FOR PROFESSIONAL INVESTORS - 05/08/2026

DAILY REPORT INDONESIA MARKET WRAP

EQUITY MARKET

Reversal

JCI weakened and closed at 6,969 (-205 points or -2.86%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR 485Bn today and rupiah slightly weakened to IDR 17,373/USD.

Banking stocks were mostly negative as BMRI (-0.22%), BBNI (-3.02%), BBCA (-0.8%), and BBRI (-1.51%) all retreated, except BDMN (+11.08%). Consumer names were mixed as KLBF (+2.22%) and KAEF (+24.51%) up, while UNVR (-1.91%), ICBP (-1.74%), and INDF (-2.11%) corrected. Mining stocks were negative as ITMG (-4.71%), INDY (-14.82%), TINS (-14.88%), INCO (-13.89%), and ANTM (-6.44%) all corrected. Material names were negative as TPIA (-3.93%) and BRPT (-5.09%) all closed lower. Other movers were MAPI (+12.36%), GSMF (+10.16%), DSSA (-14.94%), and MDKA (-13.13%).

E-commerce transactions in Indonesia grew 6.2% in the first quarter of 2026, driven by the momentum of Ramadan and Eid al-Fitr. Shopee became the most frequently accessed e-commerce platform with 191.4 million visits in March 2026, followed by Tokopedia, Lazada, and Blibli.

