2Tn today and rupiah was stabilized at IDR 16,289/USD.

Banking stocks were positive as BBRI (+6.3%), BBCA (+3.51%), BMRI (+4.03%), BBNI (+3.81%), and BBTN (+4.56%) all advanced. Consumer names were mostly positive as KLBK (+0.73%), UNVR (+1.7%), MYOR (+1.83%), and HMSP (+1.85%) all up, except INDF (-0.31%). Telco stocks were positive as TLKM (+6.35%), EXCL (+5.56%), and ISAT (+2.21%) all closed higher. Pulp & paper names were positive as INKP (+3.08%) and TKIM (+0.34%) all rose. Other movers were BBYB (+22.22%), MLPT (+19.96%), BKSL (-5.16%), and ITMG (-4.85%).

Bank Indonesia (BI) reported Jun25 Retail Sales Index (RSI) at 231.9 or +1.3% YoY (slowing figure compared to May25 RSI which grew +1.9% YoY). BI indicated that Jul25 RSI will grow +4.8% YoY but fall on MoM basis by -4% due to decline in sales in food and beverages, cigarettes, and communication equipment

BOND MARKET

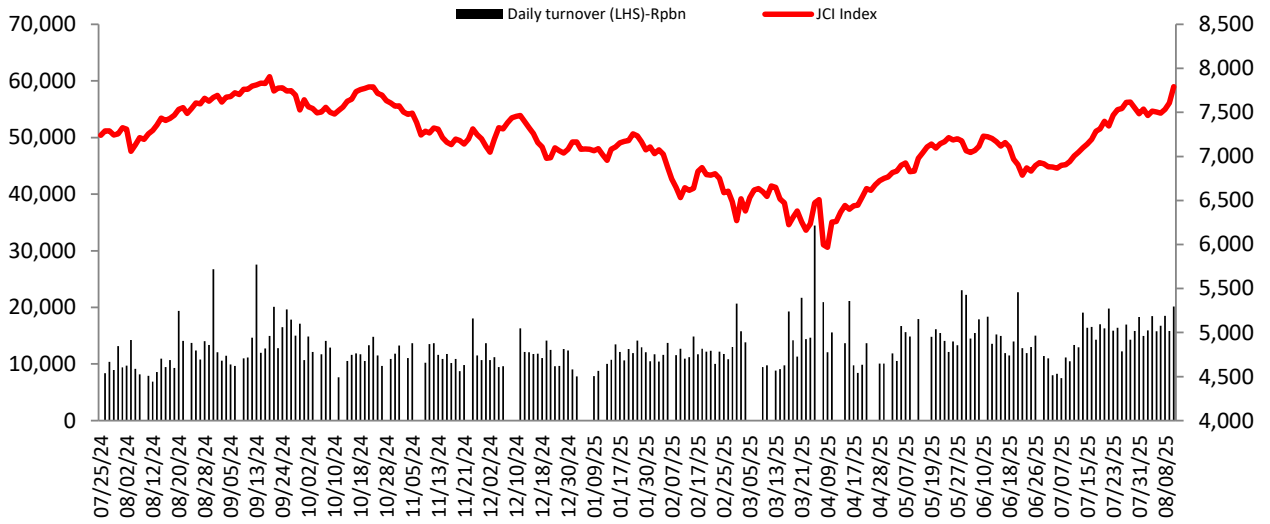
Massive Auction!

Indonesia bond market opened the day with widened bid - ask spread with Rupiah opened at 16,312 level. Market players turned defensive and stay sidelined ahead of regular auction today. We heard no trade in the morning session, at least from our side. Nearing the lunch time, MoF announced the all time high incoming bids in history with total size IDR 162.3227Tn, with new series FR109 as dominated bidder. After the announcement, we heard some bidder turned to secondary and collecting some non benchmark series at better yield. We heard 6Y FR87 got taken at 102.1 (6.04%) and 4Y FR100 at 101.5 (6.39%). However, we still seen some profit taker later.

