



FOR PROFESSIONAL INVESTORS - 04/01/2026

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Sharp Rebound

JCI advanced and closed at 7,184 (+136 points or +1.93%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net outflow of IDR -166Bn today and rupiah was stabilized at IDR 16,980/USD.

Banking stocks were mixed as BBCA (+0.78%), BBRI (+0.6%), and BNLI (+8.55%) closed higher, while BBNI (-1.06%) and MEGA (-6.59%) retreated. Consumer names were positive as INDF (+3.54%), UNVR (+4.95%), KLBF (+1.03%), MYOR (+2.46%), and HMSP (+2.07%) all advanced. Telco stocks were positive as TLKM (+2.94%), EXCL (+1.69%), and ISAT (+0.48%) all advanced. Mining names were mixed as ANTM (+6%), INCO (+7.48%), and TINS (+8.08%) inched higher, while ITMG (-6.56%) and ADRO (-3.49%) weakened. Other movers were BULL (+24.7%), IMPC (+21.6%), MEDC (-7.67%), and STTP (-6.78%).

The government officially announced policy points at the National Work Culture Transformation Press Conference. These policies aim to promote work efficiency, maintain fiscal stability, and ensure the security of national energy supplies. The government estimates budget savings from the policy at Rp259.4tn-Rp268.4tn.

