

FOR PROFESSIONAL INVESTORS - 03/12/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Rebound

JCI advanced and closed at 6,665 (+119 points or +1.82%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 149Bn today and rupiah slightly weakened to IDR 16,445/USD.

Banking stocks were positive as BBRI (+2.64%), BBKA (+2.24%), BMRI (+2.95%), BBNI (+1.8%), and MEGA (+2.54%) all in green. Consumer names were mostly positive as ICBP (+4.8%), INDF (+2.75%), KLBF (+0.94%), and HMSP (+0.95%) all inched higher, except UNVR (-3.36%). Telco stocks were positive as TLKM (+3.38%), FREN (+4.35%), and ISAT (+0.99%) all inched higher. Retailer names were mostly positive as AMRT (+3.45%), MAPI (+6.48%), and MAPA (+2.5%) all in green, except ACES (-1.5%). Other movers were MSIN (+14.78%), DSSA (+11.45%), MINA (-24.8%), and BKSL (-17.24%).

BI Consumer Confidence Index (CCI) in Feb2025 declined by 1.2ppt to 126.4 and employment availability index falls by 1.5ppt to 106.2.

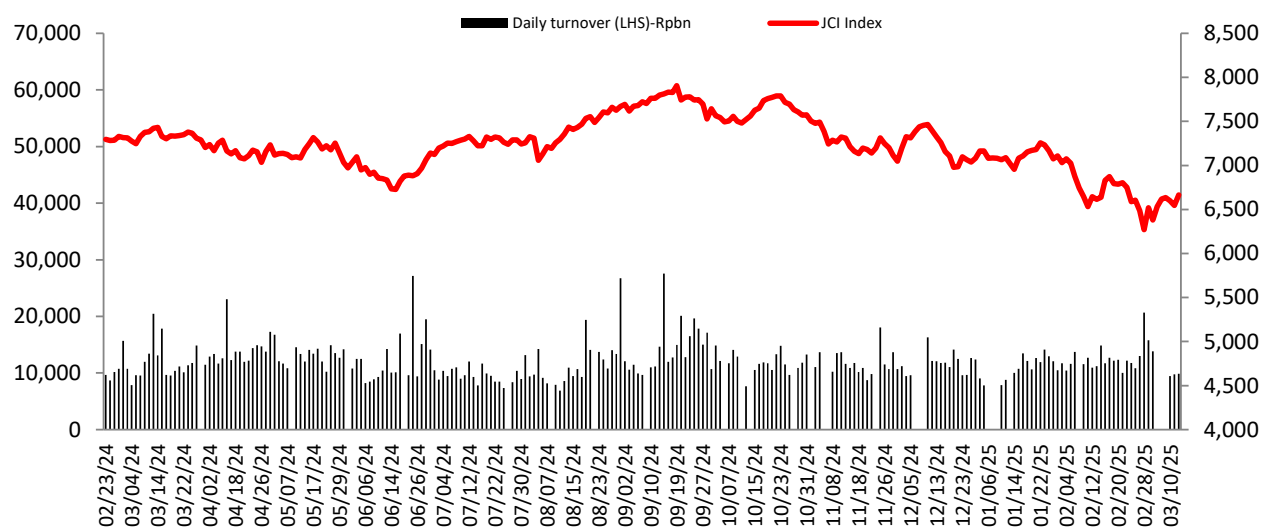
BOND MARKET

SELLING CONTINUES

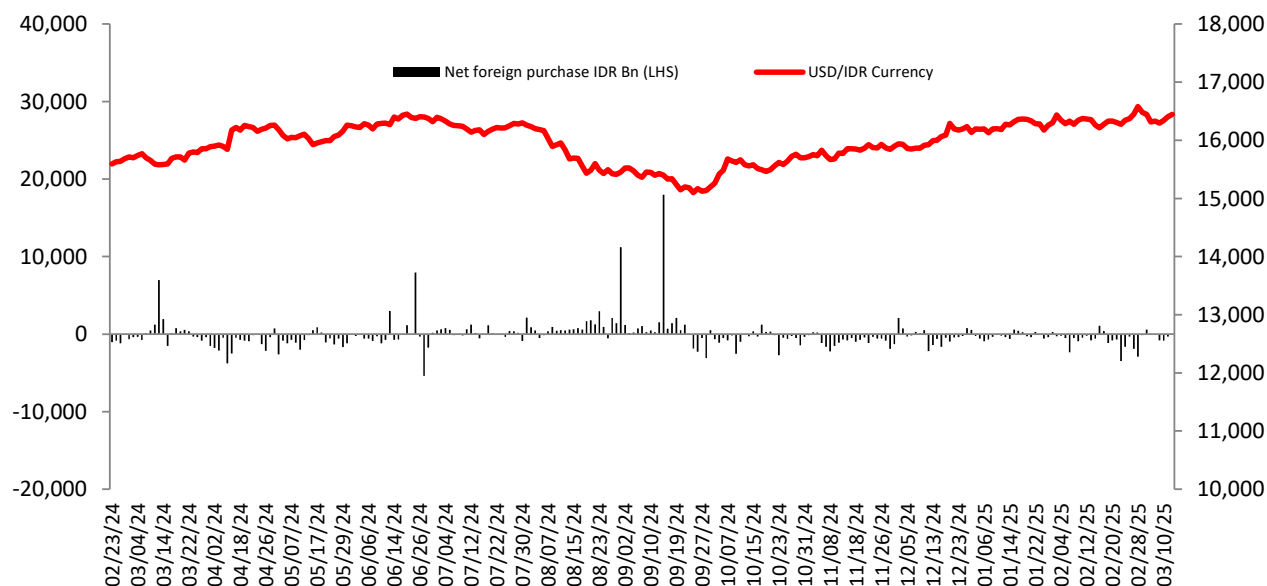
IndoGB market traded lower today ahead of US CPI data tonight with overall yield curve closed higher by 2 – 3 bps. As soon as market opened, offerish tone were seen on benchmark and non-benchmark series, especially on 10Y FR103. Although we saw few bottom fishers came into the market, the buying failed to lend a support as prices went further south. The 10Y already traded above 6.90% and closed at 6.94%. By end of the day, the benchmark series of 5/10/15/20Y closed the week at mid yield 6.71%/6.93%/6.97%/7.02%

