



FOR PROFESSIONAL INVESTORS - 11/12/2025

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Slightly Higher

JCI slightly strengthened and closed at 8,389 (+22 points or +0.26%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 1.2Tn today and rupiah was stabilized at IDR 16,703/USD.

Banking stocks were mostly positive as BBCA (+1.19%), BMRI (+1.71%), BBRI (+0.26%), and BBNI (+0.9%) all rose, except BNLI (-0.47%). Consumer names were mostly positive as INDF (+1.77%), UNVR (+2.41%), MYOR (+3.41%), and HMSP (+2.41%) all in green, except KLBF (-1.56%). Poultry stocks were positive as JPFA (+6.36%), CPIN (+0.85%), and MAIN (+4.29%) all rose. Material names were mixed as BRPT (+7.08%) in green, while TPIA (-0.35%) corrected. Other movers were MPRO (+20%), BUVA (+5.52%), DEWA (-6.28%), and RISE (-6.25%).

Government non-tax state revenue from energy and mineral sector reaches Rp200.7tn as of 10 November 2025, or equivalent to 78.8% of 2025 state budget target

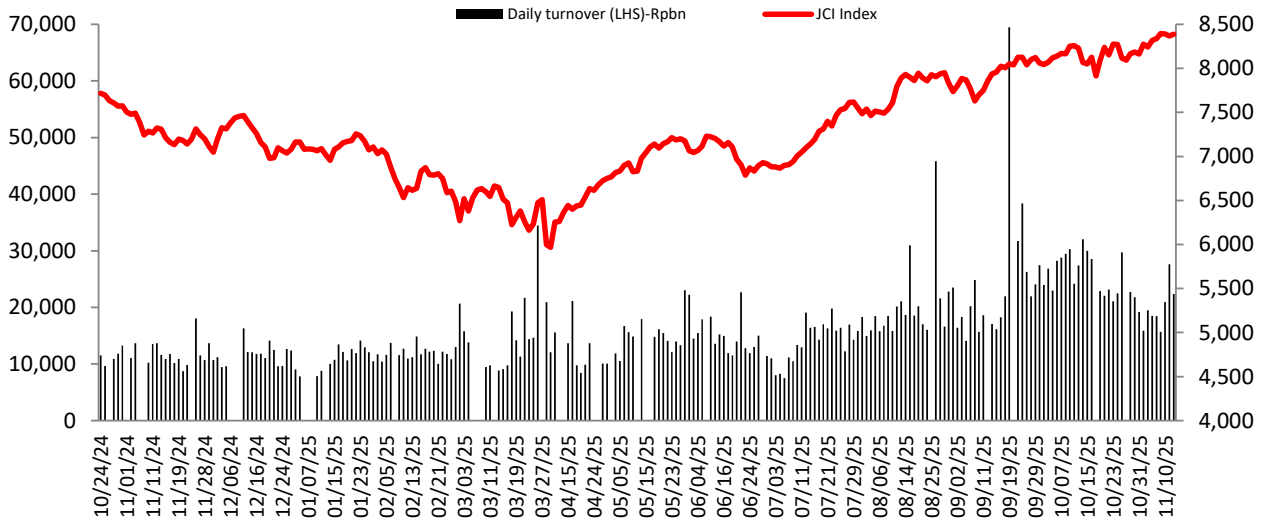
### BOND MARKET

#### BETTER BUYING

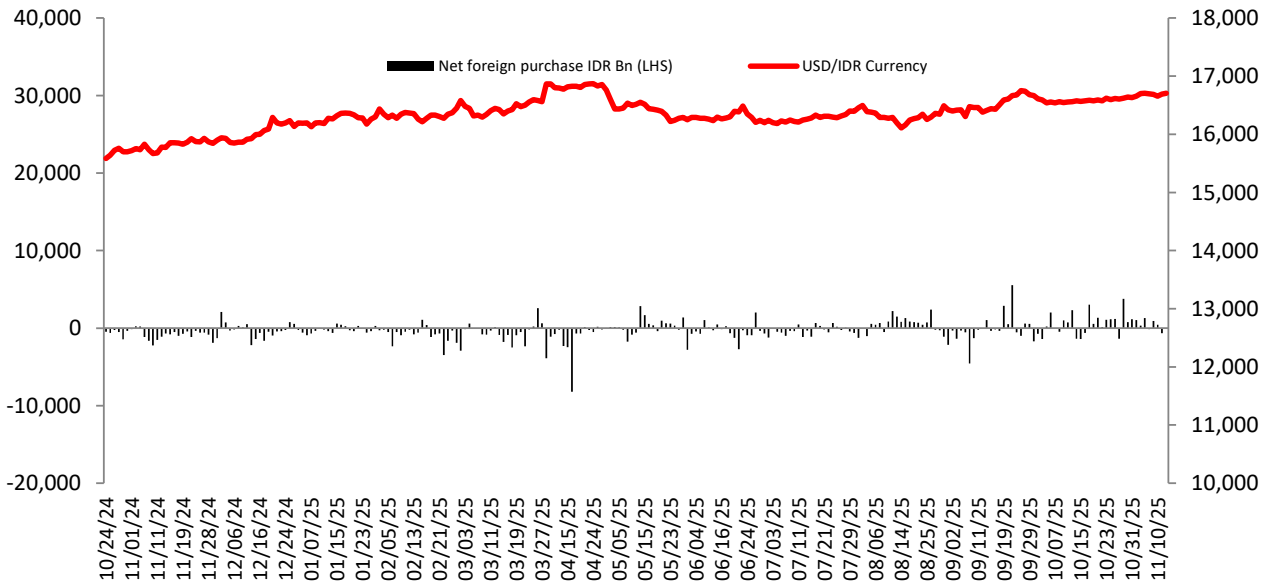
Indonesia bond market opened the day in biddish tone with Rupiah still traded in 16700 level. Buying interest seen in short to belly area mostly by local names although we heard offshore are also buying albeit in small caps. Overall yield curve shifted lower by 1-3bps mostly in front end to 10Y area. The benchmark series of 5/10/15/20Y closed the day at mid-yield 5.45%/6.13%/6.41%/6.52%.

# 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        | 4.4        | 5Y         |
| FR91                  | FR0091 Govt         | 102.5    | (0.1)      | 6.4        | 10Y        |
| FR93                  | FR0093 Govt         | 101.0    | (0.0)      | 6.6        | 15Y        |
| FR92                  | FR0092 Govt         | 106.3    | 0.0        | 6.1        | 20Y        |
| PBS036                | INDOIS 5 ¼ 08/15/25 | #N/A N/A | #VALUE!    |            | 15-8-2025  |
| PBS003                | INDOIS 6 01/15/27   | 101.3    | (0.0)      | 3.4        | 15-01-2027 |
| PBS037                | INDOIS 6 ¾ 03/15/36 | 105.2    | #VALUE!    |            | 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           | 8,388.6  | 0.3        | 18.5       |            |
