



FOR PROFESSIONAL INVESTORS - 08/27/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Slightly Higher

JCI slightly strengthened and closed at 7,936 (+30 points or +0.38%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 213Bn today and rupiah slightly weakened to IDR 16,360/USD.

Banking stocks were mixed as BBCA (+0.61%) and MEGA (+4.49%) up, while BBNI (-1.98%), BBRI (-0.96%), and BMRI (-2.04%) retreated. Consumer names were negative as HMSP (-1.87%), ICBP (-0.53%), MYOR (-2.27%), UNVR (-1.96%), and INDF (-2.56%) all down. Pulp & paper stocks were positive as INKP (+3.92%) and TKIM (+0.35%) all in green. Mining names were mostly positive as ANTM (+2.78%), ADRO (+4.03%), INCO (+6.08%), and INDY (+0.75%) all closed higher, except PTBA (-2%). Other movers were MPRO (+14.9%), BSDE (+10.55%), KPIG (-7.41%), and FILM (-7.21%).

Danantara plans to issue Patriot Bonds worth Rp50tn, with a coupon of 2% for a tenor of 5 years and 7 years. The bond issuance is intended for the development of a waste-to-energy project.

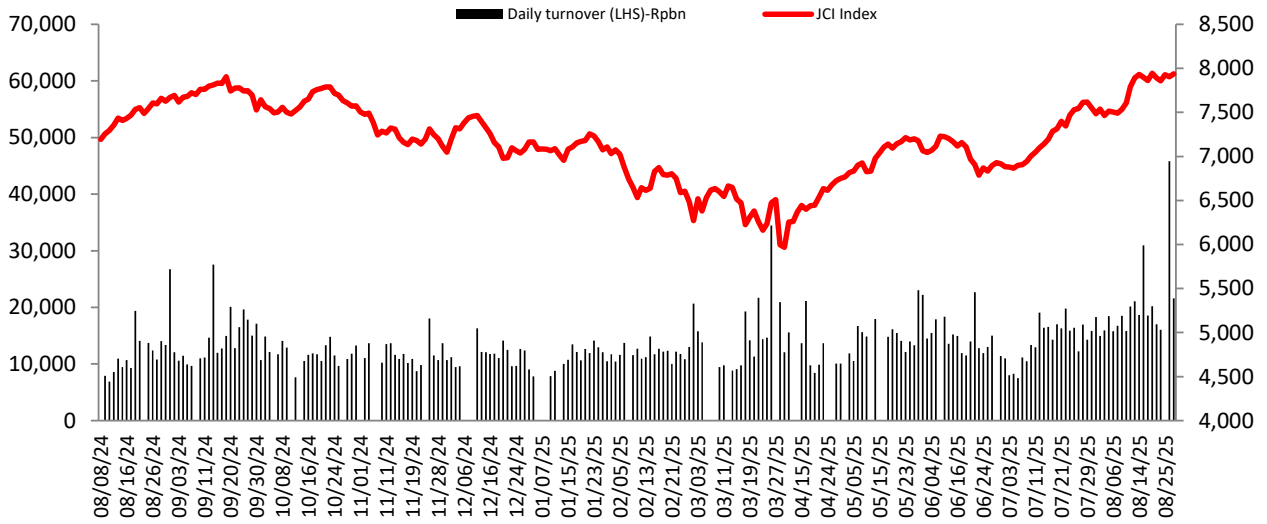
BOND MARKET

Slow Day

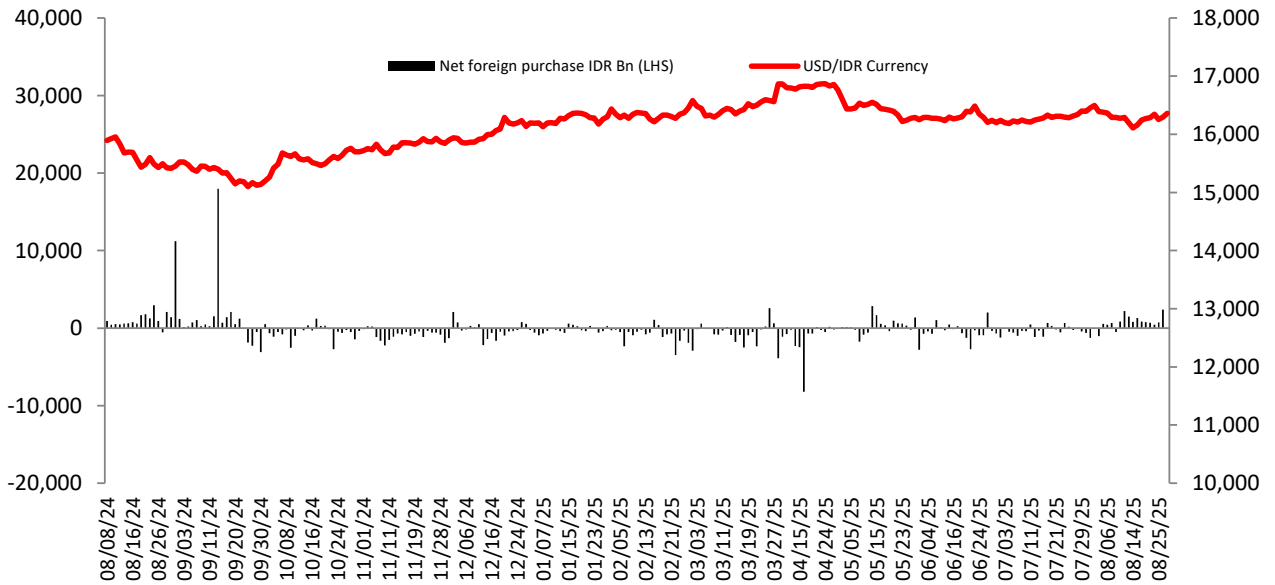
After yesterday robust demand in auction, Indonesia bond market traded in slow pace today. In the morning session, we heard some bidder chasing front end up to belly area. Market continued in two ways interest up until closing time. While interest in short end bonds still very much high, we noted some lagging belly to long area. The 5Y/10Y/15Y/20Y benchmark closed the day at mid-yield of 5.68%/6.30%/6.68%/6.81%.

