

FOR PROFESSIONAL INVESTORS - 07/17/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Higher

JCI advanced and closed at 7,287 (+95 points or +1.32%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR - 1.1Tn today and rupiah slightly weakened to IDR 16,331/USD.

Banking stocks were mixed as BMRI (+0.64%) and BBRI (+0.26%) advanced, while BNL (-0.36%), BBTN (-1.61%), and BBNI (-0.48%) declined. Telco names were positive as TLKM (+4.53%), ISAT (+8.13%), and EXCL (+3.89%) all in green. Poultry stocks were positive as CPIN (+5.35%), JPFA (+4.32%), and MAIN (+6.3%) all in green. Consumer names were mixed as MYOR (+2.01%), UNVR (+0.96%), and HMSP (+0.83%) advanced, while KLBF (-0.33%) and INDF (-0.6%) corrected. Other movers were BRPT (+8.46%), AMRT (+5.12%), INTP (-5.07%), and SMGR (-3.57%).

Bank Indonesia recorded bank industry loan growth in June 25 at 7.77% YoY, slowing down compared to the previous month at 8.43% YoY, the lowest growth since March 2025. Investment loan grew 12.53%, working capital 4.45%, and consumption 8.49%.

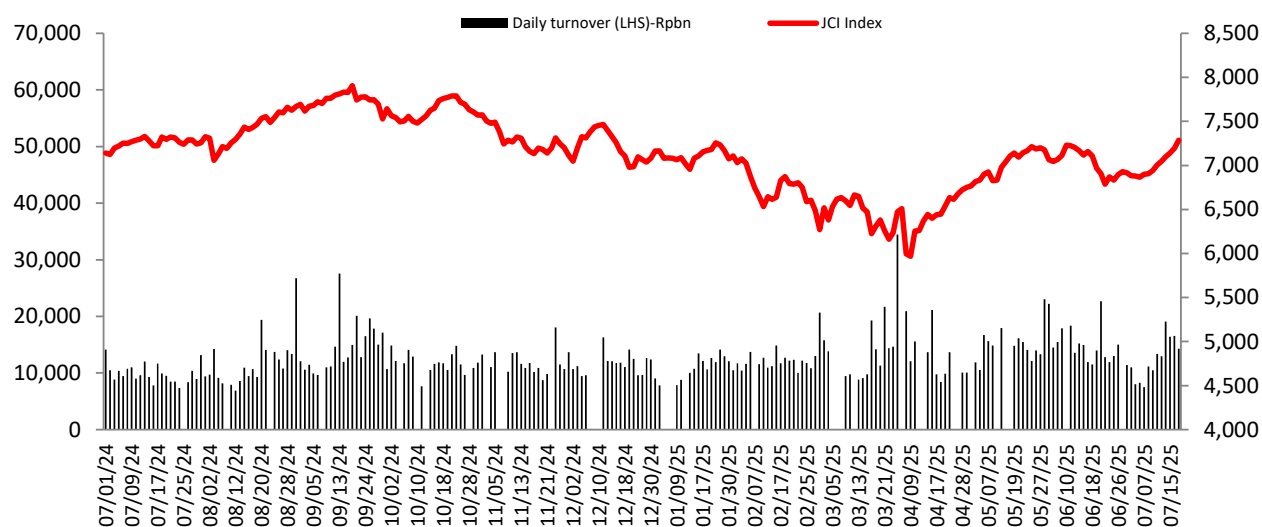
BOND MARKET

After BI Cut Rate

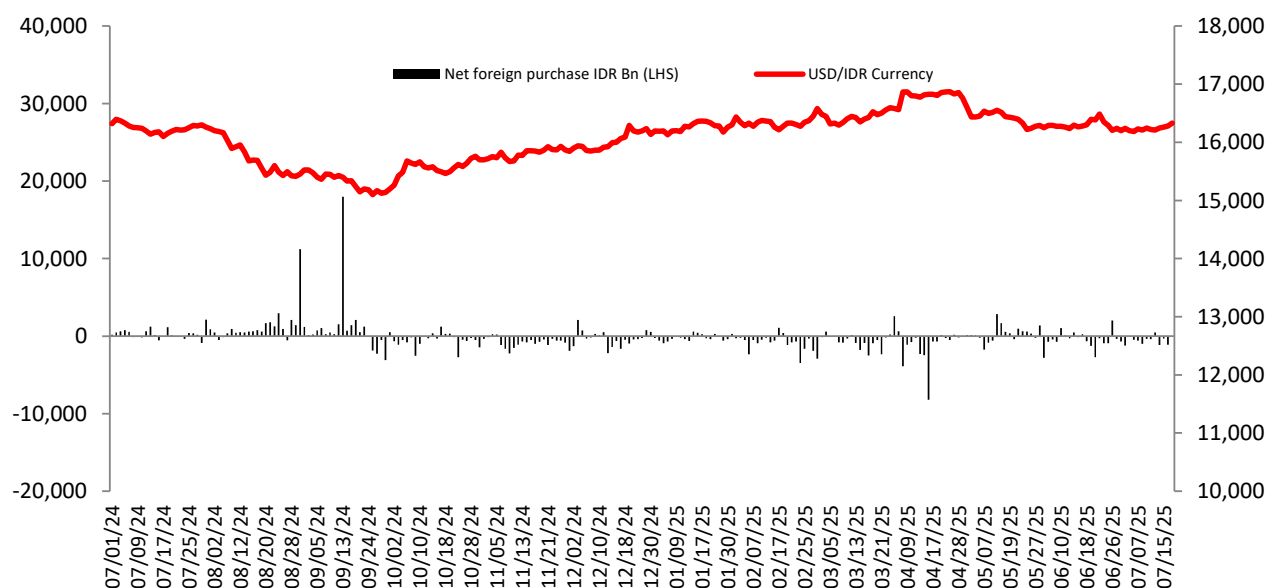
After BI rate decision yesterday, bond market opened the day softer and wider as Rupiah opened at 16,300 compare yesterday closing at 16,287. Some biddish tone from local banks and interbank were seen on the bid side, especially on front end to 5Y ahead of a closely-watched SRBI auction tomorrow. Overall market was relatively quiet with small trades on benchmark and non benchmark series. By the end of day yield curve closed slightly lower by 1 – 2 bps. Spot closed at 16,340.

