FOR PROFESSIONAL INVESTORS - 07/14/2025

DAILY REPORT
INDONESIA MARKET WRAP

EQUITY MARKET

Higher

JCI advanced and closed at 7,097 (+50 points or +0.71%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 460Bn today and rupiah slightly weakened to IDR 16,245/USD.

Banking stocks were negative as BNLI (-1.43%), BBNI (-3.35%), BBCA (-1.16%), BBRI (-2.58%), and BMRI (-5.63%) all retreated. Consumer names were mixed as INDF (+1.21%) and ICBP (+0.73%) up, while HMSP (-0.81%), MYOR (-3.26%), and KLBF (-2.19%) down. Material stocks were positive as BRPT (+16.67%) and TPIA (+2.3%) all advanced. Properties names were negative as SMRA (-2.09%), LPKR (-4.71%), PWON (-2.16%), and CTRA (-4.59%) all retreated. Other movers were SSIA (+24.93%), PTRO (+24.76%), FILM (-10.54%), and KPIG (-5.35%).

President Prabowo Subianto concluded its negotiation with President of the European Commission, Ursula von der Leyen, in Brussels, Belgium and agreed on the Indonesia-European Union Comprehensive Economic Partnership Agreement (IEU-CEPA).

BOND MARKET

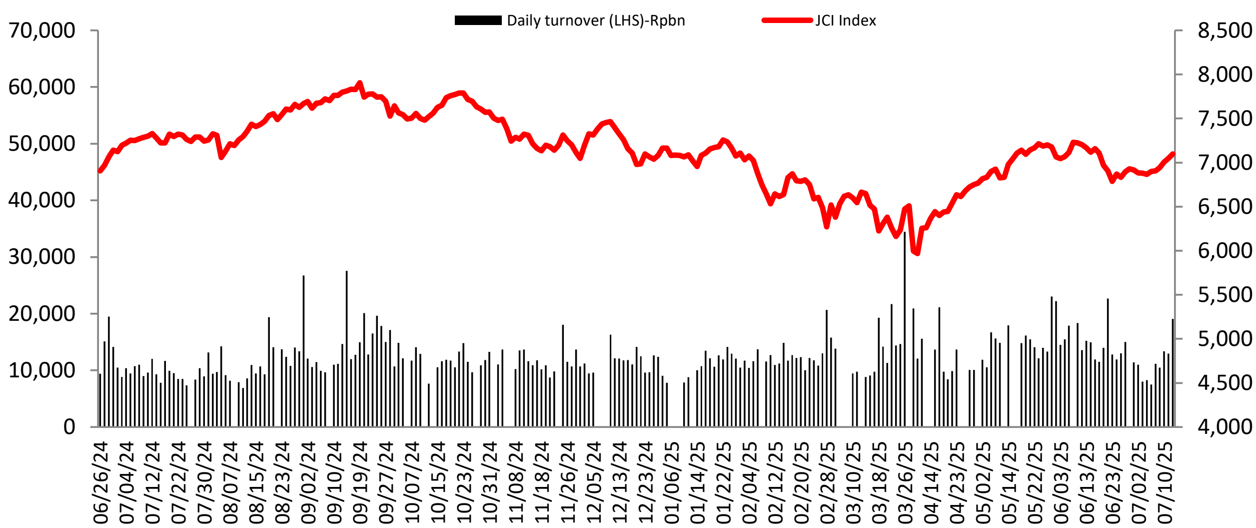
LITTLE CHANGE

Indonesia bond market start the week with wide spread and softer tone. Limited activities remained focus on 5Y and 10Y area while the other part of the yield curve was quoted within range throughout the day. There is not much activity both from local and foreign as most players prepared for tomorrow auction. By the end of day yield curve closed little higher by 1 – 2 bps. In the meantime, market waiting for the US CPI data and BI meeting on Wednesday.