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	3.6	5Y
FR91	FR0091 Govt	101.7	0.1	5.5	10Y
FR93	FR0093 Govt	99.1	(0.0)	4.5	15Y
FR92	FR0092 Govt	103.2	0.1	3.0	20Y
PBS036	INDOIS 5 ¾ 08/15/25	#N/A N/A	#VALUE!	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	100.9	0.0	3.0	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.0	(0.2)		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.7	#VALUE!		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,936.2	0.4	12.1	
Thailand	SET Index	1,248.9	(0.2)	(10.8)	
Korean Stock Exch.	KOSPI Index	3,187.2	0.2	32.8	
Straight Times	FSSTI Index	4,240.1	(0.1)	11.9	
Kuala Lumpur	KLCI Index	1,587.9	0.4	(3.3)	
Philippines	PCOMP Index	6,273.3	2.1	(3.9)	
Nikkei	NKY Index	42,520.3	0.3	6.6	
Hang Seng	HSI Index	25,201.8	(1.3)	25.6	
MSCI-Asia pacific	MXAP Index	212.6	(1.0)	17.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	45,418.1	0.3	6.8	
S&P 500	SPX Index	6,465.9	0.4	9.9	
Nasdaq	CCMP Index	21,544.3	0.4	11.6	
FTSE 100	UKX Index	9,273.3	0.1	13.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,360.0	(0.4)	(1.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,260.0	0.0	0.0
3 month	IDSWT3M Index	16,287.8	0.2	(0.8)
6 month	IDSWT6M Index	16,270.0	0.1	(0.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,303.0	0.3	(0.8)
6 month	IDFWT6M Index	16,318.0	(0.2)	(0.6)

*price as of 8/26/2025

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