



FOR PROFESSIONAL INVESTORS - 10/02/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rebound

JCI slightly strengthened and closed at 8,071 (+27 points or +0.34%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net outflow of IDR 1.4Tn today and rupiah slightly strengthened to IDR 16,588/USD.

Banking stocks were mixed as BNLN (+6.36%) and MEGA (+3.67%) inched higher, while BBNI (-0.25%), BMRI (-0.46%), and BBRI (-2.62%) down. Consumer names were mixed as ICBP (+1.88%), MYOR (+3.85%), and UNVR (+0.56%) in green, while GGRM (-1.68%) and INDF (-1.06%) corrected. Telco stocks were mixed as TLKM (+2.29%) in green, while ISAT (-0.59%) and EXCL (-3.83%) closed lower. Retailer names were mostly positive as AMRT (+4.86%), MAPI (+1.75%), and ERAA (+0.95%) all closed higher, except MAPA (-1.8%). Other movers were BBYB (+16.02%), DEWA (+13.61%), ESSA (-3.36%), and SMGR (-3.19%).

Headline inflation rose to 2.7% in September, sharply above the 2.3% in August and above consensus expectations of 2.5%. Core inflation remained broadly unchanged at 2.2% (same in August and September). The main driver of the upside in inflation was the food, beverage & tobacco category (5.0% YoY in September versus 4.0% in August; 28% CPI weight).

