



FOR PROFESSIONAL INVESTORS - 06/30/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Continued Higher

JCI slightly strengthened and closed at 6,928 (+30 points or +0.44%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 2Tn today and rupiah slightly weakened to IDR 16,238/USD.

Banking stocks were mostly negative as BBTN (-3.04%), BNI (-14.72%), BMRI (-2.89%), and BBRI (-2.35%) all retreated, except BBKA (+0.29%). Consumer names were mostly positive as ICBP (+3.45%), INDF (+0.93%), KLBF (+0.66%), and SIDO (+1.65%) all rose, except UNVR (-0.68%). Mining stocks were positive as ANTM (+3.4%), INCO (+6.81%), ADRO (+2.23%), PTBA (+2.5%), and INDY (+4.18%) all closed higher. Retailer names were positive as AMRT (+3.02%), MAPI (+4.89%), ERAA (+4.95%), and MAPA (+2.34%) all rose. Other movers were BTPN (+24.75%), PTRO (+9.41%), JSPT (-11.06%), and TRIM (-8%).

President Prabowo Subianto officiated the groundbreaking ceremony for the Antam-IBC-CBL consortium's integrated electric vehicle ecosystem mega project. Valued at US\$5.9bn (approximately Rp96tn), the project is located in the Artah Industrial Hills (AIH) area in Karawang, West Java.

