



FOR PROFESSIONAL INVESTORS - 08/05/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rebound

JCI advanced and closed at 7,515 (+51 points or +0.68%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net inflow of IDR 552Bn today and rupiah was stabilized at IDR 16,381/USD.

Banking stocks were positive as BMRI (+2.81%), BBCA (+1.81%), BBNI (+5.24%), BBRI (+0.81%), and BBTN (+1.83%) all up. Consumer names were mixed as UNVR (+2.27%) and ICBP (+0.26%) rose, while SIDO (-0.8%), INDF (-0.6%), and MYOR (-3.42%) down. Properties stocks were positive as PWON (+3.41%), BSDE (+3.77%), CTRA (+2.25%), and LPKR (+7.06%) all inched higher. Material names were negative as TPIA (-1.63%) and BRPT (-4.28%) all corrected. Other movers were KPIG (+24.29%), FILM (+21.05%), DEWA (-6.09%), and INKP (-4.22%).

The National Nutrition Agency stated that the beneficiaries of free nutritious meals (MBG) until the end of July 2025 amounted to 7.7mn or 9% of the target by the end of 2025, with the number of nutrition fulfilment service units (SPPG) totalling 2,522.

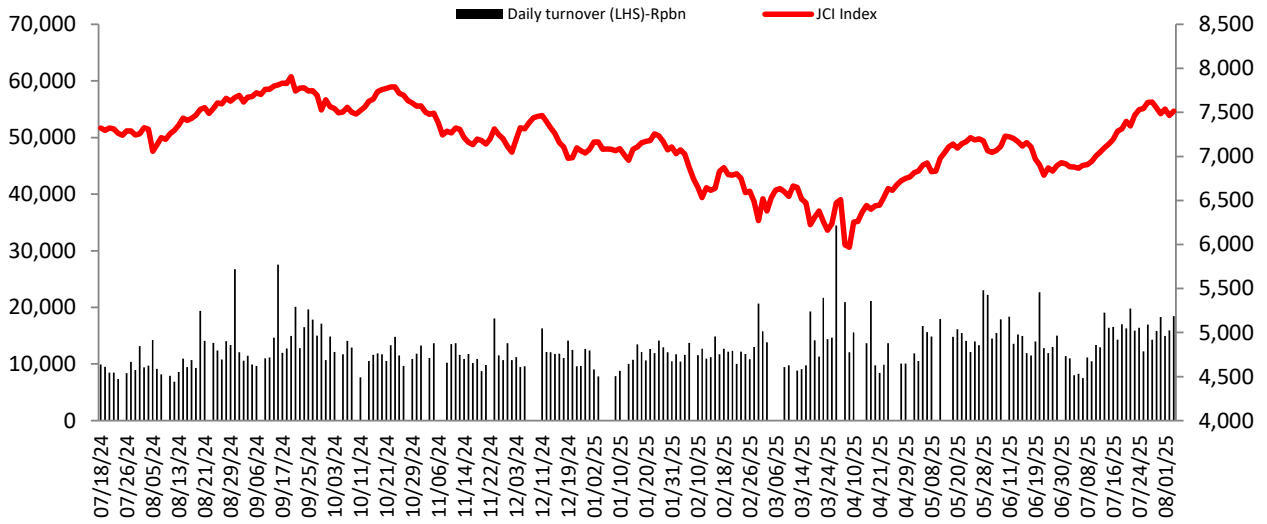
BOND MARKET

Sukuk Auction

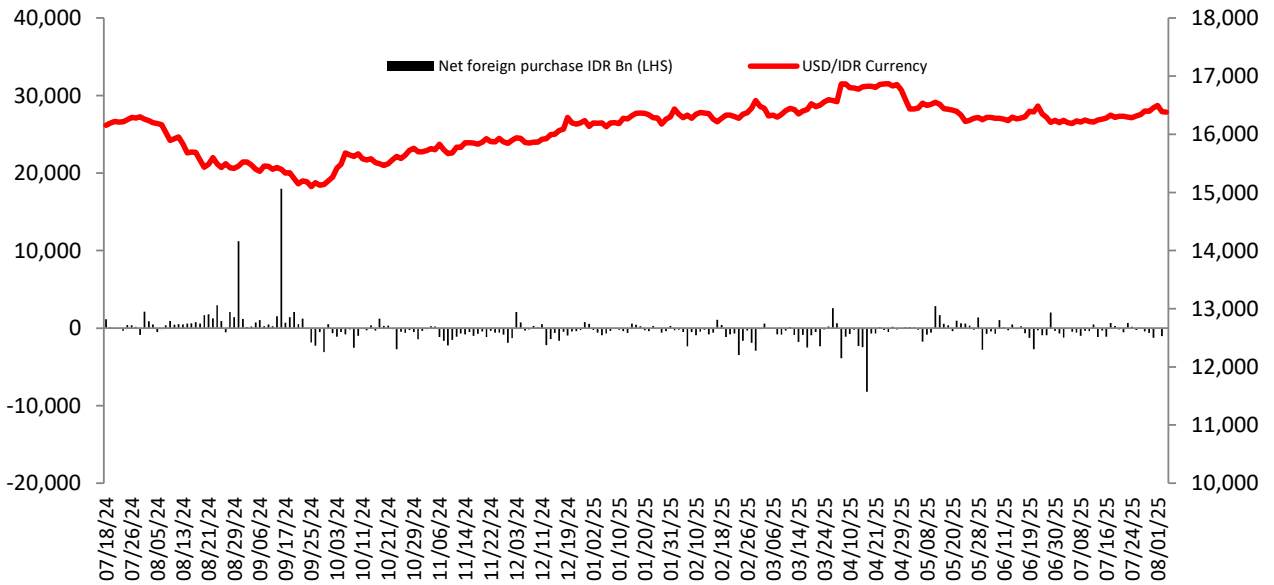
Indonesia bond market start the day unchanged with Local currency closed at 16,390 and 10Y UST yield at 4.21%. After open the day unchanged, bond prices moved nowhere throughout the day as we heard hardly any trade done. In the middle of the day, Indonesia 2Q GDP data came out and printed higher than estimated at 5.12% (where estimated was 4.8% and previous was 4.87%) and no reaction after the news. Today we have sukuk auction, MoF was received demand with total of IDR 43.02Tn incoming bids out of which MoF upsized the issuance to IDR 12Tn from initial target of IDR 9Tn. The series