



FOR PROFESSIONAL INVESTORS - 09/03/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Higher

JCI advanced and closed at 7,886 (+84 points or +1.08%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 1.4Tn today and rupiah was stabilized at IDR 16,415/USD.

Banking stocks were mixed as BBRI (+1.77%), BMRI (+1.09%), and BBNI (+2.32%) rose, while MEGA (-2.71%) and BBCA (-0.31%) corrected. Consumer names were positive as INDF (+2.67%), KLBF (+1.72%), ICBP (+1.09%), HMSP (+1.9%), and UNVR (+0.59%) all closed higher. Mining stocks were positive as INDY (+24.81%), INCO (+6.78%), ADRO (+0.58%), ANTM (+0.29%), and TINS (+2.9%) all inched higher. Cement names were mixed as INTG (+3.32%), SMGR (+3.32%), and SMBR (+4.23%) inched higher, while SMCB unchanged. Other movers were DSSA (+10.24%), IMPC (+9.92%), BALI (-12.46%), and BRPT (-3.51%).

Indonesia trade balance in Jul25 recorded at US\$4.2bn (+1.7% MoM; +784% YoY), export grew +5.6% MoM ; +11.4% YoY to US\$24.7bn, import grew +6.4% MoM while declined -5.3% YoY to US\$20.6bn.