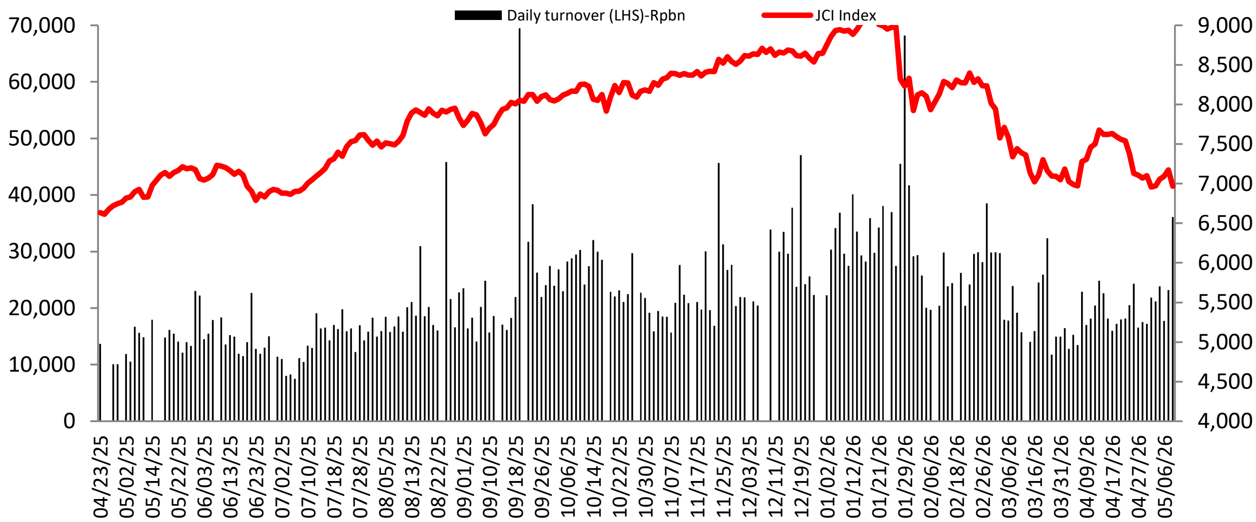
BOND MARKET

Choppy

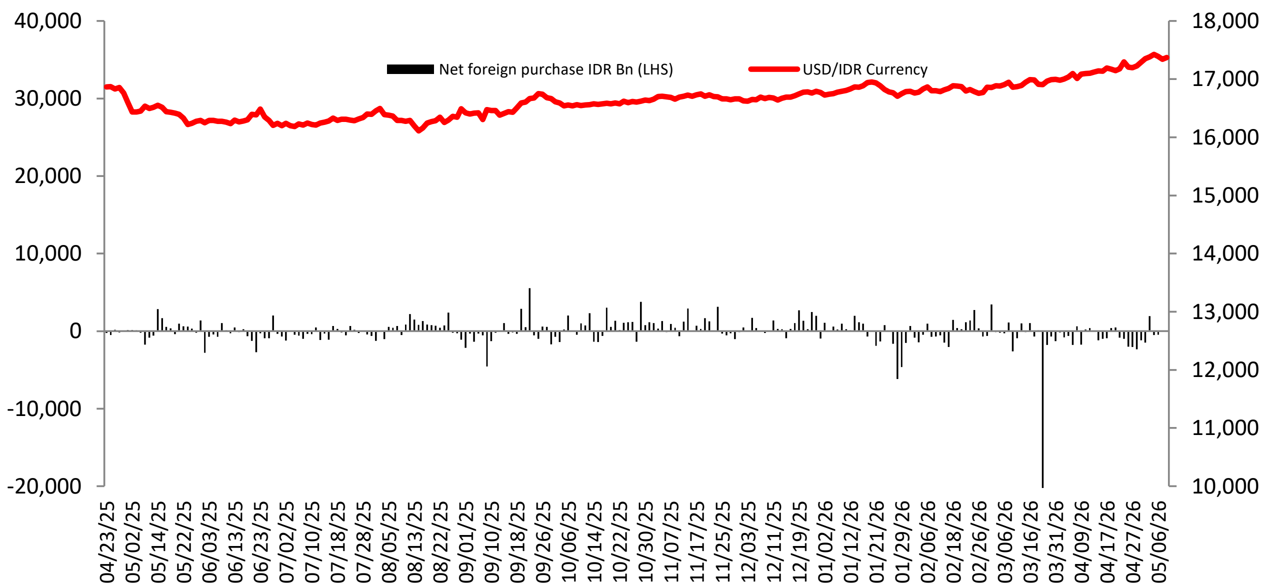
INDOGB closed mixed to slightly weaker amid choppy trading, as market players balanced improved domestic liquidity sentiment from the stronger-than-expected SRBI auction against persistent global risk-off pressure following renewed Middle East tensions. BI upsized SRBI issuance to IDR30Tn (vs. initial IDR20Tn target) with lower cut-off and weighted average yields, triggering better demand particularly on the front-end and helping bonds trim earlier losses post-auction. However, offshore selling on strength and cautious sentiment toward higher UST yields kept the broader market volatile, with benchmark yields ending mostly 1–5bps higher across the belly-to-medium tenor while the long-end was relatively unchanged.

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	99.1	0.0	(1.2)	5Y
FR91	FR0091 Govt	99.3	0.0	(3.2)	10Y
FR93	FR0093 Govt	97.9	0.0	(3.5)	15Y
FR92	FR0092 Govt	103.4	0.1	(2.8)	20Y
PBS036	INDOIS 5 ⅜ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.1	0.1	(1.1)	15-01-2027
PBS037	INDOIS 6 ⅞ 03/15/36	102.4	(0.0)	(2.8)	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	100.4	#VALUE!	(1.4)	15-06-2047
Asia Pacific					
Jakarta Composite	JCI Index	6,969.4	(2.9)	(19.4)	
Thailand	SET Index	1,501.6	(0.4)	19.2	
Korean Stock Exch.	KOSPI Index	7,498.0	0.1	77.9	
Straight Times	FSSTI Index	4,921.9	(0.4)	5.9	
Kuala Lumpur	KLCI Index	1,748.1	(0.6)	4.0	
Philipines	PCOMP Index	5,961.0	(1.2)	(1.5)	
Nikkei	NKY Index	62,713.7	(0.2)	24.6	
Hang Seng	HSI Index	26,393.7	(0.9)	3.0	
MSCI-Asia pacific	MXAP Index	273.4	2.1	20.1	
Global Indices					
Dow Jones	INDU Index	49,597.0	(0.6)	3.2	
S&P 500	SPX Index	7,337.1	(0.4)	7.2	
Nasdaq	CCMP Index	25,806.2	(0.1)	11.0	
FTSE 100	UKX Index	10,257.1	(0.2)	3.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	17,373.0	(0.2)	(3.9)
Swap-IDR				
1 month	IDSWT1M Index	17,356.3	(0.2)	3.8
3 month	IDSWT3M Index	17,359.6	(0.3)	(3.9)
6 month	IDSWT6M Index	17,356.9	(0.3)	(3.8)
Forward-IDR				
3 month	IDFWT3M Index	17,364.8	(0.3)	(3.8)
6 month	IDFWT6M Index	17,443.5	(0.4)	(4.0)

*price as of 5/7/2026

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