absorbed (against incoming bids) on the auction were IDR 1Tn (IDR 4.885Tn) 9mo SPN-S, IDR 1.3Tn (IDR 7.782Tn) 2Y PBS3, IDR 1.9Tn (IDR 8.484Tn) 3Y PBS30, IDR 1.7Tn (IDR 5.655Tn) 4Y PBSG1, IDR 4.95Tn (IDR 7.7Tn) 14Y PBS34, and IDR 1.15Tn (IDR 7.4775Tn) 24Y PBS38 at cut off yields of 5.52%, 5.68%, 5.84%, 6.10%, 6.75%, and 6.98% respectively. No winner on 6mo SPNS.

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	99.1	(0.0)	3.0	5Y
FR91	FR0091 Govt	100.2	(0.0)	4.0	10Y
FR93	FR0093 Govt	97.9	0.1	3.3	15Y
FR92	FR0092 Govt	102.2	0.0	2.1	20Y
PBS036	INDOIS 5 ¼ 08/15/25	99.9	(0.1)	0.8	15-8-2025
PBS003	INDOIS 6 01/15/27	100.6	0.0	2.3	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	101.0	0.0	1.4	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.0	0.0	1.1	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,515.2	0.7	6.1	
Thailand	SET Index	1,244.8	1.3	(11.1)	
Korean Stock Exch.	KOSPI Index	3,198.0	1.6	33.3	
Straight Times	FSSTI Index	4,208.6	0.3	11.1	
Kuala Lumpur	KLCI Index	1,538.6	0.8	(6.3)	
Philippines	PCOMP Index	6,353.6	0.1	(2.7)	
Nikkei	NKY Index	40,549.5	0.6	1.6	
Hang Seng	HSI Index	24,902.5	0.7	24.1	
MSCI-Asia pacific	MXAP Index	204.9	0.4	12.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,173.6	1.3	3.8	
S&P 500	SPX Index	6,329.9	1.5	7.6	
Nasdaq	CCMP Index	21,053.6	2.0	9.0	
FTSE 100	UKX Index	9,155.8	0.3	12.0	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,381.0	0.1	(1.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,385.9	(0.6)	0.8
3 month	IDSWT3M Index	16,393.6	(0.6)	(1.5)
6 month	IDSWT6M Index	16,390.7	(0.6)	(1.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,393.4	(0.7)	(1.4)
6 month	IDFWT6M Index	16,431.3	(0.7)	(1.3)

*price as of 8/4/2025

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