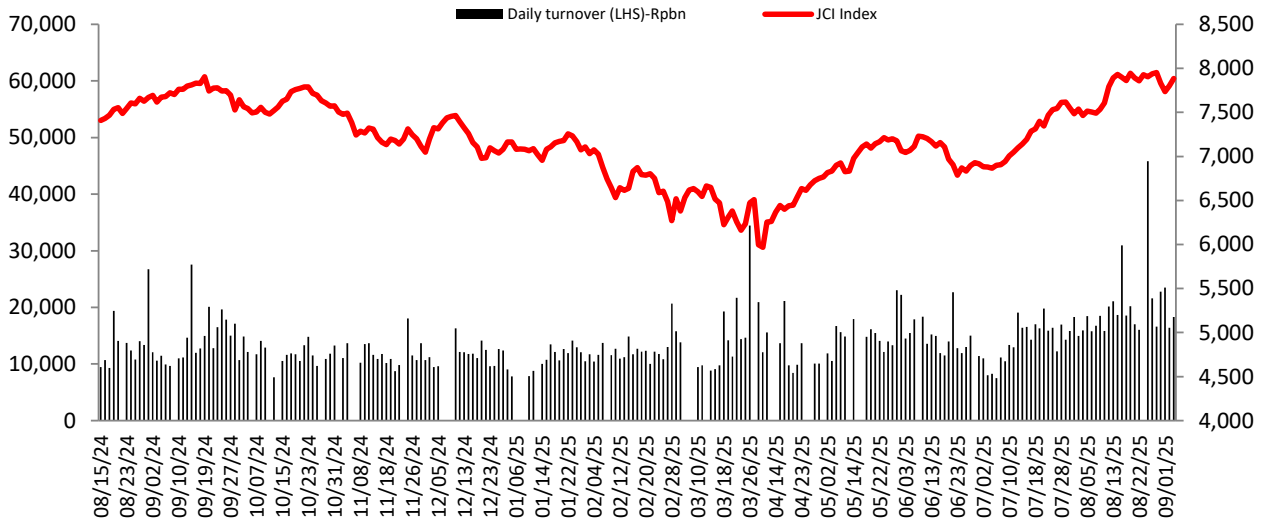
BOND MARKET

SLID LOWER

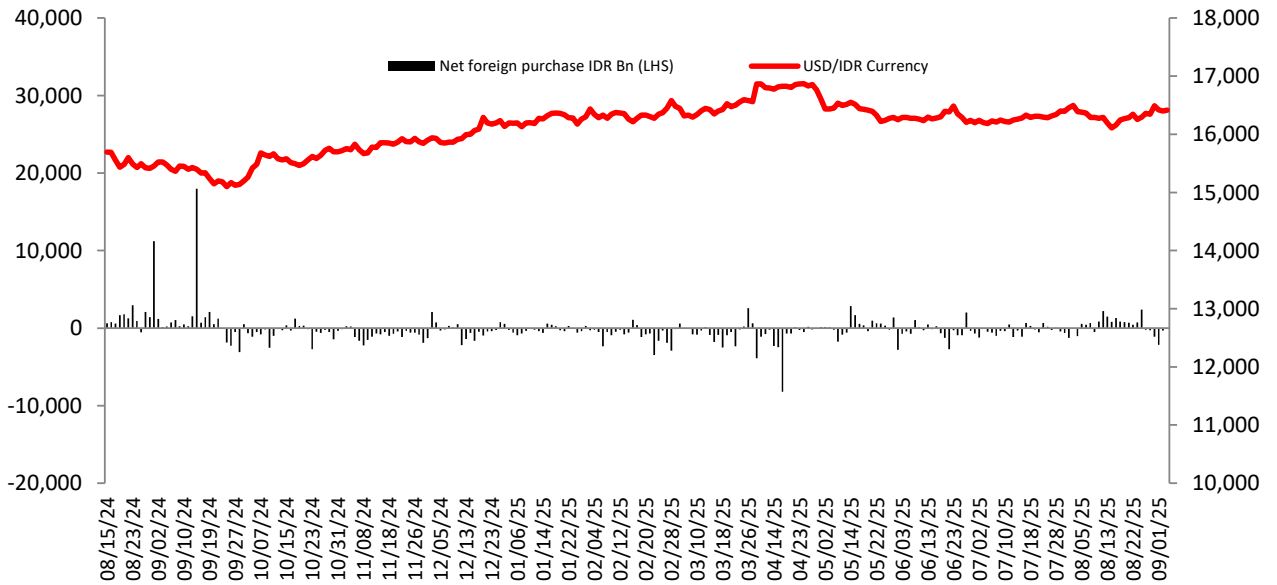
Indonesia bond market closed the day with yield higher 1 – 3 bps across the curve following the risk-off sentiment last night globally. In the morning session, market opened softer ahead of regular SRBI auction, move forward due to Friday holiday. BI announced the incoming bids of SRBI auction IDR 17.746Tn compared to last Friday at IDR 11.794Tn. BI accepted sz IDR 5.32Tn (vs. last IDR 10.334Tn). The winners get the weighted average yield higher 2 – 4 bps. The 6mo SRBI at 5.06% and 12mo SRBI at 5.13%. Post the SRBI auction result, market went weaker with several selling activities seen. Total foreign ownership went up to IDR 953.85Tn on Aug 29 2025, from previously IDR 935.71Tn on Jul 31 2025.

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	99.7	(0.0)	3.7	5Y
FR91	FR0091 Govt	101.6	(0.1)	5.5	10Y
FR93	FR0093 Govt	99.0	(0.1)	4.4	15Y
FR92	FR0092 Govt	102.8	(0.1)	2.7	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.9	0.1	3.0	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.4	0.0		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.7	(0.1)		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,885.9	1.1	11.4	
Thailand	SET Index	1,259.3	0.8	(10.1)	
Korean Stock Exch.	KOSPI Index	3,184.4	0.4	32.7	
Straight Times	FSSTI Index	4,289.3	(0.2)	13.2	
Kuala Lumpur	KLCI Index	1,578.5	0.1	(3.9)	
Philippines	PCOMP Index	6,082.9	(0.7)	(6.8)	
Nikkei	NKY Index	41,938.9	(0.9)	5.1	
Hang Seng	HSI Index	25,343.4	(0.6)	26.3	
MSCI-Asia pacific	MXAP Index	211.6	(0.1)	16.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	45,295.8	(0.5)	6.5	
S&P 500	SPX Index	6,415.5	(0.7)	9.1	
Nasdaq	CCMP Index	21,279.6	(0.8)	10.2	
FTSE 100	UKX Index	9,159.3	0.5	12.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,415.0	(0.1)	(1.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,437.8	(0.0)	1.1
3 month	IDSWT3M Index	16,406.1	(0.2)	(1.6)
6 month	IDSWT6M Index	16,405.1	(0.5)	(1.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,433.3	(0.4)	(1.6)
6 month	IDFWT6M Index	16,450.0	(0.4)	(1.4)

*price as of 9/2/2025

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