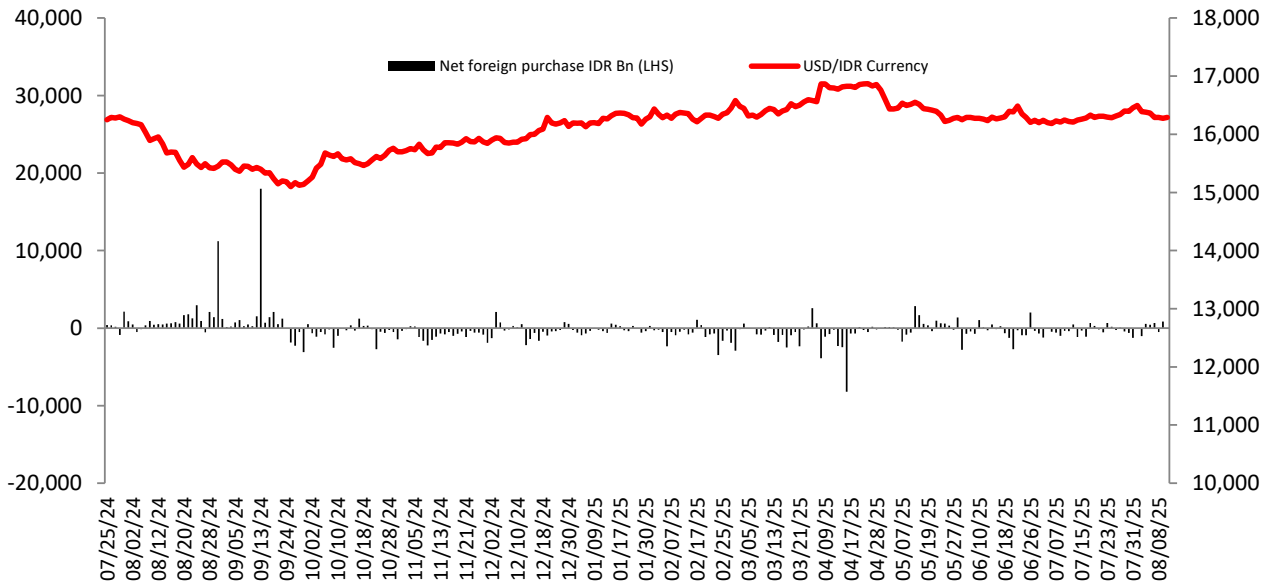
In today's auction, the series absorbed (against incoming bids) on the auction were IDR 0.5Tn (IDR 1.515Tn) 3mo SPN, IDR 2Tn (IDR 6.935Tn) 12mo SPN, IDR 9.9Tn (IDR 88.0626Tn) 6Y FR109 (New Benchmark Series), IDR 8.85Tn (IDR 34.042Tn) 11Y FR108, IDR 3.75Tn (IDR 13.312Tn) 15Y FR106, IDR 3.6Tn (IDR 7.801Tn) 20Y FR107, IDR 1.95Tn (IDR 5.084Tn) 29Y FR102, and IDR 1.45Tn (IDR 5.572Tn) 39Y FR105 at weighted average yields of 5.35%, 5.4%, 5.95%, 6.47%, 6.8%, 6.85%, 6.9% and 6.94% respectively.

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	99.5	0.0	3.4	5Y
FR91	FR0091 Govt	100.6	0.2	4.4	10Y
FR93	FR0093 Govt	98.3	0.0	3.7	15Y
FR92	FR0092 Govt	102.6	(0.2)	2.4	20Y
PBS036	INDOIS 5 ¼ 08/15/25	100.0	0.1	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	100.8	(0.0)	2.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.0	0.1	1.4	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.7	0.1	2.8	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,791.7	2.4	10.1	
Thailand	SET Index	1,259.1	(0.5)	(10.1)	
Korean Stock Exch.	KOSPI Index	3,189.9	(0.5)	32.9	
Straight Times	FSSTI Index	4,225.4	(0.2)	11.6	
Kuala Lumpur	KLCI Index	1,567.9	0.3	(4.5)	
Philippines	PCOMP Index	6,289.9	0.6	(3.7)	
Nikkei	NKY Index	42,718.2	2.1	7.1	
Hang Seng	HSI Index	24,969.7	0.3	24.5	
MSCI-Asia pacific	MXAP Index	209.0	0.1	15.1	
<u>Global Indices</u>					
Dow Jones	INDU Index	43,975.1	(0.5)	3.4	
S&P 500	SPX Index	6,373.5	(0.3)	8.4	
Nasdaq	CCMP Index	21,385.4	(0.3)	10.7	
FTSE 100	UKX Index	9,162.3	0.4	12.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,289.0	(0.1)	(1.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,259.6	(0.4)	0.0
3 month	IDSWT3M Index	16,248.1	(0.3)	(0.6)
6 month	IDSWT6M Index	16,256.6	(0.3)	(0.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,273.5	(0.2)	(0.6)
6 month	IDFWT6M Index	16,278.5	(0.3)	(0.3)

*price as of 8/11/2025

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