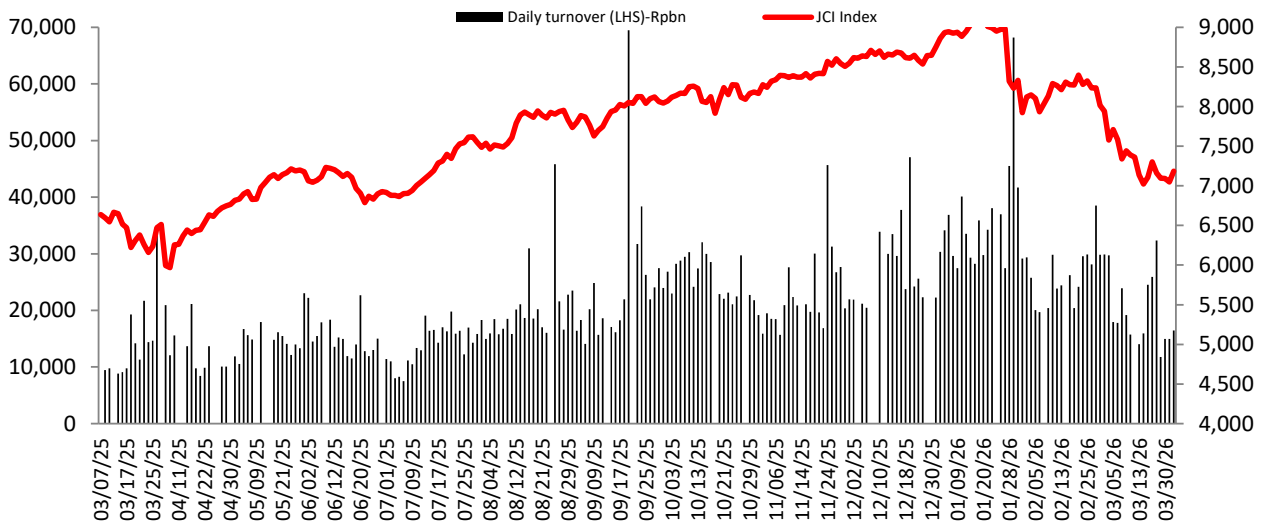
BOND MARKET

Firmer

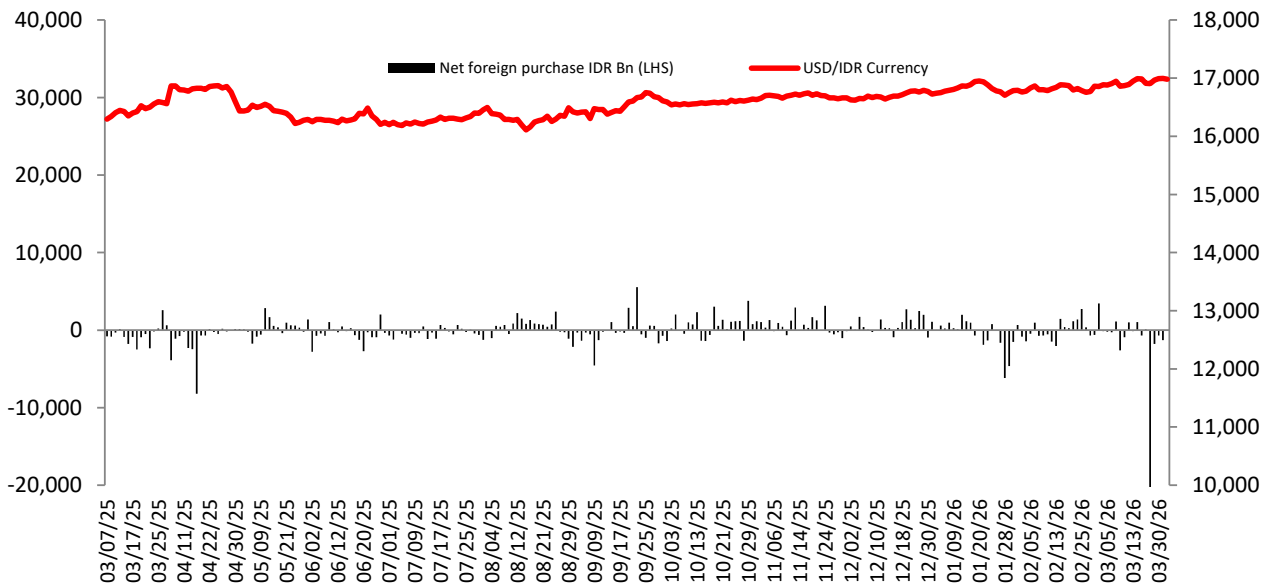
Indonesia bond market opened on a firmer tone, following decline in UST yield amid easing concerns external factors. Rally was seen early in the session, led by 5Y FR109 taken at 97.35 (6.87%). The rally quickly lifted prices across the board as solid bid seen from mixed players. However towards the end of the trading session, profit taking activities began to emerge. Market closed with yields lower by 9 – 19 bps compared to yesterday closing level. The 5Y/10Y/15Y/20Y benchmark closed the day at mid-yield of 6.41%/6.6%/6.73%/6.78% 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	99.4	0.1	(0.9)	5Y
FR91	FR0091 Govt	98.8	0.5	(3.6)	10Y
FR93	FR0093 Govt	96.9	0.9	(4.4)	15Y
FR92	FR0092 Govt	102.0	0.4	(4.1)	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	100.8	(0.0)	(0.4)	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	102.3	0.1	(2.9)	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	100.4	0.4	(1.4)	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,184.4	1.9	(16.9)	
Thailand	SET Index	1,471.0	1.6	16.8	
Korean Stock Exch.	KOSPI Index	5,478.7	8.4	30.0	
Straight Times	FSSTI Index	4,975.8	1.8	7.1	
Kuala Lumpur	KLCI Index	1,708.9	1.1	1.7	
Philippines	PCOMP Index	5,998.7	0.8	(0.9)	
Nikkei	NKY Index	53,739.7	5.2	6.8	
Hang Seng	HSI Index	25,294.0	2.0	(1.3)	
MSCI-Asia pacific	MXAP Index	226.5	(1.3)	(0.5)	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,341.5	2.5	(3.6)	
S&P 500	SPX Index	6,528.5	2.9	(4.6)	
Nasdaq	CCMP Index	21,590.6	3.8	(7.1)	
FTSE 100	UKX Index	10,372.7	1.9	4.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,980.0	0.1	(1.7)
<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 3/31/2026

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