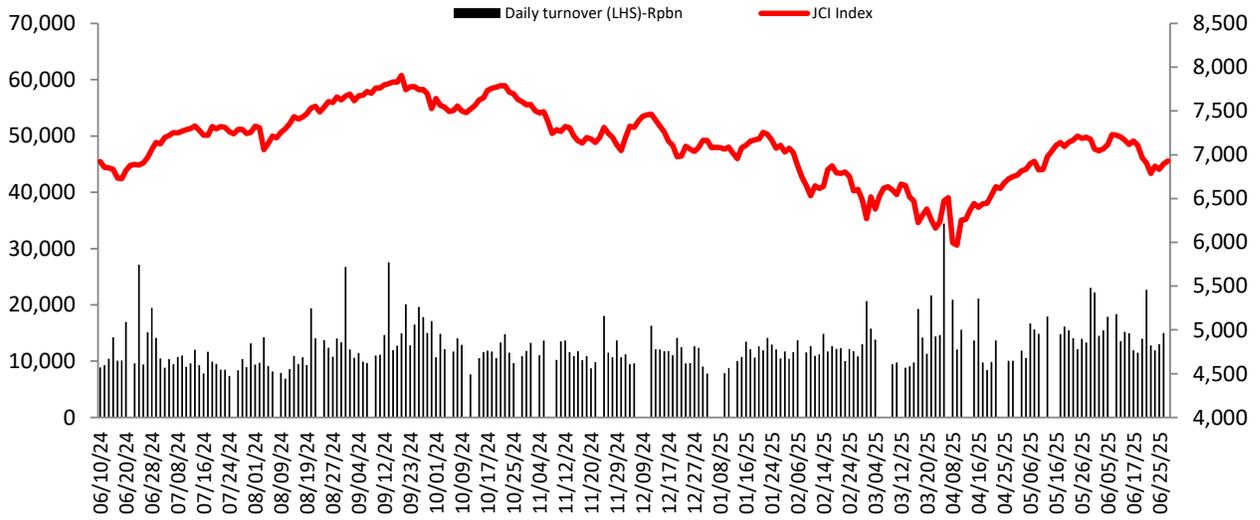
BOND MARKET

FLATTISH

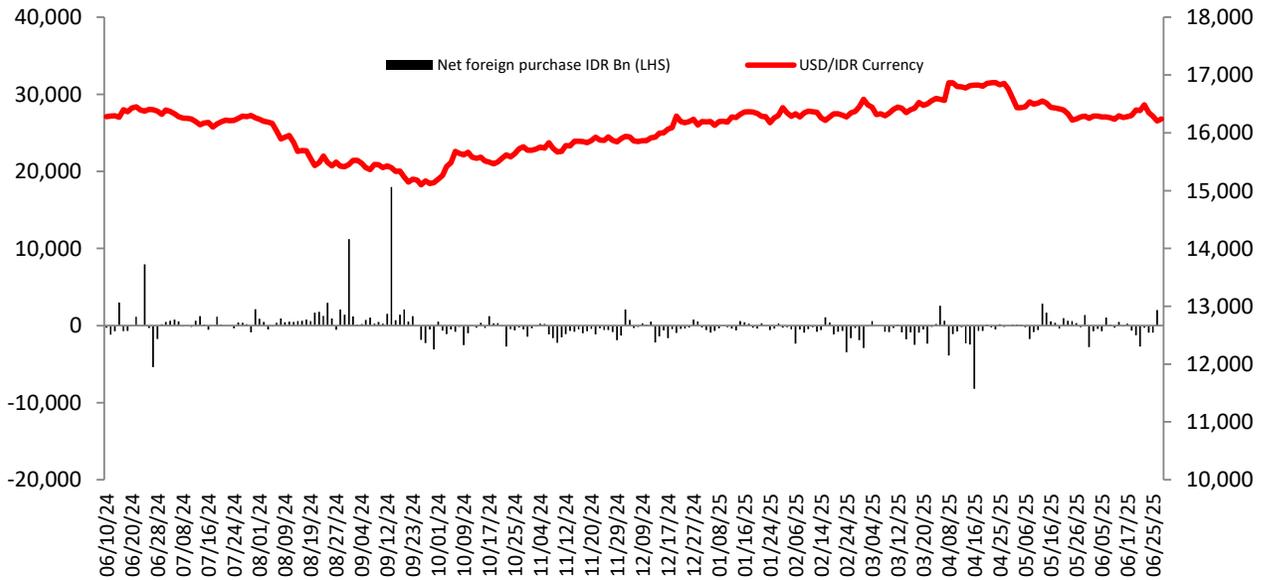
Indonesia bond market started the week flattish despite month-end rebalancing flows today. We witnessed several sporadic activity although the volume was very limited. The yield was unchanged despite two ways trading today ahead of fresh new supply expected tomorrow. Some heavy bidders were seen in below 1Y area. The yield curve was higher around 2 – 3 bps. Overall market just trading sideways today. The 5Y FR104/10Y FR103/15Y FR106/20Y FR107 closed the day at mid yield of 6.29%/6.62%/6.94%/7.01%. There will be fresh supply tomorrow as Indonesia Debt Management Office (“DMO”) will hold conventional bond auction with IDR 27Tn issuance target (up from the usual 26Tn). 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 77.179Tn and DMO issued IDR 28Tn.

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	98.6	0.1	2.5	5Y
FR91	FR0091 Govt	99.3	0.1	3.1	10Y
FR93	FR0093 Govt	96.4	(0.2)	1.7	15Y
FR92	FR0092 Govt	101.3	0.1	1.1	20Y
PBS036	INDOIS 5 ¾ 08/15/25	100.0	0.1	0.9	15-8-2025
PBS003	INDOIS 6 01/15/27	99.9	0.0	1.6	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.4	0.0	0.8	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.0	0.1	1.0	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,927.7	0.4	(2.2)	
Thailand	SET Index	1,088.2	0.5	(22.3)	
Korean Stock Exch.	KOSPI Index	3,071.7	0.5	28.0	
Straight Times	FSSTI Index	3,964.3	(0.0)	4.7	
Kuala Lumpur	KLCI Index	1,533.0	0.3	(6.7)	
Philippines	PCOMP Index	6,364.9	(0.7)	(2.5)	
Nikkei	NKY Index	40,487.4	0.8	1.5	
Hang Seng	HSI Index	24,072.3	(0.9)	20.0	
MSCI-Asia pacific	MXAP Index	203.8	0.4	12.2	
<u>Global Indices</u>					
Dow Jones	INDU Index	43,819.3	1.0	3.0	
S&P 500	SPX Index	6,173.1	0.5	5.0	
Nasdaq	CCMP Index	20,273.5	0.5	5.0	
FTSE 100	UKX Index	8,779.5	(0.2)	7.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,238.0	(0.2)	(0.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,212.0	(0.4)	(0.3)
3 month	IDSWT3M Index	16,223.5	(0.4)	(0.4)
6 month	IDSWT6M Index	16,208.3	(0.5)	(0.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,236.9	(0.5)	(0.4)
6 month	IDFWT6M Index	16,294.0	(0.4)	(0.4)

*price as of 6/27/2025

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