



FOR PROFESSIONAL INVESTORS - 11/27/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Correction

JCI weakened and closed at 8,546 (-56 points or -0.65%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 284Bn today and rupiah slightly strengthened to IDR 16,643/USD.

Banking stocks were mostly negative as BBNI (-1.36%), BBRI (-1.32%), BBCA (-1.19%), and BMRI (-3.28%) all closed lower, except PNBN (+8.26%). Consumer names were negative as GGRM (-1.79%), ICBP (-0.58%), MYOR (-2.29%), INDF (-0.67%), and KLBF (-2.39%) all down. Poultry stocks were negative as MAIN (-4.38%), JPFA (-2.43%), and CPIN (-1.89%) all closed lower. Telco names were mixed as ISAT (+1.32%) in green, while EXCL (-0.7%) and TLKM (-4.03%) declined. Other movers were BBYB (+24.75%), MPRO (+12.81%), DNAR (-12.1%), and BUMI (-6.92%).

Minister of Finance Regulation No.81/2025 requires village governments to submit the deed of establishment of the red and white cooperative in order to disburse their village funds.

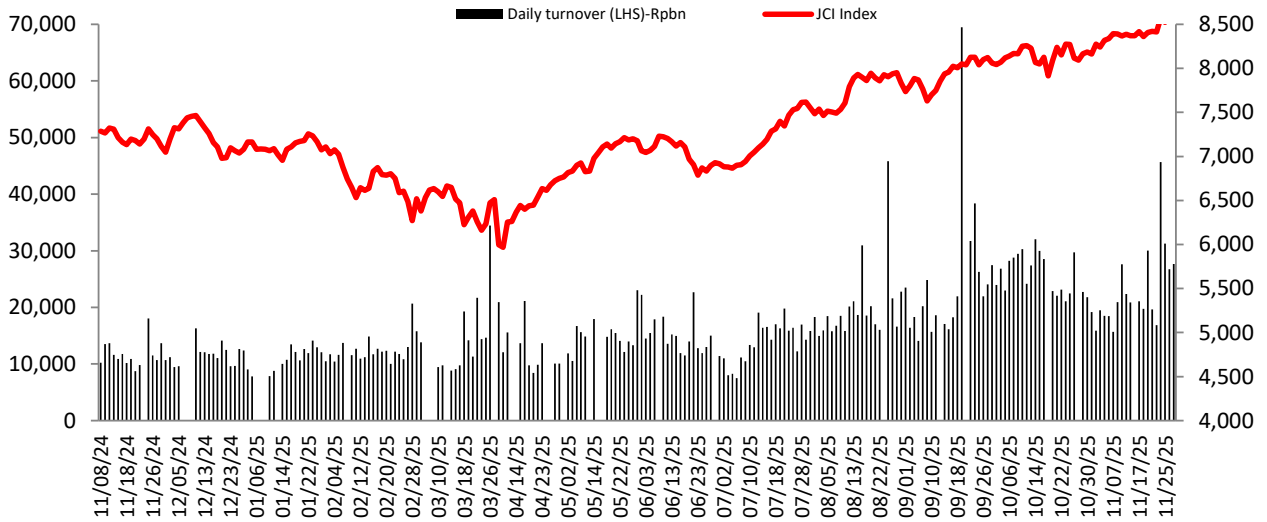
BOND MARKET

LITTLE CHANGE

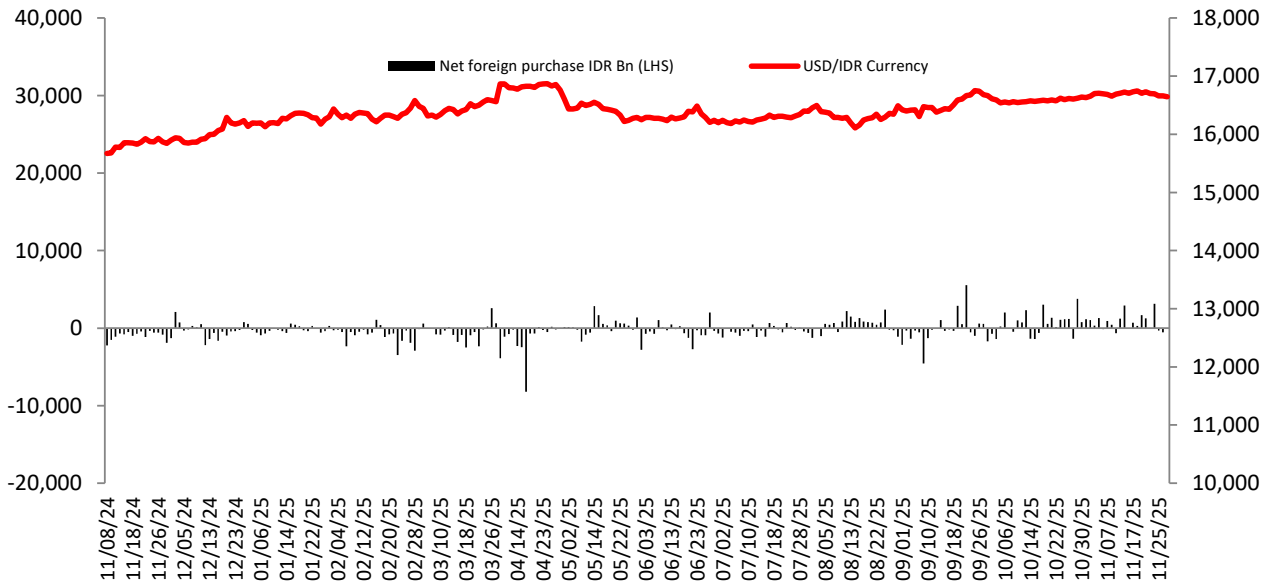
Indonesia bond market closed with little change today. The morning session opened with selling interest with local and onshore foreign banks as the main seller. The interest remained focus on 10Y area. 10Y FR103 got traded at 6.27%. In the second session, the losses were erased as bottom fisher emerged. At the end of the day, yield curve close mixed with 5Y/10Y/15Y/20Y benchmark closed the day at mid yield of 5.75%/6.25%/6.43%/6.53%