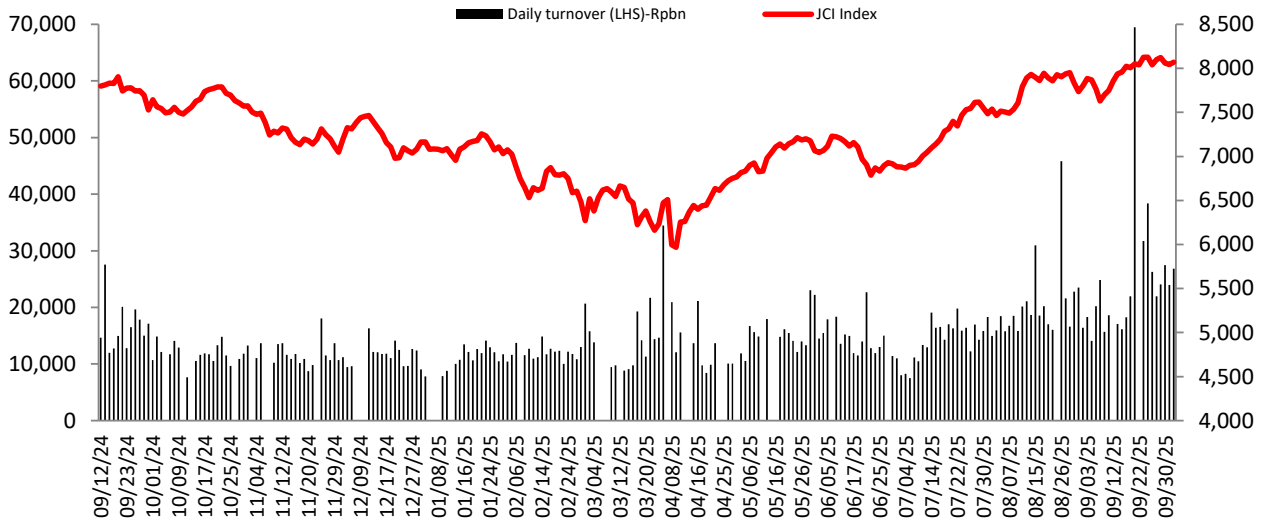
BOND MARKET

Buy and Sell

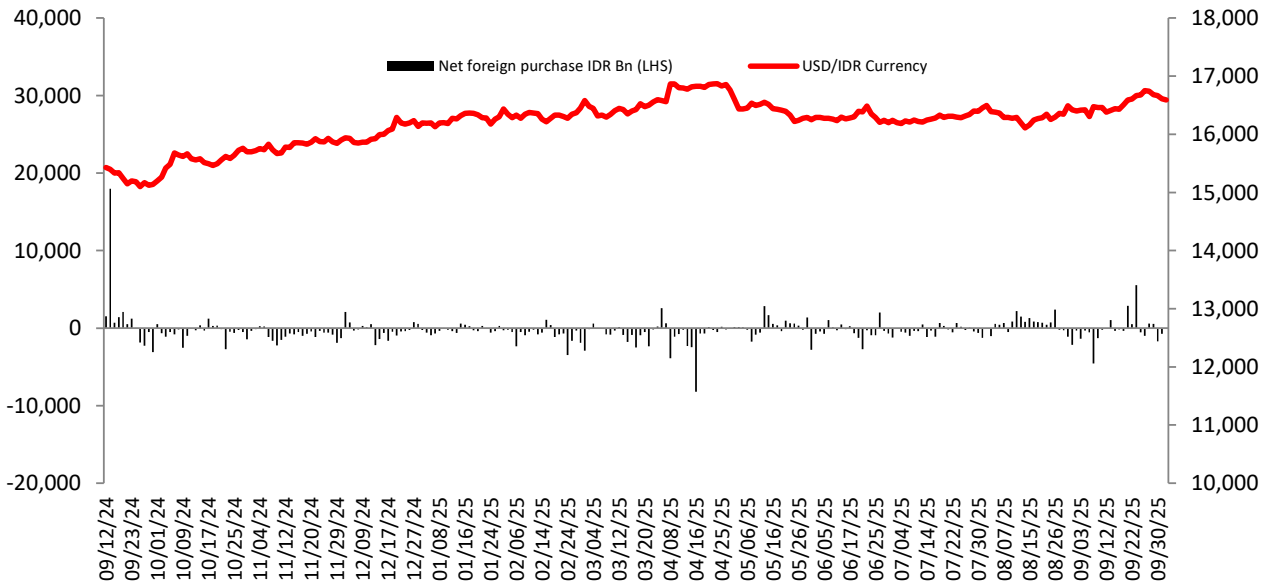
Indonesia bond market closed the day with lower yield around 2 – 5 bps following local currency post better today at level below 16,620 and closed at 16,598. As soon as market opened, biddish tone was thick in the air. The 5Y areas, FR87 taken at 5.57% while FR109 got taken at 5.36%. Significant price increase soon invited profit takers in market. The activity came from onshore buying interest met with offshore outflows. The benchmark series of 5, 10, 15 and 20Y closed the day at mid yield of 5.42%, 6.27%, 6.67% and 6.77% respectively.

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	100.2	0.0	4.2	5Y
FR91	FR0091 Govt	102.9	0.1	6.7	10Y
FR93	FR0093 Govt	99.5	0.1	4.9	15Y
FR92	FR0092 Govt	103.2	0.1	3.0	20Y
PBS036	INDOIS 5 ¾ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.3	0.0	3.4	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	102.4	0.0		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.7	0.0		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,071.1	0.3	14.0	
Thailand	SET Index	1,290.2	1.2	(7.9)	
Korean Stock Exch.	KOSPI Index	3,549.2	2.7	47.9	
Straight Times	FSSTI Index	4,395.2	1.7	16.0	
Kuala Lumpur	KLCI Index	1,637.8	1.0	(0.3)	
Philippines	PCOMP Index	6,039.8	0.2	(7.5)	
Nikkei	NKY Index	44,936.7	0.9	12.6	
Hang Seng	HSI Index	27,287.1	1.6	36.0	
MSCI-Asia pacific	MXAP Index	220.8	0.1	21.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,441.1	0.1	9.2	
S&P 500	SPX Index	6,711.2	0.3	14.1	
Nasdaq	CCMP Index	22,755.2	0.4	17.8	
FTSE 100	UKX Index	9,450.5	0.0	15.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,588.0	0.1	(2.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,673.8	(0.2)	2.6
3 month	IDSWT3M Index	16,669.1	(0.2)	(3.2)
6 month	IDSWT6M Index	16,679.2	0.1	(3.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,700.6	(0.0)	(3.3)
6 month	IDFWT6M Index	16,717.3	(0.1)	(3.0)

*price as of 10/1/2025

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