

FOR PROFESSIONAL INVESTORS - 07/09/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Higher

JCI advanced and closed at 6,944 (+40 points or +0.57%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 367Bn today and rupiah slightly weakened to IDR 16,243/USD.

Banking stocks were mostly positive as BBRI (+0.27%), BBNI (+0.76%), BNLN (+2.53%), and BBTN (+1.85%) all up, except BMRI (-0.21%). Consumer names were mixed as INDF (+1.87%), KLBF (+0.67%), and SDO (+5.1%) rose, while GGRM (-2.8%) and HMSP (-1.64%) declined. Poultry stocks were positive as CPIN (+3.18%), JPFA (+3.53%), and MAIN (+4%) all in green. Retailer names were positive as MAPA (+3.52%), ACES (+4.94%), MAPI (+0.81%), and ERAA (+0.96%) all up. Other movers were PANI (+11.27%), KPIG (+3.35%), TCPI (-2.3%), and TOWR (-1.87%).

Bank Indonesia (BI) reported the Consumer Confidence Index (CCI) at the level of 117.8 in June 2025. This indicates stability at an optimistic level. The CCI in June slightly increased from May's position of 117.5.

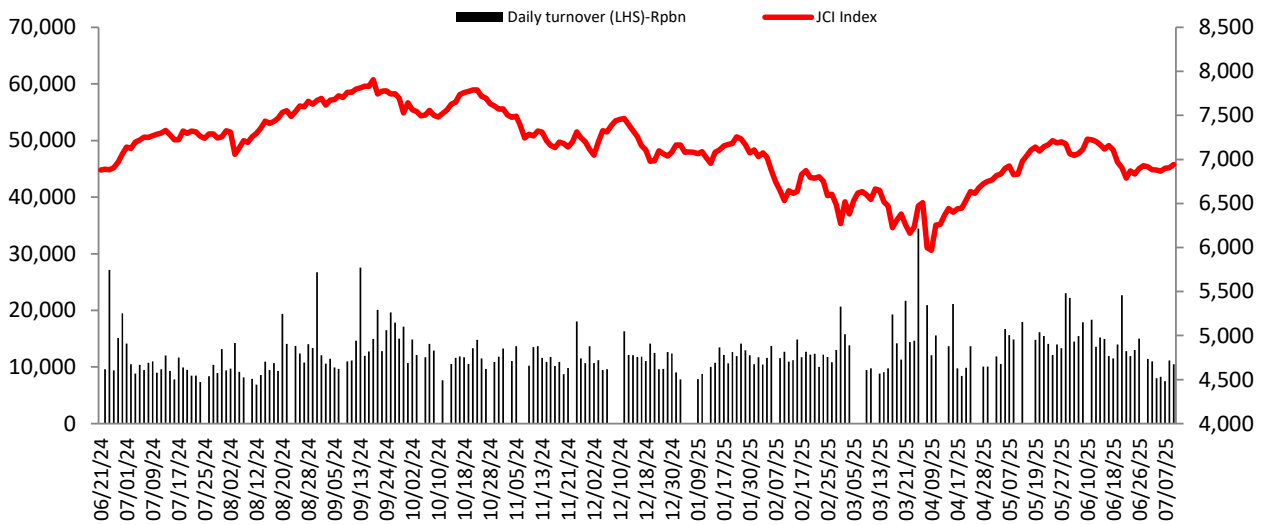
BOND MARKET

FLATTISH

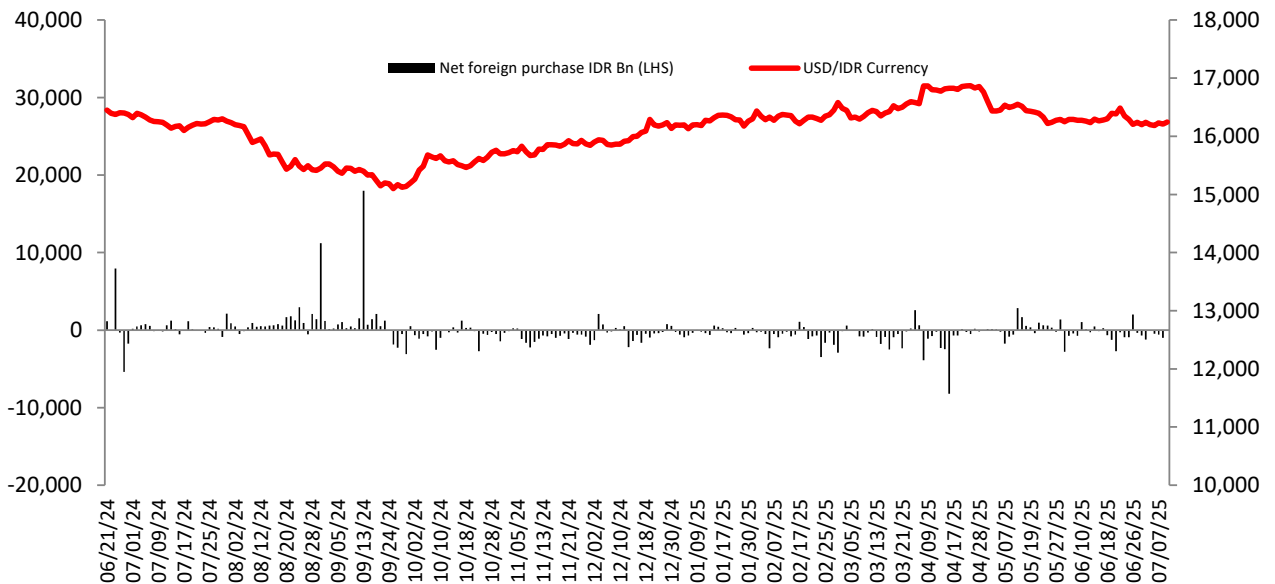
The bond market saw no improvement in risk sentiment today although we witnessed two ways trading in the market. Morning session saw selling interest on the belly started by interbank, while banking books still supported the front end area. Meanwhile on the afternoon session, we witnessed offshore real money and central bank showed their buying interest particularly after London opened although trading volume remained thin. Thin trading volume during the day pushed bidders to be more defensive. Price movement went back to range bound lacking fresh catalyst.

