



FOR PROFESSIONAL INVESTORS - 03/31/2026

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Trending Down

JCI weakened and closed at 7,048 (-43 points or -0.61%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 1.3Tn today and rupiah was stabilized at IDR 16,995/USD.

Banking stocks were mixed as BMRI (+0.43%) and BNL I (+1.13%) rose, while BBTN (-0.79%), BBNI (-2.34%), and BBRI (-0.89%) declined. Consumer names were mostly positive as INDF (+6.72%), KLBF (+3.19%), ICBP (+1.73%), and GGRM (+3.11%) all in green, except UNVR (-0.82%). Retailer stocks were mostly positive as AMRT (+5.34%), MAPI (+3.88%), and ACES (+0.53%) all advanced, except ERAA (-1.05%). Telco names were positive as TLKM (+0.66%), EXCL (+3.51%), and ISAT (+0.48%) all rose. Other movers were BKSL (+8.74%), MSIN (+7.69%), GIAA (-8%), and ESSA (-6.58%).

Government intends to accelerate commodities downstreaming with the focus on biofuel development, including mandatory B50 biodiesel program and E20 biethanol program

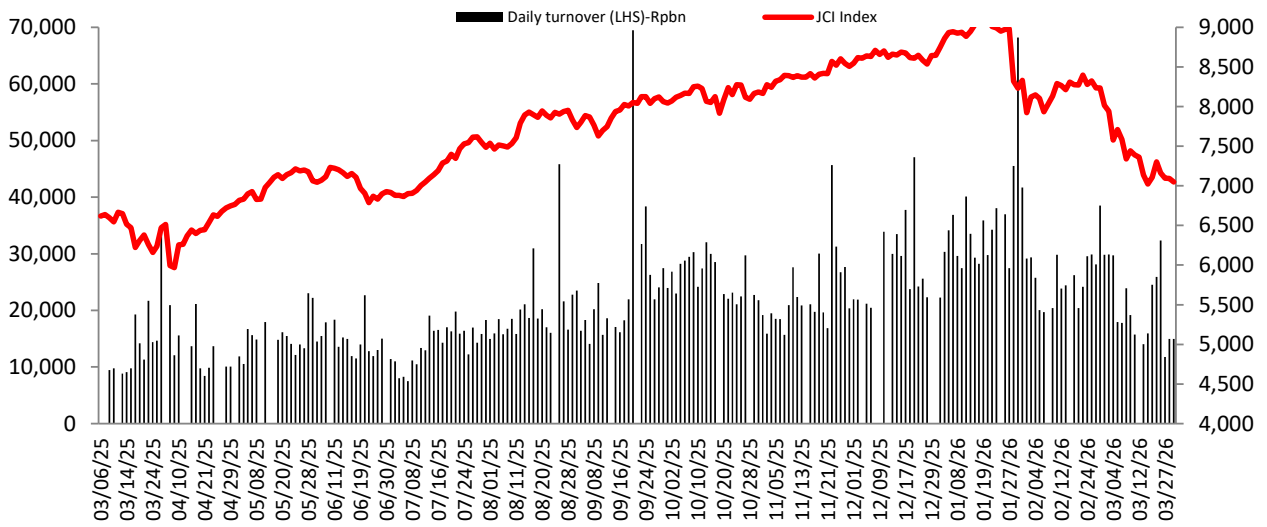
BOND MARKET

Bond Auction After Holiday

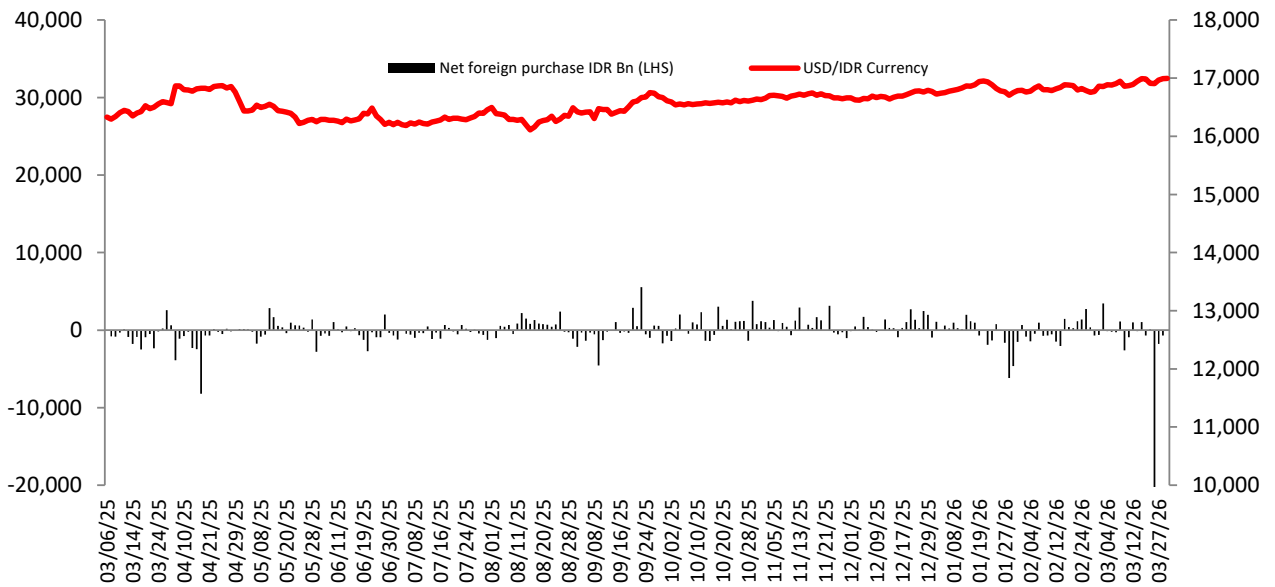
Typically ahead of a government bond auction, not much activity is seen in the market in the morning session. Nearing lunch time, MOF announced the incoming bids which was recorded IDR 58.22Tn. After the auction result, bond prices picked up by 25 – 35bps. The MoF managed to issue IDR 40Tn from initial target IDR 36Tn. The series absorbed (against incoming bids) on the auction were IDR 1Tn (IDR 4.75Tn) 1mo SPN, IDR 1.15Tn (IDR 1.15Tn) 3mo SPN, IDR 5Tn (IDR 6.6Tn) 12mo SPN, IDR 16.7Tn (IDR 19.93Tn) 5Y FR109, IDR 7.4Tn (IDR 12.21Tn) 10Y