



FOR PROFESSIONAL INVESTORS - 10/24/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Mixed

JCI was flat and closed at 8,272 (-3 points or -0.03%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 1.2Tn today and rupiah slightly strengthened to IDR 16,595/USD.

Banking stocks were mostly positive as BMRI (+2.71%), BBRI (+0.79%), BBNI (+3.07%), and BNL I (+4.89%) all advanced, except BBKA (-0.6%). Consumer names were mixed as UNVR (+11.95%) and KLBF (+3.38%) advanced, while GGRM (-2%), MYOR (-3.65%), and INDF (-1.02%) corrected. Telco stocks were negative as EXCL (-0.77%), ISAT (-3.05%), and TLKM (-2.08%) all retreated. Retailer names were negative as MAPA (-1.56%), ERAA (-3.2%), MAPI (-4.03%), and AMRT (-1.36%) all declined. Other movers were RISE (+20%), AKRA (+8.52%), DSNG (-9.21%), and EMTK (-8.71%).

Government through Danantara investment agency is planning to negotiate with the government of China regarding the debt on the Jakarta-Bandung high-speed train project which has reached US\$7.3bn. Danantara plans to restructure the debt up to 60 years period.

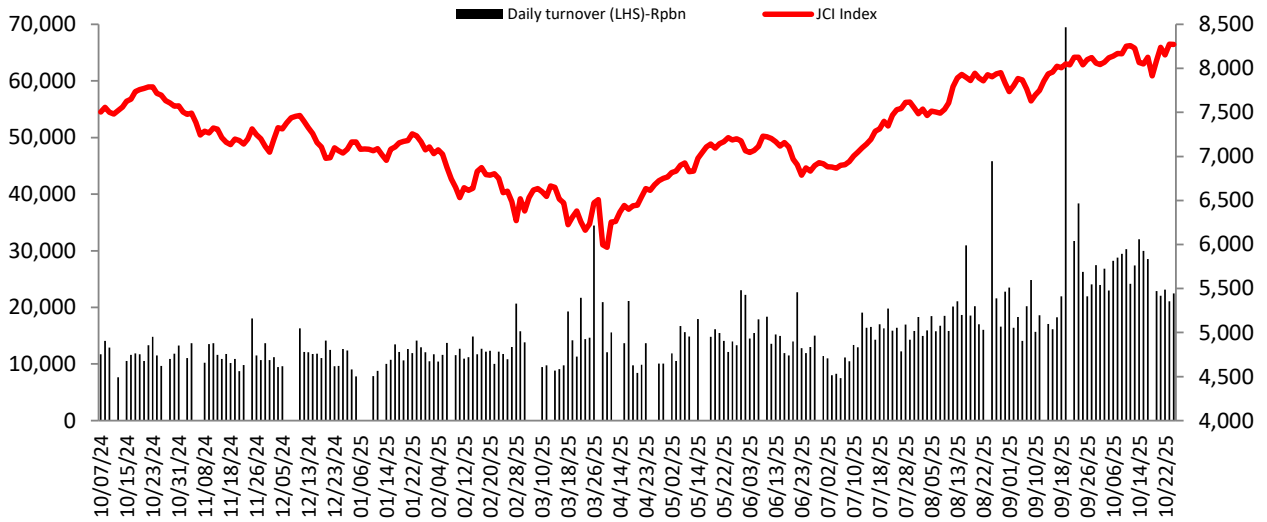
BOND MARKET

Unchanged Sentiment

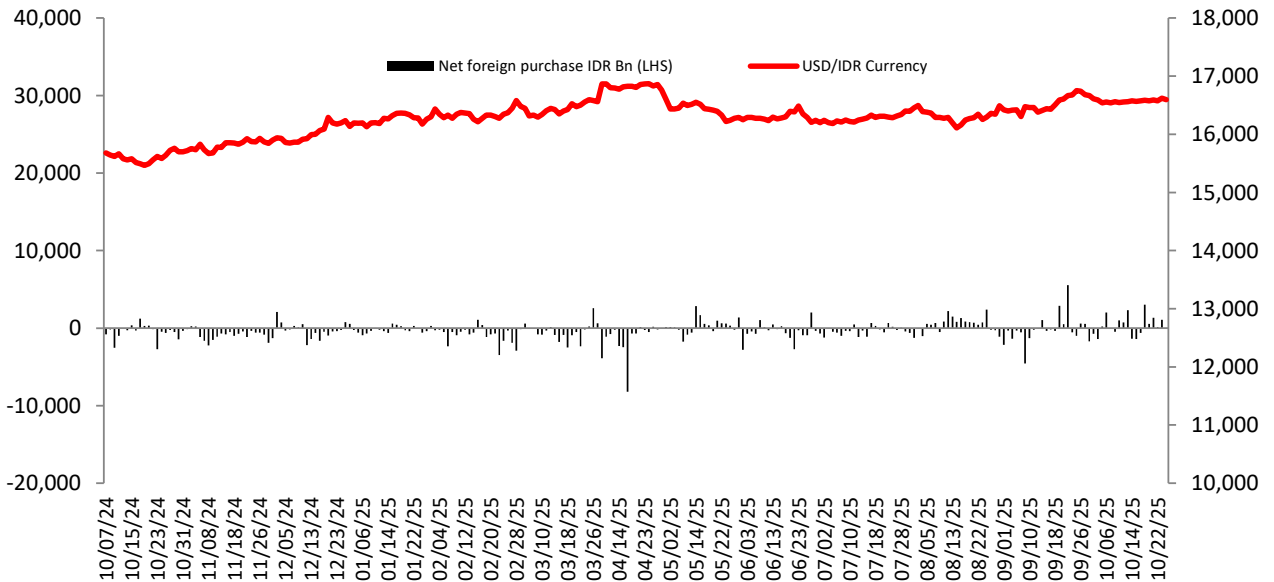
Indonesia bond market closed the week with unchanged sentiment. Market is still moving two ways in the morning session, although in the second session bond market was pretty quiet. Trading concentrated on front to middle maturities while the other part of the yield curve was quoted within range throughout the day. IDR bond the prices ended the day unchanged from yesterday level.

