FOR PROFESSIONAL INVESTORS - 04/17/2025

DAILY REPORT
INDONESIA MARKET WRAP

EQUITY MARKET

Rebound

JCI advanced and closed at 6,438 (+38 points or +0.6%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net outflow of IDR -680Bn today and rupiah was stabilized at IDR 16,825/USD.

Banking stocks were mixed as BBCA (+0.29%) and PNBN (+8.25%) inched higher, while BBRI (-0.27%), BBNI (-1.46%), and BMRI (-0.65%) declined. Consumer names were mixed as ICBP (+3.41%), HMSP (+1.79%), and GGRM (+1.33%) in green, while INDF (-1.35%) and KLBF (-4.38%) weakened. Material stocks were positive as BRPT (+4.79%) and TPIA (+0.67%) all inched higher. Properties names were positive as CTRA (+3.07%), PWON (+2.3%), BSDE (+1.89%), and SMRA (+2.65%) all up. Other movers were MDKA (+16.25%), PNLF (+14.02%), ARNA (-8.21%), and STTP (-3.78%).

Bank Indonesia (BI) reported March2025 Retail Sales Index (RSI) reached 236.7, +0.5% YoY and +8.3% MoM. Majority of growth came from the information and communication segment, food, drinks, cigarettes segment, as well as the clothing segment