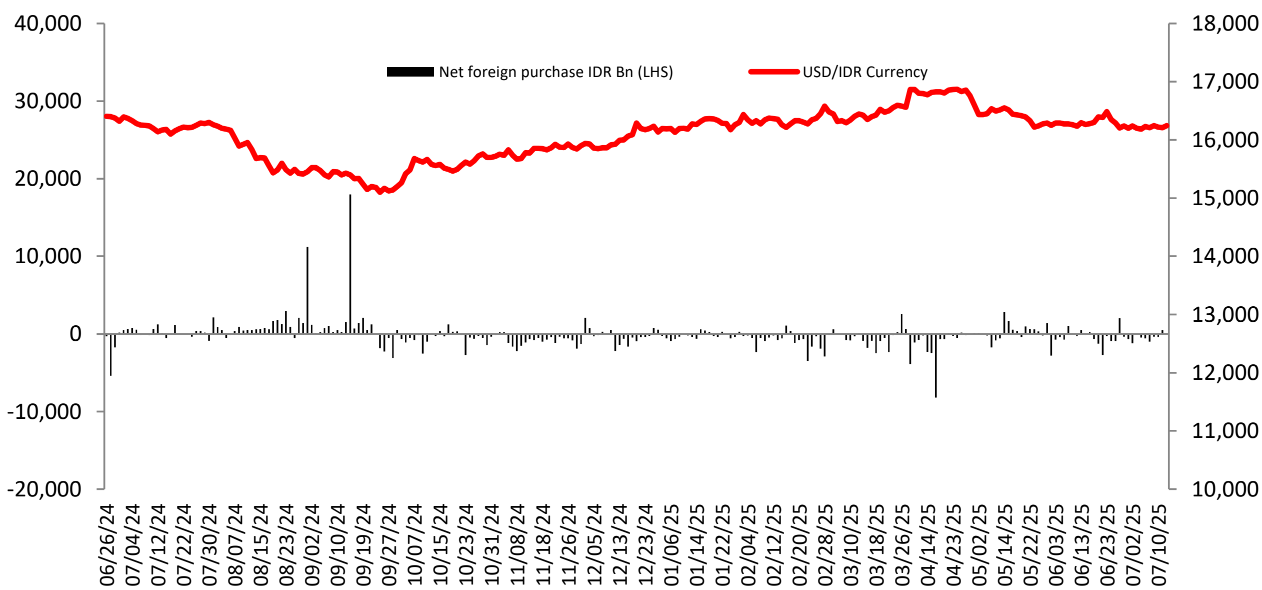
There will be fresh supply tomorrow as Indonesia Debt Management Office ("DMO") will hold conventional bond auction with IDR 27Tn issuance target. The series that will be issued are 3M SPN, 1Y SPN, 5Y FR104, 10Y FR103, 15Y FR106, 20Y FR107, 30Y FR102 and 40Y FR105. In the previous conventional auction, incoming bids reached IDR 121.67Tn and DMO issued IDR 32Tn.

GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
Bonds					
FR90	FR0090 Govt	98.8	0.1	2.7	5Y
FR91	FR0091 Govt	100.0	0.0	3.8	10Y
FR93	FR0093 Govt	97.4	0.1	2.7	15Y
FR92	FR0092 Govt	102.0	0.0	1.8	20Y
PBS036	INDOIS 5 ⅜ 08/15/25	100.1	0.0	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	100.1	0.0	1.8	15-01-2027
PBS037	INDOIS 6 ⅞ 03/15/36	100.5	0.0	0.9	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.2	0.4	1.3	15-06-2047
Asia Pacific					
Jakarta Composite	JCI Index	7,097.2	0.7	0.2	
Thailand	SET Index	1,141.0	1.8	(18.5)	
Korean Stock Exch.	KOSPI Index	3,202.0	0.8	33.4	
Straight Times	FSSTI Index	4,106.3	0.5	8.4	
Kuala Lumpur	KLCI Index	1,537.5	0.1	(6.4)	
Philipines	PCOMP Index	6,525.0	1.0	(0.1)	
Nikkei	NKY Index	39,459.6	(0.3)	(1.1)	
Hang Seng	HSI Index	24,203.3	0.3	20.7	
MSCI-Asia pacific	MXAP Index	202.1	(0.1)	11.3	
Global Indices					
Dow Jones	INDU Index	44,371.5	(0.6)	4.3	
S&P 500	SPX Index	6,259.8	(0.3)	6.4	
Nasdaq	CCMP Index	20,585.5	(0.2)	6.6	
FTSE 100	UKX Index	8,971.2	0.3	9.8	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	16,245.0	(0.2)	(0.9)
Swap-IDR				
1 month	IDSWT1M Index	16,220.0	(0.2)	(0.2)
3 month	IDSWT3M Index	16,225.8	0.0	(0.5)
6 month	IDSWT6M Index	16,219.9	0.0	(0.5)
Forward-IDR				
3 month	IDFWT3M Index	16,236.0	(0.0)	(0.4)
6 month	IDFWT6M Index	16,271.3	0.0	(0.3)

*price as of 7/11/2025

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