FR108, IDR 1.7Tn (IDR 4.91Tn) 15Y FR106, IDR 2.4Tn (IDR 3.15Tn) 20Y FR107, IDR 1.5Tn (IDR 1.91Tn) 30Y FR102 and IDR 3.15Tn (IDR 3.59Tn) 40Y FR105 at weighted average yields of 4.68%, 4.97%, 5.89%, 6.53%, 6.64%, 6.67%, 6.81% and 6.8% respectively. Rupiah closed at 17,041.

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	99.3	(0.0)	(1.0)	5Y
FR91	FR0091 Govt	98.4	0.2	(4.0)	10Y
FR93	FR0093 Govt	96.1	0.1	(5.3)	15Y
FR92	FR0092 Govt	101.7	(0.1)	(4.4)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.9	(0.0)	(0.4)	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.4	#VALUE!	(3.7)	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	100.1	0.0	(1.7)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,048.2	(0.6)	(18.5)	
Thailand	SET Index	1,448.1	(0.1)	15.0	
Korean Stock Exch.	KOSPI Index	5,052.5	(4.3)	19.9	
Straight Times	FSSTI Index	4,885.5	(0.2)	5.1	
Kuala Lumpur	KLCI Index	1,690.4	0.1	0.6	
Philippines	PCOMP Index	5,948.9	1.4	(1.7)	
Nikkei	NKY Index	51,063.7	(1.6)	1.4	
Hang Seng	HSI Index	24,788.1	0.2	(3.3)	
MSCI-Asia pacific	MXAP Index	229.5	(2.1)	0.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	45,216.1	0.1	(5.9)	
S&P 500	SPX Index	6,343.7	(0.4)	(7.3)	
Nasdaq	CCMP Index	20,794.6	(0.7)	(10.5)	
FTSE 100	UKX Index	10,208.3	0.8	2.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,995.0	(0.0)	(1.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,991.3	0.2	1.6
3 month	IDSWT3M Index	16,992.4	0.2	(1.7)
6 month	IDSWT6M Index	16,996.6	0.2	(1.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	17,007.4	0.3	(1.7)
6 month	IDFWT6M Index	17,021.2	0.3	(1.5)

*price as of 3/30/2026

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