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	98.9	0.0	2.8	5Y
FR91	FR0091 Govt	99.9	(0.1)	3.7	10Y
FR93	FR0093 Govt	97.4	(0.1)	2.7	15Y
FR92	FR0092 Govt	101.9	(0.0)	1.8	20Y
PBS036	INDOIS 5 ½ 08/15/25	100.1	0.0	1.0	15-8-2025
PBS003	INDOIS 6 01/15/27	100.3	0.0	2.0	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	100.7	0.2	1.1	15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	98.8	0.8	1.9	15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,287.0	1.3	2.9	
Thailand	SET Index	1,196.4	3.4	(14.6)	
Korean Stock Exch.	KOSPI Index	3,192.3	0.2	33.0	
Straight Times	FSSTI Index	4,160.6	0.7	9.8	
Kuala Lumpur	KLCI Index	1,520.9	0.6	(7.4)	
Philippines	PCOMP Index	6,295.6	(0.7)	(3.6)	
Nikkei	NKY Index	39,901.2	0.6	0.0	
Hang Seng	HSI Index	24,499.0	(0.1)	22.1	
MSCI-Asia pacific	MXAP Index	202.6	(0.1)	11.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	44,254.8	0.5	4.0	
S&P 500	SPX Index	6,263.7	0.3	6.5	
Nasdaq	CCMP Index	20,730.5	0.3	7.4	
FTSE 100	UKX Index	8,962.5	0.4	9.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,331.0	(0.3)	(1.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,300.0	0.1	0.3
3 month	IDSWT3M Index	16,288.5	0.1	(0.8)
6 month	IDSWT6M Index	16,294.8	0.1	(0.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,304.4	0.0	(0.8)
6 month	IDFWT6M Index	16,345.0	0.0	(0.8)

*price as of 7/16/2025



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