| Thailand              | SET Index           | 1,287.1  | (1.0)      | (8.1)      |            |
| Korean Stock Exch.    | KOSPI Index         | 4,150.4  | 1.1        | 73.0       |            |
| Straight Times        | FSSTI Index         | 4,561.0  | 0.4        | 20.4       |            |
| Kuala Lumpur          | KLCI Index          | 1,631.6  | (0.2)      | (0.7)      |            |
| Philippines           | PCOMP Index         | 5,714.0  | 1.5        | (12.5)     |            |
| Nikkei                | NKY Index           | 51,063.3 | 0.4        | 28.0       |            |
| Hang Seng             | HSI Index           | 26,922.7 | 0.8        | 34.2       |            |
| MSCI-Asia pacific     | MXAP Index          | 227.7    | 0.0        | 25.4       |            |
| <u>Global Indices</u> |                     |          |            |            |            |
| Dow Jones             | INDU Index          | 47,928.0 | 1.2        | 12.7       |            |
| S&P 500               | SPX Index           | 6,846.6  | 0.2        | 16.4       |            |
| Nasdaq                | CCMP Index          | 23,468.3 | (0.3)      | 21.5       |            |
| FTSE 100              | UKX Index           | 9,900.0  | 0.0        | 21.1       |            |

|                    | Bloomberg Code | IDR      | % Chg. D-D | % Chg. YTD |
|--------------------|----------------|----------|------------|------------|
| Spot IDR           | IDR Currency   | 16,703.0 | (0.1)      | (3.6)      |
| <u>Swap-IDR</u>    |                |          |            |            |
| 1 month            | IDSWT1M Index  | 16,692.0 | 0.2        | 2.7        |
| 3 month            | IDSWT3M Index  | 16,695.3 | 0.2        | (3.4)      |
| 6 month            | IDSWT6M Index  | 16,697.2 | (0.1)      | (3.4)      |
| <u>Forward-IDR</u> |                |          |            |            |
| 3 month            | IDFWT3M Index  | 16,706.6 | 0.3        | (3.3)      |
| 6 month            | IDFWT6M Index  | 16,709.0 | 0.2        | (3.0)      |

\*price as of 11/11/2025

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