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	100.5	(0.0)	4.5	5Y
FR91	FR0091 Govt	103.4	(0.0)	7.4	10Y
FR93	FR0093 Govt	101.8	0.1	7.3	15Y
FR92	FR0092 Govt	107.0	0.0	6.8	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.5	0.1	3.6	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	104.8	0.0		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	8,271.7	(0.0)	16.8	
Thailand	SET Index	1,312.9	0.8	(6.2)	
Korean Stock Exch.	KOSPI Index	3,941.6	2.5	64.3	
Straight Times	FSSTI Index	4,422.2	0.1	16.8	
Kuala Lumpur	KLCI Index	1,613.3	0.3	(1.8)	
Philippines	PCOMP Index	5,988.0	(1.1)	(8.3)	
Nikkei	NKY Index	49,299.7	1.4	23.6	
Hang Seng	HSI Index	26,160.2	0.7	30.4	
MSCI-Asia pacific	MXAP Index	225.0	(0.3)	23.9	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,734.6	0.3	9.8	
S&P 500	SPX Index	6,738.4	0.6	14.6	
Nasdaq	CCMP Index	22,941.8	0.9	18.8	
FTSE 100	UKX Index	9,569.0	(0.1)	17.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,595.0	0.2	(3.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,647.6	0.3	2.4
3 month	IDSWT3M Index	16,619.7	0.2	(2.9)
6 month	IDSWT6M Index	16,649.1	0.2	(3.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,657.1	0.2	(3.0)
6 month	IDFWT6M Index	16,658.2	0.3	(2.7)

*price as of 10/23/2025

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