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	97.4	(0.0)	1.2	5Y
FR91	FR0091 Govt	97.6	(0.1)	1.3	10Y
FR93	FR0093 Govt	95.8	0.1	1.1	15Y
FR92	FR0092 Govt	100.6	(0.2)	0.5	20Y
PBS036	INDOIS 5 ¾ 08/15/25	99.8	0.0	0.6	15-8-2025
PBS003	INDOIS 6 01/15/27	99.1	(0.1)	0.7	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	99.8	0.0	0.2	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	97.1	(0.0)	0.1	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,665.0	1.8	(5.9)	
Thailand	SET Index	1,160.7	(2.3)	(17.1)	
Korean Stock Exch.	KOSPI Index	2,574.8	1.5	7.3	
Straight Times	FSSTI Index	3,835.9	0.3	1.3	
Kuala Lumpur	KLCI Index	1,484.8	(2.3)	(9.6)	
Philippines	PCOMP Index	6,195.3	(0.2)	(5.1)	
Nikkei	NKY Index	36,819.1	0.1	(7.7)	
Hang Seng	HSI Index	23,600.3	(0.8)	17.6	
MSCI-Asia pacific	MXAP Index	185.0	(0.8)	1.9	
<u>Global Indices</u>					
Dow Jones	INDU Index	41,433.5	(1.1)	(2.6)	
S&P 500	SPX Index	5,572.1	(0.8)	(5.3)	
Nasdaq	CCMP Index	17,436.1	(0.2)	(9.7)	
FTSE 100	UKX Index	8,531.4	0.4	4.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,445.0	(0.2)	(2.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,337.9	0.2	0.5
3 month	IDSWT3M Index	16,431.4	0.6	(1.7)
6 month	IDSWT6M Index	16,427.8	0.5	(1.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,445.8	0.6	(1.7)
6 month	IDFWT6M Index	16,473.3	0.6	(1.5)

*price as of 3/12/2025



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