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	100.3	(0.0)	4.2	5Y
FR91	FR0091 Govt	102.2	(0.1)	6.1	10Y
FR93	FR0093 Govt	100.8	(0.2)	6.3	15Y
FR92	FR0092 Govt	105.7	(0.2)	5.5	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.1	(0.1)	3.2	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	104.8	(0.3)		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	102.0	0.0		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,545.9	(0.7)	20.7	
Thailand	SET Index	1,252.7	(0.7)	(10.5)	
Korean Stock Exch.	KOSPI Index	3,986.9	0.7	66.2	
Straight Times	FSSTI Index	4,509.3	0.2	19.1	
Kuala Lumpur	KLCI Index	1,617.5	(0.4)	(1.5)	
Philippines	PCOMP Index	5,969.1	(0.6)	(8.6)	
Nikkei	NKY Index	50,167.1	1.2	25.7	
Hang Seng	HSI Index	25,945.9	0.1	29.3	
MSCI-Asia pacific	MXAP Index	223.0	1.5	22.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	47,427.1	0.7	11.5	
S&P 500	SPX Index	6,812.6	0.7	15.8	
Nasdaq	CCMP Index	23,214.7	0.8	20.2	
FTSE 100	UKX Index	9,671.6	(0.2)	18.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,643.0	0.1	(3.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,665.0	(0.2)	2.5
3 month	IDSWT3M Index	16,663.3	(0.3)	(3.2)
6 month	IDSWT6M Index	16,665.0	(0.5)	(3.2)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,675.8	(0.2)	(3.1)
6 month	IDFWT6M Index	16,735.7	(0.2)	(3.2)

*price as of 11/26/2025

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