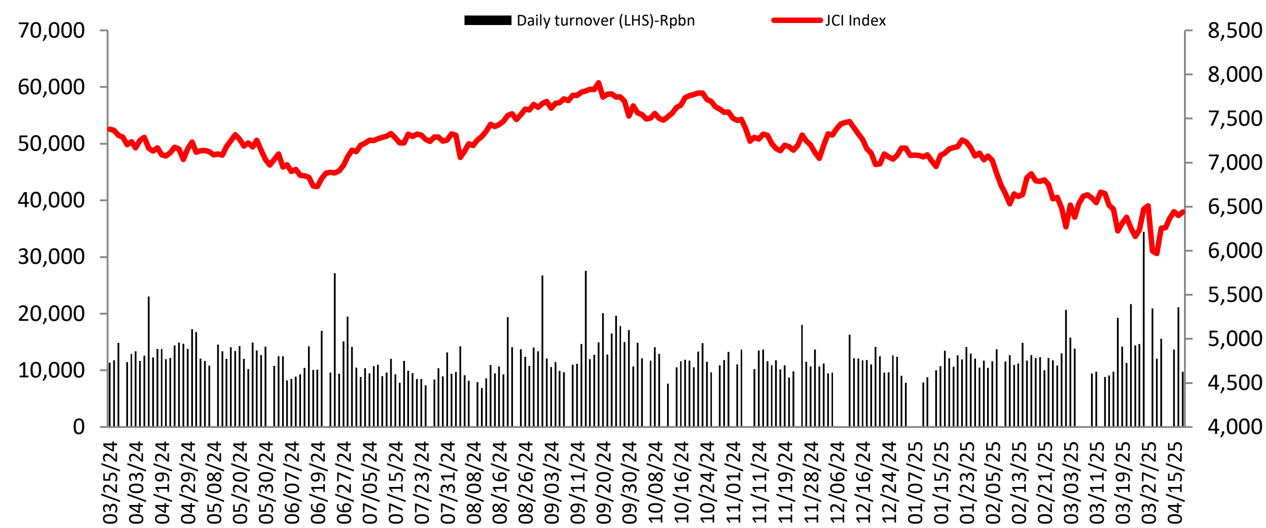
BOND MARKET

Light Session

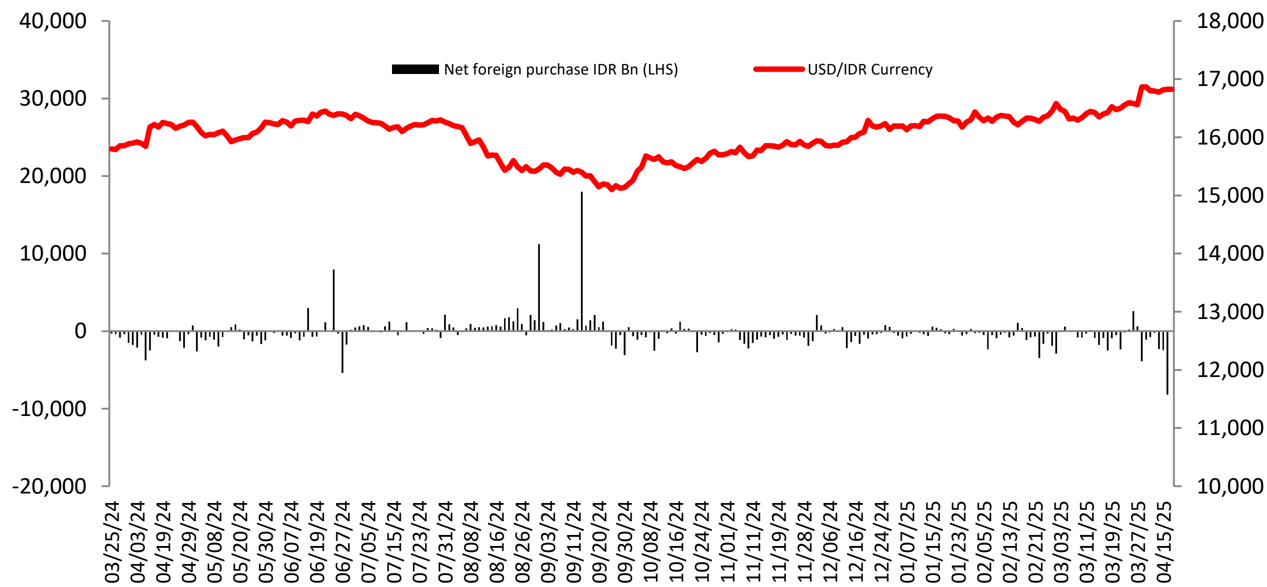
Indonesia bond market opened the day with quiet ode ahead of Easter holiday. There was little to no trading in the morning session with bidding interest seen in short to belly areas. Second session, saw more actions with 5Y and 10Y benchmark series got traded down to 98.75 (6.78%) and 98.75 (6.92%). Most traded bonds today aside from 10Y benchmark were 3Y PBS30 and 5Y FR104 which were traded last at yield 6.69% and 6.75% respectively. There will be fresh supply next week as Indonesia Debt Management Office ("DMO") will hold conventional bond auction after long hiatus.

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	97.4	0.1	1.3	5Y
FR91	FR0091 Govt	97.2	(0.0)	0.9	10Y
FR93	FR0093 Govt	94.4	0.1	(0.4)	15Y
FR92	FR0092 Govt	99.5	0.3	(0.6)	20Y
PBS036	INDOIS 5 ⅜ 08/15/25	99.8	0.0	0.6	15-8-2025
PBS003	INDOIS 6 01/15/27	99.1	0.0	0.8	15-01-2027
PBS037	INDOIS 6 ⅞ 03/15/36	99.8	0.0	0.2	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	96.2	(0.0)	(0.8)	15-06-2047
Asia Pacific					
Jakarta Composite	JCI Index	6,438.3	0.6	(9.1)	
Thailand	SET Index	1,141.3	0.2	(18.5)	
Korean Stock Exch.	KOSPI Index	2,470.4	0.9	3.0	
Straight Times	FSSTI Index	3,720.3	1.6	(1.8)	
Kuala Lumpur	KLCI Index	1,483.3	0.4	(9.7)	
Philipines	PCOMP Index	6,134.6	(0.8)	(6.0)	
Nikkei	NKY Index	34,377.6	1.3	(13.8)	
Hang Seng	HSI Index	21,395.1	1.6	6.7	
MSCI-Asia pacific	MXAP Index	176.4	(0.9)	(2.9)	
Global Indices					
Dow Jones	INDU Index	39,669.4	(1.7)	(6.8)	
S&P 500	SPX Index	5,275.7	(2.2)	(10.3)	
Nasdaq	CCMP Index	16,307.2	(3.1)	(15.6)	
FTSE 100	UKX Index	8,207.6	(0.8)	0.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	16,825.0	0.0	(4.3)
Swap-IDR				
1 month	IDSWT1M Index	16,843.6	0.2	3.6
3 month	IDSWT3M Index	16,855.0	0.2	(4.3)
6 month	IDSWT6M Index	16,840.1	0.2	(4.3)
Forward-IDR				
3 month	IDFWT3M Index	16,872.5	0.1	(4.3)
6 month	IDFWT6M Index	16,844.0	(0.3)	(3.8)

*price as of 4/16/2025

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