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	98.6	0.0	2.5	5Y
FR91	FR0091 Govt	99.7	(0.0)	3.5	10Y
FR93	FR0093 Govt	97.3	0.2	2.7	15Y
FR92	FR0092 Govt	101.9	0.1	1.7	20Y
PBS036	INDOIS 5 ¾ 08/15/25	100.1	0.0	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	100.0	0.0	1.7	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.5	(0.1)	0.9	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	97.9	(0.0)	1.0	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,943.9	0.6	(1.9)	
Thailand	SET Index	1,110.4	(0.5)	(20.7)	
Korean Stock Exch.	KOSPI Index	3,133.7	0.6	30.6	
Straight Times	FSSTI Index	4,057.8	0.2	7.1	
Kuala Lumpur	KLCI Index	1,529.2	(0.1)	(6.9)	
Philippines	PCOMP Index	6,504.3	1.1	(0.4)	
Nikkei	NKY Index	39,821.3	0.3	(0.2)	
Hang Seng	HSI Index	23,892.3	(1.1)	19.1	
MSCI-Asia pacific	MXAP Index	202.0	0.1	11.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,240.8	(0.4)	4.0	
S&P 500	SPX Index	6,225.5	(0.1)	5.8	
Nasdaq	CCMP Index	20,418.5	0.0	5.7	
FTSE 100	UKX Index	8,870.8	0.2	8.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,243.0	(0.2)	(0.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,247.0	0.3	(0.0)
3 month	IDSWT3M Index	16,231.3	(0.0)	(0.5)
6 month	IDSWT6M Index	16,245.0	0.2	(0.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,259.5	0.0	(0.6)
6 month	IDFWT6M Index	16,312.0	0.5	(0.6)

*price as of 7/8/2025



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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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